

Top down

Total steel used per category

In limited cases where quality data for bottom-up analysis was unavailable, we used top-down estimates of the total steel used per subsector/category. Examples include total volume of rails used (as almost 100% of rails is used in public infrastructure) and total steel used in electricity transmission and distribution.

Bottom up

Quantify activity

Annual volumes per category (lane-km, track-km, m² GIFA, units, MW) from Eurostat, ACEA, Wind-Europe and academic literature.

Apply steel intensity

Tons of steel per unit from engineering literature and EPDs, flat/long split from Allwood et. al. shape data.

Total in scope steel demand for public procurement**Filter to Annex II in-scope demand**

Direct procurement: 100%

Support schemes: 100%*

Apply 25% low-emission threshold steel

Low carbon steel demand subject to Annex II requirements