



Progress Report

2026



Message from the Chair



The past year, and recent weeks in the Middle East, have shown just how quickly expectations and risks for the steel industry are evolving. Industry conversations centred on sustainability investments are now diverted to tackling immediate logistical and operational challenges. The resilience of energy and materials supply chains in this more volatile landscape is dominating the attention of both industry and consumers. And yet with climate change unabated, customers, regulators, investors and civil society are asking tough questions about **the credibility of transition plans and 'green' claims**. In this evolving context, **ResponsibleSteel's role as a trusted** multistakeholder convenor and an independent global reference point has never been more critical.

In 2025, the steel industry increasingly recognised the value of ResponsibleSteel certification - not just as a best practice badge, but as a practical framework for continuous improvement. Seven new sites achieved ResponsibleSteel certification, among them the first in the Gulf Cooperation Council (GCC) region,

the largest single site to date in Europe, and four new sites in India. Equally encouraging, every site reaching the end of its certification cycle chose to recertify. These achievements highlight the importance to steelmakers and their customers of having credible, independent verification, particularly in challenging market conditions.

Last year also saw a step change in global alignment. ResponsibleSteel concluded groundbreaking agreements with the Low Emission Steel Standard (LESS) in Europe and with the China Iron and Steel Association (CISA), **the national body for steelmakers in the world's** dominant market. ResponsibleSteel demonstrated our key value as a global convener, laying foundations for interoperability mechanisms that provide market clarity and enable investment to help grow markets for low-emission and near-zero steel. This is a clear demonstration of what policymakers and industry leaders increasingly recognise - the need for interoperable metrics and definitions - and ResponsibleSteel is leading this shift.

Our collaborative model and our multistakeholder approach are central to

ResponsibleSteel's ongoing success. We help bind the steel manufacturing value chain to civil society, finance and policy experts, and together we build a shared understanding of what credible progress in sustainability looks like. To assist us, we welcomed six new Board Directors in 2025, refreshing our bench strength by broadening the expertise and perspectives guiding our work.

Thank you to all our members and partners for your commitment throughout the year. Your keen engagement, through committees, surveys and reviews, helps ensure ResponsibleSteel remains grounded, that we retain integrity and impact, and also crucially, deliver efficiency and value. Together, we are helping shape an industry capable of delivering the responsible, resilient transition the industry needs.



Gerry Tidd

Chairman,
ResponsibleSteel



Key moments from 2025

February



ResponsibleSteel launches claims working group

In response to member requests, ResponsibleSteel began working group discussions to assess the current claims framework and identify opportunities to strengthen the value of Core Site Certification claims while maintaining the credibility of ResponsibleSteel and its members.



Video explainer clearly sets out how ResponsibleSteel certification works

ResponsibleSteel published a [short video explainer](#) outlining the Production Standard's Principles and the key components of ResponsibleSteel certification. This 3-minute video is an engaging and useful tool which can be used by members to demonstrate the role and value of ResponsibleSteel to stakeholders.

May



Investor roadshow highlights the power of Core Site Certification

In partnership with Ceres, ResponsibleSteel embarked on an investor roadshow in the US, convening asset managers, banks, and other financial institutions to explore the information investors need to make informed decisions and the role ResponsibleSteel can play in supporting capital allocation for the steel sector's transition to near zero.



Microsoft references ResponsibleSteel

[Microsoft and Carbon Direct provided guidance](#) on the performance criteria they expect of their suppliers, aimed at accelerating decarbonisation in the built environment. For steel, the criteria recognise ResponsibleSteel Progress Level 2 as the minimum threshold, and Level 3 alongside a time-bound plan to reach Level 4, which is recognised as the ideal benchmark, providing a much-needed demand signal for the market.

May-June



ResponsibleSteel and IRMA host workshops on driving just transitions for steel and mining

Funded by the ISEAL Innovations Fund with support from the Swiss State Secretariat for Economic Affairs (SECO), these two workshops were part of a joint project exploring the role of voluntary sustainability standards in supporting a just transition within the steel and mining sectors. These workshops offered a valuable opportunity to influence the development and implementation of just transition standards and assurance systems, and were critical to gaining stakeholder insights to inform our recently launched report: [Driving just transitions in the mining and steel sectors](#).

June



ResponsibleSteel publishes fundamentals for GHG emissions accounting and classification

ResponsibleSteel published its [GHG emissions accounting & classification fundamentals](#) to improve the comparability, consistency and transparency of emissions accounting and reporting across the global steel industry by showcasing three of Principle 10's fundamental components.



ResponsibleSteel and LESS publish joint briefing

This [joint briefing from ResponsibleSteel and the Low Emission Steel Standard \(LESS\)](#) outlined a practical approach for designing a fair and effective EU label for low-emission steel. The report highlighted that while steel recycling rates are high, global scrap availability is fundamentally limited. It proposed a "steel decarbonisation scale" that accounts for both greenhouse gas emissions and the ratio of scrap to primary iron used in production.



Campaign launches aimed at steel buyers and investors

Our [Strength to Strength campaign](#) highlighted how Certified Steel – and ResponsibleSteel certification more broadly – can support investment and procurement. The campaign featured tailored guides for steel [buyers](#) and [investors](#) designed to illustrate the use of certification as a tool to mitigate risk and support decision-making.

September-October



ResponsibleSteel hosts two convenings on policy

These convenings, hosted in [Delhi](#) and [Brussels](#), brought together governments, policymakers, civil society and industry leaders to discuss some of the most critical obstacles and opportunities to driving steel decarbonisation in India and Europe.



Working group convenes to revise criteria related to climate transition plans

ResponsibleSteel launched a working group to discuss revisions related to transition plans, including emissions reduction target setting and related disclosures, as part of the broader [revision of the International Production Standard](#). These discussions aimed to provide clarity and cohesion between Principle 10 criteria and forge links between site-level and corporate-level planning.

September-October



Just transition working group launches

This working group was tasked with examining the findings of ResponsibleSteel's joint project with IRMA to promote just transitions across the steel and mining sectors. The working group aims to determine the most effective way to advance this work and identify opportunities to integrate just transition principles.



First open elections for a new Board Director

ResponsibleSteel held its first open election for a seat on the ResponsibleSteel Board of Directors, giving membership a pivotal opportunity to help shape the future of our organisation and the industry.

November

ResponsibleSteel announces landmark agreements with LESS and CISA at COP30

At COP30 in Belém, [ResponsibleSteel announced new partnerships with the China Iron and Steel Association \(CISA\) and Europe's Low Emission Steel Standard \(LESS\)](#), extending a common approach to GHG measurement and classification to regions representing some 60% of the world's steel production. These agreements aim to bring major steel-producing regions together under interoperable definitions of low-emission and near-zero steel and signal strong global support for the scrap-variable approach to steel classification.



December



SteelWatch includes ResponsibleSteel certification in Transformation Tracker

SteelWatch launched its [Steelmaker Transformation Tracker](#) to monitor the performance of 22 major steelmakers on their climate and social commitments. ResponsibleSteel Core Site Certification and Certified Steel are both included as key indicators to measure progress.



Banking 'LEO platform' takes a ResponsibleSteel lens on steelmaker data

The [LEO platform](#) aims to simplify how companies provide data to banks for transition finance and regulatory reporting. Developed by ESG Book with global banks in partnership with GFMA, Google and BCG, this platform enables ResponsibleSteel members to share their data privately. The template is interoperable with bank requirements, ISSB, CSRD, GRI and aligned to ResponsibleSteel requirements, reducing duplicate work.



ResponsibleSteel and industry leaders call on EU steel label to adopt 'sliding scale' approach

ResponsibleSteel joined other industry stakeholders to [argue for the adoption of the Sliding Scale or Steel Decarbonisation Scale](#) as the basis for the European Label for Steel, ensuring a fair and effective transition of the steel industry to near-zero emissions steel.

The background image shows an industrial facility, likely a steel mill, with various structures and pipes. A prominent building in the foreground has a green facade with the EMSTEEL logo and name in Arabic and English. The scene is overlaid with a semi-transparent blue and teal graphic consisting of overlapping circles and shapes. The text is centered in white.

Insights from our certification programme



In 2025, the first site in the MENA region, as well as the largest site in Europe to date, achieved Core Site Certification.

7 new sites were certified, and 100% of sites with certifications expiring in 2025 chose to pursue re-certification, with 6 sites completing the re-certification process.



“

ResponsibleSteel certification provides the industry's most trusted pathway for advancing responsible low emissions steel production. Achieving Core Site Certification is a significant milestone for EMSTEEL, reinforcing our commitment to transparency, sustainability and continuous improvement. As the first Certified Site in the MENA region, we are proud to support the growth of responsible steelmaking across the region.

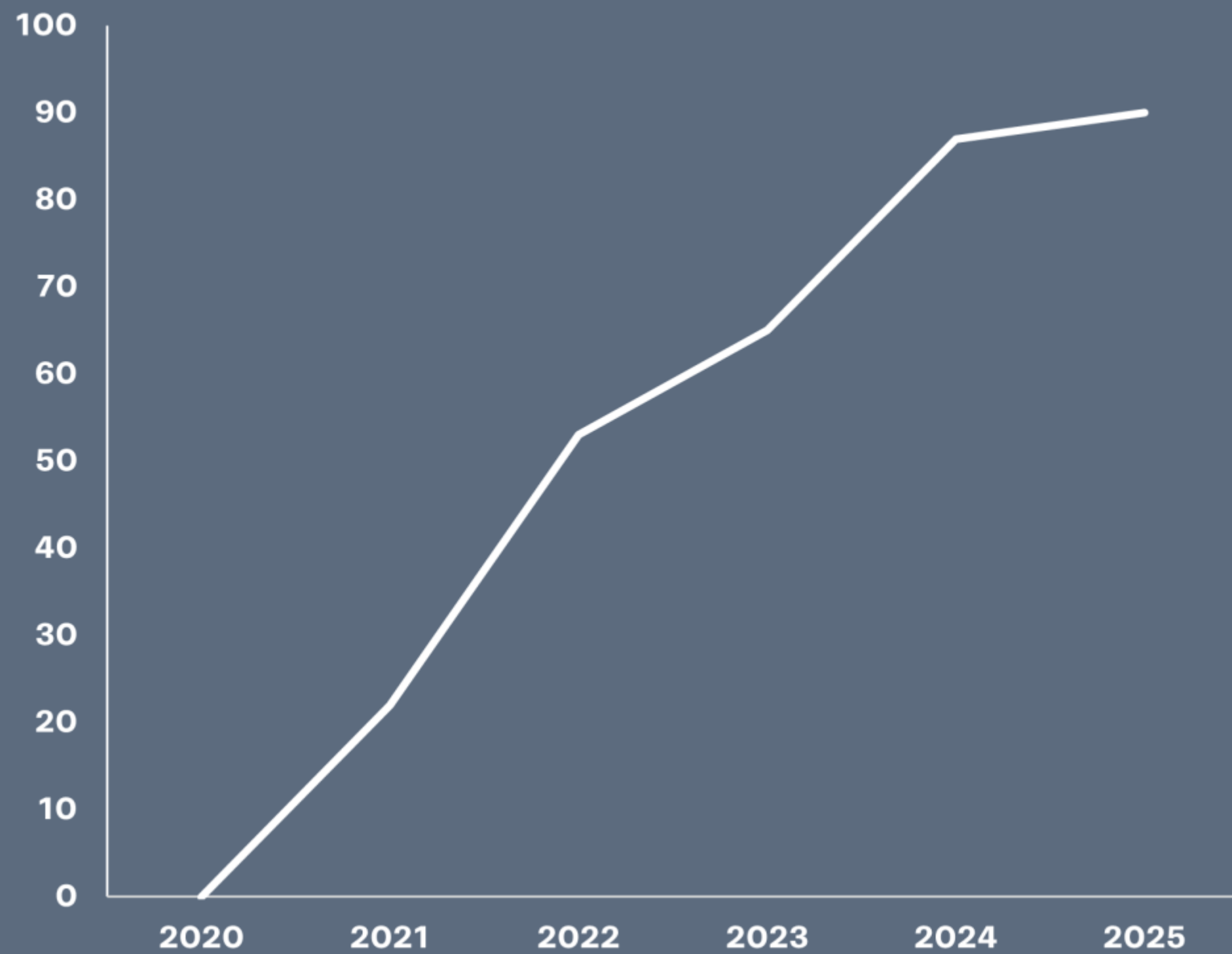
”

Dr Dimitrios Dimitriou

Vice President - ESG & Sustainability, EMSTEEL and
ResponsibleSteel Board Director



Growth of certified sites year-on-year:



Globally we have

90

Certified sites across 19 countries

Site type	Number of sites
Steelmaking	41
Downstream	49



A year of firsts



JSW Steel achieves first certifications for 4 sites

ResponsibleSteel Core Site Certification now covers around 29% of India's steel capacity.



EMSTEEL achieves first certification

The first ResponsibleSteel Core Site Certification in the MENA region.



thyssenkrupp Steel achieves first certification

The largest steelmaking site in Europe to date to be certified.

Certified Sites





Certified sites have a production capacity of over:

142

million metric tons
of crude steel
yearly.

Equivalent to:

6.47%

of global
crude steel
capacity.



Image courtesy of JSW Steel.



Certified Sites collectively employ over:

262,000
workers

An 11% increase from over 236,000 workers in December 2024.

Direct workers: 139,200
Contract workers: 123,549

Female*	Male*
10% of workers	90% of workers

*Direct workers only based on information from 33 out of 43 certificates.



ResponsibleSteel certification covers:

28

Electric Arc Furnaces

Compared to 24 EAFs
in December 2024.

51

**Blast Furnace-Basic
Oxygen Furnaces**

Compared to 47 BF-BOFs
in December 2024.



266 million metric tons CO₂e

Equivalent to 7.3% of the steel
sector's CO₂e emissions come from
ResponsibleSteel certified sites.

This is significant - as part of their certification,
all of these sites have committed to site-level
targets in line with the Paris Agreement.



Insights from our membership programme



“

As a global supplier of offshore wind foundations, Penglai Dajin Offshore Heavy Industry joined ResponsibleSteel to strengthen responsible sourcing and transparency across the steel supply chain. Credible standards like ResponsibleSteel play a vital role in supporting the low-carbon transition of steel and ensuring that renewable energy infrastructure is built on truly sustainable foundations.

”

Carlos Martin

General Manager - Floating Offshore Wind,
Penglai Dajin Offshore Heavy Industry



We welcomed 12 new members in 2025, contributing to a total of:

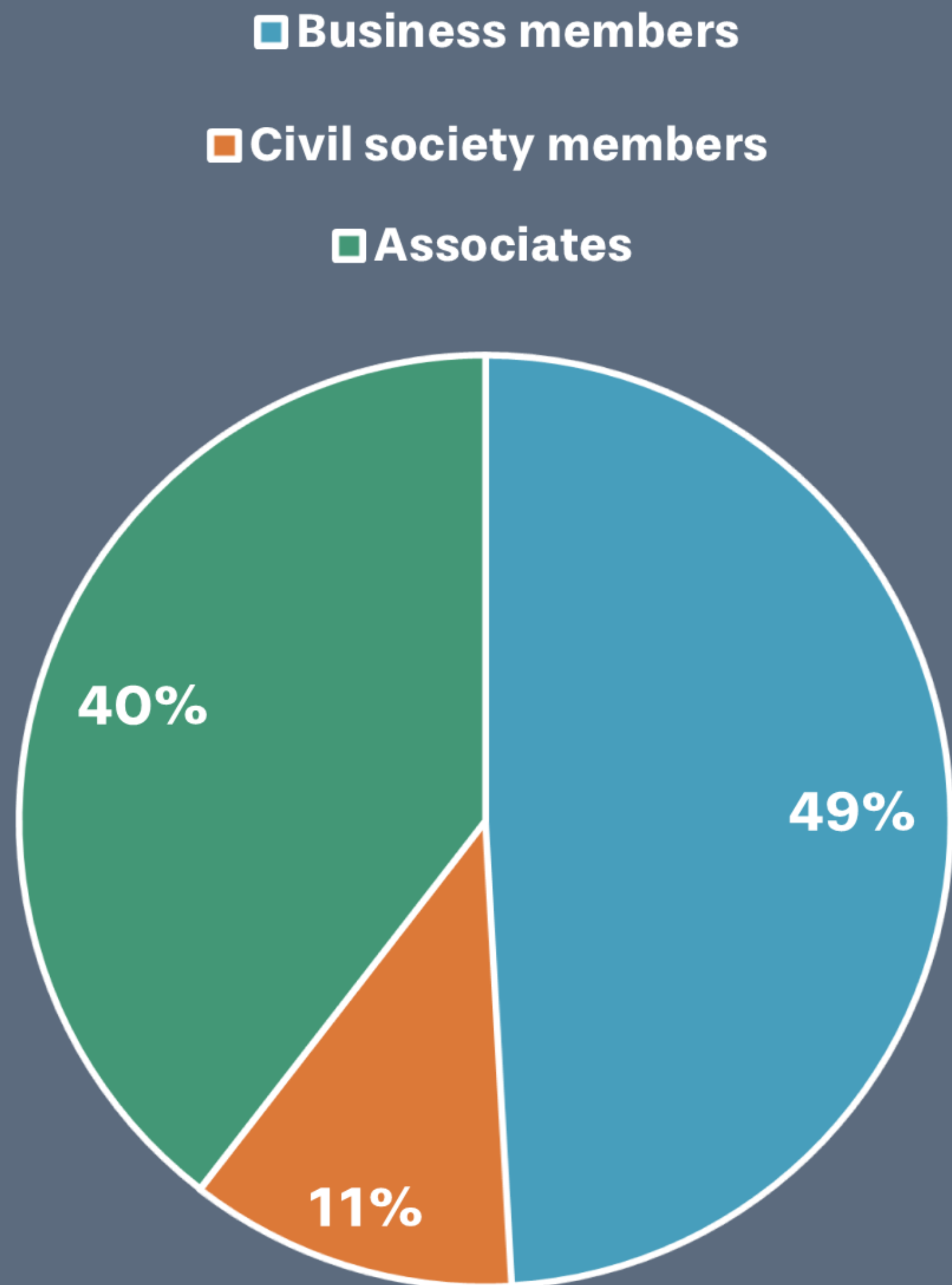
167

ResponsibleSteel members at the end of 2025.

82 Business Members

19 Civil Society Members

66 Associate Members





Steelmaking members have a production capacity of over:

254

million metric tons
of crude steel
yearly.

Equivalent to:

11.56%

of global
crude steel
capacity.



We have members
headquartered in
36 countries.



Africa



Asia



Europe



Middle East



North America



Oceania



South America





STEELWATCH

Bringing climate urgency to steel

“

Building the market for low-emissions and responsibly-produced steel requires a robust standard, with transparency and third-party verification. As ResponsibleSteel delivers and refines this, SteelWatch has contributed to working groups, making our views known and hearing others. Having a diverse group of members involved in the development of the International Production Standard helps to achieve a balance between what steelmakers deem feasible, and where the standard needs to set the bar to trigger ambitious action on the climate crisis.

”

Caroline Ashley

Executive Director, SteelWatch

Message from the CEO





As we look ahead, our task is clear: to scale the global market for responsibly produced low-emission and near-zero steel to flourish. Many companies continue to face unpredictable market conditions and, as a result, we are seeing delays to major transition investments. In such an environment, progress rarely follows a straight line, but this only underscores the importance of staying focused on the long-term **mission we share. We've been encouraged by** the renewed determination of many of our members and stakeholders to keep driving continuous improvement despite the challenging context.

A key focus in 2025 was strengthening alignment between ResponsibleSteel and other climate methodologies, both through our role in the Steel Standards Principles and in our MoUs with regional frameworks to develop interoperability mechanisms.

This work is key to expanding low-emission steel supply, enabling global trade through comparable data, strengthening investment cases, reducing regulatory burden and supporting effective policy. In short, it helps to

keep global trade gates open and ensure a claim made in one region can be understood and trusted in another. It is another example of how ResponsibleSteel enables change: by reducing fragmentation, building trust and creating the conditions for real momentum.

In 2026, our focus is on reinforcing the systems that will underpin growth in responsibly produced low-emission and near-zero steel. We are progressing work around interoperability, as well as the revision of our Production Standard and claims framework to improve clarity and usability. We are continuing to expand our engagement with buyers and investors, highlighting certification as a multipurpose tool to manage risk and track supplier and investee progress.

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Annie Heaton

CEO,
ResponsibleSteel



Come with us

Find out more about how you can support us:

www.responsiblesteel.org

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