European Blast Furnace Capacity: Assessment of the Likely Time-line for Closures

Blast Furnace Plant	Capacity, M tpy	No of Blast Furnaces	Comments
Austria			
Voestalpine, Donawitz	1.7	2	One blast furnace is likely to close in 2027, with the start-up of an EAF. A second EAF has been announced for completion in 2030.
Voestalpine, Linz	5.0	3	Assumption is that one blast furnace will close in 2027, the others after 2030.
Belgium			
ArcelorMittal, Ghent	4.4	2	An investment in EAF steelmaking was postponed in 2024, and so the blast furnaces are likely to operate into the 2030s. Construction of electrical infrastructure necessary for the EAF capacity only began in 2026.
Bosnia & Herzegovina			
Pavgord, Zenica	1.2	1	In 2025 the Zenica steel plant was sold by ArcelorMittal to a local company, Pavgord. Production may stop by around 2028 due to exhaustion of local iron-ore reserves.
Czech Republic			
Liberty Steel, Ostrava	-	-	Steelmaking stopped permanently in 2024 due to bankruptcy of the company.
Trinecke Zelezarny, Trinec	2.1	2	Trinecke was planning to close one blast furnace by around 2028-29 with government support. But in 2025 this transformation was delayed until at least 2030 due to uncertainty about financial support. Trinecke continues to call for greater support from the government and the EU before it commits to de-carbonization.
Finland			
Ruukki (SSAB), Raahe	2.4	2	The transformation to the EAF route at Raahe is unlikely before the 2030s, as investments at SSAB's plants in Sweden will take place first.

(Cont'd)

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France			
ArcelorMittal, Dunkirk	6.5	3	Due to low power costs in northern France, the investment in EAF is continuing. First stage is due by 2029, when one or two of the blast furnaces may close.
ArcelorMittal, Fos-sur-Mer	5.0	2	Investment in blast furnaces continues, as the construction of an EAF plant has yet to be formally approved.
Saint-Gobain, Pont-a-Mousson	1.0	3	Blast furnaces make pig iron for casting into pipes. No news on their future situation.
Germany			
ArcelorMittal, Brandenburg	2.3	2	In 2025 ArcelorMittal officially cancelled its plan to invest in DRI and EAF capacity at its German sites. It cited the state of the steel market and the difficult economics of low-carbon steelmaking.
ArcelorMittal, Bremen	4.0	2	
DK Recycling, Duisburg	0.2	2	Blast furnace is used to recycle waste from EAF steelmaking to make pig iron. With the build-up of EAF capacity in Europe, its services will be in demand.
HKM, Huckingen	5.2	2	Salzgitter acquired full control of HKM in 2026. It is already advancing an investment in an EAF for completion by 2029.
Rogesa, Dillingen	4.7	2	One blast furnace is likely to close by 2028.
Salzgitter	4.6	2	Salzgitter plans to continue the route to low-carbon steelmaking, with one blast furnace likely to close in 2027. The second stage was postponed in 2025.
ThyssenKrupp Stahl (TKS), Duisburg	9.8	4	Sale of TKS to Jindal Steel collapsed in May 2026. Two of the blast furnaces are due to have closed by 2030.

(Cont'd)

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Blast Furnace Plant	Capacity, M tpy	No of Blast Furnaces	Comments
Hungary			
Liberty Steel, Dunaujvaros	-	-	Closed in 2023 due to bankruptcy. Capacity was around 1.3m tpy on two blast furnaces.
Italy			
Acciaierie d'Italia (ADI), Taranto	5.0	3	Due to excessive particulate emissions, a court has ruled that hot-end operations must close by the end of October. It seems that this decision cannot be reversed or challenged further. No solution to the long-term ownership of Taranto has been found.
Netherlands			
Tata Steel, IJmuiden	6.0	2	One of the two blast furnaces was due to have closed by 2030, but this has now been postponed until the next decade. The severe environmental problems facing the IJmuiden coke plant may speed up the transformation time-table, however.
Poland			
ArcelorMittal, Dabrowa Gornicza	4.5	2	De-carbonization is at an early stage. Talks with government about funding to replace one blast furnace only appeared to start in 2025. Blast furnace production is likely to continue into the 2030s.
Romania			
Liberty Steel, Galati	3.3	2	Due to the insolvency of Liberty Steel, the plant is idle. A buyer is being sought.
Serbia			
HBIS, Smederovo	1.1	1	There has been agreement in principle with the government for the Chinese-owned steel plant to transition to the EAF route. No funding or time-frame has been made.

(Cont'd)

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Slovakia			
Nippon Steel Slovakia, Kosice	2.5	2	From October 2026, Nippon Steel took control of the Kosice plant from US Steel. Already, there are plans to start building an EAF in 2027 for completion by 2030. This would replace one of the two blast furnaces.
Spain			
ArcelorMittal, Gijon	4.5	2	Construction of one EAF began in 2024 and is due to be completed before the end of 2026. At this point, one of the two blast furnaces is likely to close. Timing for the second phase is unknown.
Sweden			
SSAB, Lulea	2.4	1	Lack of the necessary electrical infrastructure at Lulea means that a shift to EAF capacity is unlikely until 2029-30 at the earliest.
SSAB, Oxelosund	1.9	2	Construction of EAF capacity is likely to be completed in 2027, at which stage the blast furnaces would close. There continue to be delays in building the necessary electrical infrastructure, however.
United Kingdom			
British Steel, Scunthorpe	4.7	4	In 2026 British Steel was taken into public ownership from the Chinese company, Jingwe. There is currently no funding or pathway for the EAF route at Scunthorpe.
Tata Steel, Port Talbot	-	-	Blast furnaces (two) closed in 2025, some years earlier than expected. Construction of an EAF began in July 2025.
Total	**94.8**	**56**	

Projected Future Outlook – 2030 & 2035

	2030		2035	
	Capacity, M tonnes/year	Number of BF Units	Capacity, M tonnes/year	Number of BF Units
In Operational State	62.5	38	11.3	10
Scheduled Closures Due to EAF Investments	24.0	12	70.5	36
Anticipated Closures due to Economic Factors	8.3	6	13.0	10

The "base-line" for the above summary is the year 2025, when we estimate that there was 94.8m tpy of iron-making blast furnace capacity available and 56 blast furnaces in an operational state (not necessarily actually producing). According to World Steel association data, European blast furnace iron production was 64.8m tonnes, indicating capacity utilization of 68%. It should be noted that our data are largely on a "nominal" basis, including some "reserve" units on long-term idle.

By 2030 this will have declined to 62.5m tpy of capacity with 38 operational blast furnaces. In 2035, this will have fallen further to just 11.3m tpy of capacity at 10 units, less than 20%

Note that as well as replacement by EAF investments, we expect that some blast furnaces will be closed on economic grounds (13.0m tpy by 2035).

Resource-Net
Cape Town, South Africa

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