

SMU Community Chat

December 1, 2021

Starting at 11 AM Eastern

Michael Cowden, Steel Market Update

Jefferson Shaw, Evraz NA



SteelMarketUpdate.com/Blog/SMU-Community-Chat-Webinars

Steel Market Update



SMU Newsletter developed for active buyers & sellers of flat rolled steel.

Prices – Momentum – Trends – Analysis – with a guarantee

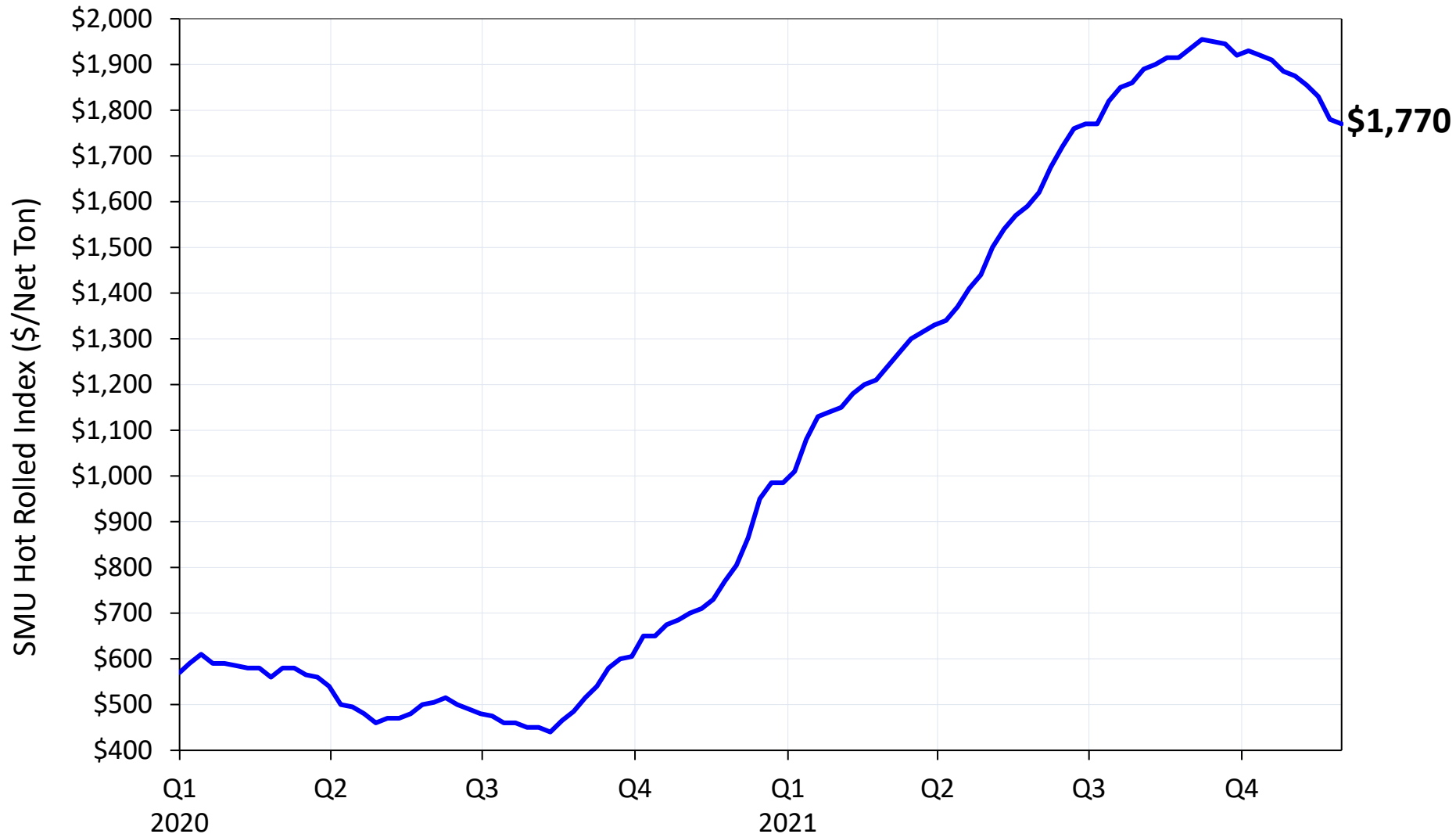
For more information visit www.SteelMarketUpdate.com

Upcoming SMU Events

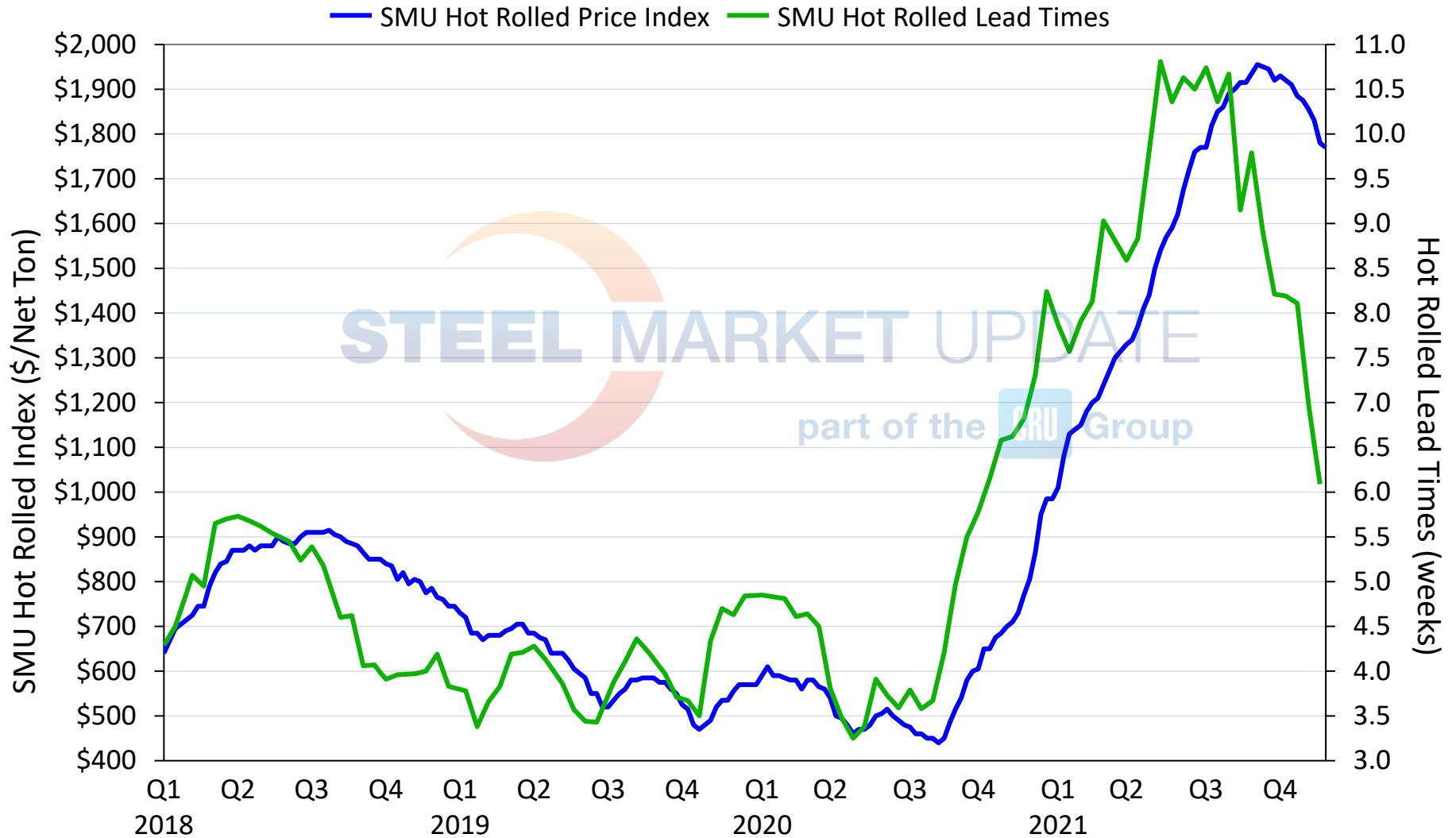
Date	Event	Status	Venue
December 7-8	CRU Carbon Offset and Clean Power Strategies Training Course	Virtual	Online
January 11-12	SMU Steel 101 Workshop	Virtual	Online
February 1-2	SMU Introduction to Steel Hedging Workshop	Virtual	Online
February 14-16	Tampa Steel Conference	Live	Marriott Waterside Hotel Tampa, Florida
April 26-27	SMU Advanced Steel Hedging Workshop	Virtual	Online
August 22-24	SMU Steel Summit Conference	Live	Georgia International Convention Center, Atlanta, Georgia

If you would like more information about any of our workshops, you may visit SteelMarketUpdate.com/Events or e-mail our team at Events@SteelMarketUpdate.com

SMU Hot Rolled Price Average

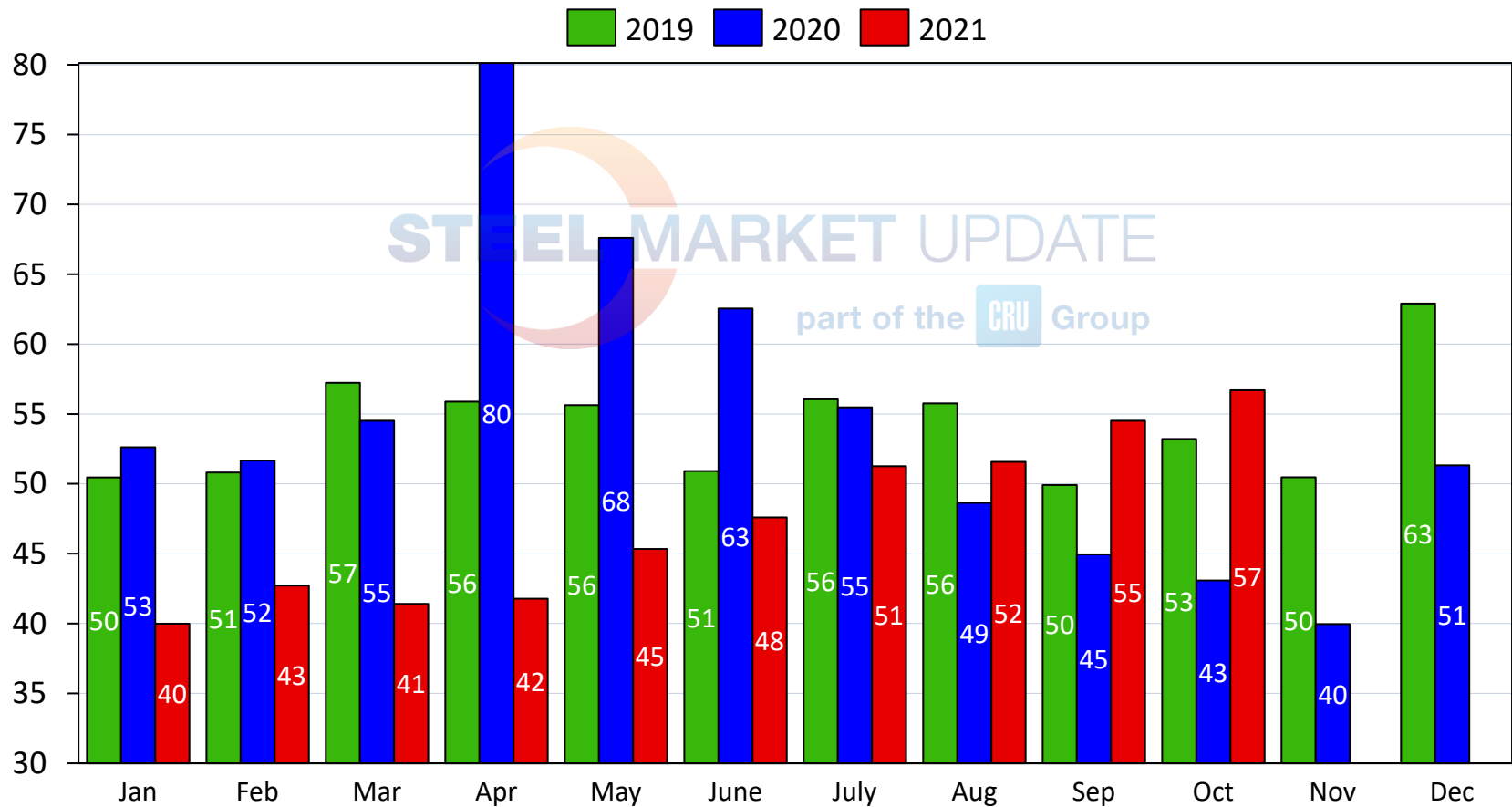


SMU Hot Rolled Index vs Lead Times



Service Center Inventories

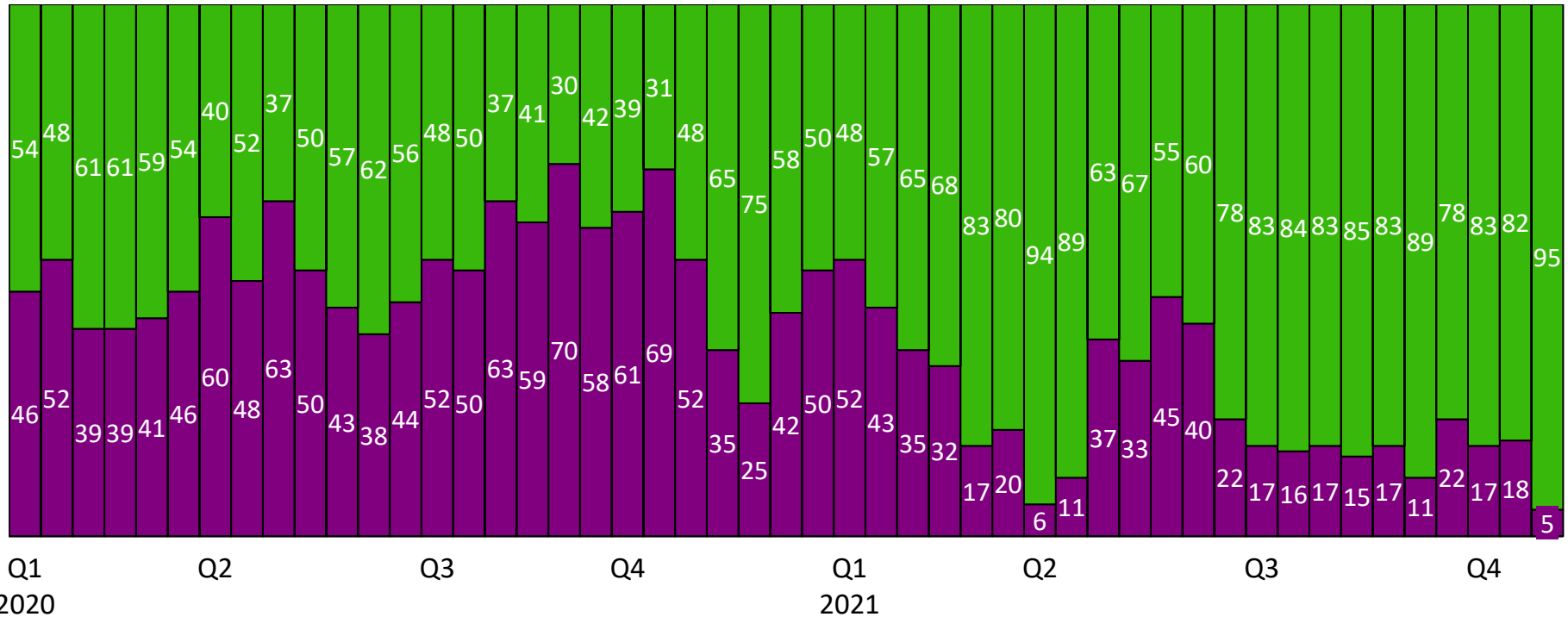
Shipping Days of Supply – Flat Rolled



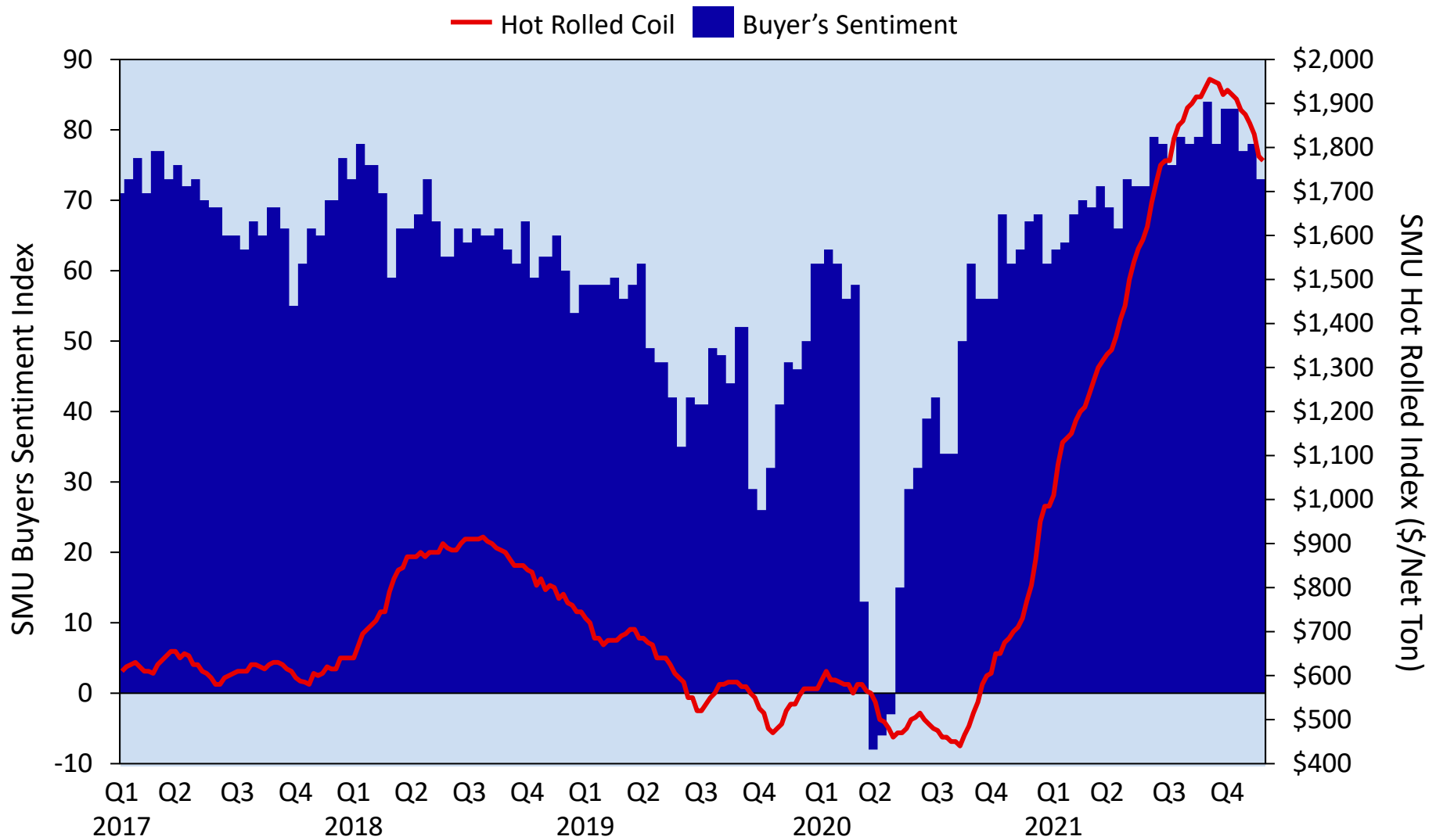
Manufacturers- Are your foreign steel suppliers quoting you competitive prices for new orders for future delivery?

Yes No

out of 100%

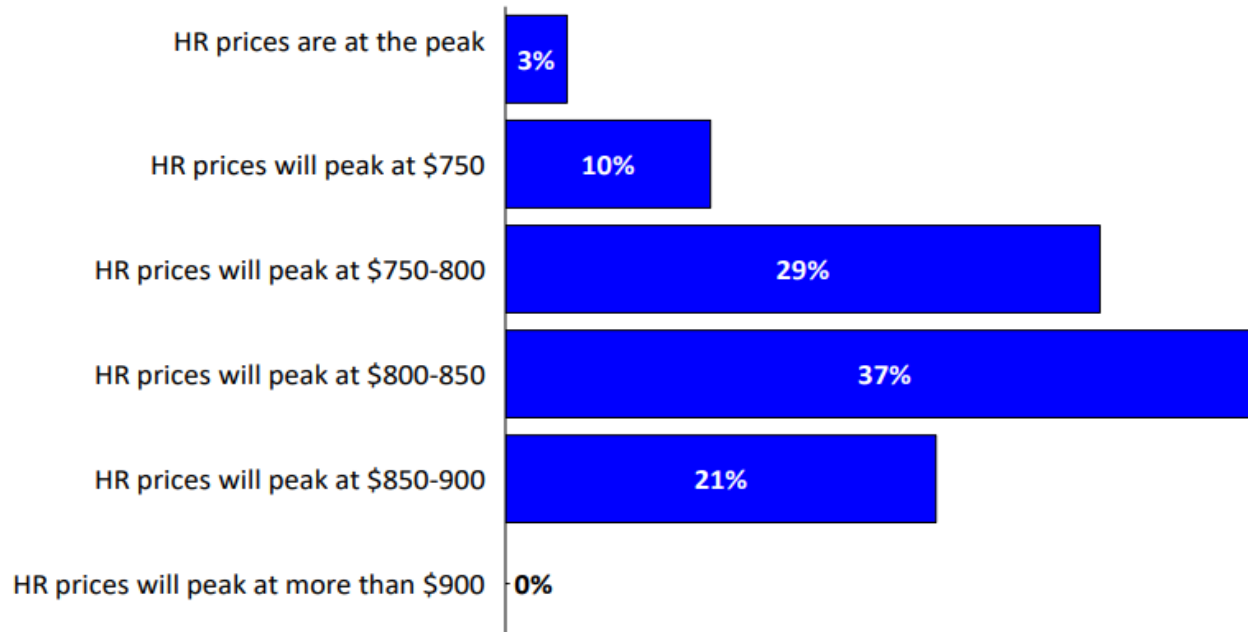


SMU Hot Rolled Index & Buyers Sentiment Index



Market Peak

At what price/ton does this market peak?



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As Vice President of Strategy, Jefferson leads corporate strategy and planning, communications, and government affairs for EVRAZ North America, which includes ENA's Canada, Pueblo, Portland, and Recycling business units. Prior to joining EVRAZ, Jefferson was a strategy consultant at Monitor Deloitte where he advised Fortune 500 clients in the industrials, energy, and services sectors. He has also held various roles in institutional investing, corporate finance, and M&A.

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EVRAZ North America

 Jefferson Shaw, Vice President - Strategy

 December 1, 2021



EVRAZ North America. Who We Are

- A leading, vertically-integrated producer of steel and steel products for energy, rail and other infrastructure markets
- Largest and only vertically-integrated energy tubulars supplier in North America offering a full suite of HSAW, ERW line pipe, and OCTG
- #1 supplier of rail in North America
- Leading supplier of heavy plate on the U.S. West Coast

Production Capacity

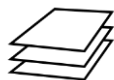


Plate & Coil **2.3Mt**



Energy Tubulars **1.4Mt**



Rail **600kt**



Rod & Bar **350kt**

People



~3,000

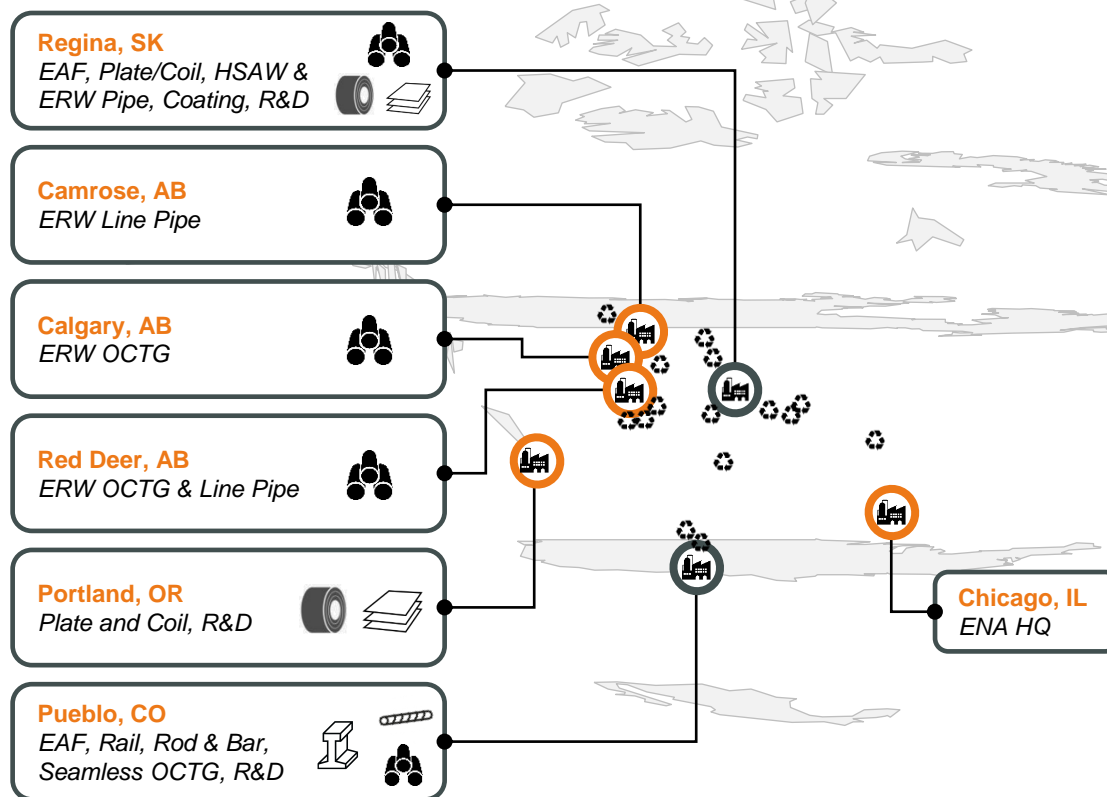
employees across the United States and Canada

Environment



- **EAF-based** steel production
- Melt **recycled scrap** equivalent to ~2M cars per year
- First steel mill to be nearly 100% powered by **solar**
- Leading supplier of **CCS pipelines**
- Advanced R&D in **hydrogen pipe**

ENA. Our Footprint



- 6** Locations across Colorado, Oregon, and Western Canada
- 10** Mills producing plate, coil, rail, OCTG, line
- 3** EAFs with 2.3Mt of steelmaking capacity
- 3** R&D centers across Canada and the U.S.
- 15** Recycling Yards

ENA. Opportunities and Challenges

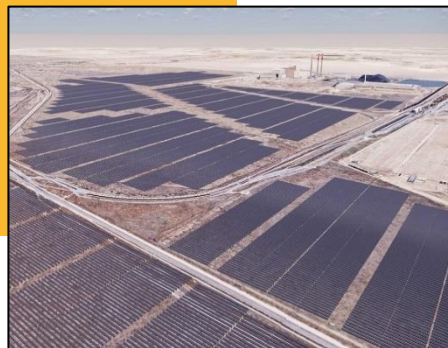
People & Talent

Oil & Gas Market Recovery

The Energy Transition

Infrastructure

Raw Material Supply



Thank You

Thank you for attending our SMU Community Chat. And a special thank you to Mr. Shaw for his participation today.

Our next webinar is **Wednesday, December 15 at 11 AM ET** with Tom Derry, CEO of the Institute for Supply Management.

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To contact Jefferson Shaw: Jefferson.Shaw@evrazna.com

For information about subscribing to SMU, contact Paige Mayhair: Paige@SteelMarketUpdate.com

To participate in our survey: Brett@SteelMarketUpdate.com

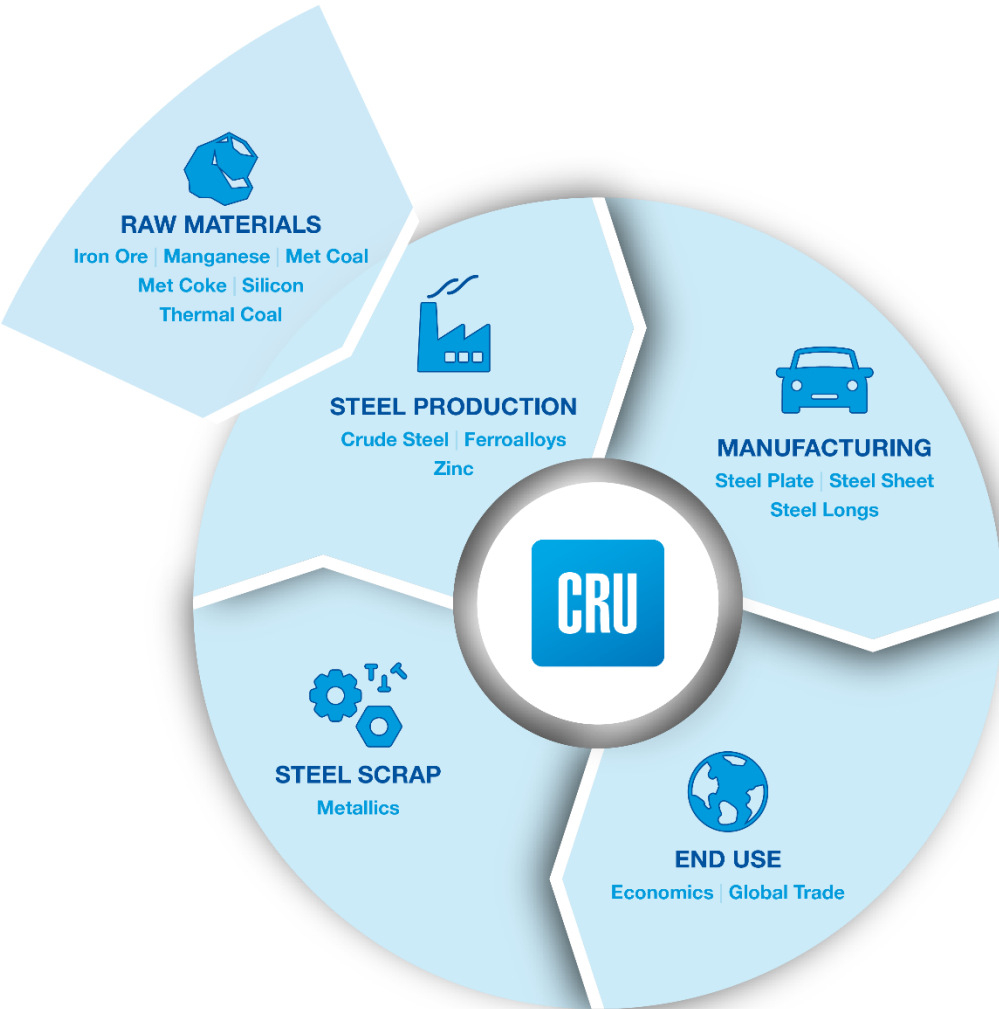
Stay safe and stay tuned to Steel Market Update!



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. He has executed turn-arounds at the corporate and business-unit level through a variety of means, including acquisitions, divestitures, restructuring, and business process re-engineering.

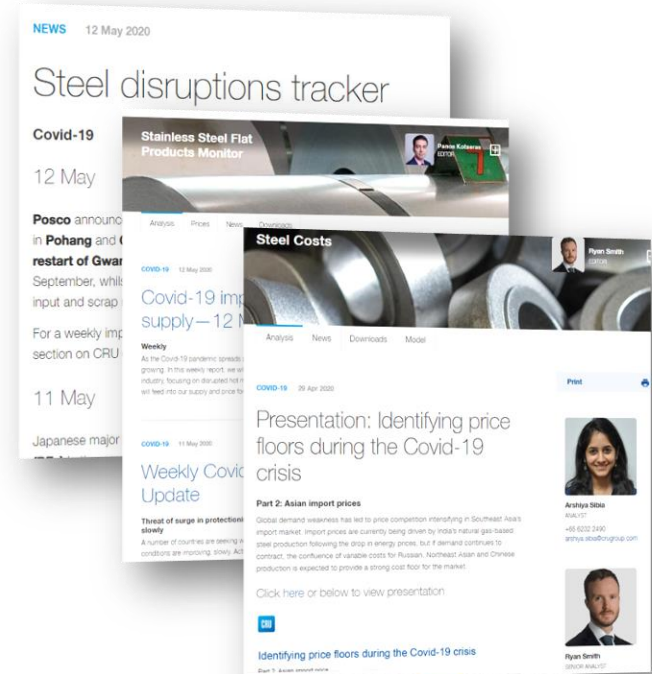
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