31ST ANNUAL

TAMPA STEEL CONFERENCE

FEBRUARY 6-7, 2020

TAMPA MARRIOTT WATER STREET



PRESENTED BY







February 6, 2020

To all 2020 Tampa Steel Conference Attendees:

Thank you for your participation in the 31st Annual Tampa Steel Conference. The Tampa Steel Conference is one of the nation's largest steel trade events. The movement of iron and steel products is extremely important to our nation's economy, and certainly to Port Tampa Bay. Accordingly, it is our goal to stage an event that pays due recognition to the steel industry and provides a forum to discuss the changing steel market. As we have in the past, we are proud to present a tremendous line-up of speakers and panelists as part of this year's program.

Port Tampa Bay is ideally situated to support the cargo needs of Florida's growing population, which is now 21 million. Florida has passed New York and is now the nation's third largest state, and Tampa, at the western end of the I-4 corridor, sits in the heart of that growth. Business is booming throughout our region and the Port's container shipping services are expanding, including the recent commencements of weekly direct container services between China and Tampa. In our release of our Port Vision 2030, which is the roadmap for our future, we have continued our commitment to grow our strong infrastructure investment plan throughout our massive 5,000 acre port complex.

In particular, we would like to thank the sponsors of the 2020 Tampa Steel Conference. Our sponsors help underwrite our conference events, and we are truly grateful. The development of this conference through the years has been possible in large part due to the ongoing support of our sponsors, and our ability to continue to host such a meaningful event has been strengthened by our sponsors' generous support.

We are honored to host you and appreciate your attendance at this year's conference. Thank you for taking part in the 31st Annual Tampa Steel Conference, and we truly hope you enjoy your time in Tampa.

Sincerely,

Paul Anderson President and CEO Port Tampa Bay

Q. Paul Gucleyan

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AJOT Steel Market Update

WEDNESDAY, FEBRUARY 5, 2020

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3:00P - 7:30P	Registration/Information desk open in hotel lobby Tampa Marriott Water Street, 505 Water Street, Tampa, FL 33602	8:30A	Break Area & Networking Tampa Marriott Water Street - Florida Ballroom	
5:30P – 7:30P	Early Bird Reception Tampa Marriott Water Street (former terrace II Terrazzo; off SW Corner of Lobby)	9:00A — 9:25A	Welcome Remarks	
THURSDAY, FEBRUARY 6, 2020 7:30A – 7:30P Registration/Information desk open in hotel lobby (Alexa badd Assistance and Assis		Speakers:	Paul Anderson, President and CEO, Port Tampa Bay The Honorable Jane Castor, City of Tampa Mayor Doug Wray, Vice President - Commercial, Ports America John Packard, Master of Ceremonies /President & CEO, Steel Market Update	
8:00A	(Name badges will also be available at the Networking Reception) Buses Depart Marriott for Golf Tournament	9:25A — 9:55A	Session 1 – "A 2020 View of Steel Market Price and Demand: A Lot of 'What' and a Little of 'Why' "	
8:30A – 1:30P	Tampa Steel Conference Golf Tournament Cheval Golf Club	Speaker:	John Anton , Director of Steel Analytics / Pricing and Purchasing Service at IHS Markit	
9:45A	4312 Cheval Blvd Lutz, FL 33558 Shuttle Departs Marriott for Tennis Tournament	9:55A — 10:40A	Session 2 – Panel: "The Downstream Effects of Steel Tariffs and Quotas"	
10:00A – 1:00P	Tampa Steel Conference Tennis Tournament Sandra Freedman Tennis Facility 59 Columbia Drive, Tampa, FL 33602	<u>Panelists:</u>	Lewis Leibowitz , The Law Office of Lewis E. Leibowitz Blake Hurtik, Editor , Argus Metal Pricing, Argus Media Group	
10:00A – 11:30A	Walking Tour of Tampa's Riverwalk & Franklin Street	10:40A — 10:55A	Official Break	
3:45P	(meet in hotel lobby at 10:00A) Meet in lobby of Marriott for Port Tour	10:55A — 11:40A	Session 3 – Crossfire Panel - "U.S. Trade Policy Debated from Both Sides"	
4:00P - 5:00P	Port Tampa Bay Harbor Tour	Moderator:	John Packard, Master of Ceremonies	
5:00P – 7:00P	Aboard the Bay Spirit II Tampa Steel Conference Networking Reception	Panelists:	Philip Bell, President Steel Manufacturers Association Dave Sumoski, Exec VP-Merchant and Rebar Products at Nucor Richard Chriss, President and International Trade Counsel, AllS	
	Tampa Marriott Water Street - Outside Terrace 505 Water Street, Tampa , FL 33602 (Conference name badges will be available at the reception) Business casual dress	11:40A — 12:00P	John Foster, President of Kurt Orban Partners and Chairman of AllS Session 4 – "How Population Growth and Economic Development are Fueling Florida's Construction Market"	
		<u>Speaker:</u>	Dr. Jerry Parrish, Chief Economist, Florida Chamber of Commerce	
		12:00P – 1:20P	Session 5 – Networking Lunch & Keynote Session	

Introduction: Speaker:

FRIDAY, FEBRUARY 7, 2020

Paul Anderson, President and CEO, Port Tampa Bay
Thaddeus M. Bullard, aka Titus O'Neil, WWE Superstar and Founder
of the Bullard Family Foundation



HISTORY OF THE STEEL CONFERENCE

Extending from the 20th into the 21st century, the Tampa Steel Conference has developed to where it is now recognized industry-wide as one of the nation's leading steel trade conferences with participants from across the globe.

Hosted by Port Tampa Bay, the Tampa Steel Conference has evolved from a 1990 evening reception to a major national industry forum. The event serves as a venue to extend Port Tampa Bay's appreciation to its steel customers and to recognize and honor the importance of the shipment of steel through the Port. The conference also provides an opportunity to reflect on national and international issues impacting the steel industry and shipment of steel.

After the first few years, the conferences grew with the addition of golf and tennis tournaments. In a relaxed atmosphere, the sporting events and evening reception concentrate on networking and reinforcing business ties. Then it's time to get down to the "steel tacks" of the conference with the speakers' forum. The forum was initiated as an outlet for current steel topics to be brought to the table to give insight to the changing steel market.

Many notable speakers have visited the podium over the years at the Tampa Steel Conference including Father William Hogan, John Correnti, Horst Buelte, James Collins, Wilfried von Bulow, Mario Longhi and former U.S. Congressmen Sam Gibbons and Jim Davis to name a few. Many topics pertinent to the industry, including sourcing of raw materials, anti-dumping, steel demand, transportation and the changing environment of the U.S. domestic industry have been discussed over the years.

Much of the credit for the success of the Tampa Steel Conference goes to our sponsors who give yearly, and this conference could not be hosted in the fashion that it is without their gracious support. In addition, the American Institute for International Steel has provided valuable logistical support to the conference over the years.

We wish to thank everyone for their involvement in this conference. We are grateful to all of you for your support of the Tampa Steel Conference.

SPEAKER'S FORUM



Paul Anderson, President and CEO, Port Tampa Bay

Paul Anderson is the current President and CEO of Port Tampa Bay. Prior to his arrival here in Tampa in December of 2012, he held a series of high-profile leadership positions in both the public and private sectors. In 2003, Mr. Anderson was nominated to the Federal Maritime Commission by President George W. Bush and was unanimously confirmed by the U.S. Senate in 2004. He served a five-year term ending in 2008. A highlight of Anderson's service included his appointment to the Committee on Marine Transportation, a cabinet-level strategy

group responsible for the nation's seaports and reporting directly to the President.

He served as the Chief Executive Officer for the Jacksonville Port Authority and spent 10 years as an executive with JM Family Enterprises, a diversified automobile business headquartered in Deerfield Beach, Florida. Mr. Anderson also served as a senior director of Seabulk Marine, Inc., an international marine transportation company in Fort Lauderdale, Florida.

Mr. Anderson has also served as an advisor on inter-modal issues to multiple governors including former Florida governors Jeb Bush and Charlie Crist.

Mr. Anderson recently completed a second term as the Chairman of the Florida Ports Council, having been reelected by his fellow Florida's port directors. He also serves in multiple national leadership positions including the board of directors of the Coalition for America's Gateways and Trade Corridors (CAGTC). Mr. Anderson also serves on the board of directors for the Florida Chamber of Commerce; Associated Industries of Florida; Moffitt Cancer Center Foundation; Leukemia Lymphoma Society; Florida Aquarium; Visit Tampa Bay; Tampa Hillsborough EDC; and the Hillsborough Metropolitan Planning Organization (MPO).



John Packard, President and CEO, Steel Market Update

John Packard spent 31 years actively selling steel in the service center, trading company and steel mill segments of the industry. He started Steel Market Update in 2004 as a way of communicating with his customers and in 2008, Steel Market Update was incorporated as a provider of market intelligence to the steel industry. He also founded the SMU Steel Summit Conference, which has become the leading steel conference in North America, as well as a group of successful steel training

workshops. The CRU Group, a global leader in steel analysis, price assessments, consulting and events has now acquired Steel Market Update.



John Anton. Associate Director, Pricing and Purchasing, IHS Markit

Mr. John Anton is an associate director and the lead steel expert in the Pricing and Purchasing Service at IHS Markit. Recognized for his expertise in the ferrous metals industry, he is responsible for evaluating the outlook for steel. Mr. Anton also specializes in forecasting commodities and works closely with the Energy and Economics teams at IHS Markit to identify the specific impacts of changing oil price and alternative oil price scenarios. Prior to joining IHS, now IHS Markit, in 1995, he was in the private practice

of law as well as an economist and statistician for the United States Department of Labor in the Bureau of Labor Statistics (BLS). Mr. John Anton received a Bachelor of Science in Economics from Florida State University, US, and a Juris Doctor from the Marshall-Wythe School of Law at the College of William and Mary, US.



Philip Bell, President, Steel Manufacturers Association

Philip K. Bell is President of the Steel Manufacturers Association (SMA), which represents 25 North American steel producers and over 100 associate member companies across the U.S., Canada, and Mexico.

Prior to leading the SMA, Mr. Bell served as Director of External Communications and Public Affairs for Gerdau Long Steel North America, based in Tampa. He developed an

interest in the steel industry and manufacturing in the late 1980's, while serving as an operations supervisor at Elementis Chromium, in Corpus Christi, Texas. He has held executive level positions in operations, human resources and public affairs with Gerdau, the SGL Carbon Group, and Qualitech Steel Corporation.

Mr. Bell currently serves on the U.S. Department of Commerce International Trade Advisory Committee on Steel (ITAC 12), advising the Secretary of Commerce and United States Trade Representative on trade policy, agreements, and other trade-related matters. He represents domestic steel producers as part of the U.S. delegation to the OECD steel committee, and the North American Steel Trade Committee (NASTC). He is a graduate of Leadership Tampa Class of 2010. Additionally he is on the board of directors for the National Association of Manufacturers Council of Manufacturing Associations and is a member of the Association of Iron and Steel Technology (AIST).

Mr. Bell is a graduate of Texas A&M University - Corpus Christi, and holds a master's degree in Global Strategic Communications from the University of Florida.



Richard Chriss, President and International Trade Counsel, American Institute for International Steel

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.

Mr. Chriss served as Senator Chuck Grassley's international trade counsel, on both his personal and Senate Finance Committee staffs. In that role, Mr. Chriss was involved in drafting bills and helping develop legislative strategy for a number of key trade initiatives, including Trade Promotion Authority, the Africa Trade Bill, FTA implementing legislation, and other similar legislation. Mr. Chriss later served for two years as Senior Counsel to the Under Secretary for International Trade in the Department of Commerce.

Then-Ambassador Rob Portman asked Mr. Chriss to work with him at the Office of the United States Trade Representative, a job he held for about six years. In this position, he worked on the WTO Doha Round negotiations in Geneva, the US-Korea trade agreement (KORUS) in Korea and in the United States, China trade issues, and other related matters.

Mr. Chriss left USTR in mid-2011 to create and manage his own firm to primarily advise American businesses on trade matters, including trade negotiations, market access, and trade compliance issues. He assumed his role with AllS in November 2013.



John D. Foster, President of Kurt Orban Partners and Chairman of the American Institute for International Steel

John D. Foster was born and raised in Philadelphia, Pennsylvania and graduated with honors from Marietta College in 1974 with a BA in Business and Economics. In 1991 an MBA was added to his academic resume from the University of Colorado in conjunction with the University of San Francisco's McLaren School of Business.

His steel career began at J & L Steel Corporation (later LTV Steel, ISG and Now Arcelor Mittal Steel) after being recruited upon graduation from Marietta. In 1980 Mr. Foster joined CF & I Steel (now Evraz-Rocky Mountain Steel) in Pueblo, Colorado. In 1990, he moved to manage the Rod and Wire Division for Ferrostaal Metals Corporation, which was then a joint venture between Ferrestaal and Kurt Orban Partners in San Francisco. In 1995 the Rod and Wire Division was moved to the headquarters of Ferrostaal Incorporated in Houston. Texas.

As of Janaury 1, 2008, the steel trading arm of Ferrostaal was merged into what is today Coutinho & Ferrostaal International and Mr. Foster carried the titles of Chief Operating Officder and Executive Vice President - Commercial for the sector of the Group that oversees the America's as well as President and CEO of the Company's North American Division. Both organizations are headquartered in Houston, Texas where Mr. Foster has resided the past 25 years.

As of August 1, 2012, Mr. Foster moved and christened a consulting and marketing LLC named Parters in Steel International and was subsequently retained to serve as President of Kurt Orban Partners LLC, a privately held steel trading company located in the San Francisco Bay Area which also addresses the full line of steel products for its customers on a national basis.

Industry activities include serving as Chairman for the Texas Free Trade Coalition during the Section 201 sanctions on steel under the Bush Administration and a long time member and presenter to the American Wire Producers Association and the Wire Association International. He also served as a Steel Fellow for the American Iron and Steel Institute (AISI) in 1985.

Mr. Foster was elected chairman of the American Institute for International Steel (AIIS) in 2010 and he continues to serve in that role



Blake Hurtik, Editor, Argus Metal Prices, Argus Media Group

Blake Hurtik is the Houston-based editor of Argus Metal Prices, where he oversees a global team of 18 reporters focused on price reporting, news and analysis of the ferrous and nonferrous scrap, steel, ferro-alloys and minor metals markets. He has covered commodity markets at Argus Media since 2013, spending the first four focused on the North American fertilizer trade before shifting to metals. Prior to joining Argus, he worked as a sports reporter at the San Antonio Express-News. Mr.

Hurtik has a Bachelor's of Journalism degree from the University of Texas at Austin.



Lewis Leibowitz. The Law Office of Lewis E. Leibowitz

Mr. Lewis Leibowitz is a prominent international trade and Customs attorney based in Washington, D.C. He established an individual law practic in 2015, after nearly four decades at two large law firms. Mr. Leibowitz advises clients on international trade opportunities and challenges dealing with law and government policy. He specializes in trade remedy actions, particularly helping commercial consumers and importers in navigating trade remedy cases involving basic industrial materials including steel.

A noted specialist in the law and policies affecting industrial consumers, international economic development and global competitiveness, Mr. Leibowits advises on trade and investment-related international agreements, as well as related concepts in the U.S. and in other countries. He has spoken frequently on trade remedy cases and their likely impact on the industries filing them and on those downstream customers affected by them.

Mr. Leibowitz has a wealth of experience in a wide variety of international trade matters for nearly four decades. He also handles Customs-related matters dealing with classification, valuation, country of origin, foreign trade zones and penalties.

An acknowledged leader in free zones worldwide, Mr. Leibowitz was chairman of the National Association of Foreign Trade Zones and participated in the creation of the World Free Zones Organization.



Jerry Parrish, PhD, Chief Economist, Florida Chamber

Dr. Jerry D. Parrish is the Chief Economist and the Director of Research for the Florida Chamber Foundation. In that role, he is responsible for conducting in-depth analyses on the Florida economy and on solutions to help secure Florida's future.

Dr. Parrish previously was the Chief Economist and Director of the Center for Competitive Florida at Florida TaxWatch. Prior to that position, he served as the

Associate Director of the Center for Economic Forecasting & Analysis (CEFA) at Florida State University, and has many years of experience in the private sector in management roles at international manufacturing companies.

Dr. Parrish is also an Adjunct in the Masters in Applied Economics Program at Florida State University. He earned a B.S. in Agricultural Business and Economics from Auburn University, an M.B.A. from Bellarmine University, an M.S. in Economics from the University of North Carolina at Charlotte, and a Ph.D. in Economics from Auburn University. He regularly publishes research reports and articles on the Florida economy and Florida's competitiveness.



Dave Sumoski, EVP, Merchant & Rebar Products, Nucor Corporation

Dave Sumoski is Executive Vice President of Merchant and Rebar Products for Nucor Corporation, America's largest steel producer and North America's largest recycler.

Dave joined Nucor in 1995 to serve as electrical supervisor of Nucor Steel Berkeley in Huger, South Carolina. From 1999 to 2008 Dave served as

maintenance manager of Nucor Steel Berkeley. In 2008, he was promoted to the position of General Manager at Nucor's Marion, Ohio bar mill where, in 2010, he was again promoted to Vice President and General Manager. In 2012, Dave became Vice President and General Manager of Nucor Steel Menphis.

In September 2014, Dave moved to Nucor's corporate headquarters in Charlotte, North Carolina, when he was named Executive Vice President of Engineered Bar Products. In 2017, he was appointed to his current position of Exeucitve Vice President of Merchant and Rebar Products for Nucor Corporation.

Prior to joining Nucor, Dave worked for several years at LTV-Steel in Cleveland, Ohio. Dave graduated from Drexel University with a degree in Engineering and Baldwin-Wallace University with a master's in business administration.

KEYNOTE SPEAKER



Thaddeus M. Bullard, WWE Superstar "Titus O'Neil"

Thaddeus M. Bullard is a global entertainer with the WWE as "Titus O'Neil." But out of the ring his passion as a philanthropist, father and mentor has helped thousands of kids, has raised thousands for scholarships and has raised millions for non-profit organizations such as the United Way, Susan G. Komen and the Special Olympics.

Thaddeus M. Bullard is an accomplished athlete, philanthropist and entertainer as WWE Superstar Titus O'Neil who has a heart for youth and the community. He has been presented with scores of honors and awards that speak to his commitment to giving back to others. Mr. Bullard went

from being a resident of the Florida Sheriffs Youth Ranches as a troubled, underperforming young man to being a mentor, role model and honorary Deputy for the Hillsborough County Sheriff's Office. Mr. Bullard's passion and commitment to not only succeed personally but also to help others is derived from an early seed planted at the Florida Sheriffs Youth Ranches, where many vested in him when, in his words, "they had nothing to gain in return." Mr. Bullard has meaningfully supported various organizations, locally and globally, by giving of his time, talent and treasure. Although Mr. Bullard, a product of rape, lacked a strong male role model in the home, his commitment to family, most notably his two sons, TJ (15) and Titus (13), are nothing short of remarkable. Mr. Bullard's first priority remains being a father and role model to his children. For the past nine years his "Joy of Giving" holiday event gives 15,000 gifts to underprivileged children and families in need throughout the Greater Tampa area.

Mr. Bullard is a proud member of Omega Psi Phi fraternity incorporated, the president of the Bullard Family Foundation (an organization that provides programs and resources to help build character and improve outcomes in the community) and a member of Revealing Truth Ministries in Tampa, Florida, where he resides.

ATHLETIC ACCOMPISHMENTS

1996. USA Today Parade All American

1998. Citrus Bowl. University of Florida football team

1999, Orange Bowl, University of Florida football team

2001 - 2002, Professional football player, NFL Jacksonville Jaguars

2003 - 2007, Professional football player, Arena Football League

FDUCATION

B.A. Sociology, University of Florida, 2000 Student Body Vice President, 1999-2000 Member, Florida Blue Key Leadership Honor Society M.A., Administrative Education, University of Florida, 2001



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 \$5,000 jobs throughout the region.

FOR MORE INFORMATION CONTACT

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CONTACT:

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CONTACT:

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CONTACT:

Ben Goldberg, President Phone: 866-522-2200 Email: BenGoldberg@jitwhse.com www.jitwhse.com

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Carolina, Linder's Material Handling division provides diverse products and solutions for industries including ports, recycling, materials processing, aviation, warehousing/distribution, and manufacturing, to name a few. Since 1953, Linder's mission is to provide customers with the service they need to run successful operations. Customers are at the top of our organizational chart. It is a philosophy that has guided us for 66 years, and one that we remain committed to. **KONECRANES**

CONTACT:

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CONTACT:

Matthew Rossi, General Manager, Southeast Region Phone: 800-321-5590 Email: mrossi@majesticsteel.com www.majesticsteel.com



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materials while achieving greater reach, price performance and efficiency relative to the fragmented network. We work with Mills, Importers, Service Centers and Fabricators to help them find new sales channels for Prime material, excess capacity and or slow-moving inventory. We offer our buyers a simple easy to use platform to search and find materials quickly and efficiently, with shorter lead times, smaller lot sizes and transparent pricing. Our goal is to reduce friction in an otherwise complex supply chain. We do this by taking care of everything for our sellers including payments, logistics, marketing and sales.

CONTACT:

John Armstrong, Founder and CEO Phone: 717-808-8859 Email: jarmstrong@reibus.com www.reibus.com



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deep drafts ranging from 36 to 50 feet. Services include stevedoring (Beacon Stevedoring), warehousing and transfer to and from vessel, rail or truck. Equipment includes a PECO gantry crane, a Liebherr 500S mobile harbor crane, three 200+ ton crawler cranes, a 75 ton rough terrain crane, over 200 forklifts with capacities up to 88,000 lbs, front-end loaders, bulldozers, reach stackers and portable conveyors. Beacon Stevedoring, Rukert's in-house, non-union stevedore, employs a full-time, professional staff with an assortment of gear including auto lock/release container spreaders, auto-release lumber and pulp frames, box spreaders, paper clamps and coil probes. More importantly, Beacon Stevedoring shares the same management with Rukert Terminals, so your cargo moves seamlessly from vessel to warehouse to your customers' truck or rail.

CONTACT:

Frank J. Olszewski III. Vice President Phone: 410-276-1013 Fax:410-327-2315

Email: franko@rukert.com or operations@rukert.com www.rukert.com



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CONTACT:

Nate Gazelka, Territory Manager Phone: 763-280-7265 Email: nate@superiorsteelsupply.net

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