

## 2025 FALL MEETING

The Westin Austin Downtown  
Austin, TX

October 25-27, 2025

### Planned presentations include:

- Forecasting Military and Firearms Manufacturing
- Cutting Tool and Economic Forecast
- Future 4.0 - Thriving in a Decade of Uncertainty

Registration and details to come!

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### FUTURE MEETING DATES

Be sure to mark your calendar for the upcoming Institute meetings, which are scheduled as follows:

#### 2026 Spring Meeting

May 16-18, 2026  
Opal Key Resort & Marina  
Key West, Florida

#### 2026 Fall Meeting

More information is coming soon.  
Stay tuned!

### MEMBERSHIP:

The best way to recruit new members is through referrals from current members. Do you know of a cutting tool manufacturer who is not a member? Please provide the information to the USCTI Office at [uscti@uscti.com](mailto:uscti@uscti.com) and they can be invited to the fall meeting as our guest.

### USCTI Welcomes New Member:



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## USCTI President's Message

For the second half of 2025, the challenges we faced during the first half of the year remain essentially unchanged. We continue to grapple with uncertainties surrounding tariffs and their effects on our markets, along with global conflicts and high interest rates, all of which complicate the landscape.

Our responsibility as leaders in our organizations has not changed; we must maintain our focus on improving manufacturing efficiencies and developing more effective processes. While there are some encouraging signs in the aerospace and defense sectors, the automotive and heavy equipment industries continue to struggle due to the uncertain impacts of tariffs. We hold out hope for more clarity as we approach fall.

The USCTI Spring Meeting in Savannah was a success, and we aim to carry that momentum into our 2025 Fall Meeting, scheduled for October 25-27 at the Westin Downtown in Austin, Texas. Although we hope for increased attendance, those who participated in the spring Institute meeting reported high satisfaction with the meeting's value, as indicated by our survey. Attendees praised the venue, speakers, and networking opportunities, highlighting the importance of open discussions with fellow manufacturers and sponsors.

USCTI continues to provide additional opportunities for members through regional meetings and cutting tool/economic forecasts. The next regional meeting will be a Coating Seminar hosted by CemeCon in Horseheads, N.Y., on August 27-28. Behind the scenes, our board is actively working to attract new members, enhance our statistics program, and collaborate with AIA to update NAS Standards.

I hope your summer is going well and I look forward to seeing you in Austin in October.

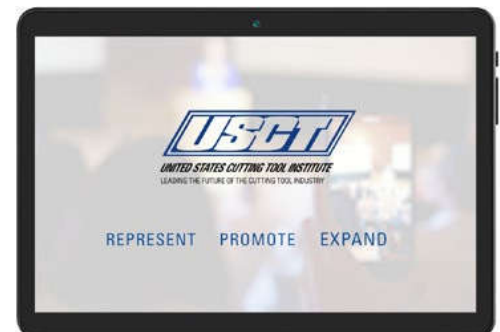
Steve Boyer  
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Steve Boyer



**WE MUST MAINTAIN OUR  
 FOCUS ON IMPROVING  
 MANUFACTURING  
 EFFICIENCIES  
 AND DEVELOPING MORE  
 EFFECTIVE PROCESSES.**



Please take a moment to watch our latest recruitment tool, a video highlighting the benefits of USCTI. We ask all members to post the [link](#) on your websites and share via your social media channels.



## 2025 USCTI Scholarship Winner

USCTI was pleased to award the 2025 Institute Scholarship to Alex Syvongsay. Alex is currently employed by Kyocera SGS while pursuing a degree in mechanical engineering from Stark State College in Ohio.



Alex Syvongsay

Said manufacturing coach Alec Lane, who nominated Alex, "Without a doubt, I can say that he is a determined individual with a curiosity and drive for manufacturing."

Alex, who currently holds a 4.0 in course work, said of this opportunity, "For a job that changed the trajectory of my life, I want to give back as much as the industry has given to me so far, with so much more to go."

As part of the USCTI mission to represent, promote, and expand the U.S. cutting tool industry, an annual \$5,000 scholarship is offered to attract students to the profession and to encourage existing USCTI member employees to deepen their commitment to their careers. Information for the 2026 Scholarship will be released later this fall. Visit the [USCTI website](https://uscti.com) for more information.

## HR Committee Update

In early June, human resources professionals from member companies around the country gathered at Allied Machine & Engineering Corp. for the second HR Day to discuss industry trends, share best practices, and explore new and emerging topics presented by a slate of guest speakers.

Jessica MacKeigan and Matt Kissling, attorneys from Thompson Hine, LLP, presented valuable information and tools related to the changing legal landscape in hiring as well as strategies to navigate medical leaves and disability accommodations. Employee engagement expert, Lisa Ryan, delivered an energetic and informative presentation on employee retention.

During a roundtable discussion and topical breakout workshop, attendees discussed common challenges and shared information. Trending topics included recruitment and retention, career paths and leadership for the next generation, and general human resources and benefits topics. One participant noted, "I thought this was the most value-added part of the agenda."

Finally, participants received a briefing on the results of the 2025 USCTI Employee Benefits Survey. This survey collected member-specific industry data such as benefit contribution rates, tuition reimbursement, holiday and overtime pay, and more. An HR Benefits Survey Workgroup recently revised the survey to generate data that will enhance benchmarking capabilities.

Thank you to the team at Allied Machine & Engineering Corp. for hosting and to the HR Day Workgroup and HR Benefits Survey Workgroup for their valuable insights and leadership.

If you would like to participate on the HR Committee or would like to be added to the HR representative email distribution list to receive surveys and other relevant information, please email [uscti@uscti.com](mailto:uscti@uscti.com).

## Technical Committee Update

USCTI is a member of the Aerospace Industries Association's Aerospace Cutting Tool workgroup, responsible for updating the National Aerospace Standards (NAS) cutting tool standards, including:

ID	Title
NAS 907	Drills, High Speed Steel 1/16" Thru 1/2"
NAS 937	Drills, Double Margin Stepped High Speed and Cobalt, 1/8" Thru 1/2"
NAS 965	Drills, High Speed Steel, Threaded Shank 1/16 Inch Thru F
NAS 986	End Mills, Finishing, High Speed Steel .125" Thru 3.000" Diameter Rev. 3
NAS 897	Reamers, Chucking 0.0469 Inch Thru 1.5000 Inches
NAS 898	Reamers, Solid Carbide, Right-Hand Cut, .1250 Thru .7500

If any member company would like to serve on USCTI's technical committee to help review comments on the revisions, please contact the USCTI office. This is a great opportunity to help shape the standards used in the aerospace industry and work alongside key contacts in the field. If you would like to participate on the AIA Aerospace Cutting Tool

Workgroup, please contact Madeline Carlson, AIA at [Madeline.Carlson@aia-aerospace.org](mailto:Madeline.Carlson@aia-aerospace.org).

As a reminder, if any member company has technical papers they would be willing to co-brand with USCTI for [USCTI's Technical Resource Center](https://uscti.com/technical-resource-center), please contact the institute office at [uscti@uscti.com](mailto:uscti@uscti.com).



## ITEM OF INTEREST

## Tungsten Carbide Grinding Materials Now Classified as Recyclable in California

As shared during a recent USCTI Institute meeting, tungsten carbide grinding materials are now officially classified as *recyclable* rather than *hazardous waste* in California.

This reclassification brings several key advantages for the cutting tool industry and USCTI members:

- **No hazardous material manifests or regulatory paperwork required.**
- **Ability to store more recyclable material on-site**, allowing flexibility to sell when recycle prices are favorable.
- **Freedom to use any logistics company**, eliminating the limitations of hazardous-certified haulers.
- **Improved operational efficiency**, especially valuable in California's strict regulatory landscape.

Special thanks to USCTI member, Robb-Jack Corporation, for its efforts in the reclassification. This is a significant win for both sustainability and business practicality – and a first-of-its-kind achievement in one of the most environmentally regulated states in the U.S.

For a copy of the technical package submitted or for more details, please contact Mike MacArthur, Robb-Jack president, at [mike@robbjack.com](mailto:mike@robbjack.com).



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# Statistics Committee Update

## Mark Stockinger, Kyocera SGS Precision Tool

To help ensure continued evaluation and improvement, the USCTI Statistics Committee met recently to review feedback provided by members in the recent Statistics Survey.

As an outcome of these discussions and suggestions from the committee, USCTI has created a survey and statistics schedule to provide an overview and timelines of the various data and survey programs administered by the Institute. This information can be shared with those responsible for providing the data or work, with the goal of using results to expand knowledge of the various reports and assist with workload planning.

### Survey and Statistics Schedule

Item	Description	Member	Reporting Mechanism	Timing
Monthly Reports	Product Division shipment reports by units and dollars <ul style="list-style-type: none"> <li>• Carbide Tooling</li> <li>• Ceramic &amp; Cermet Tooling</li> <li>• Diamond &amp; CBN</li> <li>• Drill &amp; Reamer</li> <li>• Milling Cutter</li> <li>• Tap &amp; Die</li> <li>• Tool Holder</li> <li>• All Other Tooling</li> </ul> Current Business Report includes book to bill ratio, average price per piece, exports, and surface coating data.	Assigned member representative	Secure Online Portal	<i>Due:</i> 10th of each month for prior month
Business Outlook Survey	Spring and Fall Survey cutting tool industry outlook – member feedback on industry outlook, sales revenue, export outlook, financials and raw materials.	Official company representative	Survey Monkey (via Bulletin)	<i>Spring</i> Collected beginning: April 1 Due: April 15 <i>Fall</i> Collected beginning: Oct 1 Due: Oct 10
Employee Benefits Survey	Salary and benefit information specific to USCTI members to help benchmark within the industry.	HR Representatives and Official Representatives	Excel File (via Bulletin)	Collected beginning: March 2 Due: March 30
World Cutting Tool Report	High level shipment report for North America, Europe and Japan.	USCTI provides data		Annually TBD based on input from JTA and ECTA

Additional report enhancements currently in discussion:

- Updates to the surface coating categories recently launched in the monthly Current Business Report
- Potential inclusion of data on end market segments like aerospace, automotive, medical, etc.
- Additional categories in the new annual World Cutting Tool Report
- Breaking out product categories by U.S., Mexico, and Canada
- Potential product division updates for saw blades and workholding

### New Cutting Tool Forecast from ITR Economics

USCTI and AMT hosted the first and second quarter cutting tool forecast webinars with new partner ITR Economics. The new reports are easier to digest and will continue to be enhanced with feedback. As a reminder, only members who participate in statistics have access to the forecasts and

webinars. If you are not participating and would like to, please contact the USCTI office.

### New online statistics portal to launch by end of Q3

A new secure online Statistics Portal is on the way! Enhancements include the ability for respondents to upload data directly or copy and paste an entire form into the portal. More information and onboarding will be forthcoming.

### Get involved!

If you have feedback to provide on the types of survey information that would be helpful to your company, any thoughts on enhancements currently in discussion, or if you are interested in participating on the Statistics Committee to help provide direction, please let the USCTI office know.

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# Spring 2025 Cutting Tool Business Outlook Survey

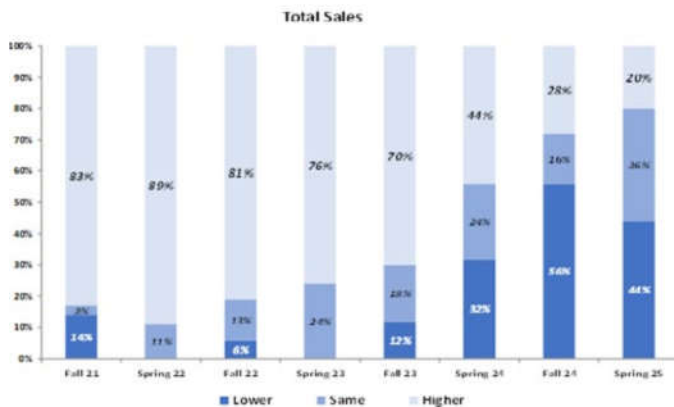
A total of 25 member companies responded to the Spring 25 Business Outlook Survey, slightly fewer respondents than the fall 2024 survey. Highlights include:

- 44% of companies reported they expect to see lower total sales revenues in the cutting tool industry in 2025 compared to 2024.
- An overwhelming majority, 96%, reported raw materials lead times remained the same as compared to the previous quarter.
- Additionally, 56% of companies' employment levels remained the same over the previous six-month period.

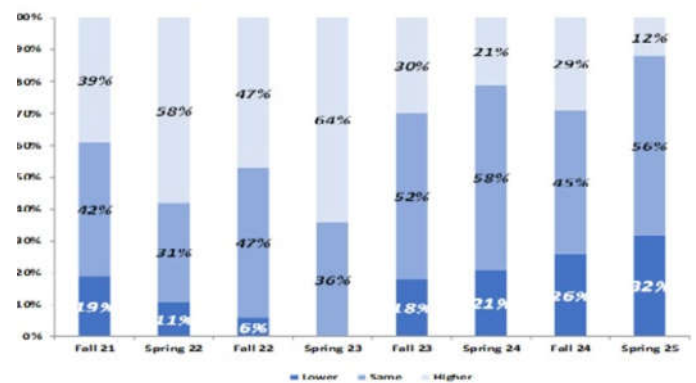
Comments noted the impact of tariff uncertainty in the market, which is leading to stagnation in many market sectors, as well as negative impacts on raw materials costs and export sales.

All member companies are encouraged to participate in the next Business Outlook Survey to be released at the fall Institute meeting. Increased participation provides more valuable information for all members.

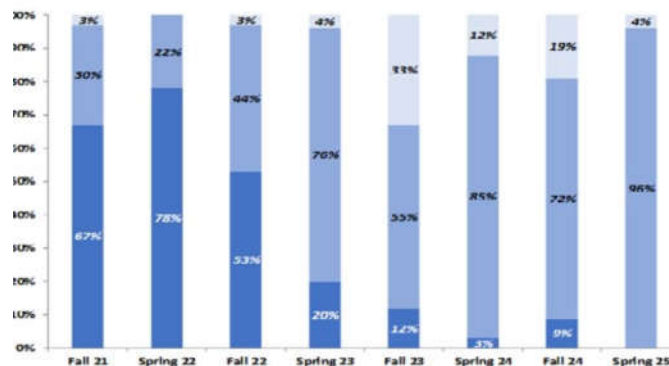
## Industry Forecast



## Employment Levels



## Raw Materials



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# Message from the Programs Committee

Planning is underway for the 2025 Fall Institute Meeting. We're looking forward to another great program October 25-27, 2025 at The Westin Downtown in Austin, Texas. The fall meeting is all about looking into the future. Exciting and informative speakers include Jake Kauffman from Defense and Munitions Magazine, who will share timely information on forecasting military and firearms manufacturing, Michael Feuz of ITR Economics, who will take a deeper dive into the cutting tool and economic forecast, and Tom Morrison of Morrison & Associates, who will challenge attendees to consider the "Future 4.0 - Thriving in a Decade of Uncertainty." Another highlight is certain to be the roundtable discussion, which is sure to prompt great discussion among our peers and industry leaders. Finally, the offsite dinner at Bangers Sausage House and Beer Garden is bound to be a crowd pleaser.

Registration for the Fall Institute Meeting will be released very soon. Keep an eye on your email and be sure to share this event with your colleagues.

Those who attended the Spring Meeting in Savannah were treated to a wonderful venue in a great host city. Many of you remarked that this was an outstanding location and a meeting with great content. The speakers delivered thought-provoking presentations on leadership, building employee loyalty, and a deep dive into an uncertain market. Members walked away inspired and informed. Networking overlooking the beautiful Savannah riverfront, social activities, and golf were other highlights of a great meeting.

Two regional meetings held this summer, HR Day in June and the upcoming CemeCon Regional Coating Seminar in August, are shaping up to be a great success and additional value for our members. We look forward to more regional events in the future.

Enjoy the rest of the summer. We hope to see you in Austin this fall.

Mike Stokey  
 Programs Committee Chair  
 Allied Machine & Engineering Corp.



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## Legal Update

# DOJ ANNOUNCES ANTITRUST WHISTLEBLOWER REWARDS PROGRAM

By Justin P. Murphy, Kristen L. Jackson, and Jamie S. Reimer, BakerHostetler

### HIGHLIGHTS

- The United States Department of Justice, Antitrust Division, has announced a new whistleblower program, marking the first time the Antitrust Division has formed a program to provide monetary rewards to individuals who assist in antitrust crime prosecutions.
- While the new whistleblower program will be operated by both the Antitrust Division and the United States Postal Service, rewards will be paid out by the U.S. Postal Service.
- The new whistleblower program could pay whistleblowers up to 30 percent of any criminal fines recovered.
- Companies should review their compliance policies and procedures to ensure that they are aligned with and consider the Antitrust Division's new whistleblower program, as the whistleblower program could affect companies' options if they are part of a future criminal antitrust investigation.

### BACKGROUND

In July 2025, the U.S. Department of Justice (DOJ), Antitrust Division (Division), announced the creation of its first-ever [Whistleblower Rewards Program](#) (Rewards Program). The new Rewards Program brings the Division in line with [other DOJ whistleblower programs](#) and further incentivizes companies to have [effective compliance programs and internal reporting mechanisms](#). The Rewards Program is being launched in conjunction with the U.S. Postal Service (USPS) and the U.S. Postal Service Office of Inspector General (USPS-OIG). A [Memorandum of Understanding](#) (MOU) between the Division and the agencies sets forth the criteria for the Rewards Program. Paid rewards to eligible whistleblowers can be up to 30 percent of the recovered criminal fine. Under the Rewards Program, the USPS will pay the rewards to eligible whistleblowers under its statutory authority to pay for information and services related to violations of postal laws. Whistleblowers will be able to submit reports through the [Division's portal](#).

### KEY PROGRAM DETAILS

- **Eligible violations:** The Rewards Program covers broad categories of potential criminal offenses, including:
  - Criminal violations of Sherman Act sections 1, 2, and 3;
  - Federal criminal violations committed to effectuate, conceal or facilitate a Sherman Act violation;
  - Federal criminal violations that target or affect public procurement at the federal, state or local level; and
  - Federal criminal violations affecting federal competition-related investigations or proceedings.
- **Eligibility for reward:** To qualify as a whistleblower, individuals must, among other things:
  - Voluntarily provide original information about eligible violations;
  - Provide information not already known to the government;
  - Provide information before any formal legal demand is received;
  - Provide information that is not derived exclusively from a judicial or administrative hearing, government report, audit or investigation, unless the whistleblower is the source of that information;
  - Not be a leader or originator of the illegal activity;
  - Not coerce others to participate in the illegal activity; and
  - Not obtain information through attorney-client privileged communications.
- **Reward amount:** The whistleblower reward amount decision will be made in consultation with the USPS and the USPS-OIG, but the ultimate decision rests with the Division. If the Division determines that a reward is appropriate, the presumption will be that the total reward will be at least 15 percent of the recovered criminal fine, but no more than 30 percent, and multiple whistleblowers may split rewards. As a threshold, the criminal fine must be at least \$1 million to be eligible for the Rewards Program.

*continued on page 9*



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- **Criteria for determining amount of reward:** The Division has discretion to determine the appropriate reward amount and may consider many factors, including:
  - Whether the information provided by the whistleblower was directly related to a successful criminal prosecution;
  - Whether the information was reliable and complete;
  - Whether the information provided resulted in the conservation of government resources; and
  - Whether the whistleblower provided ongoing, extensive, and timely cooperation and assistance by, for example, helping to explain complex transactions, interpreting key evidence, or identifying new and productive lines of inquiry.
- **Nexus to USPS:** The alleged violations must affect the USPS, its revenues or its property, but the harm need not be material or otherwise pose any substantial detriment to the USPS.

### KEY TAKEAWAYS

- The new Rewards Program is a significant development and brings the Division in line with other federal agencies that have successfully implemented whistleblower programs. For example, under the False Claims Act, the government awarded more than \$400 million in whistleblower rewards in fiscal year 2024, and

since the program began in 2011, the SEC has awarded more than \$2 billion in whistleblower rewards.

- The new Rewards Program may serve as a complement to the Division's long-standing leniency program. A company that may be on the fence regarding self-reporting to the Division under the leniency program now may also face the possibility that a whistleblower employee seeking a financial reward will cut off the company's path to leniency. The Rewards Program creates powerful incentives for individuals to report violations, making timely internal corporate detection of antitrust-related issues more important than ever.
- Importantly, the Division's leniency program relates to alleged Sherman Act violations. The new Rewards Program is not so limited. The MOU makes clear that far broader conduct may be eligible for whistleblower rewards.
- Although the program currently applies only to violations affecting the USPS, this is a low bar. The USPS has traditionally utilized a broad mandate and reach in antitrust-related investigations.
- We expect the Division to devote meaningful resources to the Rewards Program, including the review, investigation, and consideration of received complaints. However, the

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implementation and impact of the Rewards Program will take time to play out, and it will be important to stay apprised of reporting rates and rewards provided through the Rewards Program.

Companies should consider reviewing and updating their antitrust compliance policies and procedures to align with this new program. With new incentives for whistleblowers to report antitrust-related violations, there is a greater likelihood that potential misconduct will be identified to enforcement authorities. As such, companies should ensure they are maintaining effective compliance programs that can identify potential misconduct and take appropriate measures if such misconduct is discovered.

### Legal Counsel Updates

*This article was written by Justin P. Murphy, Kristen L. Jackson, and Jamie S. Reimer, attorneys with BakerHostetler and members of the firm's Antitrust and Competition team. BakerHostetler serves as antitrust counsel to the United States Cutting Tool Institute.*

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