Latest Developments in the European General Galvanizing Sector

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Vice-President, European General Galvanizers Association

EGGA GALVANIZING EUROPE

LinkedIn

Martin Kopf

President of German Galvanizing Association

President of AOT – Austrian Surface Technology Association

Vice President of EGGA – European General Galvanizing Association

CEO ZINKPOWER

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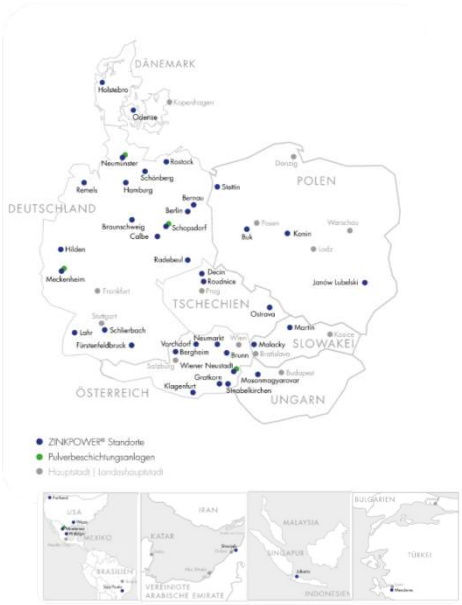
ZINKPOWER®



- ☑ **Our main business is Hot-dip galvanizing**
- ☑ **Our side business are powder coating services and Wet paint coating services**
- ☑ **We run 55 Locations on 4 continents**
- ☑ **Our Customers are: steel construction firms, metal fabricators, architects, engineers, and industrial manufacturers**

Some of our projects we worked on

Want to know more?

EGGA GALVANIZING EUROPE

The Federation of National Galvanizing Industry Associations

14 Associations
21 Countries

AUSTRIA
Fachverband der Eisen-und Metallwarenindustrie Österreichs

BELGIUM, NETHERLANDS & LUXEMBOURG
Zink Info Benelux

CZECH & SLOVAK REPUBLICS
ACSZ - Czech and Slovak Galvanizers Association

FRANCE
Galvazinc Association

GERMANY
Bundesverband Feuerverzinken e.V.

GREECE
Hellenic Galvanizers Association

HUNGARY
Magyar Tüzihorganyzók Szövetsége

ITALY
Associazione Italiana Zincatura

NORDIC COUNTRIES
Nordic Galvanizers

POLAND
Polskie Towarzystwo Cynkownicze

ROMANIA
ANAZ

SPAIN
Asociación Técnica Española de Galvanización

TURKEY
GALDER

UK & IRELAND
Galvanizers Association

Associate Members

Main Suppliers…and Intergalva Partners

INGENIA asmag group
HASCO THERMIC
WESTECH WESTERN TECHNOLOGIES
CHE I. Evensen Industriovner www.che.no
GIMECO
BOTTARO WIRE POWER SINCE 1956
W.PILLING
SCHEFFER Leading galvanizing technology.
KOERNER KK
ATUNKİMYA HOT DIP GALVANIZING CHEMICALS
Trafigura
IMR METAL POWDER TECHNOLOGIES GmbH www.imr-group.com
ANI METAL Engineered for Galvanizing
Zinco International
BOLIDEN
HÖNNETALER KETTENFABRIK
STOCKMEIER CLEANING SOLUTIONS
IHI www.herwig-gmbh.com Galvanizing Technologies
rezinal
METALSIDER2
Wiehart ZINKOXID
EverZinc The Global Zinc Expert

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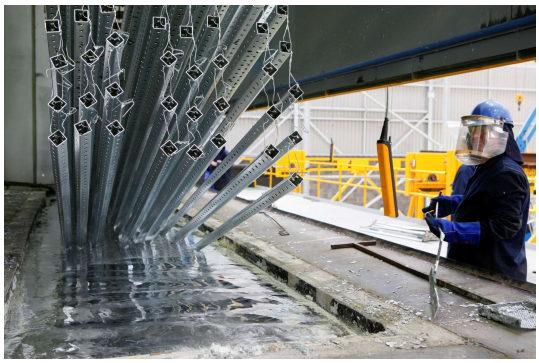
Batch galvanizing of fabricated steel items to EN ISO 1461



~700 plants in Europe

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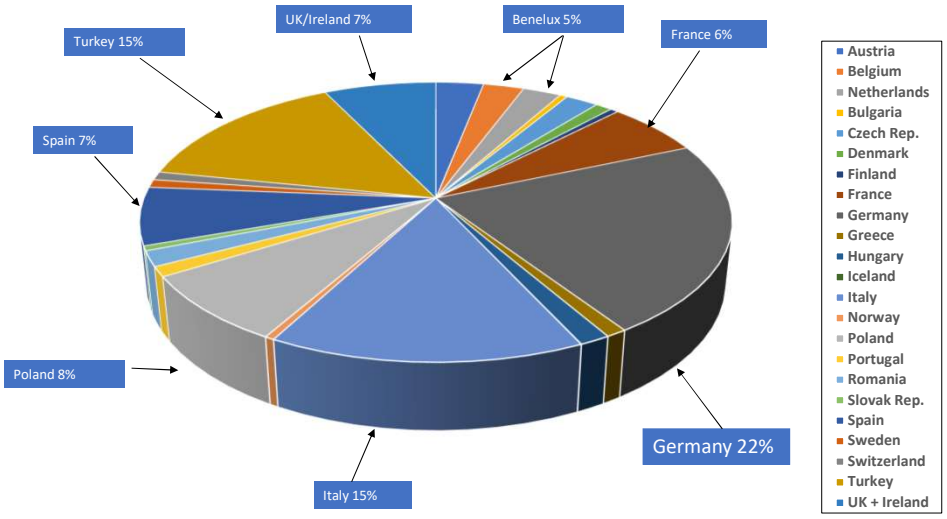
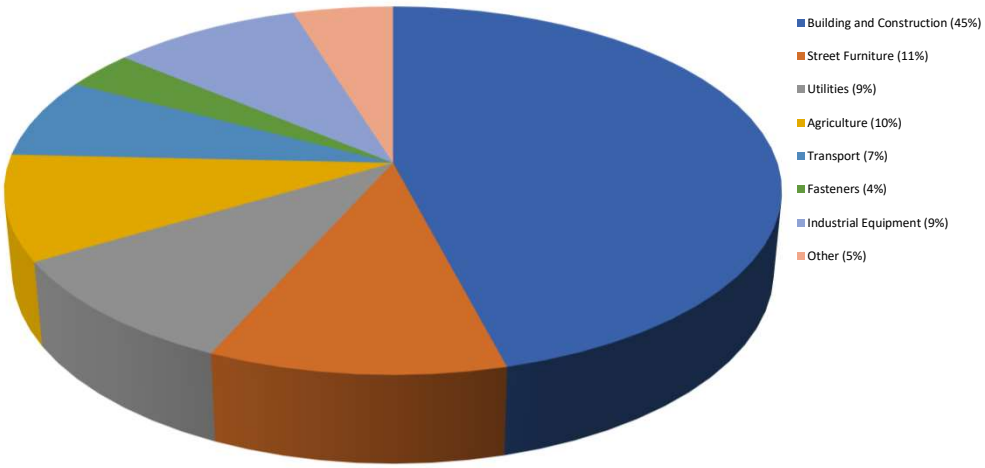
A wide range of steel items are processed in a wide range of plant sizes and configurations



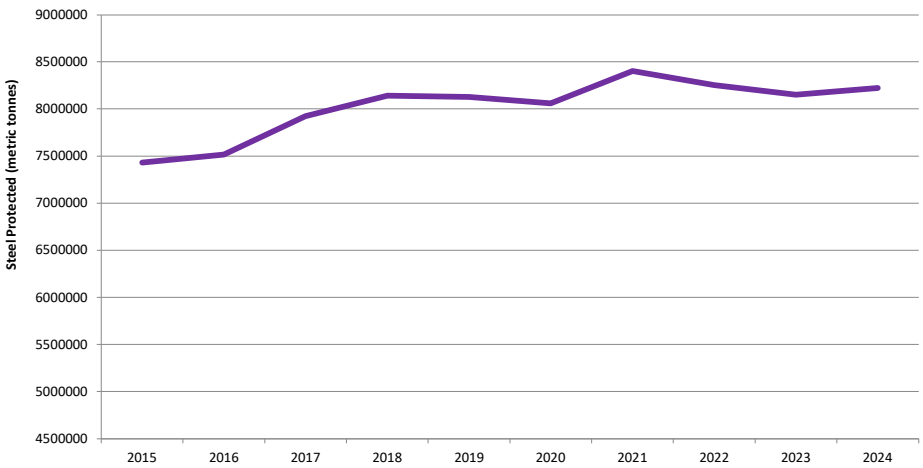

National Share of European Production - 2024



Market Segmentation – 2024: Building & Construction Dominates

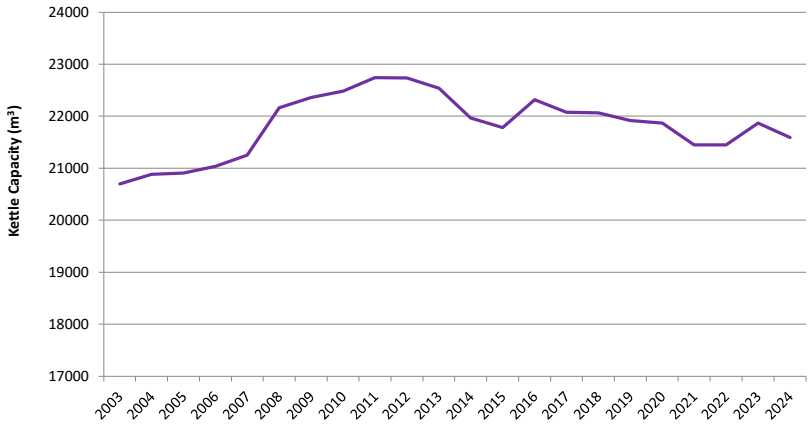


General Galvanizing in Europe, 2015 - 2024



Kettle Capacity (excludes growth in Poland and Turkey), 2003 – 2024

This trend chart excludes Poland and Turkey as comparable data for earlier years is not available for those 2 countries Total kettle capacity for Poland and Turkey for 2022 is 4813 m^3.



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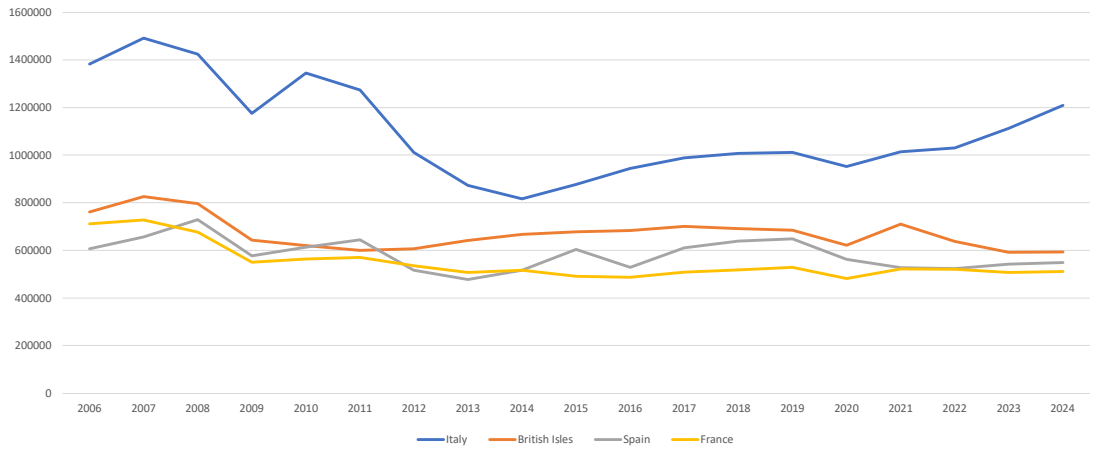
Country trends can differ – e.g., Italy 2006-2024



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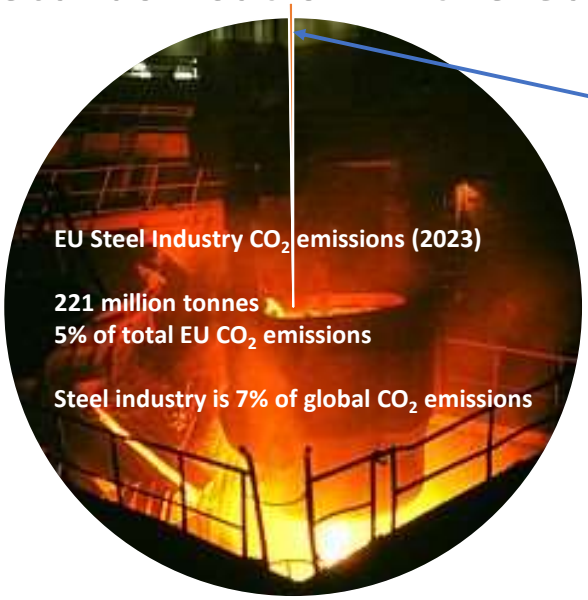
Decarbonisation in the Galvanizing Industry



EU Galvanizing Industry

~ 500,000 tonnes CO_2 emissions

Only 0.23% of steel industry CO_2 emissions

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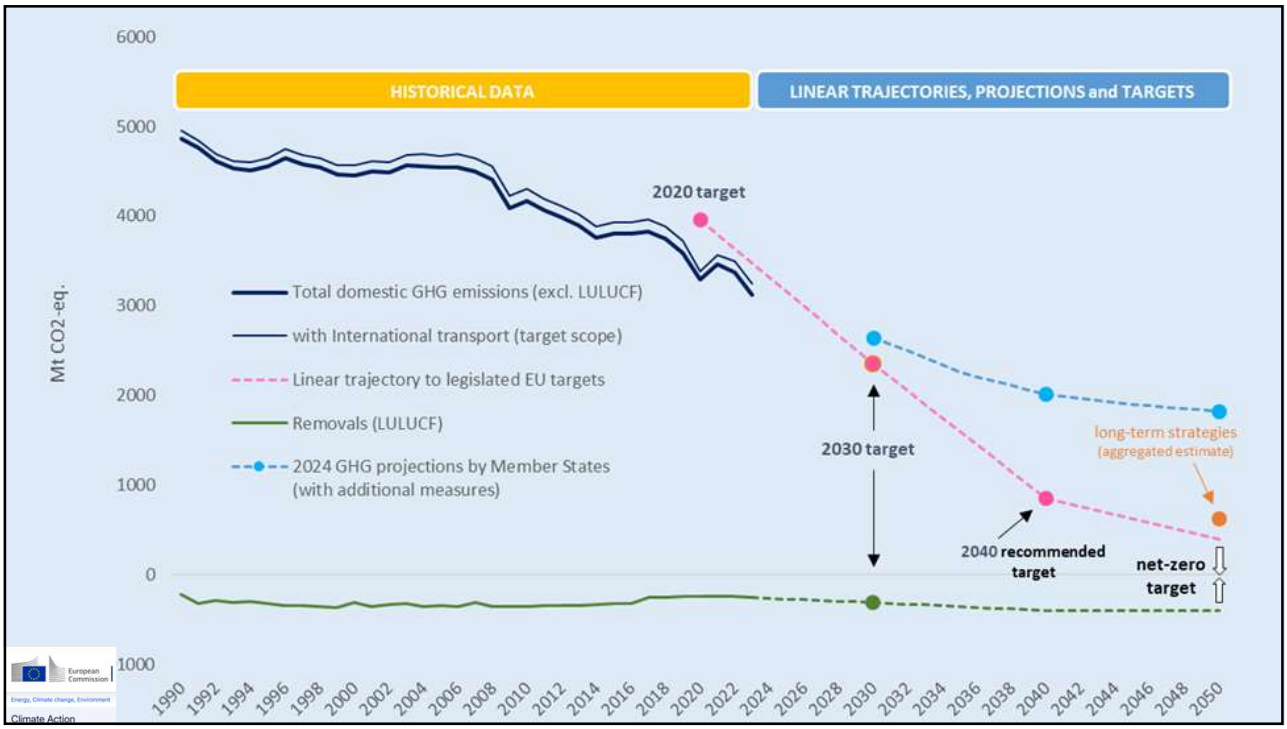
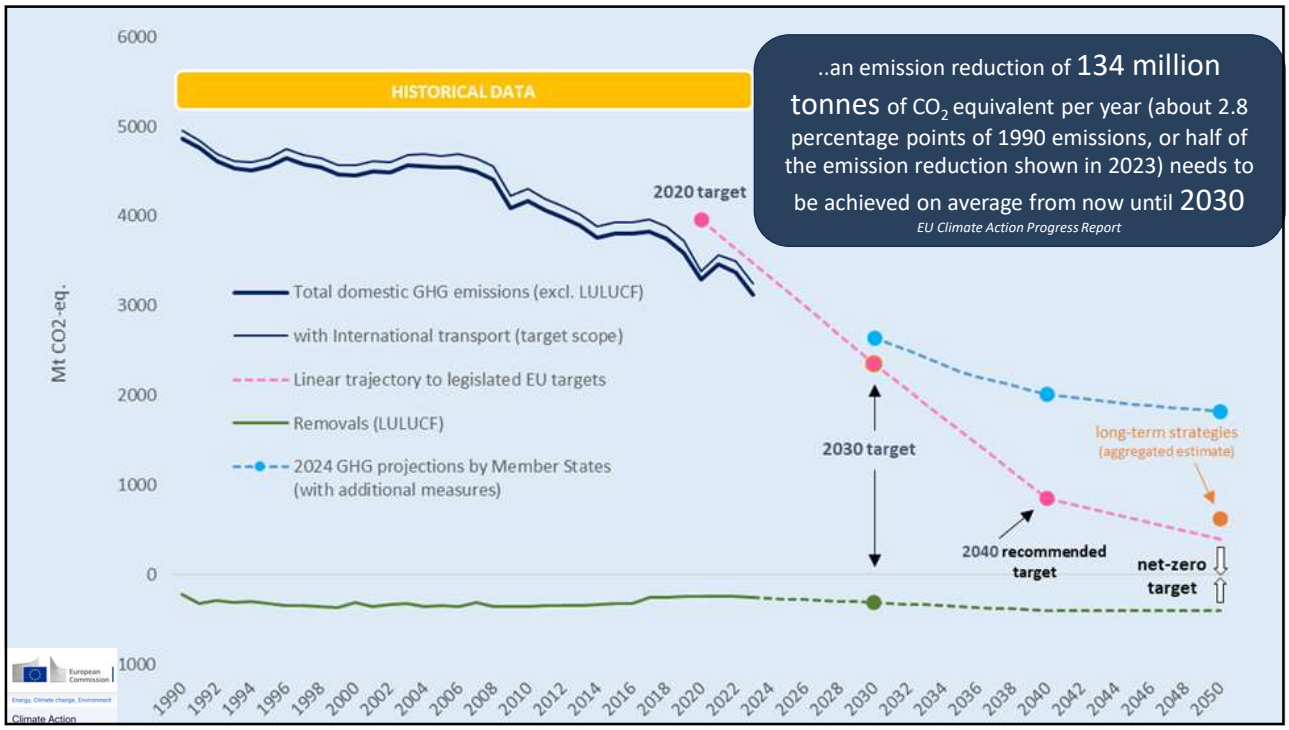
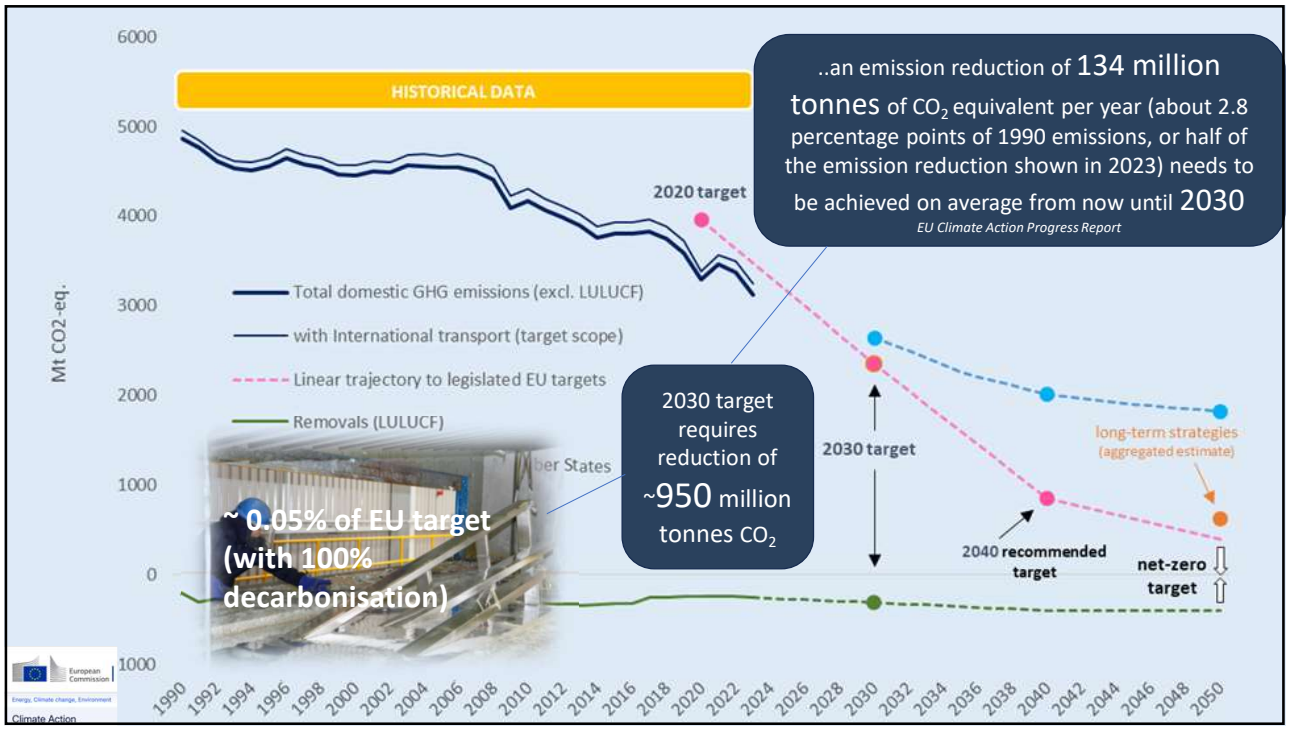



HISTORICAL DATA
2020 target
..an emission reduction of 134 million tonnes of CO_2 equivalent per year (about 2.8 percentage points of 1990 emissions, or half of the emission reduction shown in 2023) needs to be achieved on average from now until 2030
EU Climate Action Progress Report
Mt CO2-eq.
Total domestic GHG emissions (excl. LULUCF)
with International transport (target scope)
Linear trajectory to legislated EU targets
Removals (LULUCF)
2024 GHG projections by Member States (with additional measures)
2030 target
long-term strategies (aggregated estimate)
2040 recommended target
net-zero target
6000
5000
4000
3000
2000
1000
0
1000
1990 1992 1994 1996 1998 2000 2002 2004 2006 2008 2010 2012 2014 2016 2018 2020 2022 2024 2026 2028 2030 2032 2034 2036 2038 2040 2042 2044 2046 2048 2050
Climate Action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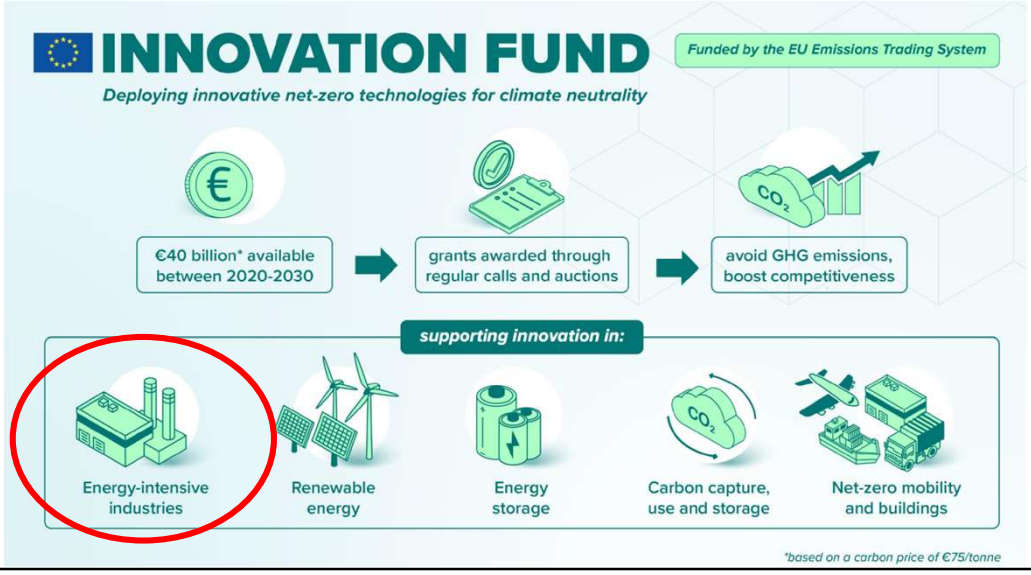
EU Climate Action Progress Report
Mt CO2-eq.
Total domestic GHG emissions (excl. LULUCF)
with International transport (target scope)
Linear trajectory to legislated EU targets
Removals (LULUCF)
2030 target requires reduction of ~950 million tonnes CO_2
~ 0.05% of EU target (with 100% decarbonisation)
2030 target
long-term strategies (aggregated estimate)
2040 recommended target
net-zero target
6000
5000
4000
3000
2000
1000
0
1000
1990 1992 1994 1996 1998 2000 2002 2004 2006 2008 2010 2012 2014 2016 2018 2020 2022 2024 2026 2028 2030 2032 2034 2036 2038 2040 2042 2044 2046 2048 2050
Climate Action

EC (and national) support for decarbonisation - *focused on "Energy Intensive Industries"*



EUROPEAN COMMISSION
DIRECTORATE-GENERAL
CLIMATE ACTION
Directorate C – Innovation for a Low Carbon, Resilient Economy
CLIMA.C.2 – Low Carbon Solutions (II): Research & Low Carbon Technology Deployment

Innovation Fund IF25 Heat Auction

Very few galvanizing plants are > 5MW

Terms and Conditions

- Minimum project size requirements apply: 5 MW_{th} of newly installed electrified / direct renewable process heat capacity. The newly installed capacity must be in a single location; virtual pooling of capacity is not permitted.
- Minimum eligible temperature level requirements apply: Process heat below 100°C as measured at the meter[19] is not eligible in this auction.
- Projects that have already been awarded funding under the Innovation Fund will be ineligible to bid in this auction.


So what drives us to decarbonise the galvanizing industry?
Importance of the Product level


Act Now

European Commission

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Law

EU framework for calculating the global warming potential of new buildings

Have your say - Public Consultations and Feedback > Published initiatives > EU framework for calculating the global warming potential of new buildings

In preparation

Draft act

Feedback period

03 October 2025 - 31 October 2025

Feedback: Open

Upcoming

Commission adoption

Planned for

Fourth quarter 2025

About this initiative

Summary

Under Article 7(3) of the revised Energy Performance of Buildings Directive, the Commission is required to establish an EU framework so that practitioners can calculate the whole life-cycle global warming potential (GWP) of new buildings. The requirement to calculate the life-cycle GWP will apply to large new buildings from 2028 and to all new buildings from 2030.

The objective is to make the national values for the life-cycle GWP of new buildings comparable.

Topic Energy

Type of act Delegated regulation

Expert group E03689

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BATCH HOT DIP GALVANIZING OF STEEL PRODUCTS TO EN ISO 1461

EUROPEAN AVERAGE

EPD EPD

Product Level

Galvanizing ~ 4.6% of the total Global Warming Potential (CO_2)

ENVIRONMENTAL IMPACT PARAMETERS	MANUFACTURING		END OF LIFE		D Benefits and loads beyond the system boundary*	Contribution (included) from galvanizing process [EN ISO 1461]
	A1 - A3 Product stage	A4 Distribution	C2 Product Waste transport	C4 Product Disposal		
Global Warming Potential, GWP [kg CO_2 eq]	2.58	0.01	0.01	4,12E-04	-1.20	0.12

Embodied carbon of zinc ~ 40% of the GWP data per unit of steel galvanized

https://www.ssab.com/en-gb/brands-and-products/ssab-weathering/sustainability

SSAB

Contact SSAB U.K. Search

Products and Services Fossil-free steel Technical support MySSAB

Sustainable solutions with SSAB Weathering steel

Galvanizing or painting steel for construction projects increases C02 emissions and costs. SSAB Weathering steel has a natural patina that makes it a more sustainable solution.

Contact us

SSAB

Products and Services Fossil-free steel Technical support MySSAB

Use steel better

Manufacturing, transporting, installing and maintaining steel creates $C0_2$ emissions. SSAB Weathering steel can reduce total $C0_2$ emissions by up to 40%.

No hot-dip galvanizing

More than 120 kg of $C0_2$ emissions are released in batch galvanizing a ton of steel. SSAB Weathering steel does not need to be galvanized due to its protective patina.

No or less painting

About 160 kg of $C0_2$ emissions are released in painting a ton of steel. SSAB Weathering develops a protective patina over time. And if a structure is painted, it can last twice as long as one in regular steel before you need to repaint.

High-strength steel

SSAB Weathering is a high-strength steel enabling thinner and lighter designs. This reduces the amount of $C0_2$ emissions from manufacturing and transportation.

Getting the message across…

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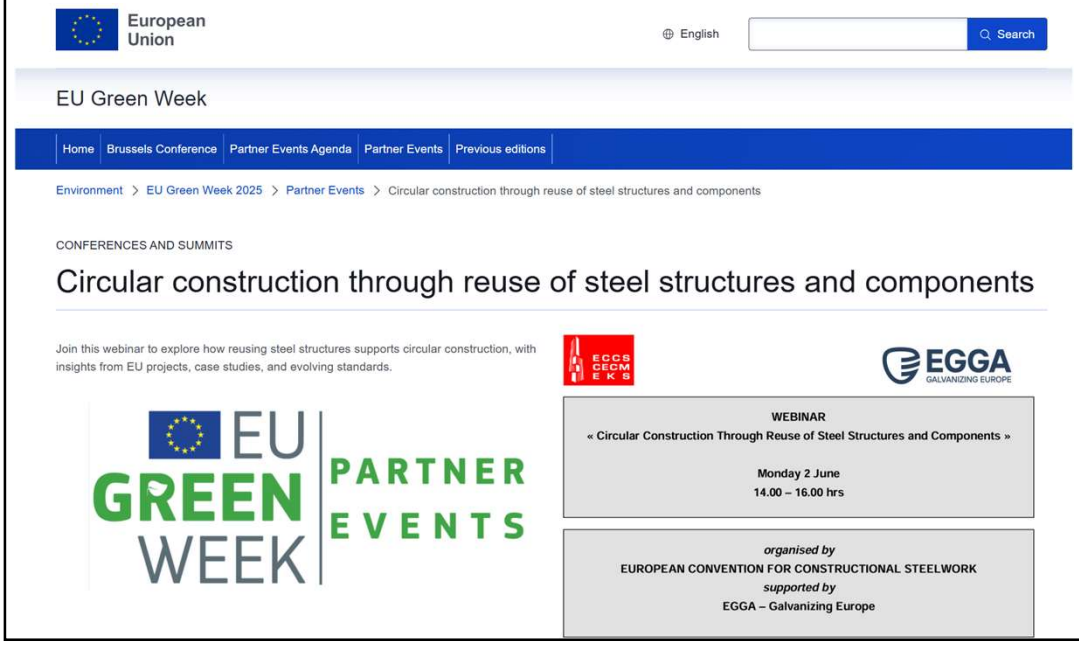

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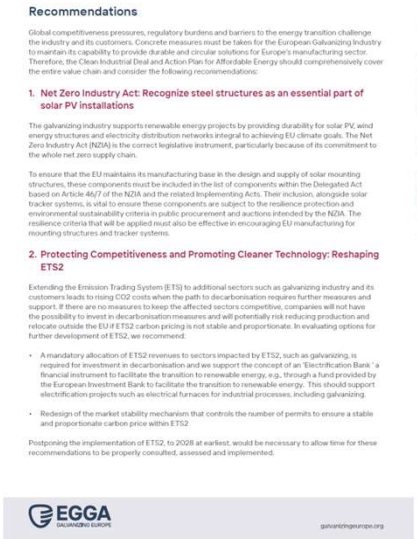
Getting the message across…

Lunch Debate with EGGA Board

Director – DG GROW, European Commission, Brussels, 27 March 2025

Getting the message across…



Recommendations

Global competitiveness pressures, regulatory burdens and barriers to the energy transition challenge the industry and its customers. Concrete measures must be takes for the European Galvanizing Industry to maintain its capability to provide durable and circular solutions for Europe's manufacturing sector. Therefore, the Clean Industrial Deal and Action Plan for Affordable Energy should comprehensively cover the entire value chain and consider the following recommendations:

1. Net Zero Industry Act: Recognize steel structures as an essential part of solar PV installations

The galvanizing industry supports renewable energy projects by providing durability for solar PV, wind energy structures and electricity distribution networks integral to achieving EU climate goals. The Net Zero Industry Act (NZIA) is the correct legislative instrument, particularly because of its commitment to the whole net zero supply chain.

To ensure that the EU maintains its manufacturing base in the design and supply of solar mounting structures, these components must be included in the list of components within the Delegated Act based on Article 46/7 of the NZIA and the related Implementing Acts. Their inclusion, alongside solar tracker systems, is vital to ensure these components are subject to the resilience protection and environmental sustainability criteria in public procurement and auctions intended by the NZIA. The resilience criteria that will be applied must also be effective in encouraging EU manufacturing for mounting structures and tracker systems.

2. Protecting Competitiveness and Promoting Cleaner Technology: Reshaping ETS2

Extending the Emission Trading System (ETS) to additional sectors such as galvanizing industry and its customers leads to rising CO2 costs when the path to decarbonisation requires further measures and support. If there are no measures to keep the affected sectors competitive, companies will not have the possibility to invest in decarbonisation measures and will potentially risk reducing production and relocate outside the EU if ETS2 carbon pricing is not stable and proportionate. In evaluating options for further development of ETS2, we recommend:

- A mandatory allocation of ETS2 revenues to sectors impacted by ETS2, such as galvanizing, is required for investment in decarbonisation and we support the concept of an 'Electrification Bank' a financial instrument to facilitate the transition to renewable energy, e.g., through a fund provided by the European Investment Bank to facilitate the transition to renewable energy. This should support electrification projects such as electrical furnaces for industrial processes, including galvanizing.
- Redesign of the market stability mechanism that controls the number of permits to ensure a stable and proportionate carbon price within ETS2

Postponing the implementation of ETS2, to 2028 at earliest, would be necessary to allow time for these recommendations to be properly consulted, assessed and implemented.

EGGA galvanizingeurope.org

Durable and Circular Corrosion Protection for Steel Products

Galvanizing provides the most effective long-term corrosion protection for steel products, through the application of a strongly bonded coating of zinc metal. It is a service that is applied after manufacture o the product and normally on a sub-contract basis. The coating ensures many decades of maintenance-free durability for infrastructure, construction and vital net-zero technologies, such as solar power installations and electricity distribution.

A galvanized coating is sufficiently durable and robust to provide corrosion protection across more than one product lifecycle and both zinc and steel are recovered at eventual end-of-life.

EGGA-Galvanizing Europe supports key EU policy goals, including achieving net-zero emissions, advancing the circular economy and providing services and materials for affordable housing and infrastructure. Addressing the challenges of small and medium-sized enterprises (SMEs) and the whole manufacturing value chain is essential to ensuring Europe's industrial leadership.

This paper contains our industry's recommendations to EU policymakers for the Clean Industrial Deal.

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