STAAL – het fundament van Europa’s duurzame toekomst

Staalbouwdag, Leusden, 9 oktober 2025

Mark Denys – Director Sustainability – Tata Steel Netherlands

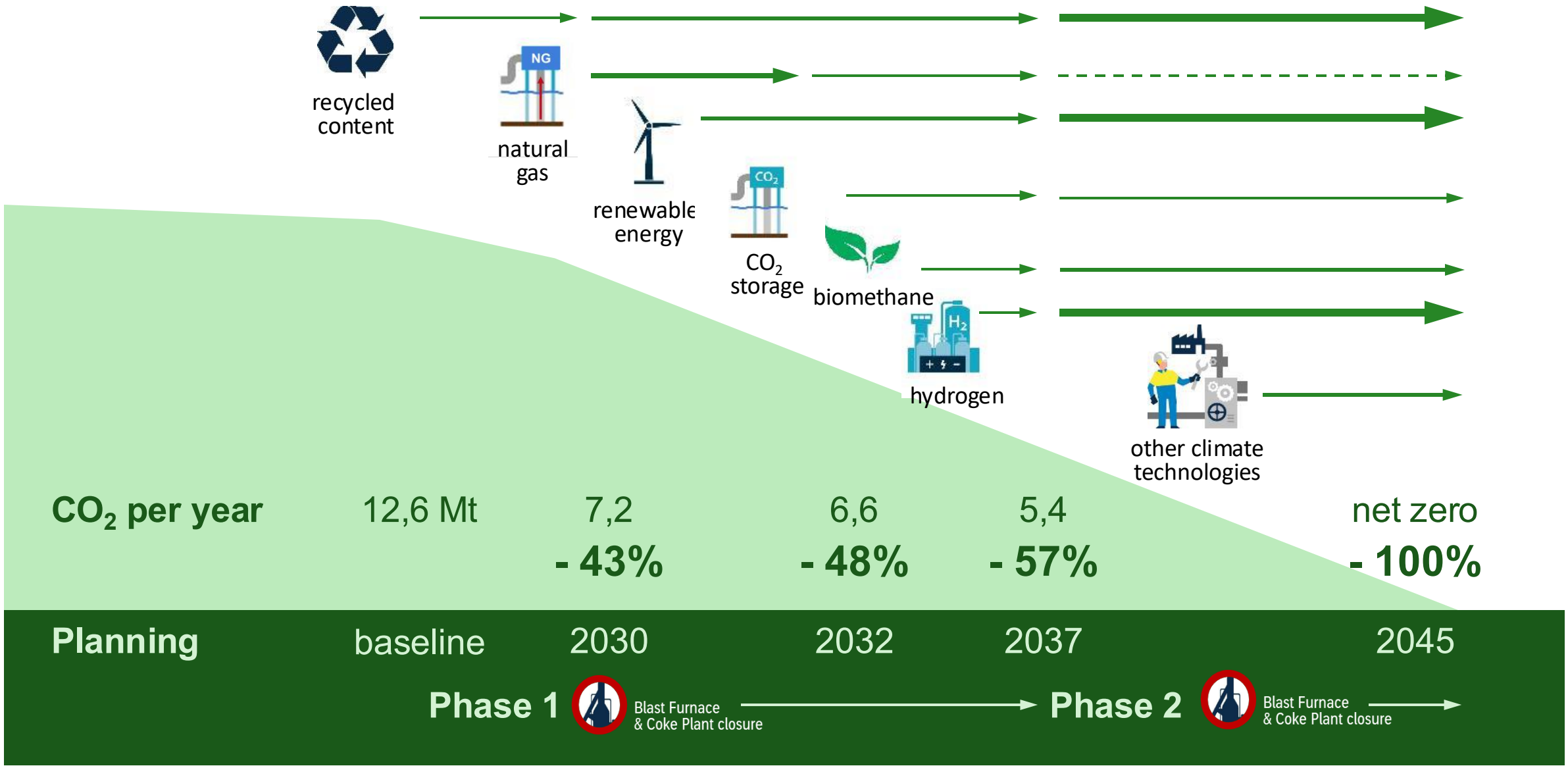
Klimaat-transitie: een fysieke werkelijkheid

Source: McKinsey Quarterly, Facing the hard stuff, August 2024.

Join Letter of Intent Tata Steel & Nederlandse overheid

29 September 2025

Tata Steel Nederland | **Groen Staal Plan 2025-2045**

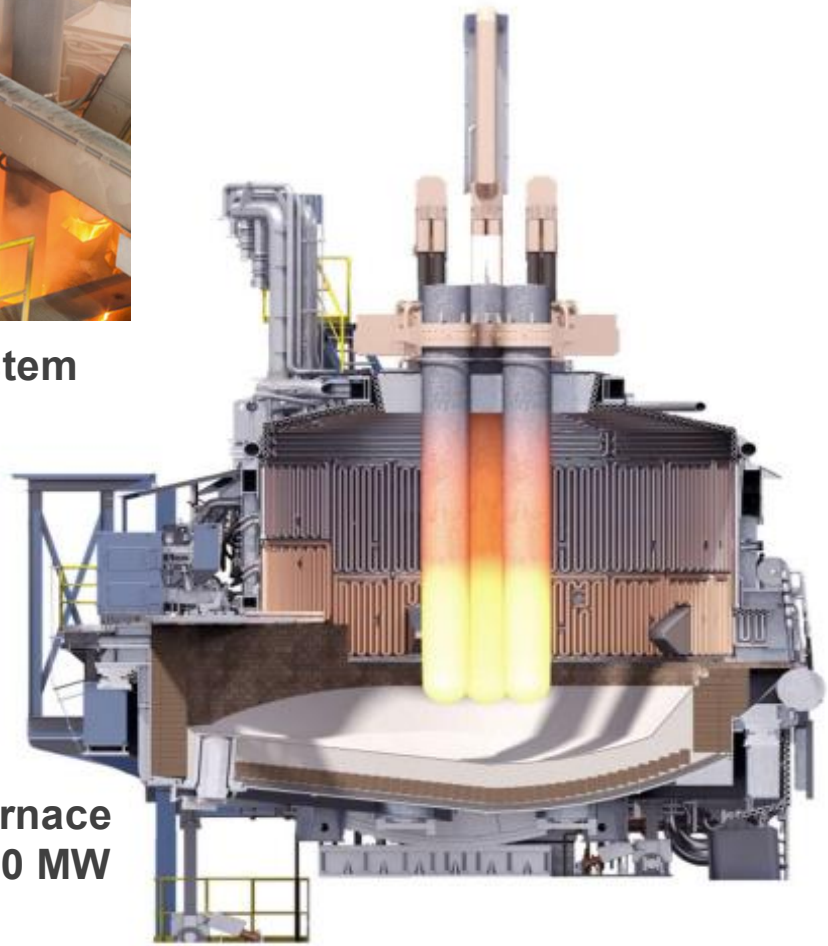


Source: https://www.rijksoverheid.nl voor Joint Letter of Intent

Groen Staal Plan 2025-2037 | **Nieuwe technologie in fase 1**

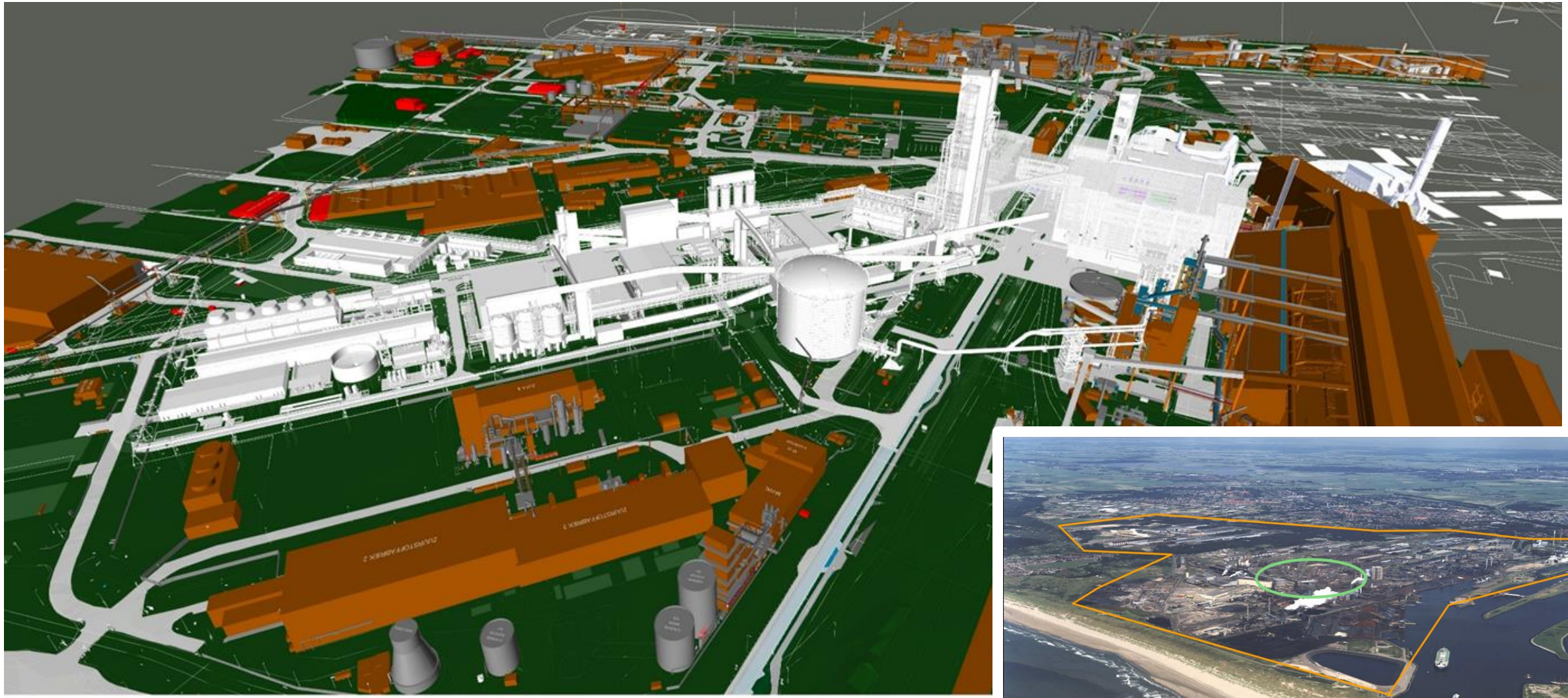
Direct Reduction Plant ~136 m

Continuous scrap feeding system



Electric Arc Furnace
300 MW

Groen Staal Plan 2025-2037 | **Impressie**



Groen Staal Plan 2025-2037 | **Een schone leefomgeving**

Source: https://www.rijksoverheid.nl voor Joint Letter of Intent

TenneT verbinding met Wind op zee

Zeremis® Carbon Lite

Gecertificeerde producten

Hogere recycled content

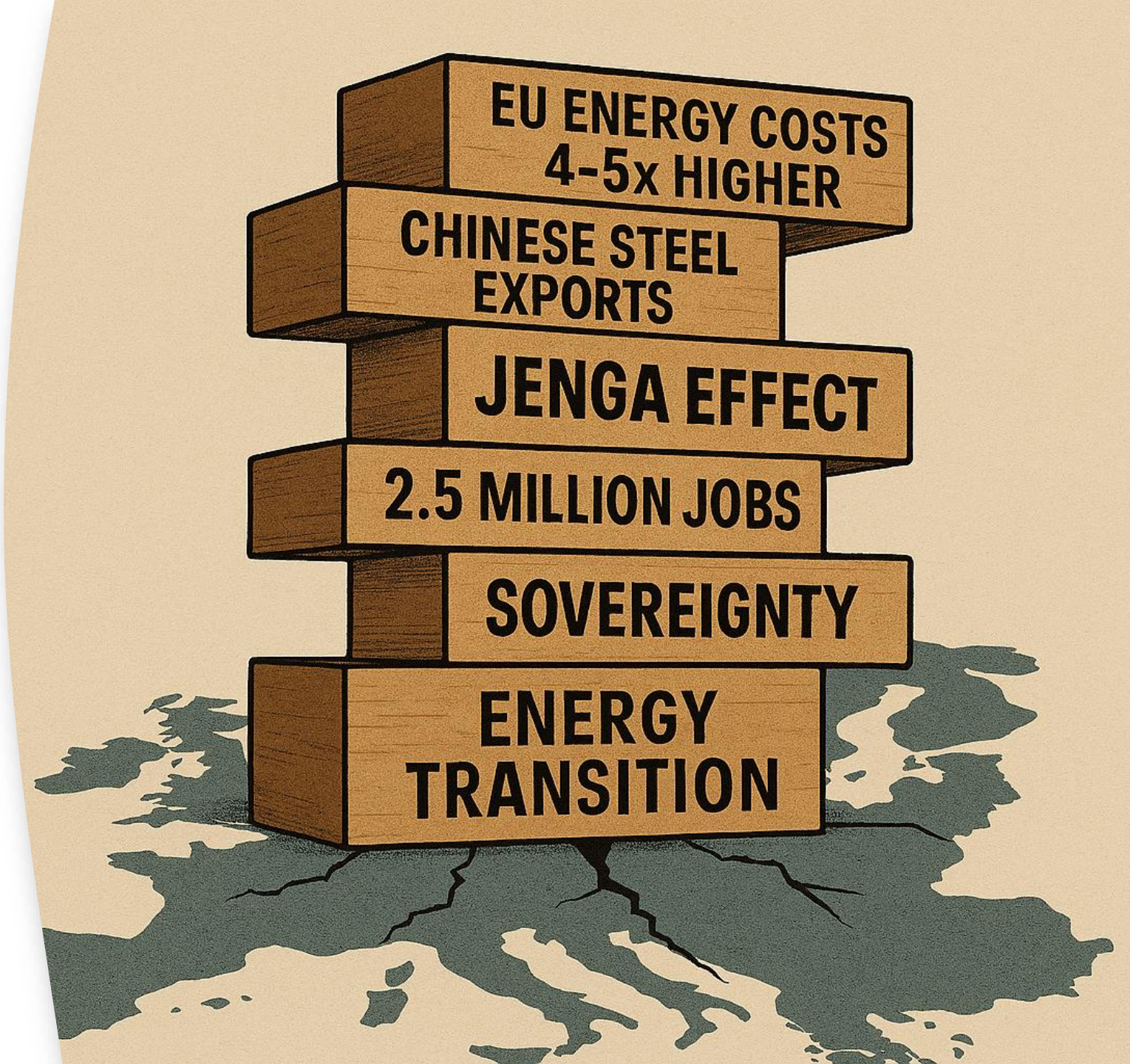
Waterstofklare processen

Grotere bijdrage aan NL economie

Sources: McKinsey, Bureau of International Recycling, Oxford Economics

Reality check…

“Zonder Europese staalproductie verliezen we strategische autonomie én ons vermogen om de energietransitie te voltooien.”



Sources: Centre for International Energy Policy (2025);
Boston Consulting Group, Steel's Contribution to a Low-Carbon Europe 2050 (2013)

De weg vooruit

Slim industriebeleid in opkomst

- Anti-dumping
- Certificering van de koolstofintensiteit
- Kritische materialen
- Circulaire economie
- …

Sources: McKinsey / Michel Hoey (Aug 2024); data from Eurostat 2024

“Wij kunnen nog kiezen.”

Source: PBL "Exploring pathways for world development within planetary boundaries", mei 2025.


Thank you

TATA Group

TATA Group

- Revenues: $165 billion
- Global Presence: 100 countries
- Employees: 1 million people worldwide

TATA Steel

- Revenues: $28 billion
- Global Presence: 26 countries
- Employees: 78 thousand
- 8th time: Worldsteel Sustainability Champion

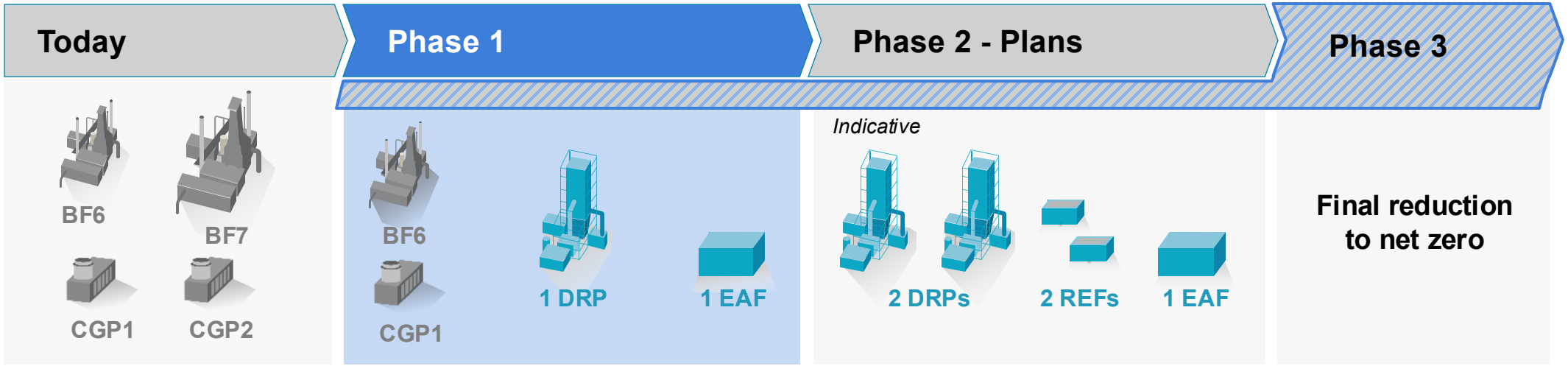
TATA Steel Netherlands

- Revenues: $7 billion
- Global Presence: 9 countries
- Employees: 12 thousand

Tata Steel IJmuiden

By 2030, the largest of two Blast Furnaces will be replaced by a Direct Reduction Plant and an Electric Arc Furnace

Pathway to Net Zero



Additional environ-mental measures

Roadmap+ (2019-25)

Environmental acceleration initiatives (2026-2030)

Closure CGP2 (2029)

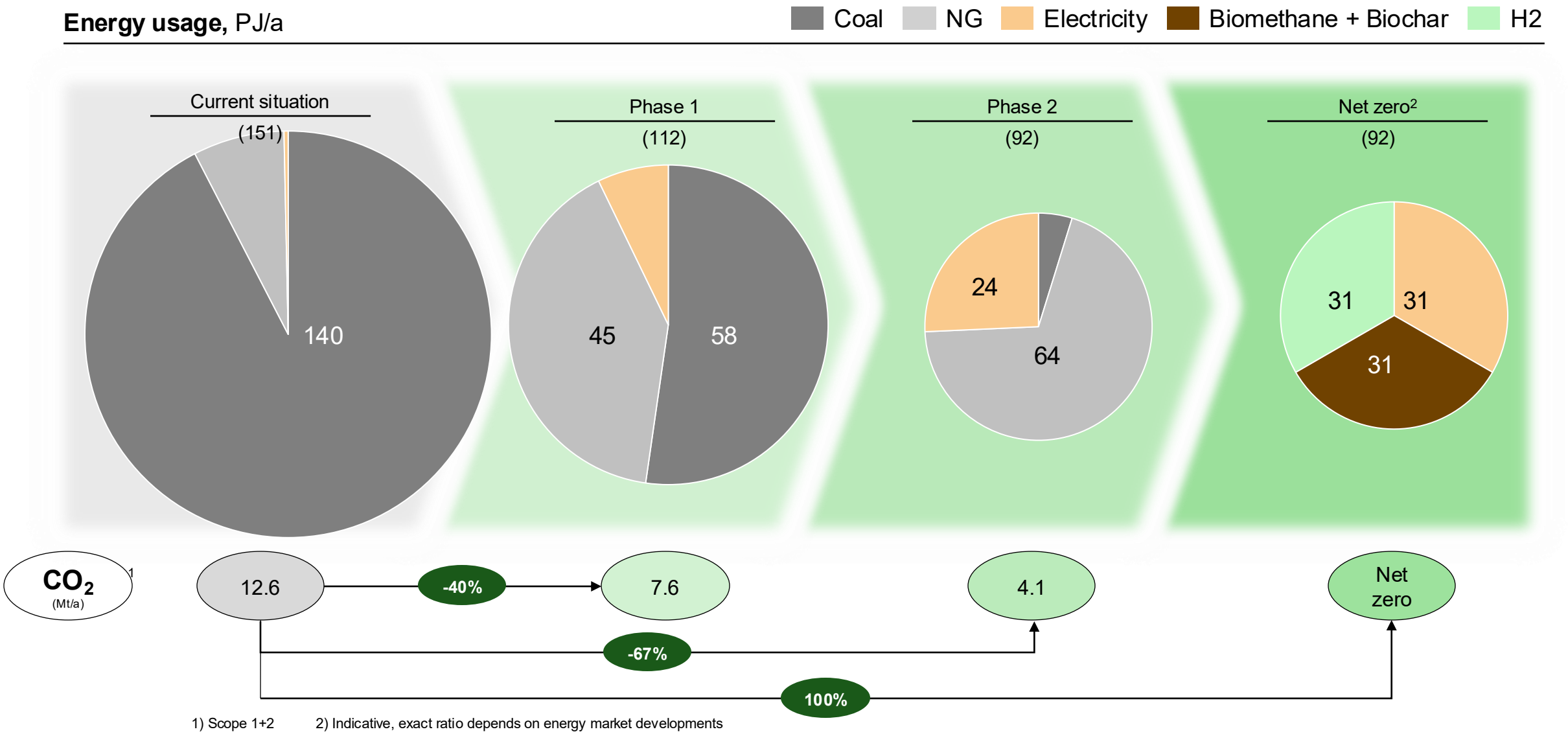
Circularity

Scrap in BOF / BF

Scrap in DRP-EAF

Increased scrap uptake

This green transition reduces TSN's energy consumption and CO_2 while fossil energy will be phased out step by step



1) Scope 1+2 2) Indicative, exact ratio depends on energy market developments

Tata Steel in IJmuiden is uniquely positioned

1. **Competitive offshore wind energy**

   Immediately next to North Sea, with direct (possibly even dedicated) access to sustainable electricity supply from offshore wind fields

2. **Electricity connection**

   Direct connection to high voltage electricity enables TSN to meet the expected increase in electricity demand (e.g., due to the use of electric furnaces)

3. **Connection to future H_2 infra**

   Potential direct connection to cost-effective green H_2 supply and storage, such as the Dutch hydrogen backbone and local H_2 hubs (e.g., Noordzee-kanaalgebied) and storage in salt caverns (e.g., Friesland, Groningen)

4. **Existing natural gas infrastructure (needed for transition)**

   Current natural gas infrastructure is sufficient to be expanded to additional demand (note: high-caloric gas not sourced from Slochteren)

5. **Existing integrated and efficient steel facility**

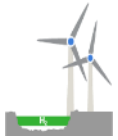
   Unique position with a fully integrated steel plant producing steel highly efficiently, being one of the lowest on the European cost curve

6. **Deep sea port & railway connection**

   Site includes a deep seaport, providing logistical cost advantage for transport of iron ore; this could become a differentiator due to direct access to green H_2 import by ship during the transition period and liquid gas-imports

HV cable offshore wind turbines to landing station TenneT

Meaningful progress with NL Government on ‘Tailormade Agreement’
– subject to approval by European Commission

Conditions for a successful transition...	...while key risks & opportunities need to be managed
 **Availability of affordable green hydrogen and electricity**	✓ Operational integration of new steelmaking assets
 **Government support**	✓ Project execution in a brownfield environment
 **Energy infrastructure**	✓ Effective CBAM, Level playing field in electricity
 **Timely permitting**	✓ EU and NL policy development
 **Level playing field**	✓ Competitive sourcing of scrap, iron ore, natural gas and hydrogen
 **Agreements with customers & green steel premium**	✓ Public acceptance of the transition plan