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Sustainable steel sheet piles

ArcelorMittal Sheet Piling – Luxembourg

November 2021

EcoSheetPile™ Plus

100% Recycled | Recyclable | Reusable | Renewably produced

Steel sheet piles: permanent & temporary applications

Permanent: Quay wall | Gdansk | Poland

Temporary: Tunnel | Kérino | France

steel sheet piles can be re-used several times before being recycled

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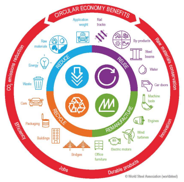


Circular economy

REDUCE

1970 - 2020

build same structure with

50% less steel

REUSE

- rental (temporary applications)
- sales with buy-back option
- sales of second hand

RECYCLE

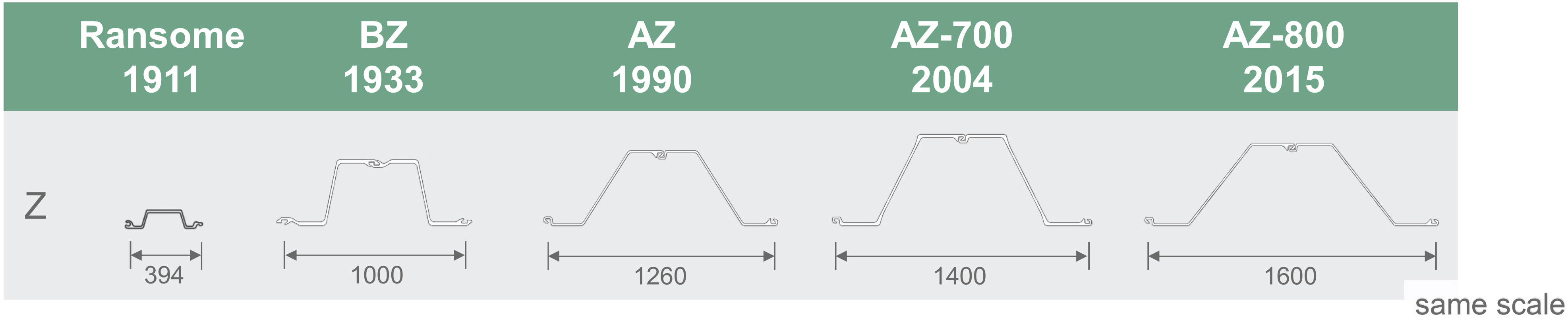
steel is **100%** recyclable

&

ssp out of **100%** recycled steel

Steel sheet piling. Historical overview

First hot rolled steel sheet pile in USA: Lackawana type, 1908.



Evolution of steel sheet piles manufactured in Luxembourg

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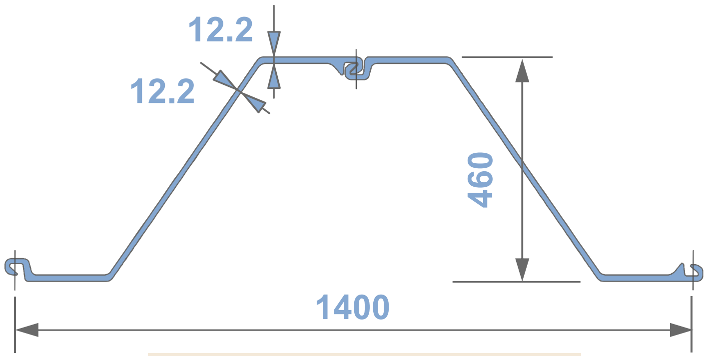
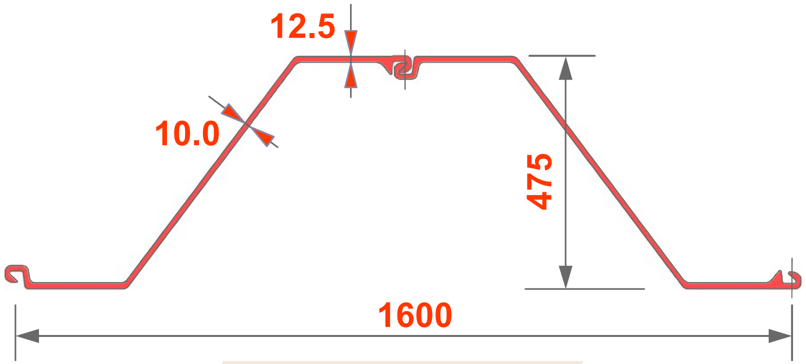
REDUCE.
Gain in efficiency – optimized shape



AZ 26-700-0.5 (2008)



AZ 25-800 (2015)

		W_{el} (cm^3/m)	mass (kg/m^2)	Δ mass (%)
2008	AZ 26-700-0.5	2 515	141.8	-10%
2015	AZ 25-800	2 500	128.2	
1950's	BZ IIR	1 370	140.0	-26%
2010's	AZ 14-770	1 355	103.2	

W_{el} : elastic section modulus

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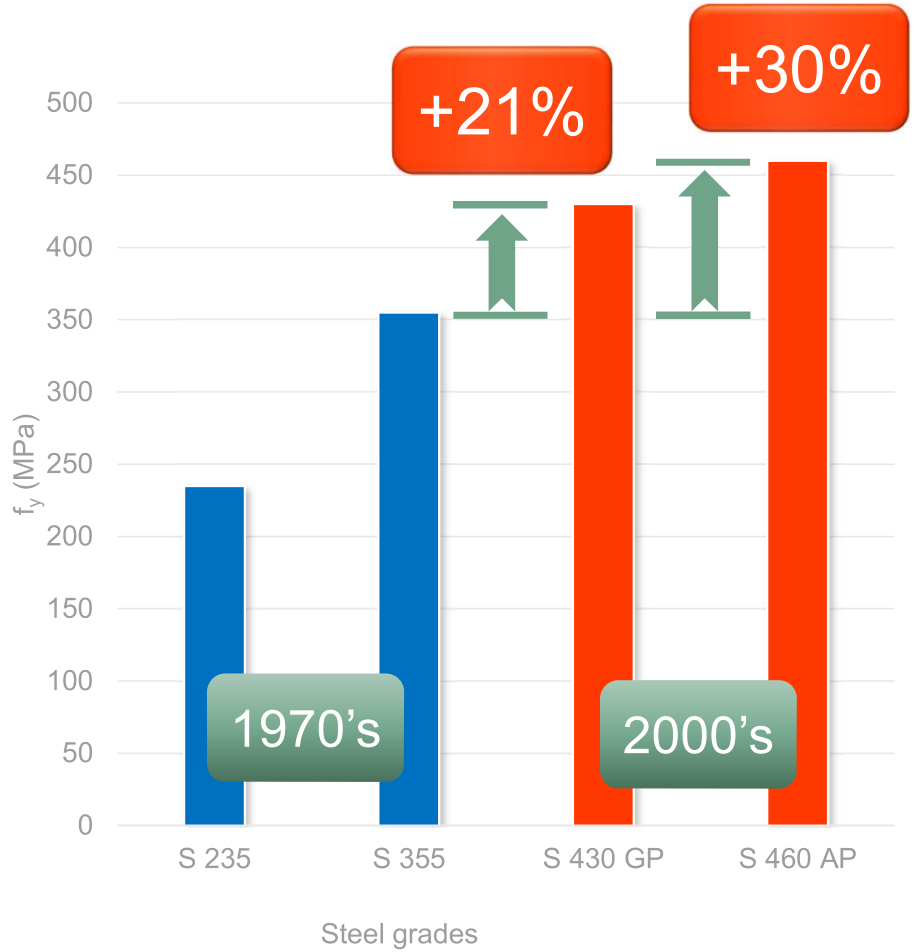
REDUCE.
Gain in efficiency - steel grade

use of high steel grades
can save up to 30% of steel



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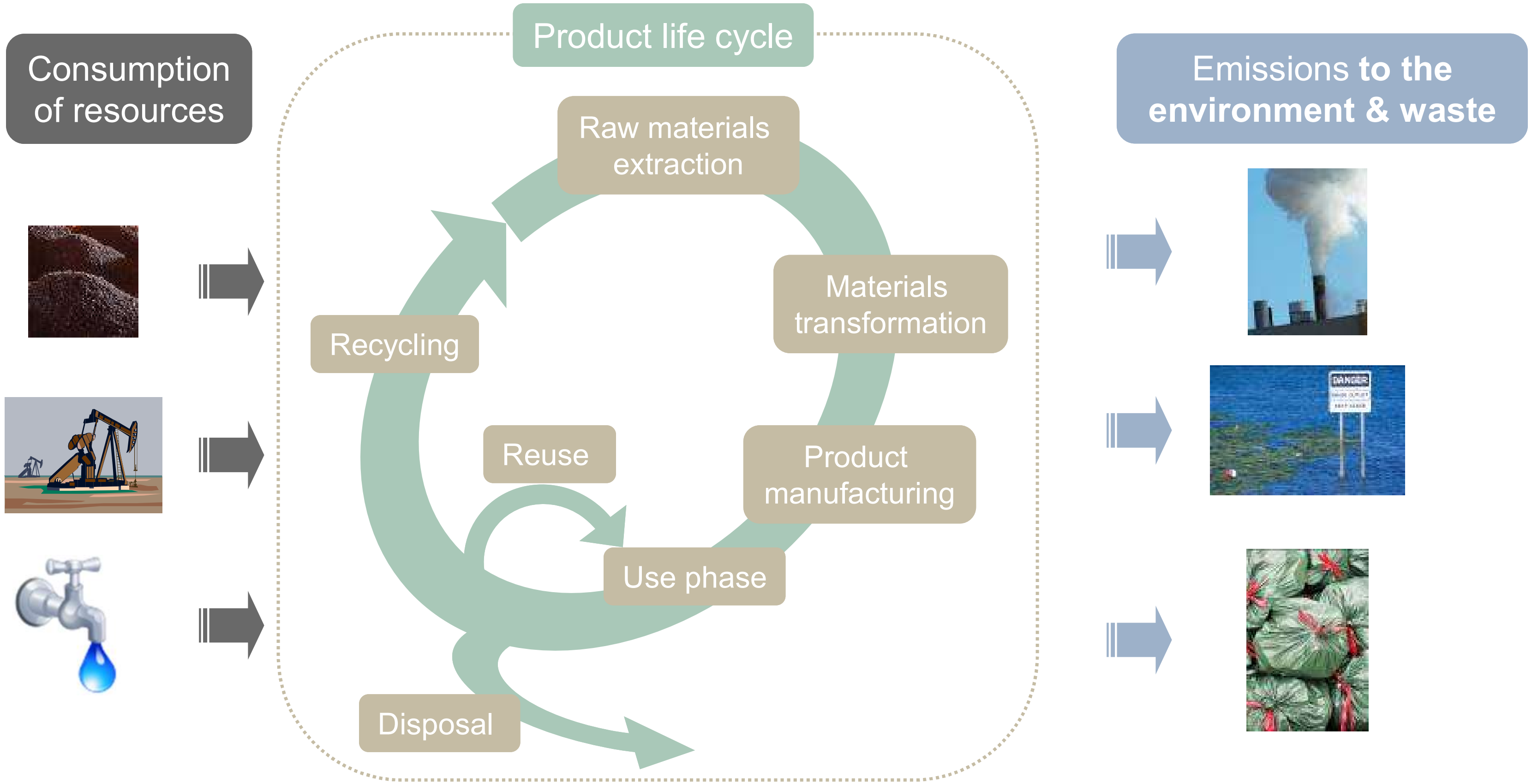
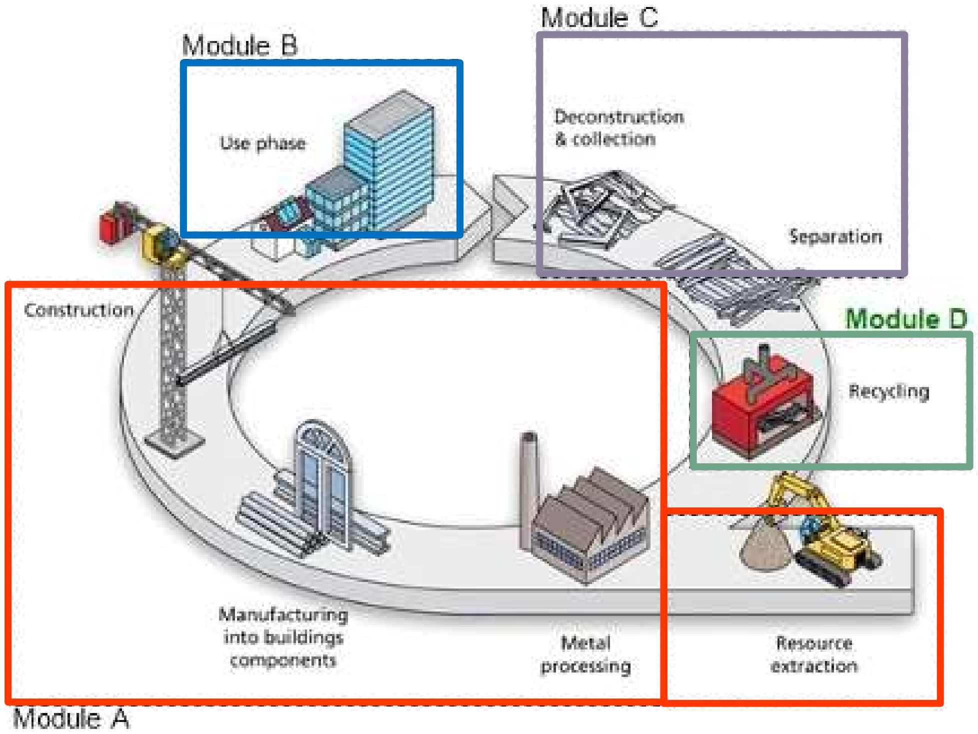
Life Cycle Assessment (LCA). Definition & principle

“Analysis of the potential environmental burdens of a product or service in its production, use phase and disposal (end of life).“ [ISO standard]



Life Cycle Assessment (LCA) & Environmental Product Declaration (EPD)

- EPD = independently verified and registered document that communicates transparent and comparable information about the life-cycle environmental impact of products (EN 15804 and ISO 14025)
- does not imply that the declared product is environmentally superior to alternatives
- different modules



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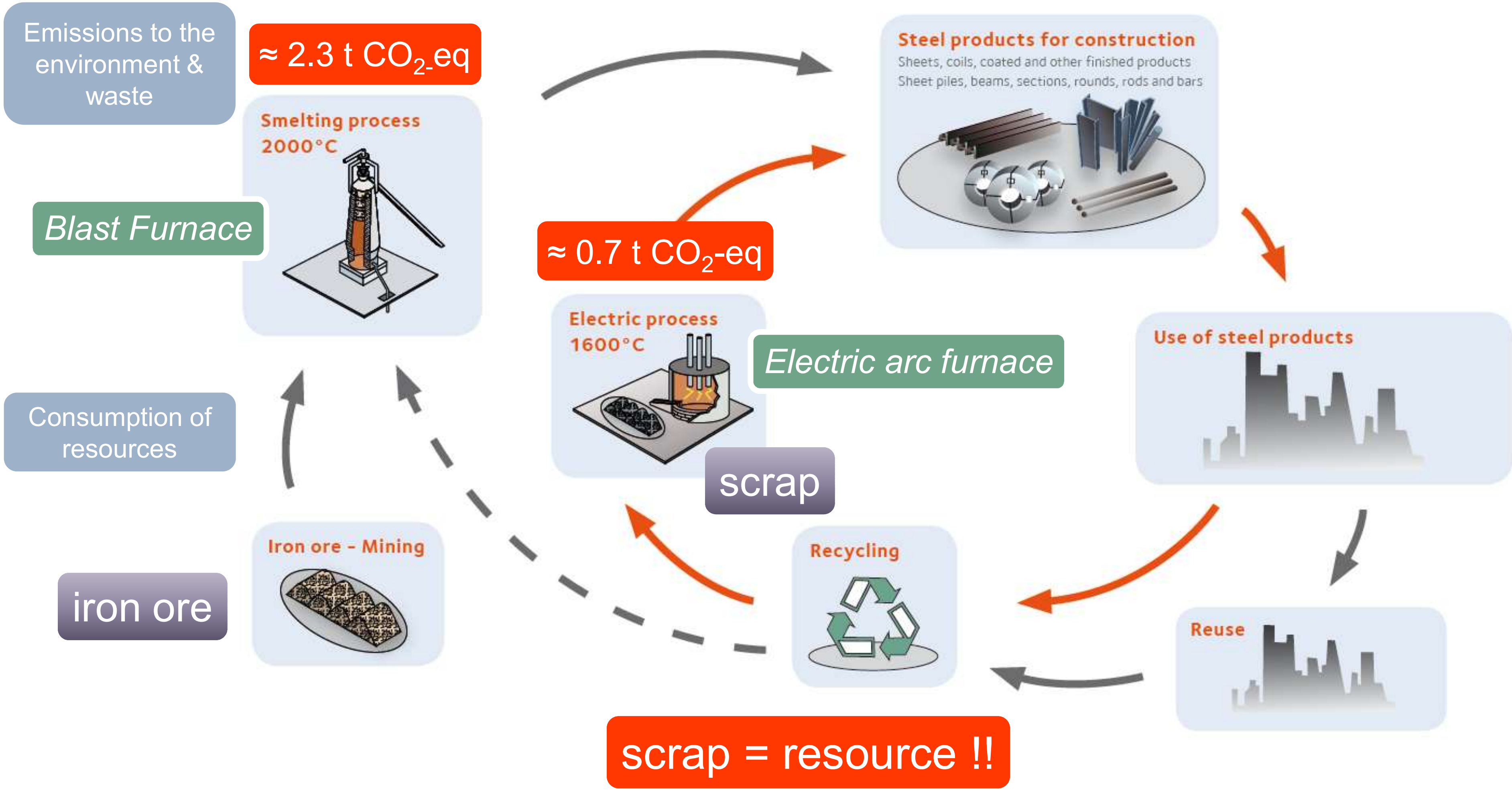
Life Cycle Assessment - Steel loop



Worldsteel methodology

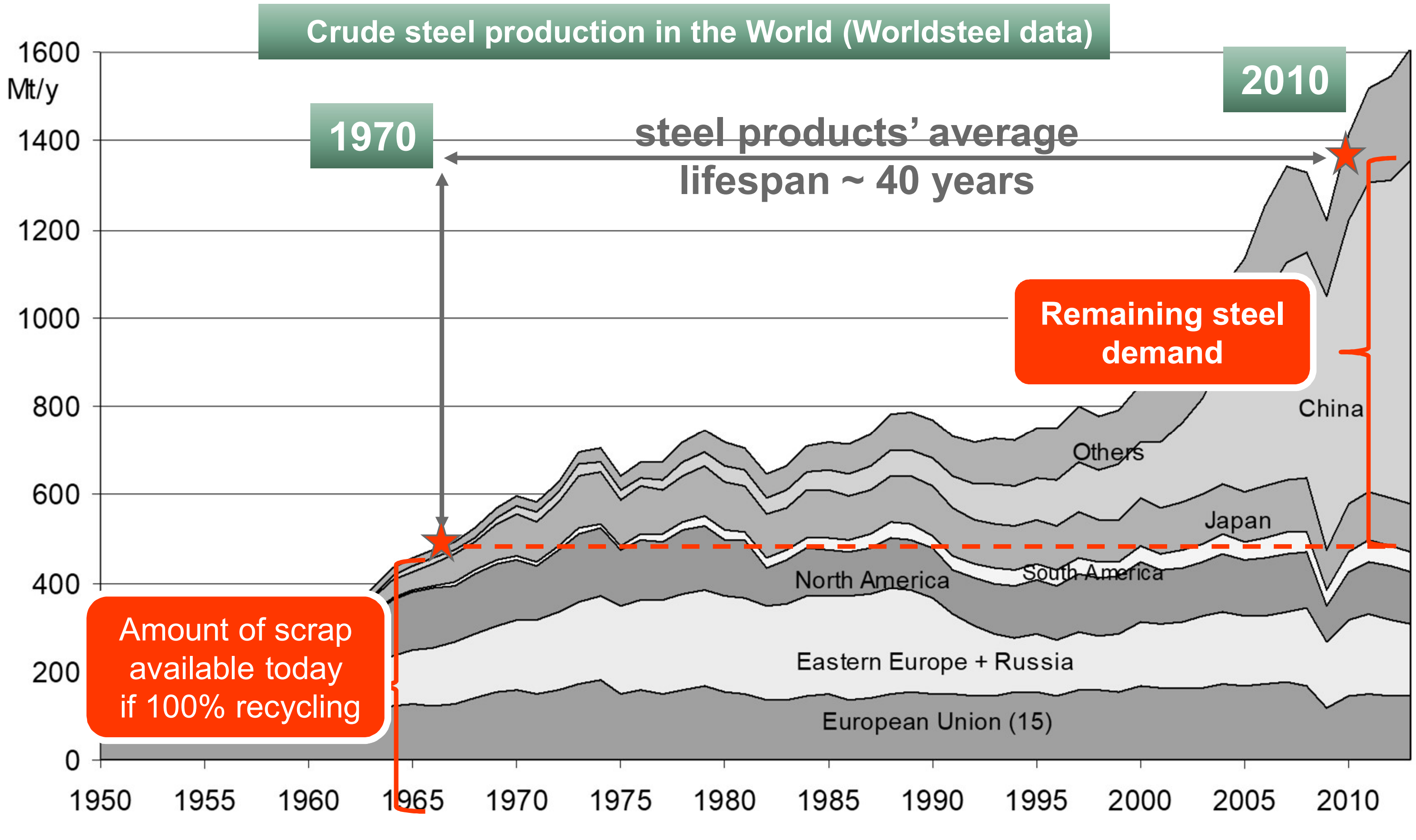
Transfer part of the burdens from BOF/BF to EAF through scrap (LCI)

$\Rightarrow$ not penalize primary route (BOF)

WHY ?

Impact of lifespan on scrap availability (2017)

scrap available (600 Mt)
<<
steel demand (1 400 Mt)



Crude steel production & CO_2 intensity (annual report 2020)

Crude steel production by process and segment 2020 (000's Mt)

(000's Mt)	Blast oxygen furnace	Electric arc furnace	Open hearth furnace	Total crude steel	%
1 NAFTA	12,669	5,143	–	17,812	25
2 Brazil	6,134	3,406	–	9,539	13
3 Europe	28,510	5,494	–	34,004	48
4 ACIS	9,752	218	201	10,171	14
Total	**57,065**	**14,261**	**201**	**71,527**	**100**

The Company's key metrics above include the U.S. operations prior to its sale to Cleveland Cliffs on December 9, 2020. The U.S. operations produced 9.93 million tonnes of crude steel in 2020 predominantly from the blast oxygen furnace route.

		Performance		
Metric	Unit	2018	2019	2020
CO_2 intensity (steel)*	**tCO_2e/tonne of steel**	**2.12**	**2.11**	**2.08**
– CO_2 intensity (BF only)	tCO_2e/tonne of steel	2.33	2.32	2.30
– CO_2 intensity (EAF only)	tCO_2e/tonne of steel	0.61	0.60	0.60
% sites below ArcelorMittal carbon efficiency benchmark	%	44	48	52
Carbon footprint intensity improvement since 2007 (target = 8% by 2020)[8]	%	**4.9**	**6.1**	**7.9**

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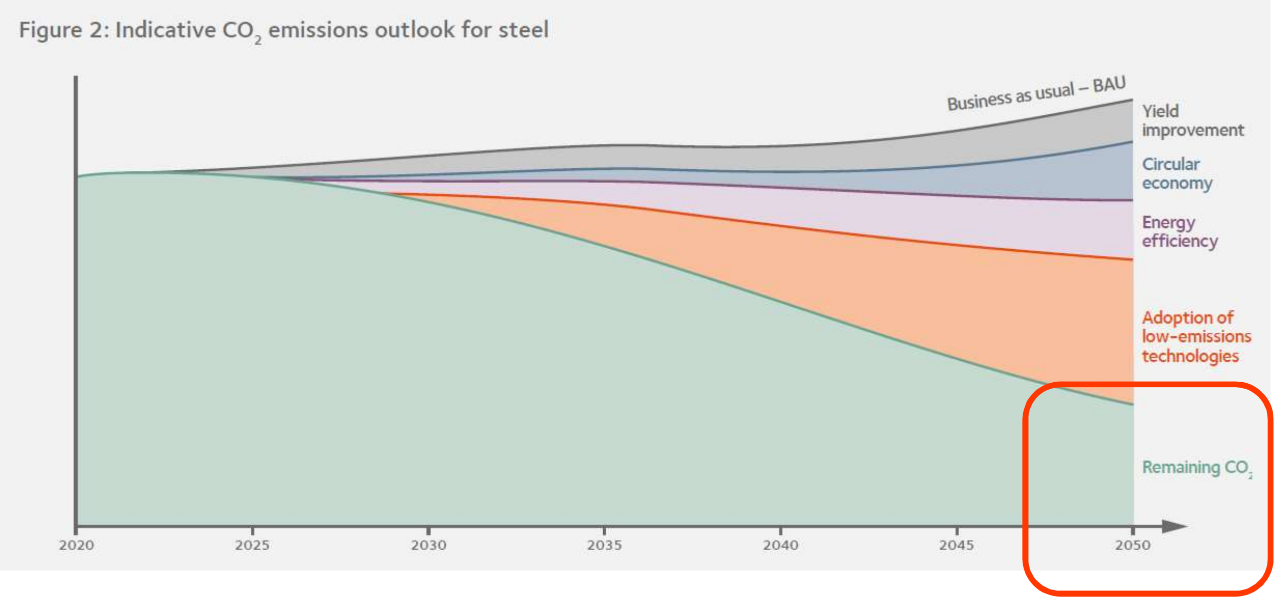
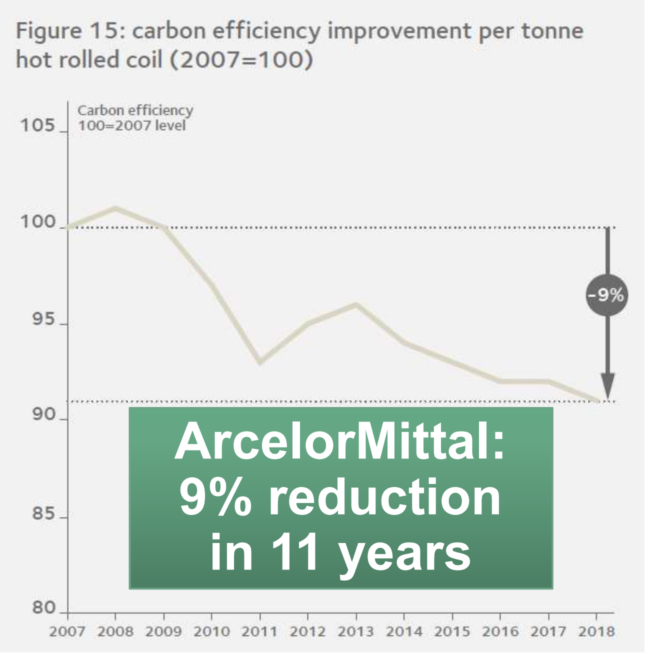
Emissions outlook and improvements forecast





Our ambition

- ArcelorMittal's ambition is to significantly reduce its carbon footprint by 2050 - carbon neutrality.

- we are undertaking **extensive research and pilot programs** within our operations, as well as evaluating the opportunity from off-setting

- interim target for ArcelorMittal Europe is to reduce by **35%** its carbon footprint by 2030.

More details: "*Climate Action Report*" published in May 2019.

https://corporate-media.arcelormittal.com/media/yw1gnzfo/climate-action-in-europe.pdf

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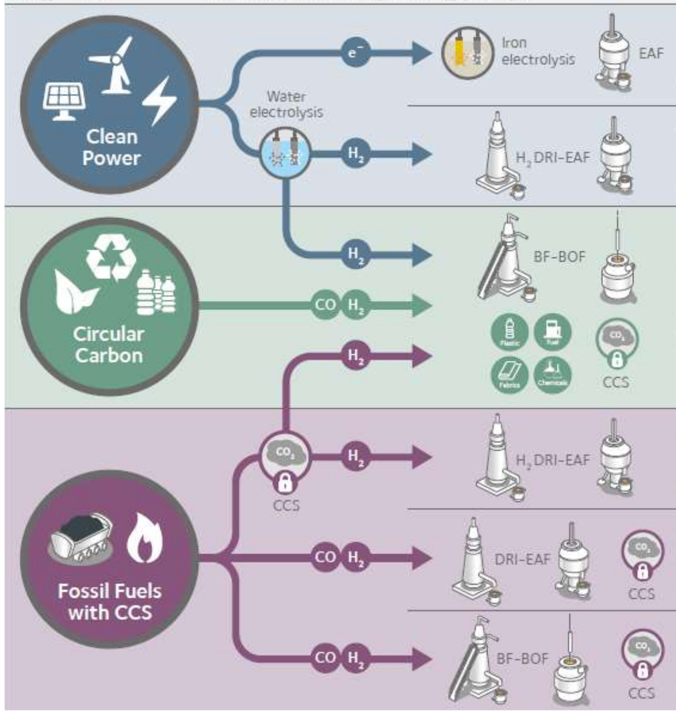
Our ambition – reducing CO_2 emissions

Box 5: possible low-emissions technology pathways using different energy sources

All technology pathways to low-emissions steelmaking entail higher costs and require time, investment and clean energy infrastructure.



Energy source	Low-emissions steelmaking technology pathway	Incremental costs to produce steel* (OPEX and CAPEX)	Commercial horizon	Energy infrastructure challenge	Energy technology challenge	Steel technology challenge
Clean Power	**Iron electrolysis** Develop iron ore electrolysis from clean electricity	To be determined	20-30 years	Power infrastructure exists – to be expanded to accommodate steelmaking needs		Electrolysis ironmaking
Clean Power	**Green hydrogen DRI** Develop hydrogen-based DRI production from clean electricity	+60-90%	10-20 years	Green hydrogen economy needs to be created – can be done incrementally	Lowering green hydrogen production costs	Hydrogen ironmaking
Circular Carbon	**Smart carbon** Produce steel with circular carbon and hydrogen, and manufacture carbon-based products from waste gases	+20-35%	5-10 years	Circular carbon and hydrogen economy expansion – can be done incrementally	Develop commercial bio-coals, bio-cokes and bio-gases for steelmaking	Commercial combined carbon and hydrogen steelmaking; upside of carbon capture and use
Fossil Fuels with CCS	**Blue hydrogen DRI** Develop hydrogen-based DRI production from reformed natural gas	+35-55%	10-20 years	Develop large commercial natural gas-based hydrogen and carbon storage projects		Hydrogen ironmaking
Fossil Fuels with CCS	**DRI with carbon capture** Use existing technology incorporating carbon capture and storage	+35-55%	5-10 years	Develop economy-wide commercial carbon transport and storage infrastructure		Commercial CO_2 capture technologies
Fossil Fuels with CCS	**Blast furnace with carbon capture** Use existing technology incorporating carbon capture and storage	+30-50%	5-10 years	Develop economy-wide commercial carbon transport and storage infrastructure		Commercial CO_2 capture technologies

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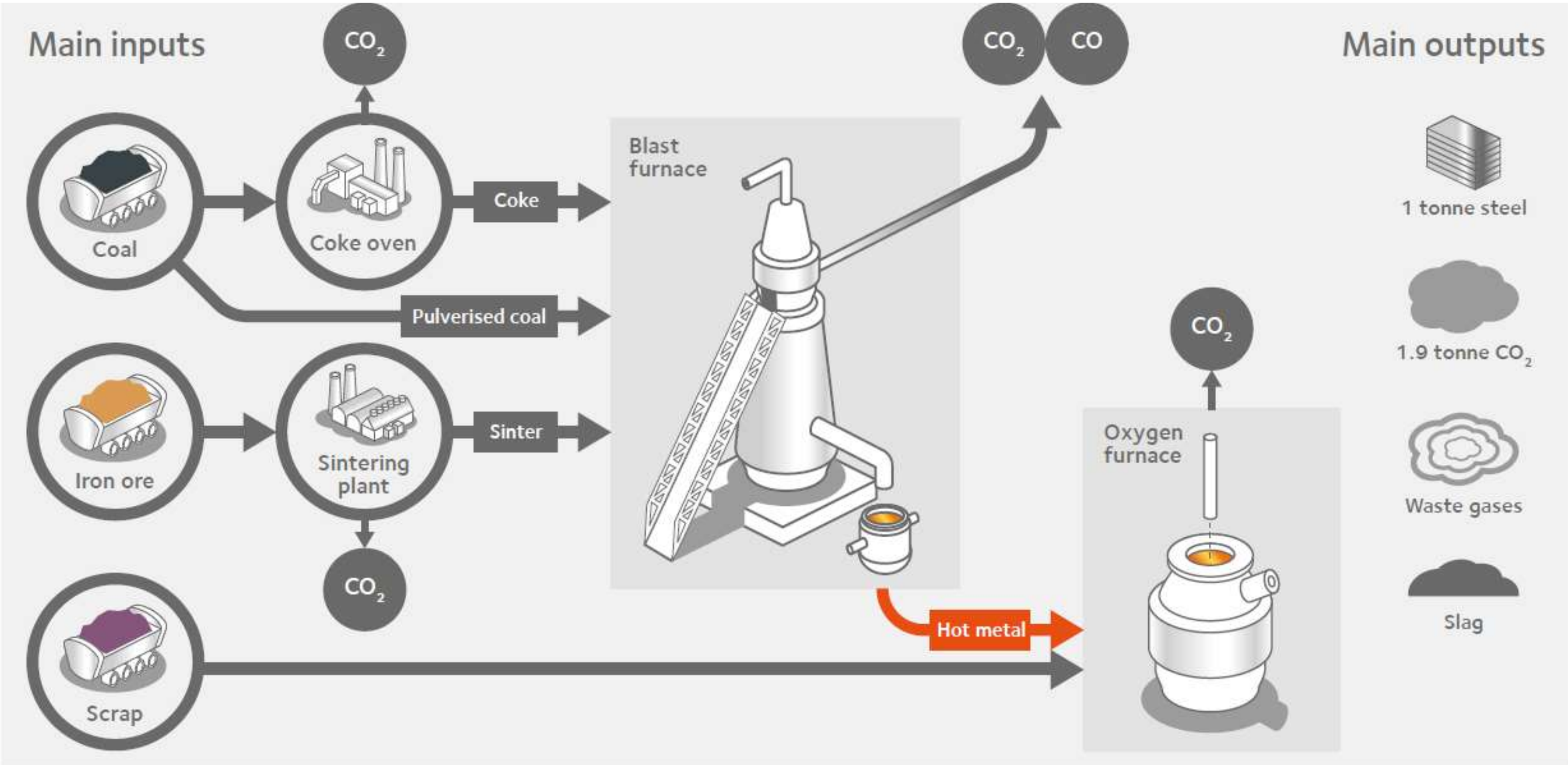
Iron production is the major source of CO_2 in primary steelmaking process



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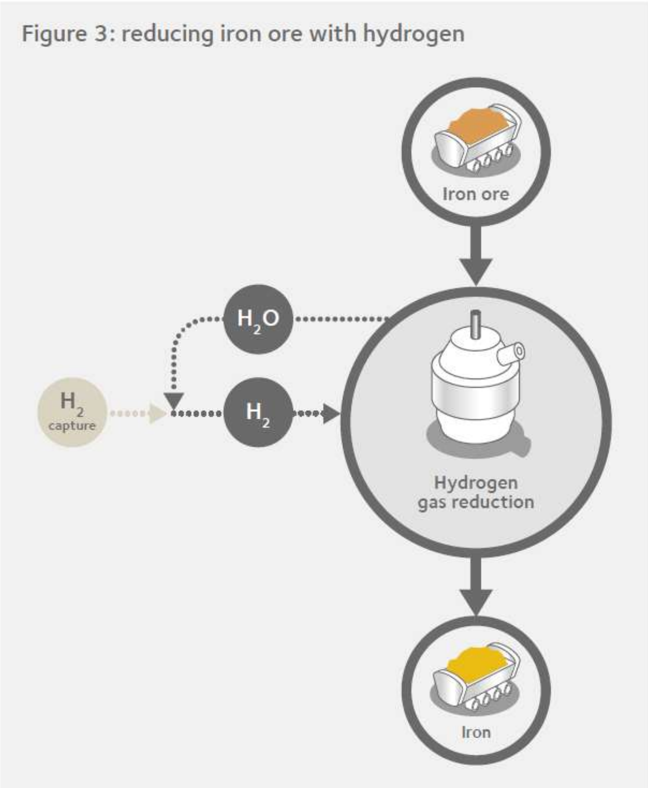
H_2 Hamburg: reducing iron ore with hydrogen



Reducing iron ore with hydrogen

- Technologies can be developed to replace the feedstock of natural gas in the Direct Reduced Iron (DRI) process with increasing levels of hydrogen. This can either be extracted from natural gas while the CO_2 is captured and stored (blue hydrogen), or through the electrolysis of water (**green hydrogen**).
- **€65 million pilot project in Hamburg**, which will produce enough hydrogen to run an experimental **DRI installation (EAF) on 100% pure hydrogen, producing 100,000 tonnes of iron per year**.

What will our roadmap to 2050 cost?

	Investment needed		Production cost increase
	ArcelorMittal Europe steel footprint	Clean energy infrastructure	
Smart Carbon	€15-25 billion	€15-165 billion[1]	+30-60%[1]
DRI route	€30-40 billion	€40-200 billion[2]	+50-80%[2]

1 Lower end of range leveraging bioenergy and CCS infrastructure; high end of range leveraging green hydrogen infrastructure.
2 Lower end of range leveraging CCS and blue hydrogen infrastructure; high end of range leveraging green hydrogen infrastructure.

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Inventing smarter steels for a better world – XCarb®

- campaign launched by the new CEO of ArcelorMittal Europe in March 2021 at European level
- XCarb® – steels with low / lower / zero CO_2-eq. emissions
- use of renewable electricity / innovative processes
- for steel sheet piles produced in Luxembourg
  - **EcoSheetPile™ Plus** – steel produced with renewable electricity in the EAF with 100% of scrap

Technical Solutions

- Green Hydrogen – DRI
- EAF – green energy
- Carbon Capture, Usage and Storage (CCUS) – over 100 facilities operating / designed
- …

Huge investments are required! Some are already under way…

The Daily Telegraph - 24.1.2021

Norway digs deep to tap carbon storage boom
Richard Orange

The country is leading a major **carbon capture operation to store up to 5 m tonnes of CO_2 per year**. The contractors have already started dynamiting the steep rocky fjord side to make way for tanks which will in three years start receiving the world's first deliveries of industrial CO_2 emissions for storage beneath the North Sea.

…

In mid-December, **Norway's parliament voted to spend** 16.8bn kroner **(£1.5bn) on Longship, calling it "the largest-ever climate project in Norwegian industry"**. This covers more than two-thirds of the total cost of developing and operating carbon capture at two industrial plants, as well as transport and storage of the CO_2. Northern Lights project, a **partnership between Equinor**, Norway's majority state-owned energy company, **Royal Dutch Shell**, and the French oil major **Total**, is responsible for the transportation and storage side. When it is fully up-and-running, the project's facility outside the city of Bergen is expected to take shiploads of CO_2 from as far south as the north of Spain and as far east as Helsinki.

…

The steelmaker **ArcelorMittal**, the French industrial gases company Air Liquide, HeidelbergCement, and Sweden's Preem refining group are four of the **big multinationals who plan to export CO_2 to Norway** from their European plants.

…

ArcelorMittal invests in low carbon steel technology – DRI / EAF (1/2)

- Sept 2021: ArcelorMittal and the EIB announce **€280 million of funding for research and innovation** supporting the steel company's decarbonisation objectives.
- Sept 2021: **German Federal Government commits its intention to provide €55 million of funding** for ArcelorMittal's **Hydrogen DRI plant** (total cost of the plant: €110 million)
- Sept 2021: ArcelorMittal announces that it has signed a letter of intent with the Governments of **Belgium** and Flanders, supporting a **€1.1 billion project to build a 2.5 million-tonne direct reduced iron (DRI) plant at its site in Gent**, as well as **two new electric furnaces**. ArcelorMittal Belgium will **reduce CO_2 emissions by 3.9 million tonnes per year by 2030.** The EAF will operate alongside its state-of-the-art blast furnace that is ready to take waste wood and plastics as a substitute for fossil carbon.
- July 2021: **ArcelorMittal Sestao (Spain) to become the world's first full-scale zero carbon-emissions** steel plant. It is the result of a memorandum of understanding signed with the Government of Spain that will see an **investment of €1 billion in the construction of a green hydrogen direct reduced iron (DRI) plant at its plant in Gijón**, as well as **a new hybrid electric arc furnace** (EAF). By 2025, the Sestao plant – which manufactures a range of flat steel products for the automotive and construction sectors, and general industry - will produce **1.6 million tonnes of zero carbon-emissions steel**.

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ArcelorMittal invests in low carbon steel technology – DRI / EAF (2/2)

- Mar 2021: ArcelorMittal is **planning to build a large-scale industrial plant for the direct reduction of iron ore (DRI)** and **electric arc furnace (EAF)-based steelmaking** at its site in **Bremen**, as well as an **innovative DRI pilot plant in addition to an electric arc furnace (EAF) in Eisenhüttenstadt**, following the announcement of the planned expansion of Germany's hydrogen infrastructure. Using **green hydrogen**, up to 3.5 million tonnes of steel could be produced by 2030. Depending on the amount of hydrogen available, **CO_2 savings of more than 5 million tonnes could be possible**. The technology conversion requires **investments in the range of €1-1.5 billion**.
- Mar 2021: Air Liquide and ArcelorMittal have signed a memorandum of understanding (MoU) with the objective of implementing solutions to produce low-carbon steel in **Dunkirk (FR)**. Goal: transform the steel production process through the development of innovative solutions involving low-carbon hydrogen and **CO_2 capture technologies**. The project will **reduce yearly CO_2 emissions from ArcelorMittal's steel-making facilities by 2.85 Mt by 2030**.
- Feb 2021: ArcelorMittal Asturias starts **coke-oven gas injection for Blast Furnace** B. Use of this innovative technology will result in a **reduction in CO_2 emissions of 125,000 tonnes a year**.

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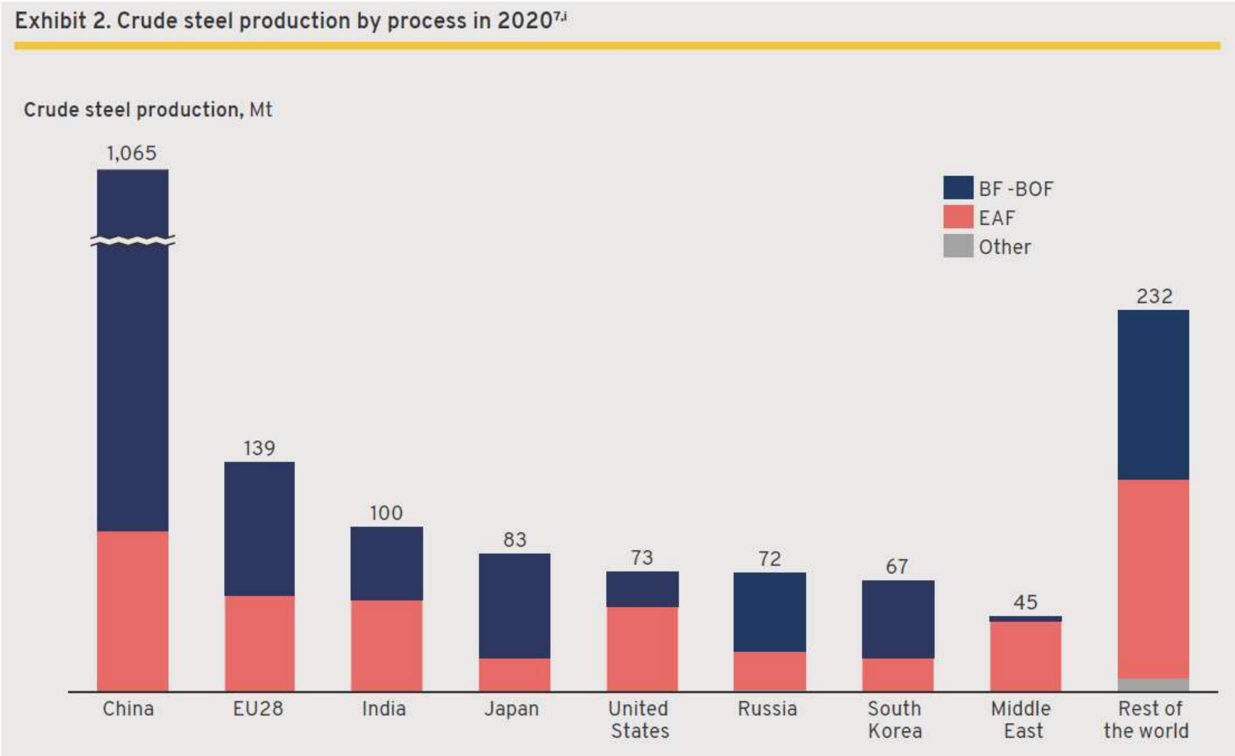
Steel industry – roadmap to net-zero carbon steel

NET-ZERO STEEL INITIATIVE / November 2021
Mission Possible Partnership



Steel industry – roadmap to net-zero carbon steel

Exhibit 3. Select global steelmaker climate targets

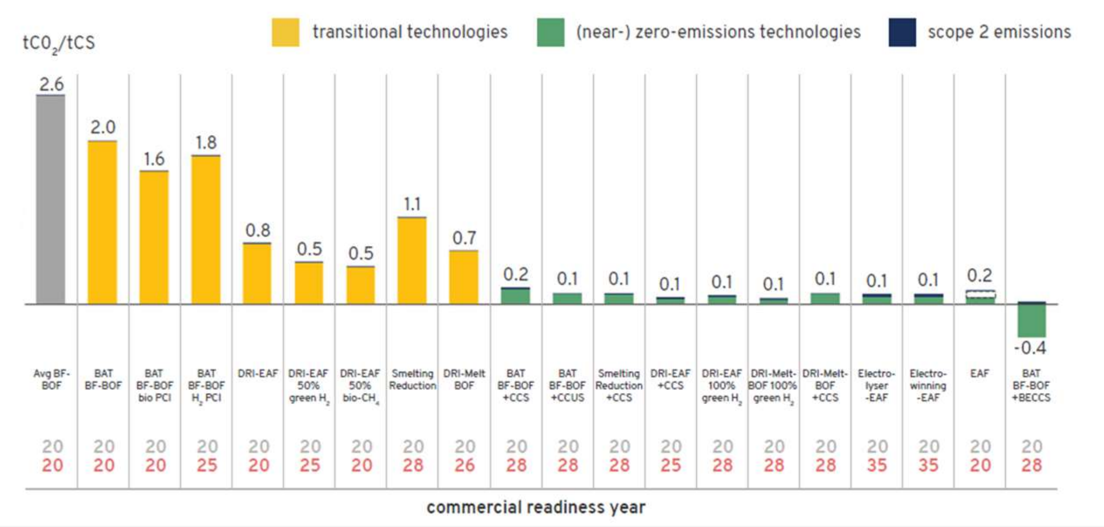
Steelmaker	Percentage of 2020 global primary steel production	Interim goal	Long-term net-zero goal
China Baowu Group	6.14%*	30% absolute emissions reduction by 2025 (from 2023 peak)	Carbon-neutral by 2050
ArcelorMittal	4.18%	Global: 25% absolute reduction by 2030; Europe: 35% absolute reduction by 2030 (2018 baseline)	Global: carbon-neutral by 2050
HBIS Group	2.33%	30% absolute emissions reduction by 2030 (from 2022 peak)	Carbon-neutral by 2050
Nippon Steel Corporation	2.21%	30% absolute emissions reductions by 2030	Climate-neutral by 2050
POSCO	2.16%	15% reduction in absolute emissions and 30% in emissions intensity by 2030	Climate-neutral by 2050
U.S. Steel Corporation	0.62%	20% emissions intensity reduction by 2030 (2018 baseline)	Carbon-neutral by 2050
Thyssenkrupp Steel Europe	0.57%	30% absolute emissions reduction by 2030 (2018 baseline)	Carbon-neutral by 2050
Tata Steel Europe	0.54%	30% to 40% absolute emissions reduction by 2030 (2018 levels)	Carbon-neutral by 2050
Voestalpine	0.38%	n/a	80% to 95% absolute emissions reduction by 2050
Liberty Steel Group	0.37%	n/a	Carbon-neutral by 2030
SSAB	0.23%	Sweden: 25% absolute emissions reduction by 2025	Global: Fossil-free by 2045
Salzgitter	0.21%	n/a	95% absolute emissions reduction by 2050 without offsets
BlueScope	0.15%	12% reduction in GHG emissions intensity by 2030 (2018 baseline)	Net-zero GHG emissions by 2050

*excludes ongoing Shandong Steel acquisition

Source: Company reports and disclosures

Companies that committed to reducing significantly their carbon footprint by 2050 and possible technologies.

Exhibit 7. Summary of archetypes with associated emissions intensities (scopes 1 and 2) in 2050 and expected commercial availability



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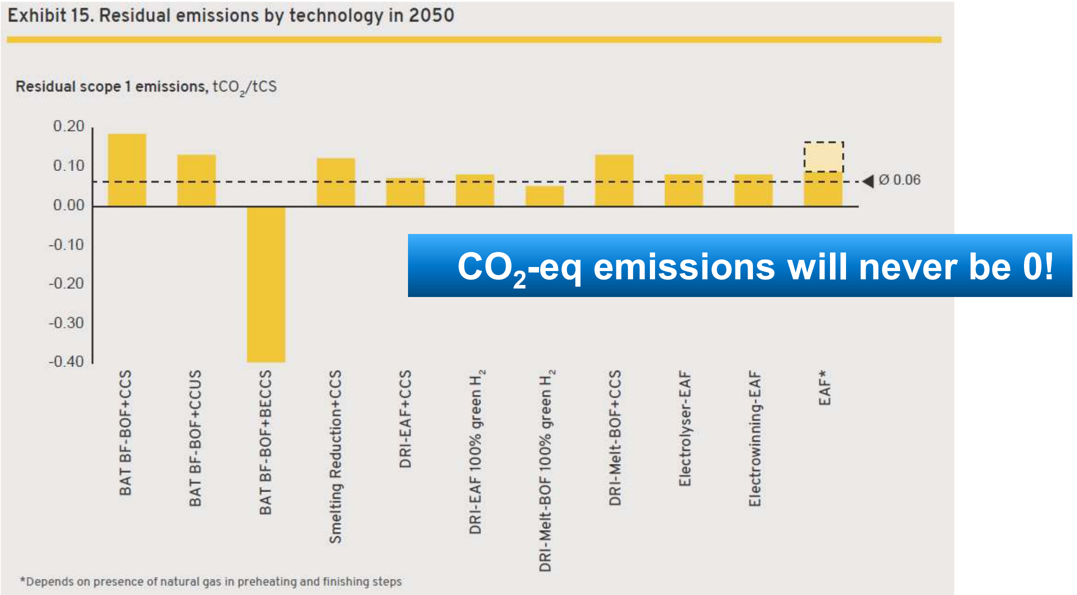
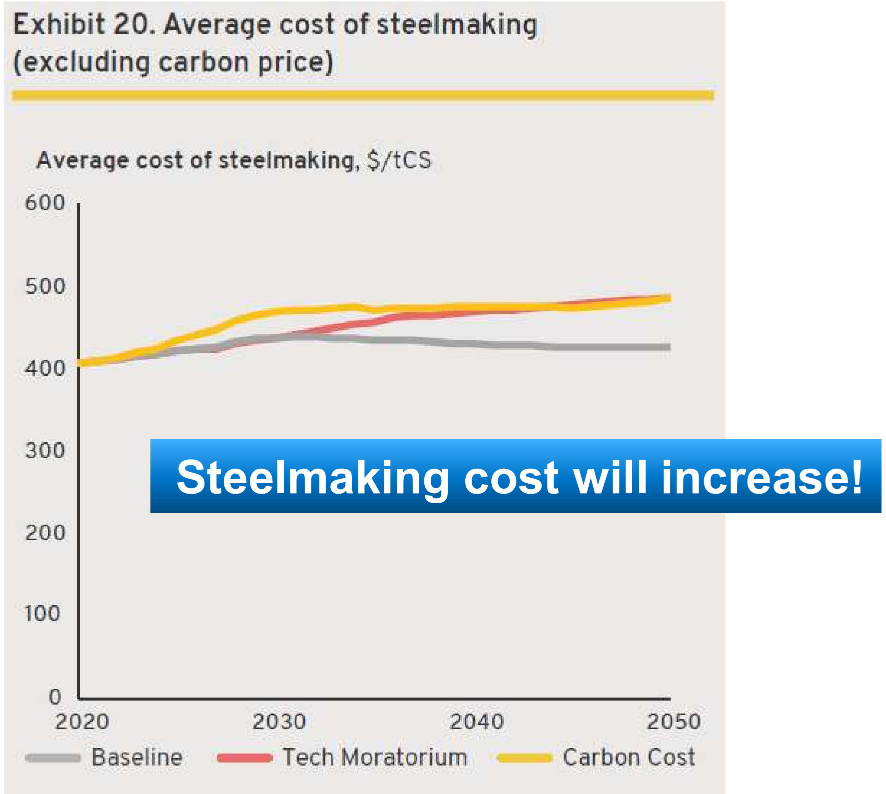
Steel industry – roadmap to net-zero carbon steel

- requires **investments in the order of €30 billions per year**, provided sufficient “green hydrogen” and “green electricity” is available at a reasonable price!
- relies heavily on Carbon Capture, Use & Storage (CCUS), which also needs huge investments!





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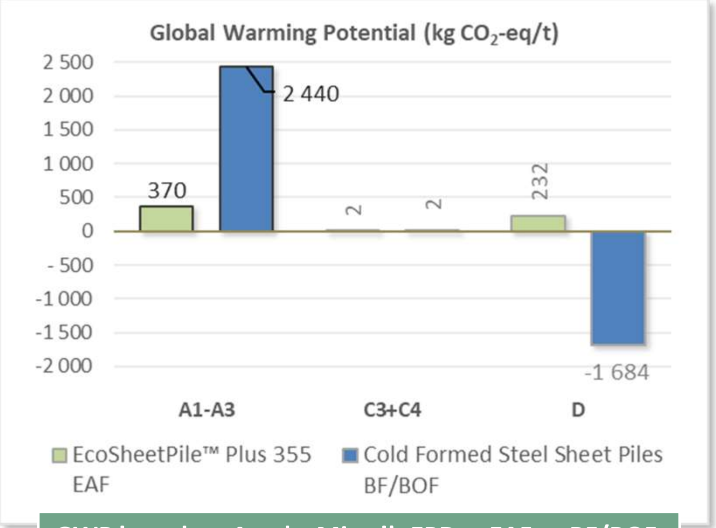
ArcelorMittal and other steel manufacturers

ArcelorMittal: “long products” such as **beams** & **sheet piles** manufactured in Europe are mainly produced with steel from EAF, which in the production phase (“cradle to gate”) has a lower carbon footprint than BF/BOF. There are some exceptions…

Competitors offer steels from EAF and BOF/BF.

Steel sheet piles:

- ArcelorMittal in Luxembourg: production from EAF, optionally with renewable electricity
- ArcelorMittal in Poland: production from BF/BOF
- Vitkovice (CZ): buys semi-products (slabs) from manufacturers using the BF/BOF route
- Anshan Zizhu (China): production from BF/BOF
- Nucor (USA): production from EAF



GWP based on ArcelorMittal’s EPDs - EAF vs BF/BOF (Recycling Rate = 100 %, Reuse Rate = 0 %)

! consider the production route of the crude steel (EAF vs BOF), but also the **rolling** of the beam-blanks / slabs into the finished product, **fabrication**, **productivity** and **transport** (mainly for long distances)
⇒ **EPDs** allow *under certain conditions* the comparison of the environmental footprint.

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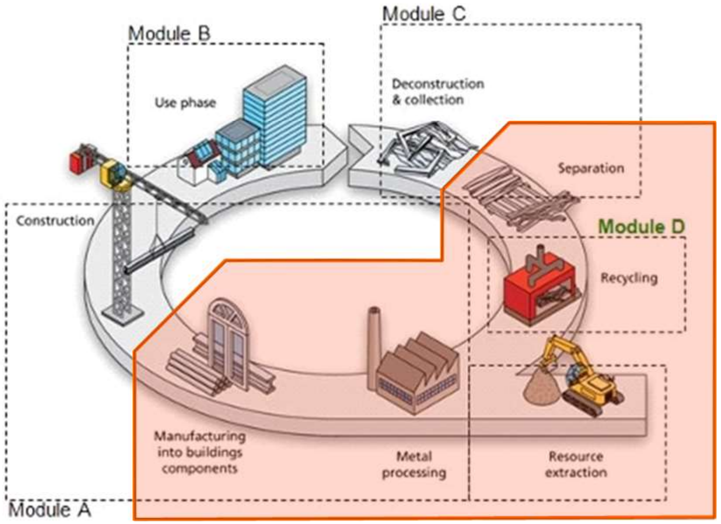
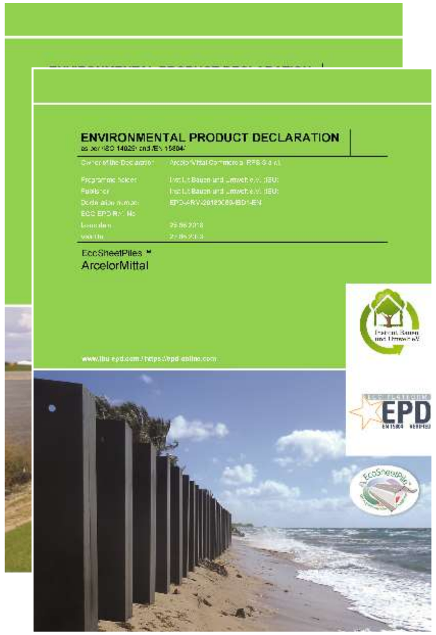
Environmental Product Declaration (EPD)

- independently verified and registered document that communicates transparent and comparable information about the life-cycle environmental impact of products (EN 15804 and ISO 14025)
- does not imply that the declared product is environmentally superior to alternatives

⇒ environmental impact of products

- declared unit: 1 t (metric tonne)
- cradle-to-gate - with options:
  - A1-A3, C3 & D
- End-of-Life scenario:
  - **varies by EPD !!!**





- transport (within Europe), installation & use phase ≈ negligible

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EPD ‘EcoSheetPiles™ Plus’ from ArcelorMittal (07/2021)

- valid for hot rolled ssp produced by ArcelorMittal – **up to S 355 GP**
- mix of shapes & production sites LU – production of 2019
  - Belval & Differdange, LU

EAF in Differdange fed with 100% renewable electricity

- manufacturing
  - LU: EAF [1] ⇒ ≈ 100% recycling, based on scrap
- End-of-Life scenario: 30% of ssp used 5 times
  - **60% recycling, 25% reuse, 15% landfill** ⇒ **85%** recycled
- published by the *German Institute IBU*
- *database: Gabi*

[1] EAF: Electric Arc Furnace

Global Warming Potential [kg CO_2-eq / t]		
Module(s)	EcoSheetPile™	EcoSheetPile™ Plus
Database	*Gabi*	*Gabi*
(A1 – A3)	**520**	**370**
(A1 – A3) + D	**517**	**694**
(A1 – A3)	*Reference*	***-29%***

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Steel sheet piles – 5 EPDs (2021)

- Differences also due to assumptions & tools: mix of mills, electricity, software, date of databases,…

Global Warming Potential [kg CO_2-eq / t]					
Module(s)	EcoSheetPile™ Plus	EcoSheetPile™	Hot rolled steel sheet piles	Cold formed steel sheet piles	Hot rolled steel sheet piles (NL - 2021)
(A1 – A3)	**370**	**520**	**937**	**2 440**	**429**
(A1 – A3)	***- 29 %***	***reference***	***+ 80 %***	***+ 369 %***	***- 18 %***
(A1 – A3) + D	694	517	603	760	406
(A1 – A3) + D	*+ 34 %*	*reference*	*+ 17 %*	*+ 47 %*	*- 21 %*
Year	*2021*	*2016*	*2018*	*2019*	*2021*
EPD Program	IBU DE	IBU DE	IBU DE	IBU DE	MRPI Stichting NL
Route	100% EAF 100% scrap + renewable electricity	100% EAF 100% scrap	Mix EAF / BOF (Belval / Dabrowa)	100% BOF	100% EAF 100% scrap
Reuse / Recycling / Landfill (%)	25 / 60 / 15	25 / 74 / 1	25 / 74 / 1	2 / 97 / 1	51 / 49 / 0
Database / Software	*Gabi*	*Gabi*	*Gabi*	*Gabi*	*EcoInvent / SimaPro*

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EPDs from other manufacturers / traders

- **generic EPDs** / industry EPDS - not forbidden per se, but can be quite misleading
- intent: compare at high level different alternatives (steel vs. concrete vs. timber), before the engineer knows which product / solution will effectively be installed / executed

Examples

- EPD Norge – Ferrometal – trading Chinese ssp (published by the *The Norwegian EPD Foundation*
  - valid for almost any steel product manufactured in ASIA
  - average of steel production in ASIA (not for a specific product, nor for a specific mill, nor a specific manufacturer)
  - manufacturing in Liangong, China
    - *World Steel Association data for rolled steel sections (ASIA) used for A1. Recycled input* (scrap) *used in the study is 43%.*
  - **NOTE**: Chinese production of ssp is most probably made with Chinese BOF steel, which has even a bigger impact than steel from a European BOF.


epd-norge.no
The Norwegian EPD Foundation

EPD

ENVIRONMENTAL PRODUCT DECLARATION

in accordance with ISO 14025, ISO 21930 and EN 15804

Owner of the declaration:	Ferrometall AS
Program operator:	The Norwegian EPD Foundation
Publisher:	The Norwegian EPD Foundation
Declaration number:	NEPD-1730-708-EN
Registration number:	NEPD-1730-708-EN
ECO Platform reference number:	00000869
Issue date:	18.03.2019
Valid to:	18.03.2024

Steel sheet piles

Ferrometall AS
www.epd-norge.no

FeRROMETALL

- EPD Norge – *Tibnor* – trading beams from ArcelorMittal and others – uses “*Histar*” EPD and adds transport from supplier in Norway to jobsite (mean value)

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Sustainability – environmental criteria – pitfalls

(wrong) **communication** …

Example: Luxembourg (CR 2020)

- there are 3 scopes
  direct & indirect emissions **272** kg CO_2-eq / t CS (CS = crude steel)

- EPD EcoSheetPiles: **520** kg CO_2-eq / t (of finished product !!)

Indicators	2018	2019	2020
Energy consumption (GJ/tCS) Gigajoules per tonne of crude steel (tCS: tonne Crude Steel) The evolution is mainly related to the fact that electricity is sourced green.	8.68	8.76	8.96
CO_2 emissions per tonne of crude steel (kg CO_2/tCS) Kilogram per tonne of crude steel (tCS: tonne Crude Steel)	300	289	272
Direct emissions (Scope 1 set by the GreenHouse Gas protocol) corresponding to the CO_2 directly emitted by the furnaces	179	180	186
Indirect emissions (Scope 2 set by the GreenHouse Gas protocol) corresponding to the CO_2 emitted to generate the energy consumed: electricity and heat (hot water, steam)	77	65	42
Other indirect emissions (Scope 3 set by the GreenHouse Gas protocol) corresponding to CO_2 emissions from products used in our workshops such as quicklime and industrial gases (oxygen, nitrogen)	44	44	44

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Green credentials – green criteria in Europe

- **Norway**: tender documents for public works (i.e. BaneNor) sometimes impose a minimum recycled content (different classes), depending on the project
- **France**: environmental impact of every new building will have to be done (including maintenance, energy consumption,…), considering also the Heath and Safety of the products during the whole lifetime (Réglementation Environnementale RE2020). Postponed to 2022. The maximum threshold for a building will gradually diminish in a few phases. https://www.ecologie.gouv.fr/reglementation-environnementale-re2020
- **France**: some large construction companies have committed to net-zero carbon emissions in 2050 and started analysing the impact of their suppliers
- **Belgium**: for buildings – free TOTEM tool – LCA of the building based on Belgian EPDs (EN 15804 with additional impact categories) – can even import BIM models - https://www.totem-building.be/ . Goal: help the Belgian construction sector to objectify and reduce the environmental impact of buildings.
- **UK**: contractors have to include Scope 3 (main contributors such as steel, concrete, asphalt,…) emissions in their environmental assessment for specific projects. The “*Environmental Agency*” already used environmental criteria.
- PEF (**Product Environmental Footprint**) will probably replace the EPDs ⇒ more consistency

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Revision of standards

- Revision of EN 15804 in 2019 – you need to consider Module D!
- New prEN 17662 (CEN-TC135 N1000 TC135 WG17 c-PCR – enquiry - 12/2020 – complements EN 15804
  - better rules, more defaults values (less space for uncertainties - variables), for instance for transport,…

Table H.1: Default values for reuse, recycling and landfill for the End of life scenarios for various structural metal products

Metal	Product	%Collected for reuse	%Collected for recycling	%Landfilled
Steel [13, 14, 15, 16]	Structural sections/tubes (hot rolled, welded)	11%	89%	0%
	Light structural steel (cold formed)	5%	93%	2%
	Internal light steel (e.g. plaster profiles, door frames)	10%	89%	1%
	Composite floor decking	10%	89%	1%
	Profile steel cladding (roof/facade)	15%	81%	4%
	Steel piles (sheet and bearing)	15%	71%	14%
	Other (e.g. stainless steel)	4%	95%	1%
	Rebar	0%	90%	10%
Aluminium	Aluminium elements 1)	0%	96%	4%

* prEN 17662-2021: "*Execution of steel structures and aluminium structures – Environmental Product Declarations - Product category rules complementary to EN 15804 for steel, iron and aluminium products for use in construction works*"

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Summary

- circular economy can help reduce the environmental impact of construction industry ⇒ optimization
- carbon neutrality can only be achieved through massive investments & R&D over a long period
- not only subsidies ⇒ cost of steel will thus increase
- short term solutions: renewable energies
- **incentives through credits for lowest environmental impact such as in NL** (*most advantageous economical tender*)
- **LCAs based on specific EPDs should be preferred**
- difficulty is to find a fair and transparent method for all the cases and construction products – comparisons (allocations!!)
- ArcelorMittal leads the path… innovative production processes

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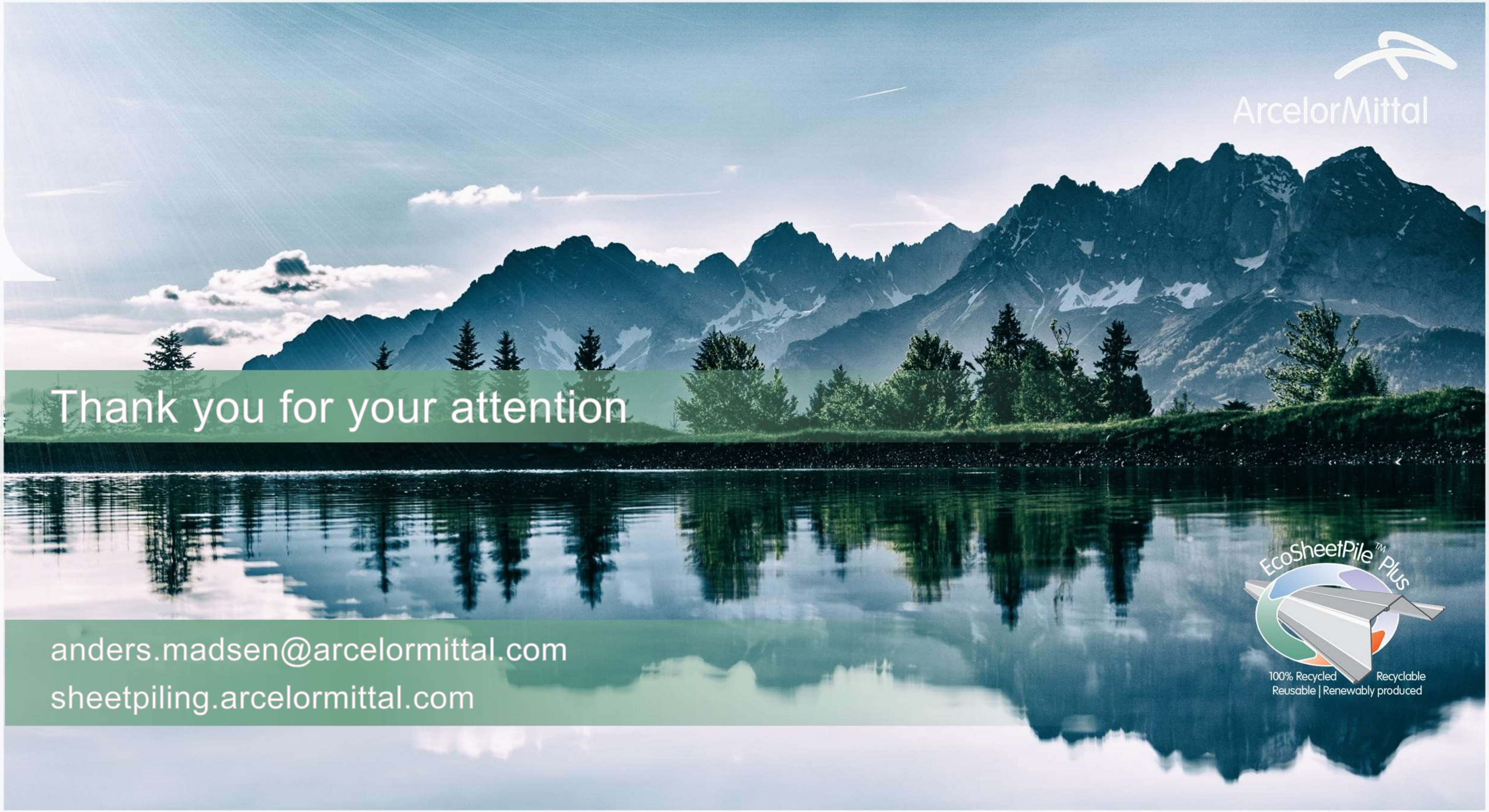
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