

### **thyssenkrupp Electrical Steel: Temporary plant shutdowns in Germany and France in face of high import pressure and a tense market environment**

- Production cutbacks and shutdowns at the Gelsenkirchen and Isbergues sites starting mid-December
- Necessary reaction to the unchecked rise in low-priced imports
- Urgent need for strong and effective trade protection measures at the European level
- Grain-oriented electrical steel: a strategically relevant and indispensable base material for power grids and the energy transition
- 1200 jobs in Germany and France at risk

Duisburg, Gelsenkirchen, Isbergues, December 11, 2025 – thyssenkrupp Electrical Steel (tkES) is set to cut back and partially shut down its production in the current fiscal year. Starting mid-December, the plants in Gelsenkirchen and Isbergues in France will be fully closed down until the end of the year. In addition, the Isbergues site will operate at just 50 percent of its total capacity for at least four months beginning in January. The thyssenkrupp Steel subsidiary is thus responding to the massively increased inflow of low-priced imports, especially from Asia.

The European market for grain-oriented electrical steel is currently under severe pressure driven by sharply rising import volumes priced well below the average production costs in the EU. Since 2022, imports have tripled, and rose a further 50 percent in 2025. These developments have led to a dramatic shift in customer orders and, as a result, to substantial underutilization of the European production facilities. Consequently, immediate measures to ensure the economic stabilization of operations are essential. Despite current challenges, the market for grain-oriented electrical steel remains attractive: according to market studies, global demand is projected to triple by 2050.

Marie Jaroni, CEO of thyssenkrupp Steel Europe: "Grain-oriented electrical steel is an indispensable element for Europe's energy infrastructure and the energy transition. We are firmly committed to maintaining production in Europe, and are currently working to ensure effective market protections. These efforts are crucial to securing fair competitive conditions for this strategically vital product and protecting approximately 1,200 high-quality jobs at our sites in Gelsenkirchen and Isbergues."

Near-term implementation of efficient and appropriate trade protection measures at the European level would help raise capacity utilization at both sites to a sustainable level. At the same time, however, the measures must also protect downstream companies within the value chain, which are likewise suffering from intensifying unfair competition. thyssenkrupp Steel remains committed to serving its customers to the highest standards and to securing the long-term future of grain-oriented electrical steel production in Europe

thyssenkrupp Electrical Steel is one of Europe's two remaining producers of grain-oriented electrical steel, a specialized material for applications in the energy industry. The material is used, for example, in transformers for substations and wind turbines. In short, it is essential for transmitting electricity from the power plants where it is generated all the way to the household outlet. Without high-performance electrical steel strip, this process simply cannot take place – the material is irreplaceable. To ensure that power transport is as efficient and low-loss as possible, special grades – referred to as top grades – are required. These grades are produced through a technologically advanced manufacturing process. thyssenkrupp Electrical Steel is one of the few companies worldwide capable of producing such top grades, making it a key technology partner across the entire electricity value chain. Grain-oriented electrical steel is also vital to the energy transition: maintaining a strong European production base strengthens the resilience and security of the region's energy supply and is therefore essential to Europe's strategic autonomy.

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