COMMERCIAL AEROSTRUCTURE Ti DEMAND and THE NEW SUPPLY CHAIN
Advanced Titanium Manufacturer

- Integrated Mill Product Supplier
- Advanced Engineering Services
- Precision Machined Parts
- Vertically Integrated Supply Chain
- Value Added Service Centers

Global Footprint

- 20 Facilities in the U.S., Canada, Europe & China
- More than 2,300 employees
- Headquartered in Pittsburgh, PA

Aerospace, Defense, Engineering & Medical
Large Commercial Jet Backlog

Airbus + Boeing = 93.88% as of July 31, 2013

New Record!

2010: 7,281
2011: 8,672
2012: 9,679
2013: 10,668

Aerospace Market News, August 2013
Titanium Buy Weight
# Projected Build Rate

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RTI Estimates
Operating Efficiencies / Lower Operating Cost as driver of demand

Lightweight planes and efficient engines
Demand for Environmentally Friendly Aircraft

• Less fuel
• Reduction in carbon emissions
• Reduction in noise pollution
In the next 20 years, nearly half of the world's air traffic growth will be to, from or within the Asia Pacific region.

Asia-Pacific region = 36% of new airplane assets

Source: Boeing Current Market Outlook 2013-2032
Fleet Age: Future Aircraft Retirements

“Over the next 20 years, the airline industry will need 35,280 new airplanes, of which 41 percent will replace older, less efficient airplanes; nearly 59 percent of the new deliveries will reflect growth in emerging markets and evolving business models.”

Boeing Current Market Outlook 2013-2032
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Boeing Current Market Outlook 2013-2032
Middle East Unrest

Egypt

Syria

Rising Oil Prices
Advancing Communications Technologies
Broadband speed 5 yrs. ago vs. today

Improving audio and video capabilities

Global Communications: Webex, Skype, Instagram & Twitter

What’s next?
Mill Product
Machining
Assembly
The New Supply Chain

Supplier Consolidation

Scrap Revert Closed Loop
Supplier Consolidation

- Ladish Co., Inc.
- ATI
- Aubert & Duval
- Primus International
- Synchronous Aerospace Group
- RTI International Metals, Inc.
- Aeromet Manufacturing
- Remmele Engineering
- Precision Castparts Corp.
Scrap Revert
Closed Loop
Challenges to the Supply Chain

Far Flung Logistics

Key Equipment Failure

Labor Shortage
Far Flung Logistics
Key Equipment Failure
Labor Shortage

A lack of qualified applicants in these areas, needed to replace those who retire:

- Assemblers and Fabricators
- Machinists and Tool & Die Makers
- Metal and Plastic Machine Workers
- Industrial Machinery Workers and Maintenance Workers
Learning Curve

Re-engineering

Additive Manufacturing

Supply Chain Opportunities
Learning Curve
Re-engineering
Additive Manufacturing
Total Commercial Airframe Titanium Demand
Mill Shipments (lbs in MMs)

2012: 50
2013P: 61
2014P: 74
2015P: 83
2016P: 86
2017P: 89

12.1% CAGR

RTI Estimates
Safe Harbor Act

The information in this presentation, including oral comments, includes "forward-looking statements" within the meaning of the Private Securities Litigation Reform Act of 1995, and is subject to the safe harbor created by that Act. Because such forward-looking statements involve risks and uncertainties, there are important factors that could cause actual results to differ materially from those expressed or implied by such forward-looking statements. These factors include, but are not limited to, the impact of global events on the commercial aerospace industry, ultimate titanium content per copy and actual aircraft build rates for new commercial and military aircraft programs, global economic conditions, the competitive nature of the markets for specialty metals, availability and pricing of raw materials, the successful completion of our capital expansion projects, and other risks and uncertainties included in the Company’s filings with the Securities and Exchange Commission. Actual results can differ materially from those forecasted or expected. Additional information concerning such factors is contained from time to time in the Company’s Securities and Exchange Commission filings, copies of which can be obtained from the Company or the SEC.
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Dawne S. Hickton, Vice Chairman, President & CEO
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