

Excellence

In the annual survey of mill customers, last year's service center favorites were also the preferences in 2019.

Repeated

Service centers are looking for a lot from their mill suppliers – quality product, on-time delivery, competitive pricing and excellent service. And the ability to deliver on those traits can be habit forming, as this year's results from Jacobson & Associates demonstrate.

This year's top performers in sheet, plate, bar/structural, SBQ and beam production, from the perspective of their service center customers, are the exact same companies that topped the charts last year.

Each year, Jacobson and Associates survey more than 2,000 major steel customers in the United States and Canada, including service centers and end users, to measure their satisfaction with producers. They query the steel consumers on four major factors: quality, service, price and on-time delivery.

Service centers singled out North Star BlueScope as North America's top sheet producer. It's a distinction the Delta, Ohio-based steelmaker has held for the past four years.

The others are also repeaters. SSAB Plate is the plate leader, Nucor Berkeley topped the survey in beams, CMC Texas is the favored bar/structural mill among distributors and Nucor Nebraska is the SBQ leader among North America's steel distributors.

Nucor Berkeley's run atop the smaller beam mill field is even longer than NorthStar BlueScope's sheet streak. The South Carolina mill has topped the service center charts for beam suppliers every year since 2012.

As is the usually the case, the opinions of service centers and end-use customers didn't overlap, for a variety of reasons. Nucor Berkeley was the only company to top both lists in beams. The Techs were the preferred sheet supplier among end users, with EVRAZ Portland topping the plate field, Nucor Texas heading up the bar/structural ratings and SDI Engineered Bar the preferred supplier in SBQ.

Overall, taking into account the viewpoints of both service center and end use customers, the leaders in the field are also largely consistent from the 2018 Jacobson rankings. North Star BlueScope tops the sheet field, as does Berkeley in beams. EVRAZ Portland repeated its spot in the plate field, as did Nucor Nebraska among SBQ

The Leaders ...

Customer Comments on What Makes Them Different

Sheet Producer

North Star BlueScope

- North Star, Delta, Ohio, is a partner. They do exactly what they say they will do, with a smile.
- North Star BlueScope provides excellent overall service. Their strengths are delivery performance, communication and customer service. Sometimes, North Star is not the best on price (but the same could be said for every mill from time to time).
- NSB's strengths: accommodating, fairness, consistency, salesforce is empowered to make quick decisions. NSB's weaknesses: only up to 60-inch wide and tends to be the highest-cost supplier.
- North Star BlueScope is reliable. They are able to make high quality products in small batches, on time.
- North Star BlueScope is a partner. They do a great job servicing the customer, but they only make HRC.
- On-time delivery from North Star BlueScope Delta, Ohio, is the best in the industry and their customer portal is one of the easiest to use.
- North Star BlueScope is the benchmark. NSB has a limited product line, but they are awesome at what they do. NSB's website is very good and easy to use.
- North Star BlueScope is an impressive supplier with better quality and delivery than their competition. NSB is very good overall.
- North Star BlueScope is a partner. They are the best people to deal with, would love to have more products or grades produced by them.

Plate Producer

EVRAZ Portland

- EVRAZ Portland has been reliable with good products and service, but they struggle with their prices sometimes.
- EVRAZ, Portland Oregon is consistent and customer focused. Strengths for Evraz Portland: they are very customer focused, delivery is always on time, very rarely is material late shipping. They work to be price competitive, in spite of tariffs shipping into Canada, whenever they can.
- EVRAZ Portland has very good quality and excellent customer service; great communication from outside sales; and usually have very fast lead times. Pricing from Evraz Portland is often higher than what we see from other mills.

- EVRAZ Portland is the West Coast leader. They are good people to work with.
- EVRAZ Portland is an excellent supplier. They excel in all areas, but can always do a little better on having floor stock.

Beam Producer

Nucor Berkeley Beams

- Nucor Berkeley is good to work with. They do a good job of accommodating our needs.
- Nucor Berkeley has very experienced people. They are easy to work with and they are quick at getting info back to us.
- Nucor Steel Berkeley has an excellent inside sales team. Berkeley is the only mill in the industry that can get a railcar loaded and shipped on the same day an order is placed.
- Nucor Berkeley has fantastic customer service and they are easy to work with. Strengths for Nucor Berkeley are the ability to roll non-standard lengths to the nearest inch and everyone in the office is extremely competent and a pleasure to work with. The weakness for Nucor Berkeley is that they have the strictest credit department.
- Nucor Berkeley has a very good inside and outside sales team and they ship in a timely manner. Nucor Berkeley's new website is not user friendly; we cannot easily find reports nor check stock.
- Nucor Berkeley is dependable. Their strengths are inside and outside sales and material availability while their weakness is size range

Bar/Structurals Producer

CMC Steel Texas

- CMC Texas has a large variety of products and good availability.

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- CMC Texas is our major supplier. They have quality people and products. The people there are the best.
- CMC is a leader. Their website is good for looking up orders.
- Strengths for CMC Texas: Good stock available to meet our needs; accurate lead times when out of stock items; quick delivery times; and quick response to inquiries. I cannot think of any weaknesses for CMC Texas.
- CMC Seguin is flexible. They will work with you to get material run, even sizes not published. CMC Seguin has less 'stock' sizes than some of their competitors..

SBQ Producer

Nucor Nebraska SBQ

- Nucor Nebraska has strong outside sales and technical support but their pricing always lags.
- Nucor is the market leader. They can always do better on pricing, but they set a good tone for the industry.
- Nucor Nebraska is dependable. They are a great mill with good people.
- Nucor Nebraska is reliable. They always deliver. I have a lot of confidence in Nucor Nebraska.
- Nucor Nebraska is a dependable supplier. They live up to their word and are upfront about delays on schedules, which is honest and appreciated

Top Suppliers

Top-ranked producers in five steel categories

Sheet Producer	North Star BlueScope
Plate Producer	EVRAZ Portland
Bar/Structurals	CMC Texas
SBQ Producer	Nucor Nebraska
Beams	Nucor Berkeley

Source: Jacobson & Associates. Data is for the 12 months ending Sept. 30, 2019

producers. Bar/structural producer CMC Texas is the only newcomer to the Top Supplier List.

Interestingly, a look at the comments from this year’s respondents show what they truly value in a mill partner, and it isn’t usually the lowest price.

The top-ranked mills were repeatedly praised for their service, ability to get ma-

terial to a customer quickly, helpful sales and customer service people, dependability and responsiveness. And, in a nod to the changing nature of the industry, the ease of use of the company website.

In contrast, pricing is rarely mentioned as one of the traits of the best-rated companies. And when it is, it’s frequent-ly an area where some of the best-rated

mills don’t stand out in, according to survey respondents. One supporter of NSB, for example, noted the company “tends to be the highest cost supplier.”

Thus, finding a satisfied service center customer is not necessarily obtained by offering the lowest price, but in providing the other attributes that keep distributors coming back year after year. ■

Most Improved Suppliers

Most Improved Suppliers in Overall Customer Satisfaction by Product Category

Sheet Producers

1. ArcelorMittal Riverdale
2. The Techs
3. ArcelorMittal Cleveland
4. USS Mon Valley
5. SDI Columbus
6. Algoma
7. NLMK PA
8. USS Midwest
9. Big River Steel
10. ArcelorMittal Indiana Harbor

SBQ Producers

1. Gerdau SBQ
2. Gerdau Special - Monroe
3. Nucor Nebraska

Plate Producers

1. EVRAZ Portland
2. Nucor Tuscaloosa
3. SSAB Plate
4. Nucor Hertford

Bar/Structural Producers

1. CMC California
2. Gerdau Cambridge
3. AltaSteel
4. Nucor Birmingham
5. CMC Tennessee
6. Gerdau Whitby
7. Nucor Seattle

Beam Producers

1. Gerdau Virginia
2. Nucor Berkeley Beams

The most improved mills are those with the highest percentage increase in overall customer satisfaction scores for the 12 months ending Sept. 30, 2019. Companies are listed in order from highest to lowest in percentage improvement.

Loyalty Index Ranking

Highest Ranked Mills in Customer Loyalty by Product Category

Sheet Producers

1. North Star BlueScope
2. SDI Butler
3. Nucor Gallatin
4. USS Mon Valley
5. Nucor Berkeley
6. CSI
7. NLMK PA
8. SDI Heartland
9. ArcelorMittal Dofasco
10. Nucor Arkansas
11. Nucor Decatur
12. SDI Columbus
13. AM/NS Calvert
14. Stelco
15. Nucor Crawfordsville

Plate Producers

1. Nucor Longview
2. SSAB Plate
3. Nucor Tuscaloosa
4. Nucor Hertford

SBQ Producers

1. Gerdau Special - Jackson
2. Nucor Nebraska
3. Alton Steel
4. SDI Engineered Bar

Beam Producers

1. Nucor Berkeley
2. Nucor Yamato
3. SDI Structurals

Bar/Structurals Producers

1. Nucor Nebraska
2. CMC Oklahoma
3. CMC Arizona
4. Nucor Texas
5. Nucor South Carolina
6. CMC Texas
7. AltaSteel
8. Nucor Jackson
9. CMC Alabama
10. Nucor Utah
11. Nucor Auburn
12. Gerdau Jackson

Companies rated the best in customer loyalty are listed in order from the highest ranked in each product category.

Source: Jacobson & Associates. Data is for 12 months ending Sept. 30, 2019.

Overall Customer Satisfaction

By Product Category, End-Users and Service Centers

Top Sheet Producers

As Rated by End-Use Customers

1. The Techs
2. AM/NS Calvert
3. SDI Columbus
4. ArcelorMittal Burns Harbor
5. ArcelorMittal Indiana Harbor
6. ArcelorMittal Cleveland
7. Big River Steel
8. ArcelorMittal Dofasco
9. AK Steel
10. CSI

Top Sheet Producers

As Rated by Service Center Customers

1. North Star BlueScope
2. Nucor Decatur
3. SDI Heartland
4. The Techs
5. SDI Butler
6. Nucor Berkeley
7. Nucor Crawfordsville
8. Nucor Gallatin
9. SDI Columbus
10. Nucor Arkansas

Top Plate Producers

As Rated by End-Use Customers

1. Evraz Portland
2. SSAB Plate
3. Nucor Tuscaloosa
4. Nucor Hertford

Top Plate Producers

As Rated by Service Center Customers

1. SSAB Plate
2. EVRAZ Portland
3. Nucor Tuscaloosa
4. Nucor Hertford

Top Beam Mills

As Rated by End-Use Customers

1. Nucor Berkeley
2. Nucor Yamato
3. SDI Structurals

Top Beam Mills

As Rated by Service Center Customers

1. Nucor Berkeley
2. Gerdau Cartersville
3. Nucor Yamato

Top Bar/Structurals Mills

As Rated by End-Use Customers

1. Nucor Texas
2. CMC Texas
3. Nucor Jackson
4. CMC South Carolina
5. CMC Arizona
6. Nucor Birmingham
7. CMC Alabama
8. Gerdau Cambridge
9. Nucor South Carolina
10. CMC South Carolina

Top Bar/Structurals Mills

As Rated by Service Center Customers

1. CMC Texas
2. Nucor Jackson
3. Nucor South Carolina
4. Nucor Nebraska
5. CMC Alabama
6. Nucor Utah
7. Cascade Steel
8. CMC Arizona
9. Nucor Seattle
10. Nucor Texas

SBQ Producers

As Rated by End-Use Customers

1. SDI Engineered Bar
2. Nucor Nebraska
3. Gerdau Special - Jackson
4. Gerdau Special - Monroe

SBQ Producers

As Rated by Service Center Customers

1. Nucor Nebraska
2. Nucor Memphis
3. Timken
4. SDI Engineered Bar

Customer satisfaction rankings are divided into the votes from end-use customers and service centers. Customers typically rank on four primary factors: quality, service, price and on-time delivery.

Source: Jacobson & Associates. Data is for 12 months ending Sept. 30, 2019

