

33RD ANNUAL



TAMPA STEEL CONFERENCE

FEBRUARY 14-16, 2022
TAMPA MARRIOTT WATER STREET



PRESENTED BY



HOSTED BY





Dear Tampa Steel Conference Friends,

Welcome. Port Tampa Bay and Steel Market Update are delighted to again be partners in presenting the 33rd annual Tampa Steel Conference. While 2021 was the first time our two organizations collaborated to bring you this event, the pandemic forced us to hold last year's conference virtually, so we are delighted to be back with a live in-person event again this year.

The significance of the movement of steel products inspired Port Tampa Bay – Florida's largest and most diversified port – to organize the first Tampa Steel Conference in 1990 as an opportunity to recognize its customers and provide a forum to discuss developments in this important sector of the economy, including the steel industry supply chain. As the Tampa Steel Conference grew to become one of the largest steel trade events in the country, it became obvious that a partnership between Port Tampa Bay and Steel Market Update would allow this event to become a great complement to the annual Steel Summit held every year by SMU, bookending the steel industry calendar with two signature conferences – one in February and one in August. In addition to being widely recognized as the expert source of steel pricing, industry news and market trends in North America, SMU and its parent company CRU, have considerable expertise in producing major in-person, as well as virtual conferences for the global metals, mining and fertilizer industries.

Thanks to the generosity of our great sponsors, we have an expanded program and a tremendous line-up of speakers and networking events in store for you this year and look forward to delivering an exciting, informative, and engaging Tampa Steel Conference.

Sincerely,

Paul Anderson
President & CEO
Port Tampa Bay

John Packard
Founder
Steel Market Update

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MONDAY, FEBRUARY 14, 2022

- 12:00P **Registration Opens**
Marriott Water Street, 505 Water Street, Tampa, FL 33602
- 1:00P – 5:15P **Part I: Introduction to Steel Hedging (separate fees required) with instructor Spencer Johnson of StoneX.**
This workshop is tailored for those looking to understand financial derivatives as an instrument to hedge price risk, protect margins, protect inventories, or offer long-term pricing to their customers.
- 3:30P **Port Tampa Bay Harbor Tour**
(complimentary - meet in lobby near escalator)
- 5:00P – 6:30P **Welcome Cocktail Reception**
The event begins with a networking cocktail party in Marriott Water Street Hotel for those arriving early.

TUESDAY, FEBRUARY 15, 2022

- 8:00A – 1:00P **Golf Outing**
(golf fees required)
- 8:30A – 12:00P **Part II: Introduction to Steel Hedging Workshop**
(extra fees required)
- 8:30A – 11:30A **Port Tampa Bay Harbor Tour**
(complimentary - meet in lobby near escalator)
- 1:30P **Special Program - Decarbonization Impact on Commodities & Flow of Materials**
This program will focus on the availability and flow of raw materials for steel making, the need for integrated steel mills, what technologies will be needed and how it will impact the domestic steel mills, carbon border adjustment mechanisms on steel and steel containing goods, and more.
- Speakers: **Lynn Lupori**, Head of Consulting, CRU
John Anton, Pricing & Purchasing Services, IHS Markit
Phil Bell, President, Steel Manufacturers Association
- 2:30P **Special Program - Transportation & Supply Chain Issues**
This program will focus on issues affecting the supply chain from ocean freight, to the ports, and from the ports to the customer.
- Speakers: **Anton Posner**, CEO, Mercury Resources
Doug Wray, Vice President Commercial, Ports America
Tom Derry, CEO, Institute for Supply Management

3:30P – 3:50P

Break

3:50P – 4:30P

Special Program - Economic Outlook for the Steel Industry

Where will the economy be in February and what is the outlook for the balance of 2022 and into 2023. How will the Biden administration and infrastructure bills impact the steel industry and much more.

Speaker:

Walter Kemmsies, Economist

5:00P

Special Networking Reception - Marriott Water Street Hotel

505 Water Street, Tampa , FL 33602
Business casual dress

WEDNESDAY, FEBRUARY 16, 2022

8:00A

Welcome Remarks from Port Tampa Bay, Mayor of Tampa and Steel Market Update

Speakers:

Paul Anderson, President and CEO, Port Tampa Bay
The Honorable Jane Castor, Mayor, City of Tampa
John Packard, Steel Market Update

8:30A

The Changing Steel Landscape

The landscape of the steel industry is changing rapidly. Paul will examine the critical issues facing the industry including direct & indirect trade, producer consolidation, new capacity, prices, prime scrap & substitutes, upstream & downstream integration by steel producers, and the decarbonization of steel. There are a lot of dire predictions out there. This is not the end of the world, it's the beginning of a new one.

Speaker:

Paul Lowrey, Managing Director, Steel Research Associates

9:30A

Fireside Chat with Lourenco Goncalves, CEO, Cleveland-Cliffs

10:00A

Break

10:30A

Crossfire Panel on Trade Issues

Speakers:

Phil Bell, President, Steel Manufacturers Association
Lewis Leibowitz, Principle, Offices of Lewis E. Leibowitz
Richard Chriss, President, American Metals Supply Chain Institute
Kevin Dempsey, President & CEO, American Iron & Steel Institute

Moderator:

Michael Cowden, Steel Market Update

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WEDNESDAY, FEBRUARY 16, 2022

11:30A **CRU View on Steel Outlook & Pricing Forecast**

Speaker: **Josh Spoore**, Principal Analyst, CRU

12:00P **Lunch**

1:00P **Steel Buyers Panel of OEMs and Service Centers**

Speaker: **John Farley**, Senior Vice President and COO, McNichols
Bill Spiegel, CEO, Southwark
Mike Lerman, President, Steel Warehouse
Bob Elsasser, Vice President Procurement, Behlen Manufacturing Co.

Moderator: **John Packard**, Steel Market Update

2:00P **Analyst vs. Steel Executive - What Will the New Normal Look Like for Steel?**

Speaker: **Todd Leebow**, CEO, Majestic Steel
Timna Tanners, Wolfe Research

Moderator: **John Packard**, Steel Market Update

2:45P **Trading Panel: The Status of World and USA Trade**

We have two traders who will discuss the state of the steel trade around the world, current steel prices, and what obstacles are impacting steel products into the United States.

Speaker: **Jose Gasca**, Managing Director, Metrading International AG
Ugur Dalbeler, Managing Director, Colakoglu Metalurji A.S.

Moderator: **John Packard**, Steel Market Update

3:30P **Close of Conference**

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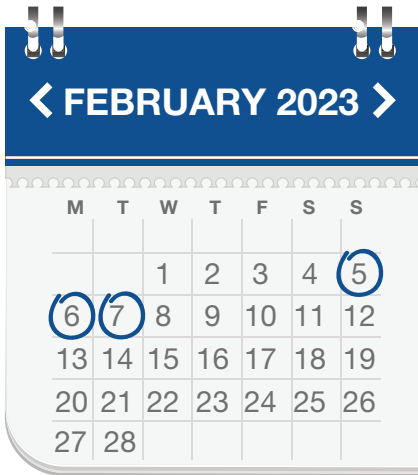


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FEBRUARY 5-7, 2023



Save the date

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SPEAKER'S FORUM



John Anton is Director in the IHS Markit Pricing and Purchasing Service. Mr. Anton's primary focus is as head of the ferrous metals team. He is a renowned steel industry expert and regularly speaks at conferences and internal meetings, such as ISM, Steel Market Update, Port Tampa Bay, and Fortune 1000 supply chain annual planning session.

Mr. Anton joined IHS Markit in 1995. Prior to that time, he was in the private practice of law. Before attending law school, Mr. Anton worked at the Bureau of Labor Statistics as an Economist/Statistician. He received a B.S. in economics from Florida State University and a J.D. from the Marshall-Wythe School of Law at the College of William and Mary.



Philip Bell, is President of the Washington, D.C. based Steel Manufacturers Association (SMA). Prior to joining the SMA in 2013, Mr. Bell served as Director of External Communications and Public Affairs for Gerdau North America. He is a 30-year industry veteran, who gained an interest in the steel industry while serving as a production and maintenance supervisor at Elements Chromium in Corpus Christi, Texas during the 1980s.

Mr. Bell currently serves on the U.S. Department of Commerce International Trade Advisory Committee on Steel (ITAC7), advising the Secretary of Commerce and United States Trade Representative on trade policy, trade agreements, and other trade related matters that benefit U.S. businesses, workers, and the economy.



Richard Chriss, is an accomplished attorney with a broad background in international trade law and policy both on Capitol Hill and in the Executive branch of the United States Government. He received graduate training in public policy and economics at Harvard University and studied international law at the University of London.

While working with the Finance Committee, Richard managed nine Committee trade hearings, coordinated Committee oversight of federal departments and agencies, and aided in preparation for WTO meetings, including Ministerial Conference meetings.

Richard later served for two years as Senior Counsel to the Under Secretary for International Trade in the Department of Commerce, where he was involved in a broad range of trade and economic policy matters.



Michael Cowden is a senior editor for Steel Market Update (SMU). Cowden has covered the steel industry since 2007. He has since 2014 specialized in flat-rolled steel but has previously reported on steel long products, steel pipe and tube as well as aluminum. Before joining SMU, Cowden held reporting jobs at Fastmarkets AMM in Chicago - where he was involved in launching AMM's daily hot-rolled coil index, the Associated Press in Pittsburgh, and the Cambodia Daily in Phnom Penh. He has also worked as a copy editor and in marketing at the University of Chicago Press.

Cowden has a bachelor's degree in English from the University of Chicago and a master's degree from Northwestern University's Medill School of Journalism.



Ugur Dalbeler is CEO of Colakaglu Metaluji A.S., based in Isanbul Turkey. Mr. Dalbeler joined Colakoglu in 1986 and has previously held roles being responsible for sales, purchasing and finance, before he was appointed as CEO in 2005. He is also a Board Member of the Turkish Steel Producers Association, Vice Chairman of the Turkish Steel Exporters Association and an Executive Board member of the World Steel Association. Mr. Dalbeler has a B.S. in Material Nad Metallurgy.



Kevin Dempsey, is the President/CEO of the American Iron and Steel Institute. He previously served as Senior Vice President of Public Policy and General Counsel to the Institute for the past 11 years, during which AISI achieved key policy successes; including: implementation of Section 232 trade remedies.

Dempsey has, and continues to, work extensively on international trade negotiations given his considerable experience with U.S. and international law related to subsidies, trade remedies, market access, intellectual property rights, and product standards, as well as U.S. legislative procedures for authorizing and implementing trade agreements.

Dempsey received his Juris Doctor Degree from Harvard Law School and a Bachelor of Arts in History from Washington University in St. Louis.



Tom Derry, is Chief Executive Officer of the Institute for Supply Management® (ISM®), with more than 30 years of experience in leadership and general management roles for public and private companies, and in the not-for-profit sector.

As CEO, Tom has a unique vantage point to observe major macroeconomic trends and the development of global supply chains through his daily contact with Fortune 500 chief procurement officers and chief supply chain officers, with government agencies and NGOs in the United States and abroad, and with leading academics. Tom has represented ISM® in meetings with the White House Council of Economic Advisors, the National Security Council, the Federal Reserve System Board of Governors, and the U.S. Small Business Administration.

Tom earned his B.S., Foreign Service, as a 1986 graduate of Georgetown University's Walsh School of Foreign Service.



Robert C. Elsasser, C.P.M., is Vice President of Procurement at Behlen Manufacturing Co. Bob is a graduate of Iowa State University with a B.S. in Engineering. He obtained his C.P.M. certification in 1981 and the lifetime certification in 2001.

Bob has been employed at Behlen Mfg. Co. for more than 32 years. Behlen has over \$250 million in revenue and employs over 1,200 Partners in Progress. With locations in Columbus and Omaha, Nebraska; Baker, Oregon; McGregor, Texas; and Sarasota, Florida. Behlen serves the Metal Building and Grain Bin markets and produces multiple products for the Farm and Ranch markets and has a transportation business with over 250 trailers and over 100 drivers.



John Farley, is the CEO and Senior VP of McNICHOLS Company. Founded in 1952, McNICHOLS is the leading supplier of Specialty Metals & Fiberglass Products. Since joining McNICHOLS in 2005, John has helped the Company achieve record growth and expansion and is responsible for the “The Hole Network” of 19 nationwide locations with oversight of sales, operations, supply, logistics, and quality.

John received his B.S. degree in Business and Economics from Lehigh University and M.B.A from Johns Hopkins University. He currently serves on the Executive Committee for the Salvation Army of Tampa and is the former president of the Juvenile Diabetes Foundation for Tampa Bay. He and his wife Megan have three children and reside in Tampa, FL.



Jose F. Gasca is based in Lugano, Switzerland and Scottsdale, Arizona, USA, and is Managing Director of Metrading International AG, Lugano, Switzerland.

In 2002 Jose joined German steel trading house Ferrostall in California and Texas. In 2005 Jose was invited to join Coutinho Caro & Co. (CCC Steel) and moved to Hamburg, Germany where he became Managing Director for Flat Products worldwide and Member of the Board. In 2012 he was invited to join the Turkish steel group Colakoglu, with the objective of opening a U.S. based subsidiary that would exclusively distribute the mill's products, and other materials from Turkey into North America. In 2016 Jose joined the Swiss based steel trading house Metrading International AG as Managing Director.



Lourenco Goncalves was appointed Chairman, President and Chief Executive Officer of Cleveland-Cliffs Inc. in August 2014. Since joining the company, he has implemented and has been executing a strategic initiative designed to strengthen Cliffs' position as a major player in the U.S. steel industry.

Mr. Goncalves brings more than 30 years of experience in the metals and mining industries in the United States and abroad. He currently serves on the Board of the American Iron and Steel Institute (AISI).

Mr. Goncalves earned a Master of Science degree in Metallurgical Engineering from the Federal University of Minas Gerais in Belo Horizonte, Brazil and a Bachelor's degree in Metallurgical Engineering from the Military Institute of Engineering in Rio de Janeiro, Brazil.



Dr. Walter Kemmsies is the managing partner of The Kemmsies Group. Walter is widely viewed as one of the foremost experts on ports, rail and infrastructure in the U.S.

Walter previously worked at JLL in the Ports Airports and Global Infrastructure practic. Before that he was the Chief Economist for Moffat & Nichol, a leading global infrastructure advisement firm. Earlier, Walter was the Head of European Strategy at JP Morgan in London and, earlier, Head of Global Industry Strategy at UBS in Zurich and London.

He holds a Doctorate degree in Economics from Texas A&M University, a Master of Arts in Economics from Florida Atlantic University and a Bachelor of Arts in Economics from Florida Atlantic University.



Todd Leebow is President and CEO of Majestic Steel USA, a leading service center within the flat-rolled steel sector. Mr. Leebow joined the company in 2007, focused on supply chain management and innovation. Under his leadership, Majestic Steel USA has invested in talent and technology to lead the company into the next generation.

Mr. Leebow is a vocal advocate for the steel industry and has a vision of leading the metals industry into the digital era. He is Founder and Executive Chairman of Felux, an independent digital marketplace and community for the steel and metals industry.



Lewis Leibowitz Principle, The Law Offices of Lewis E. Leibowitz, is a prominent international trade and customs attorney based in Washington, D.C. Lewis has long experience with international trade matters involving government regulations, administrative and judicial proceedings. He has worked on trade issues involving the steel industry, the automotive industry, textiles, agriculture and many other industries. A well-known champion of “consuming industries,” he has worked to guide coalitions aimed at reducing trade barriers, whether imposed by presidential action or administrative decisions. Lewis is a past Chairman of the National Association of

Foreign Trade Zones and assisted in the creation of the World Free Zones Organization. He is an acknowledged leader in foreign trade zone law and policy.



Mike Lerman serves as president of Steel Warehouse, founded by his father, Nathan Lerman, in 1947. As president, he oversees the service center company's Northern operations. Mike won MCN's Executive of the year in 2019. He has been instrumental in the growth of the company, which was the 14th-largest in North America in 2021. Steel Warehouse has operations in 13 locations in the U.S. including Mexico and Brazil. Among his many accomplishments at Steel Warehouse was helping create a health clinic for all of the company's employees at its South Bend, Indiana location.



Paul Lowrey is the President of Steel Research Associates, LLC. He has been in the steel industry for 25 years and has conducted over 200 customized market studies for steel producers and processors. Prior to steel, Paul worked in the energy industry for 10 years. In addition to his consulting work, Paul is a guest speaker at industry conference and writes articles for industry trade publications.



Lynn M. Lupori is Head of Consulting - North America for CRU. Lynn is focused on guiding the CRU Consulting team to bring exceptional insight into strategic questions to companies with interests in the metals related industries throughout North America. Lynn is focused on working with customers to develop and execute projects related to important and strategic issues such as market analysis, strategy development, risk assessment, as well as valuation services and negotiation support. Lynn has worked for over 20 years with domestic as well as international manufacturers determining strategic growth opportunities. Throughout her career, she has worked with North

American as well as global companies on issues such as market assessment/forecasting, capital investment plans, marketing and competitive strategy.



John Packard, Master of Ceremonies, is the President and CEO of Steel Market Update (SMU), part of CRU Group. Mr. Packard spent 31 years actively selling steel in the service center, trading company and steel mill segments of the industry. He founded SMU in 2004 and in 2008, SMU was incorporated as a provider of market intelligence to the steel industry and, in 2018, the company was purchased by the CRU Group. Mr. Packard is a frequent speaker at industry and financial events. He is also the founder of the SMU Steel 101, Managing Price Risk and custom steel training workshops, as well as the SMU Steel Summit Conference,

which has become the leading steel conference in North America.



Anton Posner is Chief Executive Officer of Mercury Resources, LLC. Over his career Anton held positions at supply chain management companies and steamship lines including sales and marine operations.

Anton holds a Bachelor of Science degree in Marine Transportation/Business Administration from The State University of New York Maritime College and Fort Schuyler where he also obtained his United States Merchant Marine License as a Third Mate. After his academic career at SUNY Maritime, Anton served as an officer in the United States Naval Reserve in various units including as a junior officer in Naval Control of Shipping unit in New York. Anton has lectured at several colleges and universities on the business of logistics.



Bill Spiegel is the President of Southwark Metal Manufacturing Company, which has been manufacturing prefabricated sheet metal duct and fittings for residential and light commercial HVAC construction for over 75 years. He has a BS from Syracuse University majoring in Accounting and has been developing strong partnerships in the industry for over 40 years. Southwark Metal Mfg. Co. is headquartered in Philadelphia.



Josh Spoore, Principal Analyst, Steel, joined CRU in 2012. Mr. Spoore is Head of Steel Analysis in North America and editor of CRU's market leading Steel Sheet Monitor and Steel Monitor. He also forecasts prices, demand, production and trade of sheet and plate products for both Canada and the US for CRU's steel sheet and plate market outlooks. Prior to this role at CRU, he was a Senior Marketing Analyst at Severstal North America, founder of Steel Reality, a forward-looking market analysis firm using a models-based approach for flat rolled and plate steel. He was also the Market Research Manager at Majestic Steel USA. He has a Bachelor of

Science degree in Business Administration from Bowling Green State University.



Timna Tanners is a managing director covering 20 equities in the Americas Metals and Mining sector in addition to forecasting relevant commodities at Wolfe Research, a premier equity research firm. Her insights have been featured regularly on business media, such as CNBC and Bloomberg News, including the trademarked term Steelmageddon®. Timna has been ranked #1 in Institutional Investor's All America Poll for nine consecutive years. Prior to October 2021, Timna covered Metals and Mining and Bank of America Securities for over 10 years, and covered the sector for over eight years previously at UBS Investment Bank. Timna holds an MBA from UCLA, a Masters in Journalism from Northwestern University, and a BA in Politics from Pomona College.



Doug Wray, Vice President Commercial, Ports America, has a diverse maritime career that spans more than 40 years. Wray coordinates on a global basis with eight of the world's largest container carriers. He is the liaison for Ports America's relationship with the various Gulf Port authorities, including the Port of Tampa. Wray is a graduate of U.S. Merchant Marine Academy, launching his career with the Masters, Mates and Pilots as an officer aboard oceangoing vessels of all types. He came ashore to work as port captain for Y.S. Line and from there spent 21 years with CP Ships in various senior management roles, the last being VP sales for USA based in Tampa. He joined Ports America in 2006.

The CRU logo consists of the letters 'CRU' in white, bold, sans-serif font, enclosed within a green square.

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Port Tampa Bay is Florida's largest port in cargo tonnage and area, totaling over 34 million tons a year and encompassing 5,000 acres.

The steel industry is especially important to the rapidly growing Florida market and Port Tampa Bay is investing in new facilities and infrastructure to maintain its dominant position serving this key line of business. New rail and highway access and expanded crane capacity have been added to further enhance service to our customers. Port Tampa Bay is the largest economic engine in West Central Florida, generating an annual economic impact of over \$17 billion and supporting over 85,000 jobs throughout the region.

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It is the mission of Steel Market Update to inform, educate, and motivate our readers on the ever changing steel market. We have a responsibility to provide our subscribers with accurate and timely insights into the key market forces and trends affecting price and supply of steel and related commodities. We take pride in the value that we provide to our members and our reputation as a leader in flat rolled steel market news and analysis.

Steel Market Update's various platforms, events and trainings exist as places that can spark a dialogue or assist in the decision-making process as to what is truly important within the manufacturing and steel industries. We believe topics such as free and fair trade, quality, costs, pricing, competition, careers and ethics will bring a sense of community to the steel industry and will benefit everyone in the process.

FOR MORE INFORMATION CONTACT

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Atlantic Logistics Founded in 2001 by Evie and Bob Hooper, Atlantic Logistics has enjoyed several years of top line profitability, an increasing customer base, and regional and national recognition for employee satisfaction. Beginning in 2003 Atlantic Logistics has been helmed by Robert Hooper Ph.D. who, continuing with his parents' vision and leadership style, has seen the company expand operations by opening second office and adding additional staff. 2021 was a record-breaking year, as Atlantic Logistics moved nearly 31,000 shipments valued at \$41 Million. Since the company's inception Atlantic Logistics successfully delivered over 230,000 shipments through more than 16,000 qualified carriers.

Robert Hooper Jr., CEO

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Johnnie Greene, COO

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Tony Barnes, Managing Principal
Phone: 317-208-2532 Email: Tony.barnes@crowe.com

www.crowe.com/metals



Steel Manufacturers Association SMA is the largest steel industry trade association in the United States and is the primary trade association representing American EAF steel producers. Accounting for over 70 percent of domestic steelmaking production, EAF producers are the most sustainable steelmakers in the world. By using an innovative, 21st century production process that is less energy-intensive, domestic steelmakers have up to 75 percent lower carbon emissions than traditional steelmakers. SMA's 24 producer members have operations in 35 states. For more information check out our website or our Facebook page.

Philip K. Bell, President, Steel Manufacturers Association
Phone: 202-680-4612 Email: bell@steelnet.org

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Felux, created by the combination of tech and steel experts, introduces the world's first transparent B2B online industrial platform for the steel industry. Gain instant access to thousands of steel buyers and sellers, negotiate real-time, analyze buying patterns and identify trends all in one place. Now Felux's members are able to secure immediate payment and track freight right to their door from the comfort of a laptop anywhere in the world. Steel mills, service centers, and manufacturers enjoy an actively managed marketplace by supply chain experts, assuring profitability while building trusting relationships. #makesteelsexy

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Scott Begin, Director of Content Marketing

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American Iron and Steel Institute, Headquartered in Washington, D.C., AISI serves as the voice of the American steel industry in the public policy arena and advances the case for steel in the marketplace as the preferred material of choice. AISI's membership is comprised of integrated and electric arc furnace steelmakers, and associate members who are suppliers to or customers of the steel industry. For more news about steel and its applications, visit AISI's website.

Kevin Dempsey

President and CEO, American Iron and Steel Institute

Email: kdempsey@gmail.com

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