

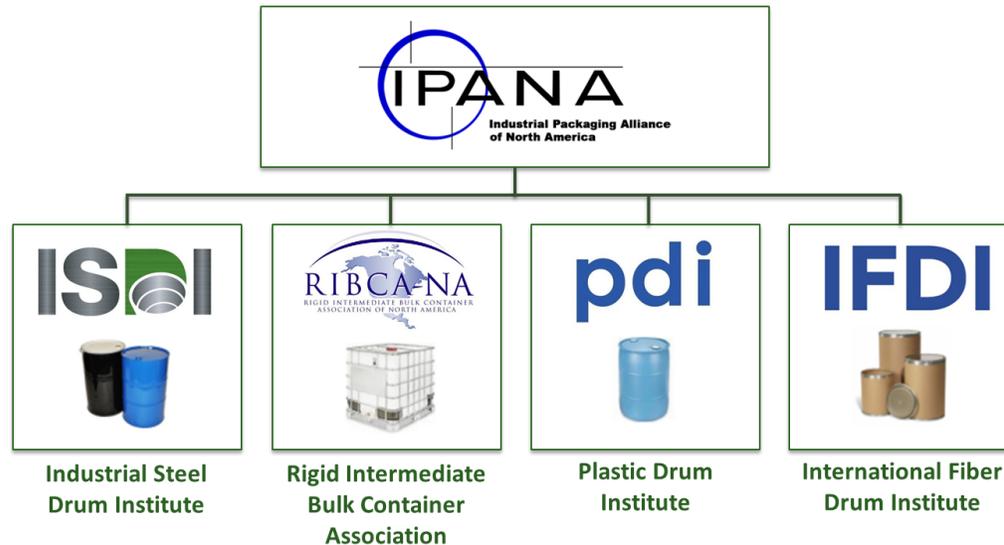


Steel Drums:
The View from North America

Industrial Steel Drum Institute

The Industrial Steel Drum Institute is the Affiliate Member of the Industrial Packaging Alliance of North America that represents manufacturers of new steel drums in North America, as well as their suppliers.

Its mission is to promote the use of steel drums, provide support on technical issues, and represent member companies' interests before regulatory bodies.



Chairman

Kyle R. Stavig

CEO

Stavig Group

Chicago Steel Container LLC

General Steel Drum LLC

Myers Container LLC

North Coast Container LLC



Executive Director

Matt Mlynarczyk

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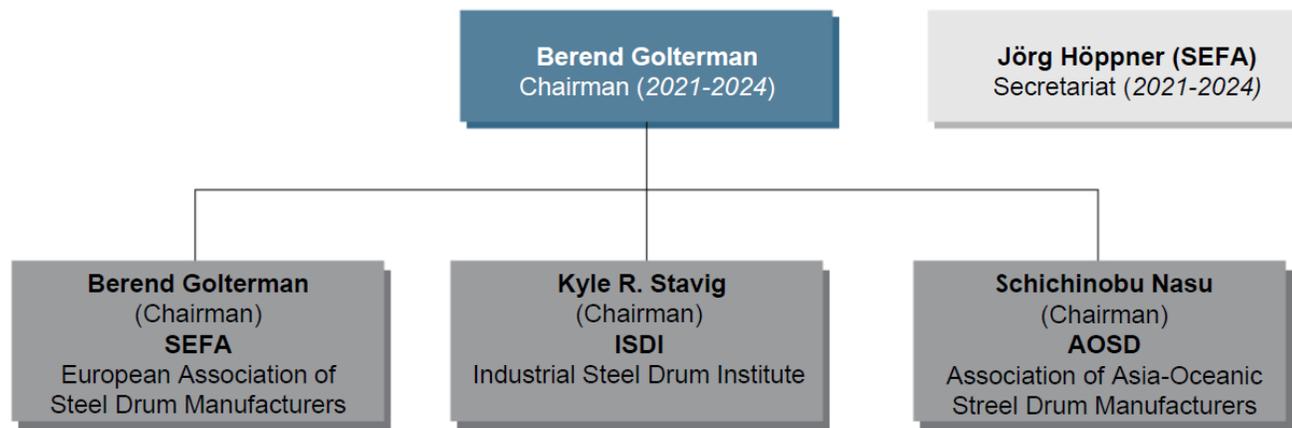
www.WhySteelDrums.org

A federation of international trade associations that represent steel drum manufacturers worldwide

Trade Association Members:

- European Association of Steel Drum Manufacturers (SEFA)
- Association of Asia-Oceanic Steel Drum Manufacturers (AOSD)
- Industrial Steel Drum Institute (ISDI)

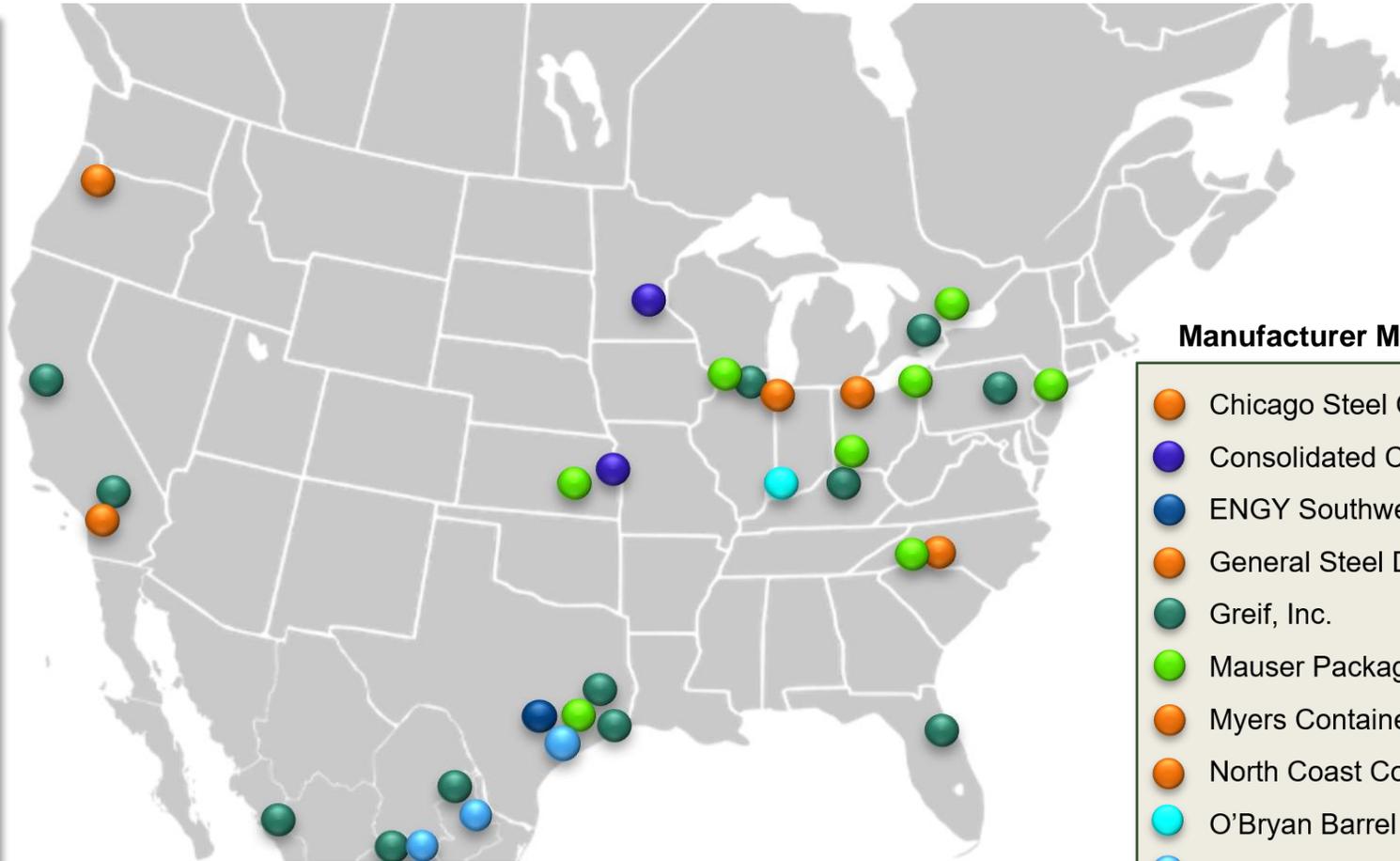
Leadership



Membership Update

Associate Member Companies

1. Berger US, Inc. (DBA Self Industries, Inc.)
2. Caribbean Containers, LLC
3. CDF Corporation
4. Con-Tech International
5. Grotnes, Inc.
6. Hentzen Coatings, Inc.
7. KNS Companies Inc.
8. Merco Machines NV
9. National Coatings Inc.
10. Nucor Steel
11. REMY International
12. Rieke Packaging
13. Steelforce Packaging North America
14. Tri-Sure®
15. United States Steel Corporation
16. Universal Chemicals & Coatings, Inc.
17. Worthington Industries



Manufacturer Member Companies

- Chicago Steel Container LLC
- Consolidated Container Company-LLC
- ENGY Southwest Container Products
- General Steel Drum LLC
- Greif, Inc.
- Mauser Packaging Solutions
- Myers Container LLC
- North Coast Container LLC
- O'Bryan Barrel Co. Inc.
- Schuetz Container Systems, Inc.

2020 North American Production Survey Data

Industrial Packaging Alliance of North America (IPANA)

North American Drum & IBC Volumes

208 Litre/55 Gallon Equivalent Units - 1 IBC = 5 drums

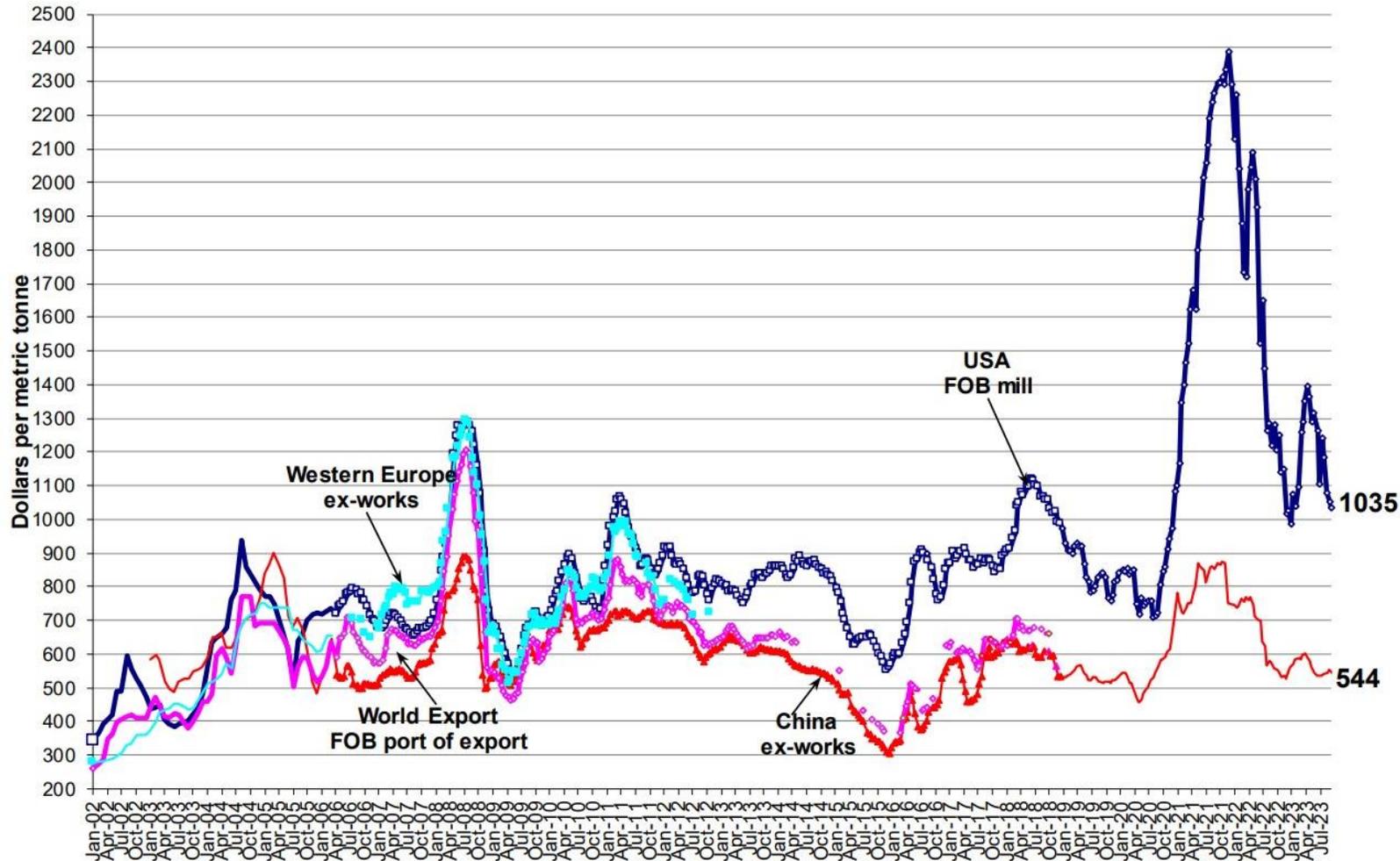
*RIPA 3 or 2 year membership survey

Year	ISDI* New Steel Drum 55G/208L	PDI New Poly Drum 45+G/171+L	RIBCA New IBC (x5)	RIBCA New Bottles (x5)	Total IBC shipment (mfg)	RIPA* Recon Steel	RIPA* Recon Plastic	RIPA* Washed IBC (300-275) (x5)	Total 208L/55G equiv	Total - New & Recon IBC	Share
2003	25,655,000	9,476,619	5,000,000	1,750,000	6,750,000	31,900,000	4,500,000	-	78,281,619	6,750,000	9%
2004	26,862,214	9,583,610	6,750,000	1,800,000	8,550,000	31,400,000	5,700,000	4,150,000	86,245,824	12,700,000	15%
2005	24,797,000	9,231,339	5,963,455	1,855,445	7,818,900	31,400,000	5,700,000	4,150,000	83,097,239	11,968,900	14%
2006	25,199,000	9,995,532	7,189,010	2,514,525	9,703,535	31,400,000	5,700,000	4,150,000	86,148,067	13,853,535	16%
2007	24,285,000	10,535,599	10,167,355	2,268,355	12,435,710	30,200,000	6,200,000	6,250,000	89,906,309	18,685,710	21%
2008	22,645,000	10,561,479	9,636,980	1,455,240	11,092,220	30,200,000	6,200,000	6,250,000	86,948,699	17,342,220	20%
2009	21,216,472	9,365,200	8,047,000	1,892,000	9,939,000	29,900,000	6,860,000	8,500,000	85,780,672	18,439,000	21%
2010	26,156,456	10,929,800	10,537,125	3,252,420	13,789,545	29,900,000	6,860,000	8,500,000	96,135,801	22,289,545	23%
2011	25,010,072	11,099,300	12,872,565	4,301,480	17,174,045	24,087,000	4,316,000	10,840,000	92,526,417	28,014,045	30%
2012	26,428,491	10,180,908	13,808,005	4,930,205	18,738,210	24,087,000	4,316,000	10,840,000	94,590,609	29,578,210	31%
2013	26,623,493	10,977,605	14,096,795	5,068,880	19,165,675	25,145,000	4,123,400	12,955,000	98,990,173	32,120,675	32%
2014	27,514,968	11,226,140	15,352,805	5,179,380	20,532,185	25,145,000	4,123,400	12,955,000	101,496,693	33,487,185	33%
2015	26,788,449	10,809,891	14,641,400	6,577,655	21,219,055	23,754,000	3,829,000	15,860,000	102,260,395	37,079,055	36%
2016	25,375,827	13,042,668	14,037,640	6,726,160	20,763,800	23,431,000	3,829,000	15,860,000	102,302,295	36,623,800	36%
2017	26,572,655	11,560,379	15,439,995	8,111,280	23,551,275	23,431,000	3,396,000	17,484,000	105,995,309	41,035,275	39%
2018	28,552,318	12,222,534	16,761,545	9,167,385	25,928,930	23,431,000	3,396,000	17,484,000	111,014,782	43,412,930	39%
2019	24,201,397	11,398,704	16,866,515	8,339,075	25,205,590	25,068,000	4,727,000	16,405,000	107,005,691	41,610,590	39%
2020	24,092,108	13,096,121	16,884,190	8,029,655	24,913,845	25,068,000	4,727,000	16,405,000	108,302,074	41,610,590	38%

Production survey suspended after 2020 for not meeting U.S. Department of Justice and Federal Trade Commission “safety zone” criteria for information exchange

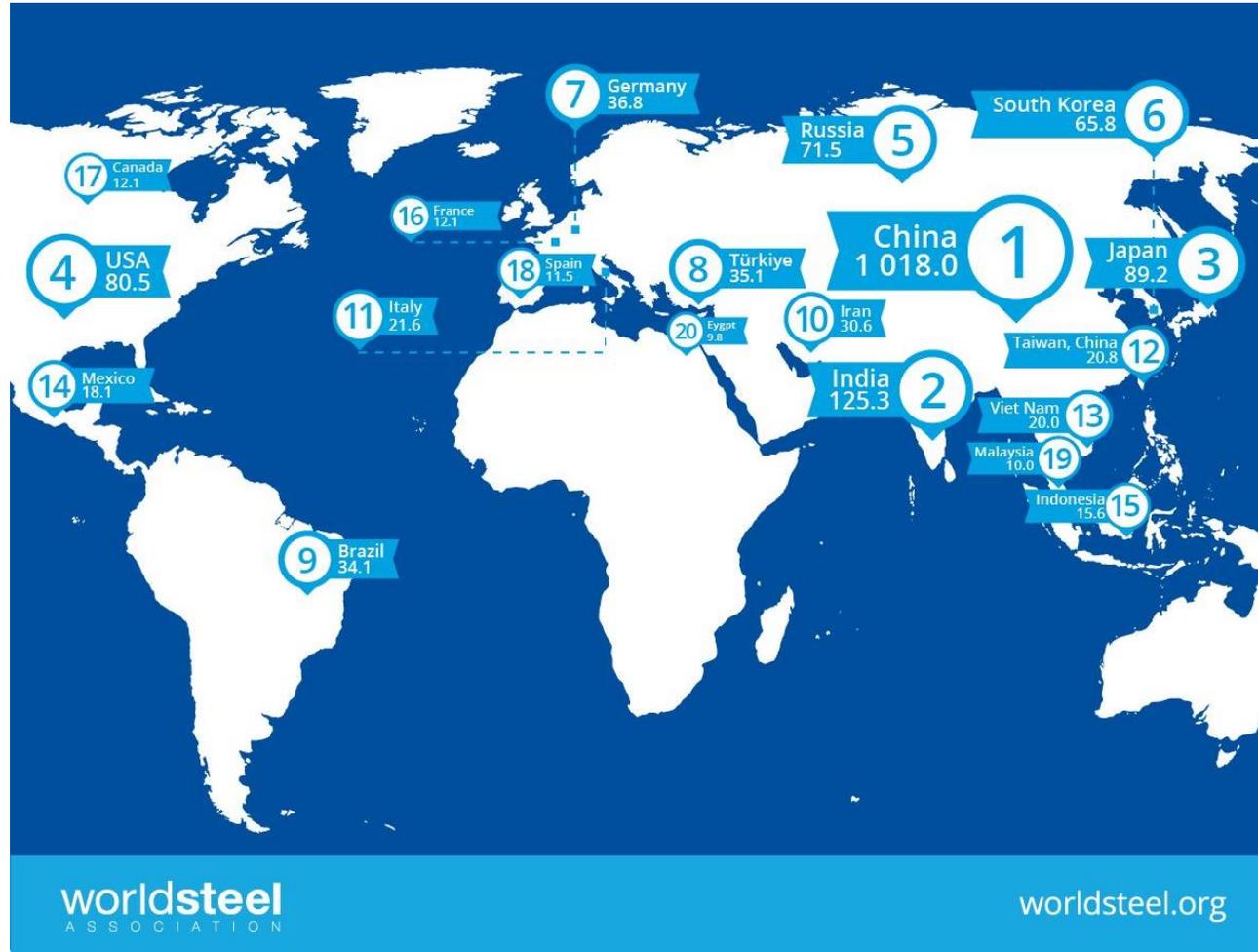
- 1) Data must be at least three months old 2) Data must be derived from at least five providers 3) No single provider may represent more than 25% of data reported

Cold-Rolled Coil Steel Pricing



CRC Pricing for USA, China, Western Europe and World Export (as of September 11, 2023)

Top 20 Steel-Producing Countries in 2022 (*million tons*)

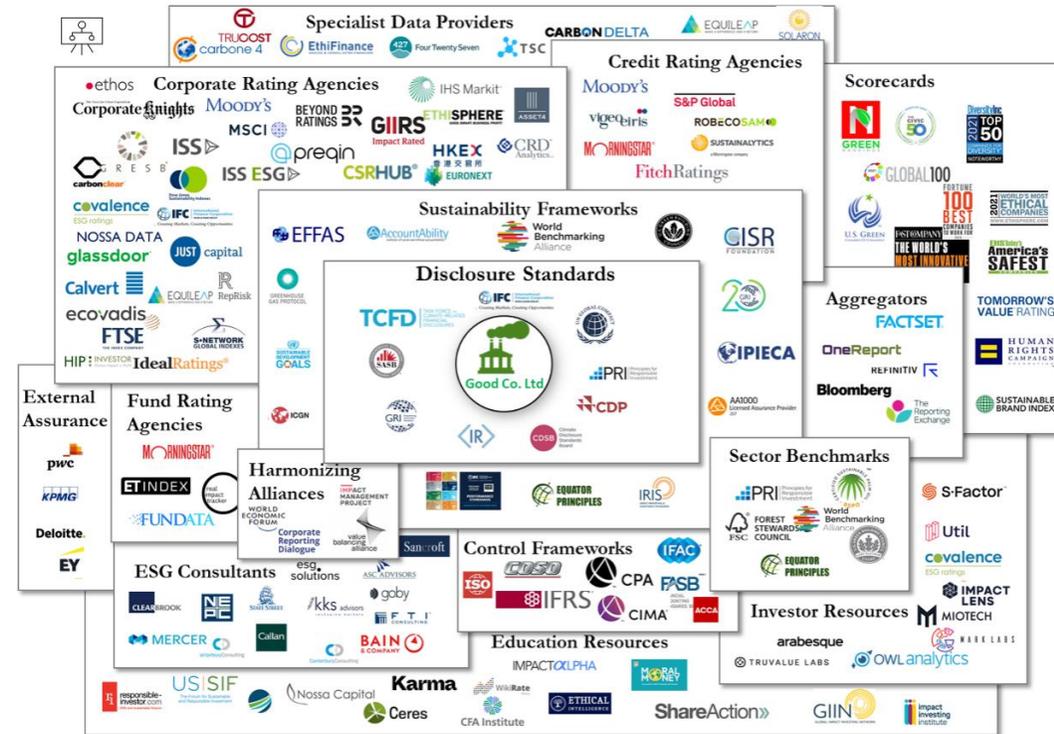


worldsteel
ASSOCIATION

Top Policy Issues: Scope 3 Emissions

Calculation Methodologies / Rating Agencies

- Significant differences remain and continue to evolve in the scope, assessment basis, and other aspects of GHG calculation methodologies and rating agencies.
- Working with the Steel Manufacturers Association and the American Iron and Steel Institute Sustainability Committee to learn more about the various approaches.
- Partnering with the Sustainable Purchasing Leadership Council to determine Scope 3 emissions and other sustainability trends that impact purchasers of industrial packaging.



Top Policy Issues: GHG Data – U.S.

Alignment of U.S. New Steel Drum GHG Data

- Beginning a dialogue with ISDI Manufacturer Member Companies to develop a range of GHG data calculations based on each company's calculation data.
- Goal is to be able to provide steel drum purchasers a consistent figure of GHG emissions created for each new steel drum.
- ISDI, as the association of new steel drum manufacturers in the U.S. believes it would benefit all parties to provide a consistent figure or range on behalf of the industry to educate customers.



Top Policy Issues: GHG Data – Global

Alignment of Global New Steel Drum GHG Data

- ISDI is working with ICDM to help develop an average figure or range for various types of new steel drums to be used globally.
- There is no recent GHG data available for new steel drums.
- New steel drum manufacturers must be able to provide their global customers a consistent GHG emissions figure new steel drums.

New Marketing Initiative



Promoting Steel Drums as the Preferred Sustainable Packaging Solution

- Focus on Together for Sustainability (TfS) Member Companies



New Marketing Initiative



Launching Campaign to Make Purchasing Agents “Heroes” within their Companies by Determining:

- The role that sustainability plays in their day-to-day jobs, performance evaluations and packaging decisions.
- Criteria purchasers use to make packaging decisions.
- How they prefer to receive information about industrial packaging.
- Information outlets they trust and rely on for the information they need.
- Influencers they trust regarding recommendations on packaging decisions.

Communications Update

Messaging Focus

- Remains Sustainability.
- Customers' purchasing professionals need constant reminders.

Messaging Partners



Sustainability Purchasing Leadership Council

- *Connects purchasers with suppliers committed to sustainable procurement*



American Iron & Steel Institute – *Sustainability Committee*



STEEL MANUFACTURERS
ASSOCIATION

Steel Manufacturers Association

Communications Update

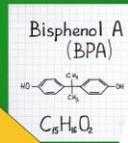
Social Media Continues to be Best Platform

- Most effective platform to reach ISDI's target audiences.
- Allows us to quickly communicate news and key messages.
- LinkedIn is the most-used social media platform by ISDI members.



Technical Alerts

- Developed on issues impacting members and customers.
- Distributed to members; then published on ISDI website and LinkedIn page.
- Five so far in 2023.

 <p>Industrial Steel Drum Institute</p> <p>Free Download</p>   <p><i>ISDI Compliance Guidance on Italy's Labeling Requirements for Steel Drums</i></p>	 <p>Industrial Steel Drum Institute</p> <p>ISDI Alert 23-02 Now Available: Shipping Steel Drums to, from, and within Brazil</p>   <p>Free Download</p>	 <p>Industrial Steel Drum Institute</p> <p>ISDI Alert 23-03 Now Available: Matching Requirement for Date Marks on Steel Drums</p>   <p>Free Download</p>	 <p>Industrial Steel Drum Institute</p> <p>ISDI Alert 23-04 Now Available: California Lists BPA as a Reproductive Toxin</p>    <p>Download Free Alert to Learn the Details</p>	 <p>Industrial Steel Drum Institute</p> <p>ISDI Alert 23-05 Now Available: German Chemical Industry Association Voluntary Standard VPA 9 on Traceability</p>   <p>Download Free Alert to Learn the Details</p>
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Communications Update

TRANSCAERSM

TRANSPORTATION • COMMUNITY AWARENESS • EMERGENCY RESPONSE

TRANSCAER[®] today Magazine Articles

TRANSCAER[®] today Magazine Ads



The image shows the cover of the TRANSCAER today magazine for the 2022-2023 period. The cover features a blue and white circular logo on the left with the text "TRANSCAER" in the center and "EMERGENCY RESPONSE", "TRANSPORTATION", and "COMMUNITY AWARENESS" around the perimeter. To the right of the logo, the word "today" is written in a blue script font, with "2022-2023" in a smaller font above it. The main image on the cover depicts several people in red protective suits and hoods working in a field, with a large plume of white smoke rising from a point in the distance. At the bottom of the cover, the text "Assisting Communities & Preparing Responders" is written in white on a blue background, and the website "www.TRANSCAER.com" is listed below it.



The advertisement features a photograph of numerous blue steel drums stacked on wooden pallets in an industrial setting. On the left side, there is a green vertical banner with white text. The text reads: "Safe. Secure. Sustainable." followed by a paragraph: "Steel Drums are the most widely used industrial packaging in the world for hazardous goods due to their consistent durability and strength as well as their ability to be reconditioned, reused and recycled." Below this, it says: "Learn more about the many benefits of steel drums at www.WhySteelDrums.org." At the bottom left of the banner is the ISDI logo, which consists of the letters "ISDI" in a bold, sans-serif font, with a stylized drum icon to the right, and the full name "Industrial Steel Drum Institute" underneath.

Communications Update



New 2023 ISDI-TRANSCAER Training Video

- “Load Securement of Steel Drums: What First Responders Need to Know.”
- Focused on proper load securement of steel drum shipments.
- Funded by government grant through TRANSCAER®.
- Video will “premiere” by end of 2023.





Standard for Steel Drums and Pails

- ISDI is an ANSI Accredited Standards Developer (ASD).
- We serve as the Secretariat of the American Standards Committee for American National Standard MH2 for Materials Handling (*Containers*) – Steel Drums & Pails.
- The first MH2 standard for steel drums and pails was published in 1958.
- Every five years ISDI is required to perform a review of the Standard to ensure it remains accurate and reflects current practices and this year we began our five-year review.



Next ISDI Membership Meeting

ISDI 2023 Fall Membership Meeting
October 25, 2023



The Four Seasons Hotel St. Louis
St. Louis, Mo. USA



Thank You: How to Follow ISDI

Website:

- www.WhySteelDrums.org

LinkedIn

- www.linkedin.com/company/industrial-steel-drum-institute

YouTube

- <https://www.youtube.com/WhySteelDrums>



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