

30TH ANNUAL
**TAMPA STEEL
CONFERENCE**

FEBRUARY 12-13, 2019
TAMPA MARRIOTT WATERSIDE



PRESENTED BY



PORT
TAMPA BAY™



PORTS AMERICA



February 12, 2019

To all 2019 Tampa Steel Conference Attendees:

Thank you for your participation in the 30th 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 commencement of weekly direct container service 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 2019 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 30th Annual Tampa Steel Conference, and we truly hope you enjoy your time in Tampa.

Sincerely,

A handwritten signature in blue ink that reads 'P. Paul Anderson'.

Paul Anderson
President and CEO
Port Tampa Bay

30TH ANNUAL TAMPA STEEL CONFERENCE

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MONDAY, FEBRUARY 11, 2019

- 3:00P – 7:30P Registration/Information desk open in hotel lobby
Tampa Marriott Waterside, 700 S Florida Ave, Tampa, FL 33602
- 5:30P – 7:30P **Early Bird Reception**
Tampa Marriott Waterside, - former II Terrazzo; off SW Corner of Lobby

TUESDAY, FEBRUARY 12, 2019

- 7:30A – 7:30P Registration/Information desk open in hotel lobby
(Name badges will also be available at the Networking Reception)
- 8:00A Buses Depart Marriott for Golf Tournament
- 8:30A – 1:30P **Tampa Steel Conference Golf Tournament**
Carrollwood Country Club
13903 Clubhouse Dr Tampa, FL 33618
- 9:45A Shuttle Departs Marriott for Tennis Tournament
- 10:00A – 1:00P **Tampa Steel Conference Tennis Tournament**
Sandra Freedman Tennis Facility
59 Columbia Drive, Tampa, FL 33602
- 10:00A – 11:30A **Walking Tour of Tampa's Riverwalk & Franklin Street**
(meet in hotel lobby at 10:00A)
- 3:45P Meet in lobby of Marriott for Port Tour
- 4:00P – 5:00P **Port Tampa Bay Harbor Tour**
Aboard the Bay Spirit II
- 5:00P – 7:00P **Tampa Steel Conference Networking Reception**
Tampa Marriott Waterside - Outside Terrace
700 S Florida Ave, Tampa, FL 33602
(Conference name badges will be available at the reception)
Business casual dress

WEDNESDAY, FEBRUARY 13, 2019

- 8:30A **Break Area & Networking**
Tampa Marriott Waterside - Ballroom
- 9:00A – 9:30A **Welcome Remarks**
- Speakers: **Paul Anderson**, President and CEO, Port Tampa Bay
Doug Wray, Vice President - Commercial, Ports America
John Packard, Master of Ceremonies
- 9:30A – 10:00A **Session 1 – A Steel Market Perspective in a Sea of Uncertainty**
- Speaker: **Lisa Reisman**, Co-founder and Executive Editor, MetalMiner
- 10:00A – 10:50A **Session 2 – Crossfire Panel: Opposing Viewpoints on U.S. Steel Trade Policy**
- Moderator: **John Packard**, Master of Ceremonies
- Panelists: **Philip Bell**, President, Steel Manufacturers Association (SMA)
Jean Carroll Kemp, Senior V.P. for Government Affairs and Trade Policy, Steel Manufacturers Association
Richard Chriss, President & International Trade Counsel, American Institute for International Steel
Paul Nathanson, Senior Principal, Bracewell LLP
- 10:50A – 11:10A Official Break
- 11:10A – 12:00P **Session 3 – Panel: Downstream Effects of Tariffs: Costs, Benefits, and Possible Solutions**
- Moderator: **Thorsten Schier**, North American Editor, Steel and Ferrous Scrap, Fastmarkets AMM
- Panelists: **Paul Lowrey**, President and Founder, Steel Research Associates
Todd Leebow, President and CEO, Majestic Steel
Chris Casey Ph. D., Co-founder & Executive Director of the Independent Steel Alliance
Alice Ancona, Director, International Trade and Investment Office, Florida Chamber of Commerce
- 12:00P – 1:30P **Session 4 – Networking Lunch & Keynote Session: “Moving the Needle in Tampa Bay”**
- Introduction: **Paul Anderson**, President & CEO, Port Tampa Bay
Speaker: **Jeff Vinik**, Chairman and Governor, Tampa Bay Lightning
Partner, Strategic Property Partners, LLC



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. Earlier this year the CRU Group, a global leader in steel analysis, price assessments, consulting and events acquired Steel Market Update.



Lisa Reisman, Co-founder and Executive Editor, MetalMiner

MetalMiner is one of the largest metals websites dedicated to global metal market intelligence. As one of the nation's foremost metals experts, Lisa and her team have developed innovations in metal price forecasting, pricing and benchmarking. In addition to past roles at Arthur Anderson and Deloitte Consulting, she has also owned and operated her own aluminum trading company. Lisa earned her MPA from New York University along with a BA in political science and journalism from the University of Wisconsin-Madison. She is a Six Sigma Black Belt.



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.



Jean Carroll Kemp, Senior V.P. for Government Affairs and Trade Policy for the Steel Manufacturers Association

Jean Carroll Kemp is a trade policy expert with over 30 years' experience. Prior to joining SMA, she served at the Office of the U.S. Trade Representative (USTR), where she combatted foreign unfair practices through negotiations and enforcement actions, including successful U.S. WTO disputes against China. She led U.S. delegations to the Global Forum on Steel Excess Capacity, and the Energy Working Group of the U.S.-EU

T-TIP free trade negotiations. Ms. Kemp also worked at the U.S. Department of Commerce for 16 years, administering AD/CVD laws.



Paul Nathanson, Senior Principal, Bracewell LLP

Paul Nathanson is a partner at Bracewell's Policy Resolution Group with more than 25 years of experience in strategic communications. Paul has extensive experience designing and implementing public affairs campaigns on trade issues, including forming domestic coalitions ranging from farmers to automakers to furniture retailers to fight against proposed dumping and countervailing duties on a range of products including shrimp, corrosion-resistant steel, Chinese wooden bedroom furniture,

Canadian pork, solar components and the Section 201 steel tariffs, as well as the repeal of the Byrd Amendment. He currently is managing strategic communications activities for the Coalition of American Metal Manufacturers and Users, a group representing U.S. manufacturers opposed to the Section 232 steel and aluminum tariffs. Paul also provides public affairs support and ongoing strategic communications counsel to corporations, trade associations and non-profit organizations. His focus is on message development and implementation, public policy analysis, social media engagement, media relations, reputation management, and strategic counseling services.



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 AIIIS in November 2013.



Thorsten Schier, North American Editor, Steel and Ferrous Scrap, Fastmarkets AMM

Thorsten Schier is Fastmarkets AMM's North American steel and ferrous scrap editor. He started with Fastmarkets as a reporter in 2010 after completing a graduate degree in Journalism at New York's Columbia University, and has knowledge of or written about almost every type of metal in the industrial supply chain.

He previously completed an undergraduate degree in Journalism at Rhodes University in South Africa and worked as a business news reporter for a national daily newspaper in his home country of Namibia.



Paul Lowrey, President and Founder, Steel Research Associates

Paul Lowrey has been in the steel industry for 25 years and has conducted over 200 customized market studies for steel producers and processors. Paul previously worked at SteelBase Partners, Metal Strategies, and Beddows & Company. 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 conferences and writes articles for industry trade publications. Paul holds a BA from Grove City College near Pittsburgh and an MBA from Northeastern University in Boston.



Todd Leebow, President and CEO, Majestic Steel

Todd Leebow is the President and CEO of Majestic Steel USA, a leading steel distribution and processing company. Majestic Steel USA has a unique culture that focuses on delivering prime product with an unparalleled customer experience. In 2007, Todd Leebow joined the family business to oversee the company's supply chain.

As an entrepreneur and visionary, Todd Leebow saw an opportunity for data and technology to maximize efficiency through Majestic Steel USA's business and innovate the way customers buy steel. Under Todd Leebow's leadership, Majestic Steel USA has been recognized as a top company to work for in Northeast Ohio and the Cleveland Area with special recognition for Leadership and Innovation. The culture that Todd Leebow has built at Majestic Steel USA allows the company to attract top talent to the steel industry and join the Majestic Family.

Todd Leebow is a philanthropist, owner and operator of other business ventures, and a vocal advocate for the steel industry.



Alice Ancona, Director, International Trade & Investment Office

Ms. Ancona heads the Chamber's international efforts and is primary advocate for international trade and investment policies. She is responsible for increasing global trade opportunities for Florida to include implementing programs that foster trade and investment as well as serving as a vital facilitator to international stakeholders, foreign agencies and representatives, member companies and state and federal agencies.

Ms. Ancona is lead staff to the Chamber's Infrastructure Coalition which serves as the unified voice of business preparing for Florida's future growth.

Prior to joining the Florida Chamber, Ms. Ancona led the governmental affairs division of the Greater Miami Chamber of Commerce.

Ms. Ancona has served on various steering committees for the Florida's transportation planning efforts, is a member of the International Policy Committee of the U.S. Chamber of Commerce, Florida International Trade Partnership, South Florida District Export Council, recipient of the 2014 International Women's Day Award from World Trade Center Miami, 2015 Person of the Year by the Florida Customs Brokers & Forwarders Association, Inc., and recipient of the 2016 Women of Distinction Award by the Lauderhill Regional Chamber of Commerce.



Chris Casey, Ph.D., Co-founder & Executive Director of the Independent Steel Alliance

Chris Casey, Ph.D., is the co-founder and Executive Director of the Independent Steel Alliance (“ISA”). ISA is a first-of-its-kind purchasing alliance formed among independently owned and operated rebar fabricators in the U.S. and Canada. ISA was launched in 2012 and has steadily grown its membership and supplier base, with the members collectively representing over 10% of the total rebar market consumption in the U.S. and Canada. The goal of ISA is to assemble and leverage the group’s volume purchasing potential for financial benefit. ISA Fabricator members represent the “best and the brightest” among independent rebar fabricators in the U.S. and Canada. Since forming ISA, Casey has become a recognized expert, speaker and advisor representing the unique needs and interests of this particular niche within the steel industry.

Prior to forming ISA, Casey was the President and second-generation owner of Bec-Don Ringgold, Inc., an independent supplier of fabricated reinforcing steel to the construction industry.

Before joining the family business in 1996, Casey was a consultant in the field of information systems management, and worked with manufacturing and banking companies to prepare their core information systems for the transition into the Year 2000.

For over a decade, Casey served on the national Board of Directors for the Concrete Reinforcing Steel Institute (a trade association for reinforcing steel); was a past Board Chairman for the Catoosa County Chamber of Commerce; and served for two years on the Georgia Chamber of Commerce Board of Directors. At the age of 39, Casey was recognized by Georgia Trend Magazine as one of Georgia’s “40 Under 40” rising professionals.

Raised in Atlanta, Casey earned a Bachelor’s degree in Management and an MBA in Information Systems, both degrees from Georgia State University. In 2013 he earned a Ph.D. in Leadership from Capella University. For his dissertation, Casey produced a quantitative study of how family businesses can define and measure success

KEYNOTE SPEAKER



Jeff Vinik, Chairman and Governor, Tampa Bay Lightning
Partner, Strategic Property Partners, LLC

Jeff Vinik purchased the Tampa Bay Lightning on March 3, 2010, promising a comprehensive transformation of the franchise while pledging to make a significant positive impact in the Tampa Bay community, and he has delivered. Upon acquiring the Lightning, Vinik vowed to make the organization “world-class,” creating an unrivaled fan experience while putting together a team of which Tampa Bay sports fans would be proud, on and off the ice.

Fast forward eight years and the Lightning are now recognized nationally as one of the top organizations in North American sports, having appeared in the National Hockey League’s Eastern Conference Final four times (2011, 2015, 2016, 2018), advancing to the Stanley Cup Final in 2015. Off the ice, the Lightning brand has been completely revitalized and transformed, having been lauded by both ESPN as the No. 1 team in professional sports in the media giant’s Ultimate Standings (also ranking in the Top 10 in six of seven years), as well as by the Sports Business Journal as one of the five finalists for Sports Team of the Year in 2016. Entering into the 2018-2019 season, the Lightning have enjoyed 158 consecutive sellout crowds at AMALIE Arena. Vinik now sits as a member of the Executive Committee of the National Hockey League’s Board of Governors.

The Lightning’s success under Vinik has coincided with the emergence of a development company, Strategic Property Partners (SPP), LLC and its plan to develop approximately 60 acres in downtown Tampa’s south core into a new district entitled “Water Street Tampa.” SPP, a partnership between Vinik and Cascade Investment, LLC of Kirkland, Washington, is expecting to deliver approximately \$3 billion in investment to bring Water Street Tampa to life and reinvent the blocks surrounding AMALIE Arena into a walkable, 24-7 live, work, play and stay wellness district. With construction of phase one already underway, the district will eventually include a School of Medicine for the University of South Florida, corporate office buildings, three Marriott hotel properties, residences, retail, restaurants, entertainment and improved infrastructure.

After growing up in New Jersey and attending high school at Riverdale Country School in New York City, Vinik graduated from Duke University (1981) with a Bachelor of Science Degree in Engineering and Economics. He went on to earn his Masters of Business Administration degree from the Harvard Business School, graduating in 1985.



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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CONTACT:

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