October 2025

Dear European Leaders,

On behalf of Europe's non-ferrous metals industry, we urge you to take immediate and decisive measures to restore the competitiveness of European industry and safeguard the wider economy.

More than three years into the most severe energy crisis in modern history, European citizens and businesses continue to suffer from unsustainably high energy prices and deep uncertainty over production costs. Despite the scale and persistence of this crisis, meaningful action to address these structural challenges remains insufficient. The consequences are severe: Europe's industrial base is being eroded at a time when global competition is intensifying.

The European non-ferrous metals industry is indispensable to Europe's economic resilience, its twin energy and digital transitions, and its security. Our materials underpin renewable energy technologies, defence capabilities, and digital infrastructure. Yet, instead of expanding mining, refining, smelting, and recycling metals capacity, Europe is losing it. Since 2020, twenty aluminium, silicon, and zinc facilities have been forced to close.

Beyond job and investment losses, the closure of EU plants leads to higher global emissions, as Europe's low-carbon metals production (we have reduced our greenhouse gas emissions by more than 62% since 1990) is replaced by imports with a much higher carbon footprint. This trajectory is fundamentally at odds with EU's climate ambitions and the strategic autonomy outlined in the Draghi Report and gravely undermines Europe's ability to remain sovereign in critical areas. It also negatively impacts the ability to achieve the Critical Raw Materials Act objectives: the development of 10 new mines for non-ferrous metals, 15 new processing facilities and 15 new recycling facilities.

The only viable path to rebuilding competitiveness is to ensure globally competitive production costs, starting with secure and affordable access to renewable and low-carbon energy. We therefore call on the European Council and the Member States to urgently commit to the following measures essential for Europe's economic security, particularly in the context of 2040 framework discussions:

Immediately address the high cost of energy for Energy-Intensive Industries (EIIs), including by considering our proposal for a price shock absorber[1].

Ensure sufficient funds are allocated to indirect carbon costs compensation to provide adequate carbon leakage protection which must remain unaffected by the addition of new sectors; **extend indirect cost compensation beyond 2030;** for aluminium and ferro-alloys as CBAM sectors – **keep indirect emissions outside CBAM scope.**

Facilitate access to globally competitive electricity through targeted support, including profile-matching costs for renewable energy sources, guarantee schemes for power purchase agreements

[1] Eurometaux Electricity Market recommendations

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(PPAs), and allocating a significant share of Contracts for Difference output to PPAs with electro-intensive industries – as recommended by Draghi Report.

Ensure CBAM becomes an effective and predictable carbon leakage protection system, incorporating export provisions, robust anti-circumvention measures, and the closure of all identified loopholes.

Make the EU ETS a driver of both decarbonisation and economic resilience through greater compliance flexibility; avoid undue direct and indirect carbon costs that lead to carbon leakage.

Reduce regulatory and market costs for NFM facilities by cutting network charges, flexibility costs, taxes, renewable levies, and other policy-imposed costs borne by EIIs; thoroughly implement these measures at national level.

Dear leaders,

Europe cannot afford further delays while competitors in the US, Middle East and China benefit from structurally lower energy costs, direct state support, and industrial policies that prioritise energy security for industry. Europe cannot ignore these realities.

Without urgent action, Europe risks losing an industry that is central to its prosperity, sustainability, and security. The time to act is now and we stand ready to support and work together.

Signatories:

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EPMA european powder metallurgy association

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