

Regaining Favor

After the supply-challenged, price-spiked year of 2021, the steel production industry returned to a more normal environment, allowing mills to better meet their customers' needs.

For North America's steel producers, this is more like it.

Most of the charts that follow are standards in the Jacobson Survey, including The Leaders, The Loyalty Index and Overall Customer Satisfaction. But one has changed from the 2021 installment to this year.

Chart 2 tracks the companies that were most improved in overall satisfaction from last year to this year. In 2021, that chart revealed the "declines in customer satisfaction." Safe to say, the past year was an environment more conducive to meeting the varied demands of metals purchasers.

Each year, John Jacobson & Associates surveys steel buyers, both end-use customers and service centers, on their opinions on the performance of their mill suppliers. Consumers are asked to weigh in on their mill providers on matters such as quality, service, price, on-time delivery, inside sales, outside sales and e-commerce. For two-plus decades, those results are presented in the pages of Metal Center News.

As usual, the lists are a mix of repeat performers and changes at the top. Four of this year's leaders in overall satisfaction were also atop the 2021 list: North Star BlueScope among sheet producers, EVRAZ Portland in plate, Nucor Berkeley in beams and Searing Industries in tube.

They were joined by two new entries, CMC Steel Texas among bar/structural makers and Nucor Memphis in SBQ.

When the polling was limited to just service centers, Nucor Longview was tops among plate performers, while the other leaders stayed atop the charts. NorthStar Blue Scope, Nucor Memphis and Nucor Berkeley were all ranked first by both service centers and end-use customers, while EVRAZ Portland (plate), Nucor Jackson (bar/structural) and CMC Atlas Tube (tube) finished first in their categories with end-users.

Returning to the Most Improved List, only one of the overall top finishers was also at the top there: Nucor Memphis. Others showing major improvement in 2022 were ArcelorMittal/Nippon Steel Calvert among sheet producers, Gerdau Cambridge in bar/structural, Algoma in plate, Gerdau Midlothian among beam makers and EXLTUBE among tube producers.

Finally, there's customer loyalty, among those traits most prized by mill producers. SDI Heartland topped the competitive list of sheet mills, ahead of United States Steel's Mon Valley Works operation and North Star BlueScope.

The other leading loyalty leaders were Gerdau Wilton in bar, Nucor Hertford in plate, Nucor Berkeley in beam, Nucor Nebraska in the SBQ sector and Wheatland Tube among tube producers.

The Leaders ...

And Customer Comments on What Makes Them Stand Out

Sheet Producer

North Star BlueScope

- North Star BlueScope is our major supplier. They are the best overall mill for our particular needs. I wish I could buy every pound of steel I use from North Star BlueScope.
- Our major supplier is North Star BlueScope. They are a great partner all around. NSB takes very good care of us. Only their price could improve, but they have notably good delivery.
- NSBS is superior in quality and service and at a competitive market price. NSB always has great relationships with customers. They have a great management and sales team.
- North Star BlueScope is solid. They have excellent management and make very solid decisions for their company. NSB are very consistent in their approach to marketing their products. North Star BlueScope is the best run mill in North America.
- North Star BlueScope is our major supplier. They make it the easiest for us to develop our program, they fulfill their contracts on time with zero rejections.
- Our major supplier is North Star BlueScope. They check all the boxes. NSB's customer service, quality and on-time delivery are all good.

Plate Producer

EVRAZ Portland

- Evraz Portland has the best delivery. They have a great turnaround time on orders.
- Evraz Portland has outstanding service with the best products, prices and delivery as well. Overall, Evraz Portland is the best plate mill.
- Evraz Portland is our major supplier due to great customer service. They are dependable and flexible.

- Evraz Portland provides reliable service. Evraz Portland does the best to communicate in a timely manner, both inside and outside sales.
- They have the best service. Evraz Portland is easy to work with, very helpful.
- Evraz Portland is setting the bar for competitive plate prices.

Bar/Structurals Producer

CMC Steel Texas

- CMC Texas acts as a cooperative partner for us, especially when it comes to being fair and competitive on prices.
- We appreciate CMC's modern e-comm system, it's very efficient. CMC just gets a little behind with deliveries.
- CMC Seguin is just friendly and their website is easy to work with. I mostly use mill portals for availability and pricing. CMC's website has everything that I need.
- CMC is responsive. They have very dependable service and they are fair on pricing.
- CMC is a dependable partner with reliable customer service that has always been very good.
- CMC is our major supplier based on our long-term relationship. CMC has good quality people. Nobody is perfect, but CMC is improving in terms of quality.

SBQ Producer

Nucor Memphis

- Nucor is our major supplier - we have just used them for a long time traditionally. Nucor has reliable delivery.
- Our major supplier is Nucor Memphis. They are on time and cost effective.
- Like the air you breathe, you need Nucor Steel. Nucor Memphis is a leader in the industry; their product quality is great, their

The Jacobson Survey has been measuring steel customer satisfaction for the past 30 years. He may be reached at (847) 735-7250 or via e-mail at jej@jacobsonsteel.com.

people are great, but their on-time performance needs to improve.

- Nucor Memphis has the best SBQ products. Although their price and delivery can always improve, Memphis deserves credit for having great product quality.
- Our major supplier is Nucor Memphis. They are on time and cost effective. Nucor Memphis is consistent. Their strengths are on-time performance, communication and response time.
- Strengths for Nucor Memphis are great communication; management has strategic vision for the market; and on-time delivery.

Beam Producer

Nucor Berkeley

- Nucor is our major supplier based on product quality and schedules. Nucor has great product selection and they hit their schedules.
- Nucor Berkeley is prompt. They have a limited size range, but they are very efficient and fast to reply to new business and shipping existing business.
- Nucor Berkeley has a super sales team that is eager to do whatever they need to in order to help customers with their needs.
- Nucor is our major supplier. They are like minded, have the same values, good customer service and price.
- Nucor is our major supplier based on their quality and availability of product. Nucor provides great service.

Tube Producer

Searing Industries

- Searing Industries is dependable - they have a slight room to improve their price and delivery, otherwise they are doing a great job.
- We have no problems with Searing Industries, they have great products and service.
- Searing Industries stands out to me as having superior customer service.
- Searing Industries has been perfect. Recent price improvements from Searing has put them right up at the top with Bull Moose.
- Searing is our major supplier based on their customer service. Searing has excellent customer service, second to none.

The Leaders

Top suppliers for the twelve months ending September 30, 2022, among all customers are:

Sheet Producer	North Star BlueScope
Plate Producer	EVRAZ Portland
Bar/Structurals	CMC Steel Texas
SBQ Producer	Nucor Memphis
Beams	Nucor Berkeley
Tube Producer	Searing Industries

Source: Jacobson & Associates Data is for the 12 months ending Sept. 30, 2022.

Nucor Berkeley topped the beam category for the 11th straight year.

Comments from their customers reflected the overall improvement in satisfaction levels this year:

“North Star BlueScope has outstanding products. I don’t think they are capable of making bad steel there. I can’t say enough good things about NSB’s product quality,” one sheet buyer said.

“Our major supplier is Nucor Memphis - they are best in class communication and service,” responded a SBQ purchaser.

And one tube purchaser added this. “Searing Industries is awesome - they have been staying competitive and checking all the boxes for us perfectly.”

Customers are in a happier place in 2022 versus the challenging market environment of 2021. ■

Most Improved in Overall Satisfaction by Product Category

Beam Producers

1. Gerdau Midlothian
2. Gerdau Virginia
3. Nucor Berkeley
4. SDI Structurals

SBQ Producers

1. Nucor Memphis
2. Nucor Nebraska
3. Timken
4. Gerdau Special – Fort Smith

Sheet Producers

1. AM/NS Calvert
2. NLMK PA
3. Stelco

4. USS Gary
5. Cliffs Burns Harbor
6. SDI Columbus
7. Big River Steel
8. Cliffs AK Steel
9. Cliffs Cleveland
10. ArcelorMittal Dofasco

Bar/Structurals Producers

1. Gerdau Cambridge
2. Cascade Steel
3. Gerdau Charlotte
4. Gerdau Wilton
5. Gerdau Jackson
6. CMC Steel Oklahoma
7. Nucor Marion
8. SDI Roanoke Bar

9. Nucor Jackson
10. CMC New Jersey

Plate Producers

1. Algoma Plate
2. Cliffs Burns Harbor Plate
3. Nucor Longview
4. Cliffs Coatesville

Tube Producers

1. EXLTUBE
2. Hanna Steel
3. Searing Industries
4. Nucor Tubular
5. Bull Moose Tube

Source: Jacobson & Associates Data is for the 12 months ending Sept. 30, 2022.

Highest Ranked Mills in Customer Loyalty by Product Category

Beam Producers

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

SBQ Producers

1. Nucor Nebraska SBQ
2. Nucor Memphis
3. SDI Engineered Bar
4. Gerdau Special – Monroe

Sheet Producers

1. SDI Heartland
2. USS Mon Valley
3. North Star BlueScope
4. SDI Sinton
5. SDI Butler
6. Nucor Decatur

7. Cliffs AK Steel
8. ArcelorMittal Dofasco
9. CSI
10. AM/NS Calvert
11. Nucor Crawfordsville
12. SDI Columbus
13. The Techs
14. NLMK PA
15. Cliffs Cleveland

Bar/Structurals Producers

1. Gerdau Wilton
2. Nucor Birmingham
3. Nucor Seattle
4. Nucor Nebraska
5. Nucor Kingman
6. Nucor South Carolina
7. Nucor Sedalia
8. Nucor Auburn

9. Gerdau Cambridge
10. CMC Steel Texas
11. CMC Steel Alabama
12. Nucor Texas
13. CMC South Carolina
14. CMC Steel Florida

Plate Producers

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

Tube Producers

1. Wheatland Tube
2. Searing Industries
3. Maruichi
4. Hanna Steel
5. Atlas Tube

Source: Jacobson & Associates Data is for the 12 months ending Sept. 30, 2022.

Customer Satisfaction Leaders

By Product Category, End-Users and Service Centers

Top Sheet Producers

As Rated by End-Use Customers

- | | |
|-------------------------|---------------------------|
| 1. North Star | 11. Stelco |
| BlueScope | 12. ArcelorMittal Dofasco |
| 2. SDI Sinton | |
| 3. SDI Heartland | |
| 4. The Techs | |
| 5. SDI Columbus | |
| 6. Cliffs Burns Harbor | |
| 7. SDI Butler | |
| 8. AM/NS Calvert | |
| 9. Nucor Crawfordsville | |
| 10. Big River Steel | |

Top Plate Producers

As Rated by End-Use Customers

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

Top Beam Mills

As Rated by End-Use Customers

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

Top Bar/Structurals

As Rated by End-Use Customers

- | | |
|----------------------|--------------------|
| 1. Nucor Jackson | 11. Nucor Nebraska |
| 2. Nucor Marion | 12. Gerdau Jackson |
| 3. Nucor Texas | |
| 4. CMC Texas | |
| 5. Nucor Sedalia | |
| 6. Nucor Auburn | |
| 7. CMC Oklahoma | |
| 8. Nucor Utah | |
| 9. Nucor Seattle | |
| 10. Nucor Birmingham | |

Top SBQ Producers

As Rated by End-Use Customers

1. Nucor Memphis
2. Nucor Nebraska

Top Tube Producers

As Rated by End-Use Customers

1. Atlas Tube
2. Wheatland Tube
3. Nucor Tubular

Top Sheet Producers

As Rated by Service Center Customers

- | | |
|--------------------|-------------------|
| 1. North Star | 11. SDI Butler |
| BlueScope | 12. SDI Heartland |
| 2. Nucor Decatur | |
| 3. The Techs | |
| 4. AM/NS Calvert | |
| 5. SDI Columbus | |
| 6. SDI Sinton | |
| 7. Big River Steel | |
| 8. CSI | |
| 9. NLMK PA | |
| 10. Nucor Arkansas | |

Top Plate Producers

As Rated by Service Center Customers

1. Nucor Longview
2. EVRAZ Portland
3. SSAB Plate

Top Beam Mills

As Rated by Service Center Customers

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

Top Bar/Structurals

As Rated by Service Center Customers

- | | |
|-------------------------|----------------------|
| 1. CMC Texas | 11. Nucor Texas |
| 2. Nucor Jackson | 12. Gerdau Charlotte |
| 3. Nucor Nebraska | |
| 4. CMC Arizona | |
| 5. CMC Florida | |
| 6. CMC South Carolina | |
| 7. CMC Alabama | |
| 8. Cascade Steel | |
| 9. Nucor South Carolina | |
| 10. Nucor Utah | |

Top SBQ Producers

As Rated by Service Center Customers

1. Nucor Memphis
2. Timken

Top Tube Producers

As Rated by Service Center Customers

1. Searing Industries
2. EXLTUBE
3. Hanna Steel

Source: Jacobson & Associates Data is for the 12 months ending Sept. 30, 2022.