



2022 ANNUAL REPORT

The Metals Service Center Institute

A Growing Community



Metals Service Center Institute
100 YEARS **STRONG™**



“MSCI offers invaluable resources to the employees of its member companies, putting great thought into providing impactful content and information for every level of our business. The institute’s efforts to ensure outreach and inclusivity in their work further solidifies the significance of their partnership and makes them a beacon of progress for this legacy industry.”

Lauren Wiggins, Kloeckner Metals, member, MSCI Forge Ahead Committee

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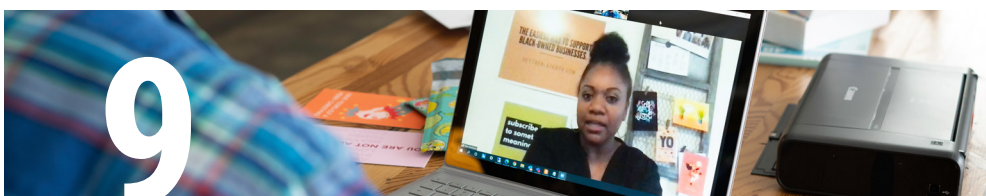
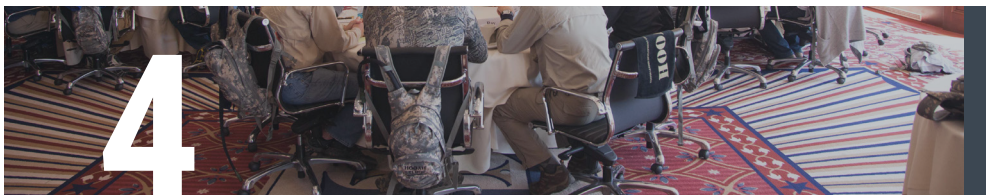
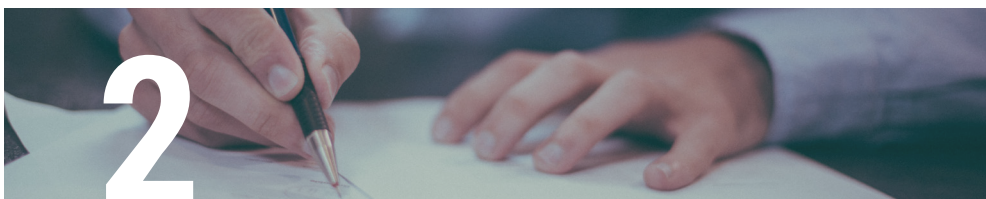
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From the Desk of Bob Weidner

Dear MSCI Community:

The theme for our 2022 annual report is “a growing community” and I want to open by thanking you for being part of this 113-year-old institution. Three years ago, associations like MSCI faced an existential crisis. With the world shut down, conferences, chapter events, and in person classes were off the table.

But, with your support, we kept our community together and now it is even stronger.

MSCI began offering more virtual content, and more content for free and on demand. We added new data products, events, and an online Community Forum where members could network, problem solve, and just get to know one another no matter where they were in the world.

As a result, MSCI is reaching more people in the industrial metals community than ever. Our value proposition has never been greater. In 2022, we:



Welcomed
22 new members

AND



Added
**more than 3,900 company
employees and leaders**
to our database

22

New members in 2022

3,924

Company employees added to database to
receive MSCI services

\$10 MILLION

In scholarships awarded to date to almost 4,700
children of member company employees



14TH

Cohort of Strategic Metals Management

By being part of our growing community, member companies and their employees have access to:

- ✓ Proprietary data and industry intelligence
- ✓ Free webinars that tackle the pressing problems of the day
- ✓ Dozens of conferences and chapter events that connect customers and suppliers
- ✓ Education opportunities for everyone from new hires to seasoned executives
- ✓ Scholarships for the children of MSCI member company employees



200 (AND GROWING)

Members of the FORGE AHEAD movement, representing 44 member companies

MSCI is for everyone. Each and every member company employee is eligible for an MSCI website login so they may access knowledge and learning classes, networking, free webinars on demand, and more. Please help us spread the word in your company so all of your colleagues can benefit from the products and services we deliver every day.

MSCI is building the next generation. I'm incredibly proud of our new Forge Ahead initiative, which brought together Gen Z and Millennial employees to discuss the future of the industrial metals industry — and their place in it.

MSCI will do more in 2023. A highlight will be our first in-person Annual Meeting in three years. For the first-time, we are co-locating with the Steel Manufacturers Association. I hope you will join us in Washington, D.C. June 21-23 for what will be one of the largest-ever gatherings of industrial metals executives. We will also launch initiatives on topics like ESG and apprenticeships, and, in 2023, we will offer MetalLearn®, our online product training tool, to members free of charge.

In closing, I would like to thank the more than **300 volunteer leaders** who have given generously to grow this community. They each have had a hand in creating the opportunities highlighted in this report. Whether you are a chapter, committee, or product council leader, or sit on our board, we are grateful for your tireless efforts.

Sincerely,

Bob



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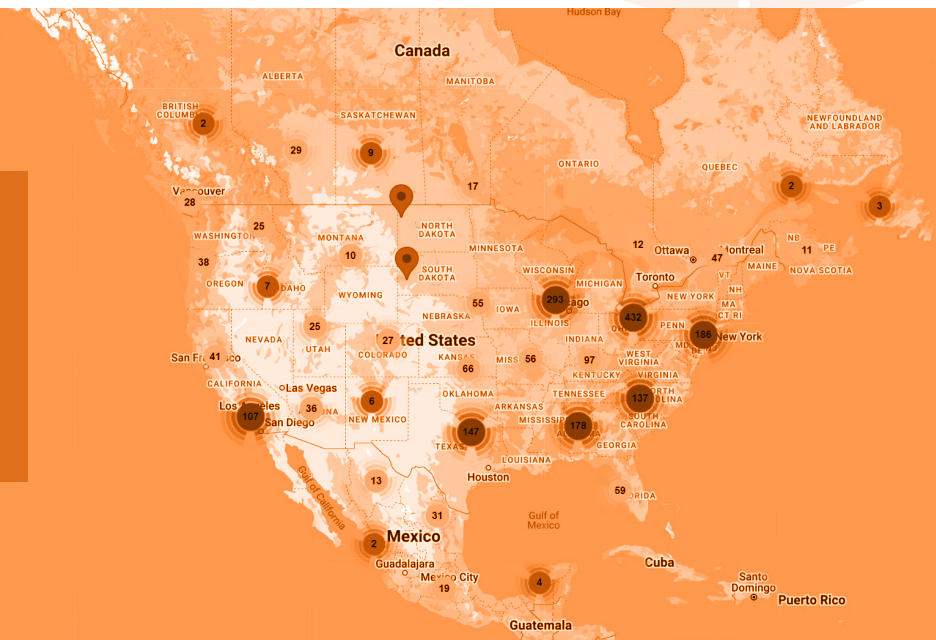
Products tracked monthly in the proprietary Metals Activity Report

Metal Matters:

How to Get Involved in Our Growing Community

#MetalMatters and membership in MSCI matters.

MSCI is thriving. Our 250 member companies operate in more than 2,200 locations across the globe. **22 companies joined our community in 2022.**



WE PROVIDE THE TOOLS TO GROW COMPANIES AND CAREERS.

Did you know, every member company employee is eligible for an MSCI website login in order to access MSCI's industry intelligence, knowledge and learning, networking, and webinar opportunities, many of which are free?

In 2022, we added more than 3,900 company employees and leaders to our database. They are now able to easily access all member benefits.

HOW CAN YOU GET MORE INVOLVED? Create an MSCI email account by following these steps

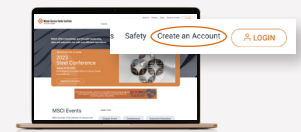


STEP 1:
Go to www.msci.org

- ✓ Verify Email
- ✓ Verify Company Location

STEP 3:
Follow the prompts to verify email address and company location

Having problems? Member Services at 847-485-3000 or email memberservices@msci.org.



STEP 2:
Click on Create Account

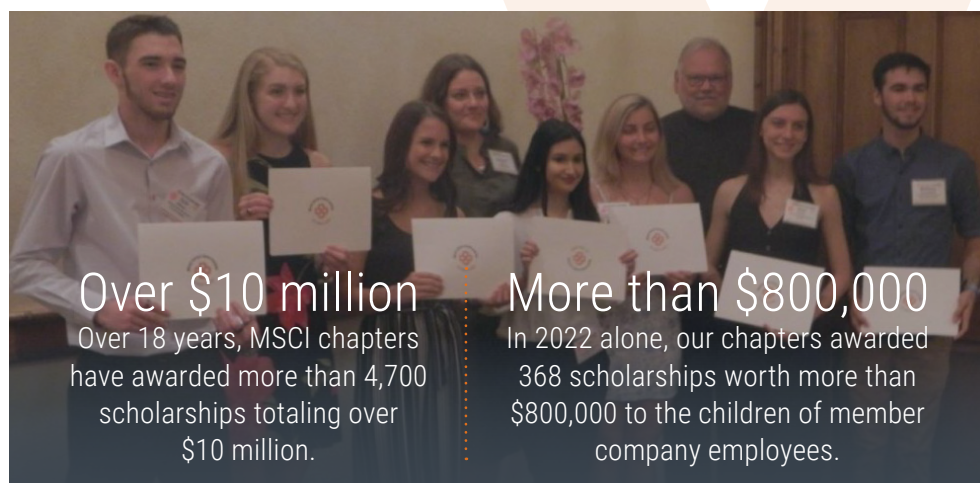
✓ *****

STEP 4:
Enter contact information and select a password

The Future Matters:

Helping Industrial Metals Families Afford Higher Education

Through its chapters, MSCI has established a scholarship program available to children of MSCI member company employees who have been accepted to a two or four-year degree college program, to a vocational school, or to a graduate degree program. Students currently attending college and/or graduate school may also apply if they meet the established criteria.



Over \$10 million

Over 18 years, MSCI chapters have awarded more than 4,700 scholarships totaling over \$10 million.

More than \$800,000

In 2022 alone, our chapters awarded 368 scholarships worth more than \$800,000 to the children of member company employees.

1

HOW CAN YOU DONATE TO THE PROGRAM?

Support your local chapter and attend a chapter fundraising event (find one at msci.org/events)

2

Donate online at donorbox.org/msci-scholarship-program

HOW CAN YOUR CHILD APPLY?

Visit msci.org/scholarships



As students, “we are really fortunate and what we can learn can be of such great value to our communities. High school students should apply for any scholarship they’re eligible for, and MSCI’s program is a great place to start.”

Alyssa Alay-Ay, 2020 MSCI Scholarship Recipient

People Matter: Building Good Careers in a Strong and Safe Industry

Hard working. Innovative. Safety conscious. These terms are just a few that describe the people who work in the industrial metals industry. People are a mill and service center's number one competitive advantage.

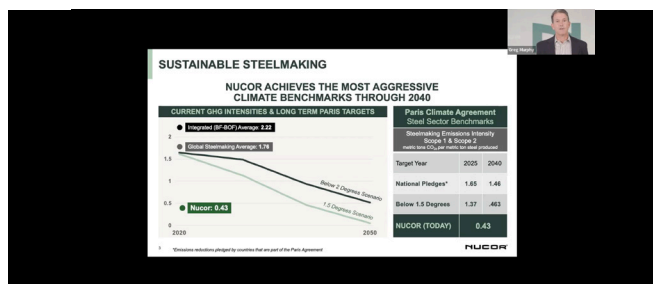
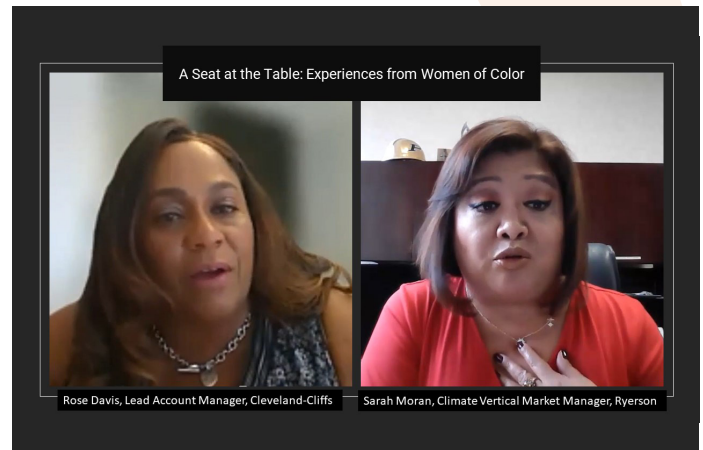
MSCI **connects the people** within the industrial metals community and provides them opportunities to learn new skills to advance in their careers.

DIVERSITY, EQUITY, INCLUSION & BELONGING

The MSCI Diversity, Equity, and Inclusion Task Force was established in July 2020 and elevated to a standing committee in 2022. Its volunteer leaders meet each month to develop content and initiatives that will enhance the industry's culture of belonging.

In 2022, MSCI hosted 5 unique webinars dedicated to DEI, which generated nearly **1,500 registrations and views**. Click [here](#) to watch past programs.

In 2023, the DEI Committee will begin work on the industry's second Diversity, Equity, and Inclusion Survey. Click [here](#) to read our 2020 report and stay tuned for the release of our next study.



DEMYSTIFYING ESG

Consistent with the industry's growing focus on Environment, Social, and Governance (ESG) issues, MSCI assembled an ESG Task Force in early 2022 that is aimed at helping member companies advance in their ESG journey. In addition to spotlighting subject matter expertise at conferences and webinars, MSCI is working to bring awareness and education to the full range of ESG topics.

Onboarding \rightleftharpoons Orientation

Orientation

- To provide the new hire the basics of the organization
- One-time event
- Few days
- One-way communication
- Online/Offline
- Provide need-to-know info

Onboarding

- To assimilate the new hire into the organizational culture
- Ongoing process
- Months to a year
- Two-way communication
- Workplace
- Providing customized job info

HUMAN CAPITAL MANAGEMENT SERIES

In 2022, MSCI partnered with Texas A&M University's Dr. Jia Wang to bring our members a series of articles and 3 webinars to help them tackle employee recruitment and retention challenges.

Wang's research focuses on international and national human resource development, organization crisis management, and learning within organizations. She has led a \$450,000 industry-based research project on optimizing human capital development for industrial distribution companies.

FORGE AHEAD

Surveys indicate millions of employees are thinking about leaving their jobs. They would stay if their employer took a greater interest in helping them grow in their career.

MSCI helps facilitate career growth.

In May, we brought together more than 200 up-and-coming leaders for **Forge Ahead**, a free weekend of networking for Millennials and GenZers. We launched our **Forge Ahead Committee**, which will plan more events. If you have not heard about Forge Ahead, [watch this video](#) and [read this post](#) from Kloeckner Metals.

Sending younger employees to Forge Ahead events in 2023 will show you're invested in them.



FORGE AHEAD COMMITTEE

Niomi Thomas (Chair)
Central Steel & Wire Company

Ashley Lukowicz
TimkenSteel Corporation

Logan Baucum
Delta Steel, Inc.

RJ Reed
Bystronic, Inc.

Nick Braden
American Metals Corporation

Lauren Wiggins
Kloeckner Metals Corporation

Jesse Casper
Olympic Steel Inc.



SAFETY

MSCI helps members continuously improve their safety and health performance and sustain a culture that puts the well-being of employees first.

We started 2022 by announcing the **2021 Safety Award winners**: Chatham Steel, Infra-Metals and Delta Steel, Inc., Leeco Steel, and SSAB Americas.

Throughout the year, we hosted **5 FREE, 1-hour webinars** related to safety. Our **Metals Safety Workshop Series** continued to set the foundation for culture change and world-class safety performance.

MSCI's Safety Hotline provided expert advice on safety-related questions. Just a phone call (888-70-SAFETY) or email (MSCISafetyHotline@amerisafegroup.com) away, members can call outside of business hours and get a response within 24 hours.

2021 SAFETY AWARD WINNERS



Data Matters: Free Access to Proprietary Industry Intelligence Products

With exclusive data, first-rate forecasting, and in-depth research, MSCI helps members stay ahead of metals industry and economic trends. Over millions of data points and decades of service, MSCI has proven itself as a trusted resource for industry intelligence.

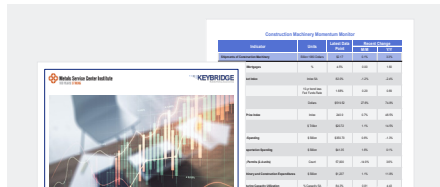
METALS ACTIVITY REPORT

For several decades, the monthly **Metals Activity Report (MAR)** has maintained an enviable record of delivering accurate data on metals service center shipments and inventories. Following 26 products in steel and aluminum across the United States and Canada, the MAR has become an indispensable tool for companies seeking the latest data on industrial metals demand.



FREE DATA REPORTS

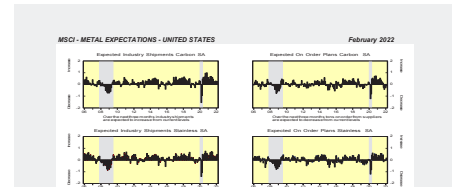
MSCI also offers 3 data products **FREE** to all member company employees:



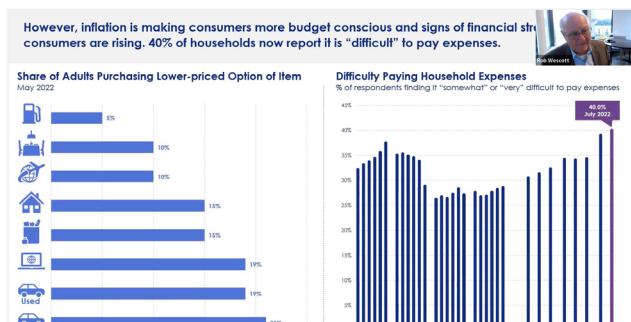
Published quarterly, **Momentum Monitors** is used to predict the turning points in demand for the vertical markets of most interest to MSCI members.



The **Economic Opportunity and Risk Tracker** provides a snapshot of where the U.S. economy is based on high-frequency and alternative indicators of economic activity.



The **Metals Tendencies Report** is a monthly opinion survey that asks senior service centers about industry conditions over the next three months.



HAVE A QUESTION ABOUT THE ECONOMY?

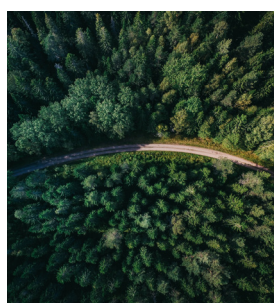
Join our **FREE** quarterly webinar with Keybridge Research President Dr. Rob Wescott.

Over his illustrious 30-year career, Wescott has served in the **White House**, at the **International Monetary Fund**, and as chief economist at **WEFA Group (IHS Markit)**. Today, he regularly testifies before Congress on the economic and financial issues of the day.

Thought Leadership Matters:

Free Access to Weekly Webinars

In addition to our two free newsletters — *Edge* and *Connecting the Dots*, which distill the latest industry and public policy news — MSCI offers free, weekly webinars that tackle a range of topics with issue experts and industrial metals executives. Each month in our CEO Huddle series, members get to hear two top industry leaders discuss the opportunities and challenges facing the industry. Our final Huddle of 2022 had nearly 2,000 attendees! Other webinar topics include:



Environmental, social, and governance (ESG) issues



Diversity, equity, inclusion, and belonging



Supply chain management



Technology



AND MORE



More than
13,200
participants



Average of
200
participants per webinar



Average of
72 member companies
on each webinar

Connections Matter: In Person and Online

Networking

MSCI continues to bring the industrial metals community together online and in person. In 2022, we hosted 4 major in person events, and our virtual networking space celebrated a successful first year.



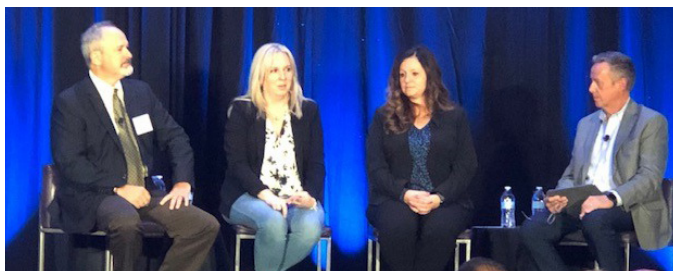
2022 Steel Conference

- **111** member companies represented
- **289** participants
- **13** sponsors
- **1** winner of the first-ever MSCI steel community golf trophy



2022 Economic Summit

- **102** member companies represented
- **216** participants
- **15** end-market sessions plus 3 general sessions
- **15** sponsors



2022 Safety Conference

- **42** member companies represented
- **142** participants
- **6** safety supporters (sponsors)
- **9** safety vendor exhibitors



2022 Aluminum Products Division Conference

- **Celebrated the 20th anniversary** of our Aluminum Products Division
- **51** member companies represented
- **171** delegates and 84 spouses
- **7** speakers who delivered thought leadership content
- **11** sponsors and 9 producer partners

MSCI COMMUNITY FORUM

MSCI's Community Forum celebrated its first anniversary in September 2022. This virtual, members-only space allows our member company employees to come together to address challenges, share ideas, exchange best practices, and ask questions related to the industrial metals sector. The conversation has been active. Members are answering questions about top of mind industry topics such as safety, recruitment and retention, industry technology, and so much more!

Education Matters:

Knowledge and Learning for Every Employee

For years, industrial metals companies have struggled to find, grow, and retain talent. MSCI helps its member companies address that challenge by providing the knowledge and learning employees need to sharpen existing skills and learn new ones.

Our instructors create lessons specifically for the industrial metals workforce. There's something for everyone, regardless of skill level or functional role.

We have online opportunities, and classes that are in person — and, when it comes to timing or location, we can tailor an opportunity to meet your unique needs.

In 2022:

381 modules

On-demand metals product and manufacturing training provided onboarding and upskilling resources to members. In 2022, we provided nearly **381 modules**.



500 industry employees

Live online programming brought back favorites like Effective Inventory Management and Supervisor Training as well as new courses like Negotiation Skills and Elevating Women in the Workforce. These programs served **more than 500 industrial metals employees**.



105 participants

Battle Tested Leadership Principles for Metals Executives was in high demand with back-to-back programs in April and May and another in October. In total, we had **105 participants**.



33 company leaders

Strategic Metals Management was back in-person with a sold-out 14th cohort and a brand-new Cleveland-Cliffs case study developed to bring industry-focused learning through all five weeks of the program. SMM served **33 industrial metals company leaders**.



Rethink, re-examine, and re-calibrate how you lead. To create a customized, private program for your company, contact Monique Combs (mcombs@msci.org or 847-485-3004).

"I don't have an MBA or other graduate degree. The formal learning I received filled an education gap for me and has deeply benefitted me in my role."

O'Neal Steel Vice President of Human Resources Jay Morrow, who attended SMM Cohort 13



**Know of an industrial metals company or
affiliate organization that might want
to join our growing community?**

Have them visit [**msci.org/join**](https://msci.org/join)