

**WORLD TRADE  
& TRANSPORT**  
CONFERENCE

# Trade & Transport Panel Discussion

*Thursday, February 28, 2019*

*New Orleans*

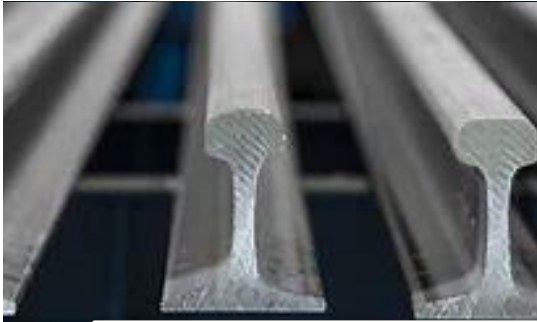


# SMA Members

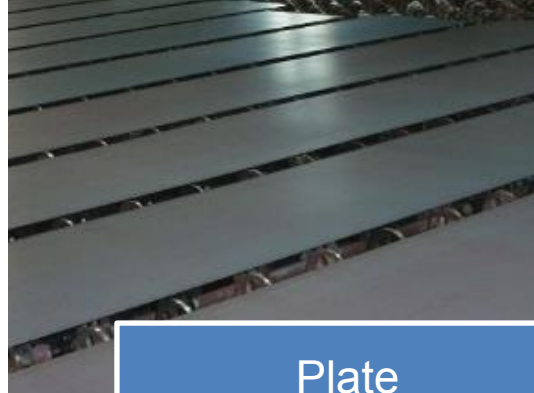


- 27 steel producing members (EAF and rolling mills)
- EAF producers represent almost 70% of U.S. domestic steel production
- Operations in 43 U.S. states
- 105 congressional districts
- Over 100 associate members

# Products We Produce



MBQ & SBQ



Plate



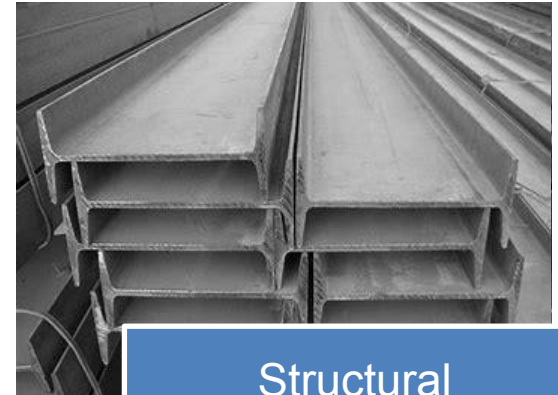
Flat Products



Long Products

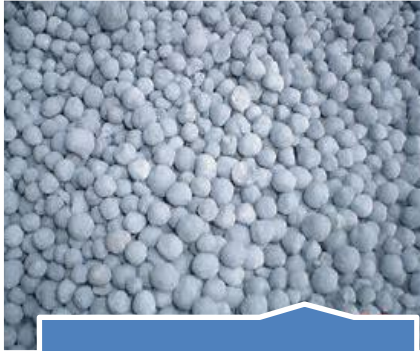


Pipe & Tube Products



Structural

# Raw Materials We Use



DRI



HBI



Refractory



Electrodes



Iron Ore



Pig Iron



Scrap



# SMA's Work CBP, Brokers, & River System

Tuesday, February 17, 2015

U.S. Army Corps of Engineers  
Regional Planning and Environment Division, South  
Coastal Environmental Compliance Section  
c/o Mark Lahare  
P.O. Box 60267  
New Orleans, LA 70160-0267

Dear Mr. Lahare,

On behalf of the member companies of the Steel Manufacturers Association (SMA), I write to convey the SMA's strong support for the Inner Harbor Navigation Canal (IHNC) Lock Replacement project. SMA is the primary trade association for North America's electric arc furnace steel producers. SMA's 31 member companies account for over seventy-five percent of total domestic steel production. We are the largest steel industry trade association in North America. We count among our members Nucor Steel, ArcelorMittal, and SSAB.

The IHNC provides a critical link between the Gulf Intracoastal Waterway and the Mississippi River. Many of SMA's members rely upon this waterway for the movement of steelmaking raw materials and finished steel products.

Philip K. Bell



# 3.5 MT Shift to Domestic Industry

*U.S. Market Supply of Steel Mill Products All Grades (Quantities in Short Tons)*

Item	January - October 2018		YTD Change		
	2017	2018	Tons	Percentage	
Domestic Mill Shipments	76,138,524	79,643,381	3,504,857	4.6%	↑
Total Imports	32,913,901	29,448,905	-3,464,996	-10.5%	↓
Semi-Finished	7,402,898	7,354,302	-48,596	-0.7%	↓
Finished	25,511,003	22,094,603	-3,416,400	-13.4%	↓
Total Exports	8,892,555	7,656,355	-1,236,200	-13.9%	↓
Apparent Steel Supply	92,756,972	94,081,629	1,324,657	1.4%	↑
Import Share of Domestic Market (%)	27.50%	23.50%	-4.0	-14.6%	↓

Source: United States Department of Commerce



# Summary of Steel Mill Goods Import Volumes

Top 15  
Steel Mill Goods  
Ports

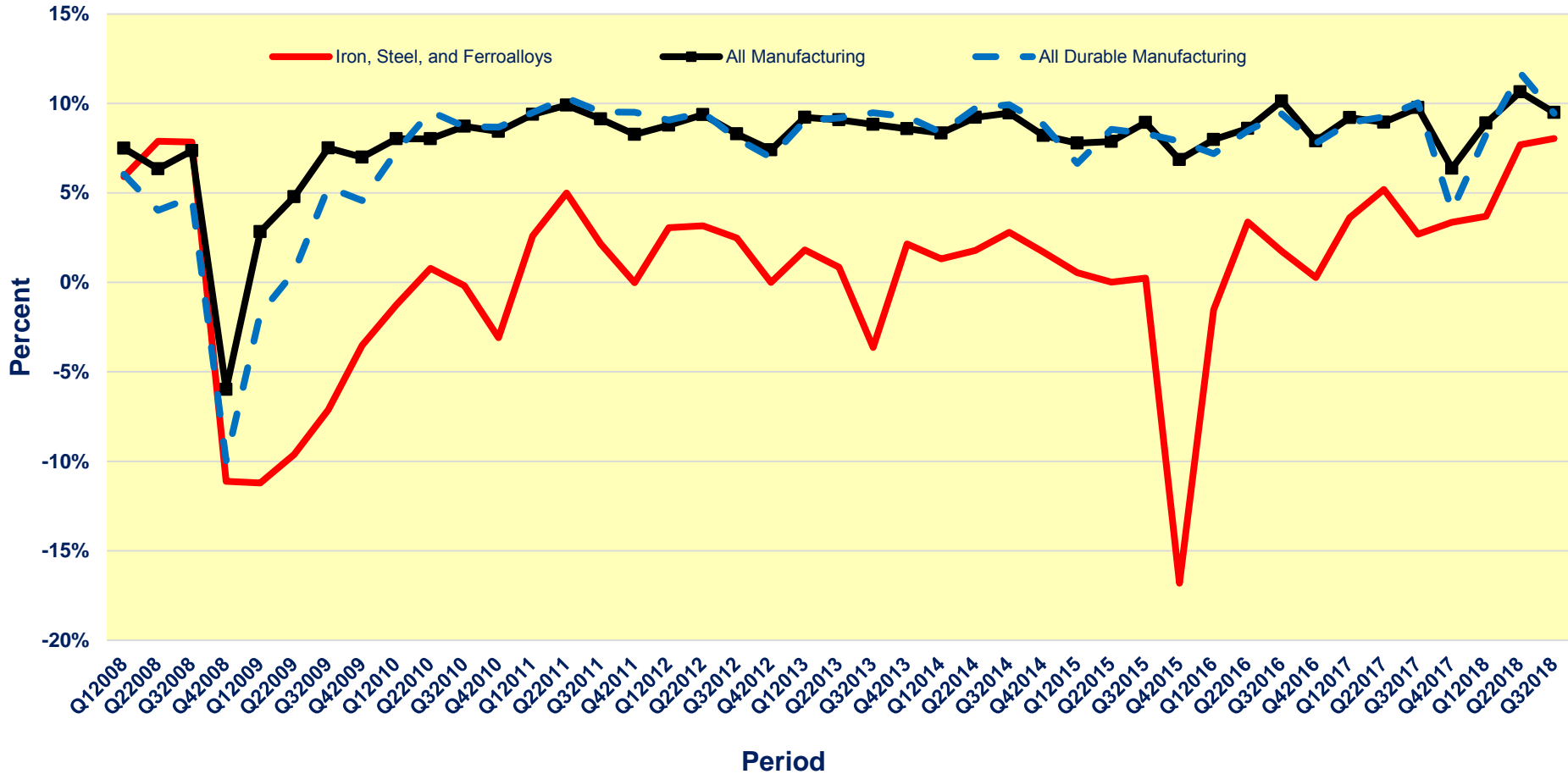
#	CBP Port District	11 Months through November		Ranking	
		2017	2018	2017	2018
1	Houston-Galveston, TX	7,198,975	6,719,603	#1	#1
2	Detroit, MI	3,548,410	3,592,670	#3	#2
3	Mobile, AL	3,638,340	3,125,313	#2	#3
4	Los Angeles, CA	2,688,211	2,756,385	#5	#4
5	Philadelphia, PA	2,961,638	2,404,398	#4	#5
6	Laredo, TX	1,745,814	1,668,768	#7	#6
7	New Orleans, LA	2,040,578	1,455,867	#6	#7
8	Chicago, IL	1,332,378	1,068,396	#8	#8
9	Columbia-Snake, OR	927,160	1,067,830	#10	#9
10	Buffalo, NY	1,068,683	885,477	#9	#10
11	Savannah, GA	820,537	619,188	#11	#11
12	Cleveland, OH	555,524	472,761	#13	#12
13	Tampa, FL	390,221	330,931	#15	#13
14	Pembina, ND	256,233	327,879	#19	#14
15	Boston, MA	325,120	299,661	#17	#15
	<b>2018 Top 15 Total</b>	<b>29,499,839</b>	<b>26,797,144</b>	<b>(2,702,695.44)</b>	
	<b>USA TOTAL</b>	<b>33,053,152</b>	<b>29,681,846</b>	<b>(3,371,305.42)</b>	

Source: USITC Data Web



# Steel Industry Profits

After-Tax Profits As A Percentage Of Net Sales

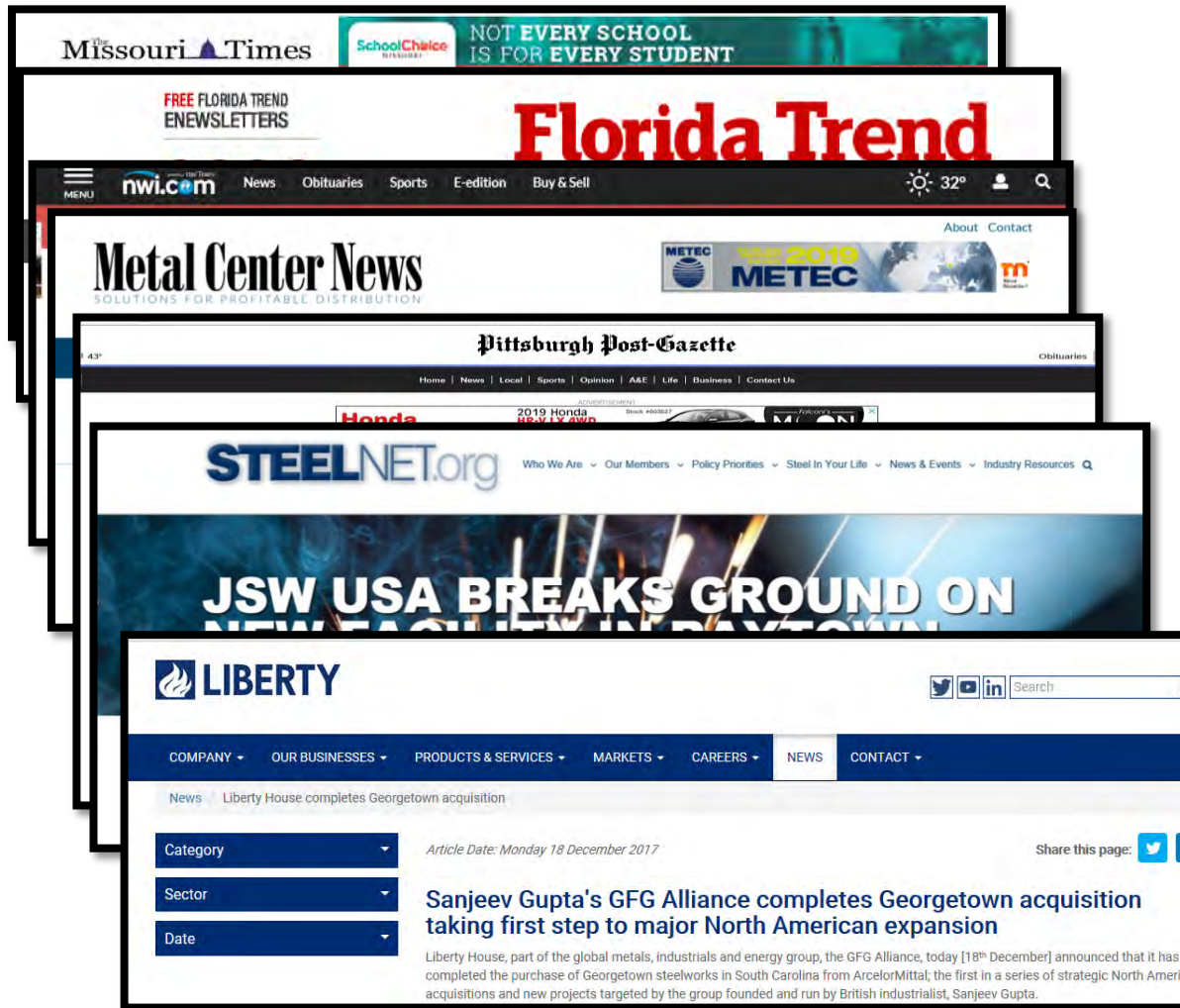


Source: U.S. Census Bureau Quarterly Financial Report





# Major CAPEX Announcements



Since January 1, 2017  
over \$10B USD  
in new steel  
industry investment  
announced

Sources: Media Outlets, Company Websites



# U.S. Carbon Scrap Exports

#	U.S. Carbon Steel Scrap Exports*	2017	Jan-Nov 2017	Jan-Nov 2018
1	Turkey	3,635,585	3,266,790	3,226,222
2	Taiwan	1,256,025	1,134,841	1,660,582
3	Mexico	1,544,051	1,491,929	1,641,799
4	Vietnam	656,898	551,007	957,215
5	Korea	523,367	463,674	821,068
6	India	655,413	619,422	793,551
7	Bangladesh	647,026	610,665	774,940
8	Egypt	400,273	400,273	652,562
9	Canada	608,967	555,986	554,770
10	Thailand	537,647	500,378	474,405
	Rest of World	3,293,282	3,016,021	2,932,847



Sources: U.S. Census Bureau via the U.S. International Trade Commission, ISRI



\*Denominated in metric tons (tonnes)

# Thank You

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Philip K. Bell

President

Steel Manufacturers Association

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