
Annual Report

2010



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A Word from the President

Dominique Maguin reviews his four years as BIR's World President...

What is your first thought when you reflect on your tenure as BIR President?

How time flies. And now the time has come for me to look back on four years as the head of our organisation. In 2007, when I was installed as President at our Spring Convention in Athens, I could not have imagined for a single moment the turbulent and dramatic period into which we were about to be plunged. The adventurous financial policies of our greatest banking institutions were about to lead us into the "sub-prime" crisis. Without realising it, the world's most renowned financiers had been creating a devilish monster which was about to spark chaos. But back in 2007, we had no concept of the phenomenon to come.

What targets had you set for your presidency?

At that time, and in co-operation with the BIR Executive Committee and Advisory Council, I established the following objectives for my time as President:

- *To set up a Statistical Observatory in order to arrive at a fuller understanding of our markets and to quantify our achievements to the economic and political worlds – a long and delicate task.*
- *To measure our industry's carbon footprint through a study ultimately undertaken by the world-renowned Imperial College of London.*
- *To create an International Trade Council to help safeguard the free movement of our materials around the world and to enable BIR to have a rapid response to any attempts by governments or consuming industries to introduce protectionist measures.*

Would it be a supreme understatement to suggest that business conditions changed significantly during your time in office?

It certainly would! 2007 and the first half of 2008 were particularly healthy periods for our businesses. Pushed upwards by international demand, the prices of our materials reached previously unequalled heights, giving us cause for additional celebration at our 2008 Spring Convention in Monte-Carlo where BIR celebrated its 60th birthday.

However, by the time of our 2008 Autumn Convention in Düsseldorf, tired and worried faces were gathering in the meeting rooms: our markets had collapsed in an instant.

Several months earlier in Monaco, our General Assembly's guest speaker Lord Nicholas Stern had told us of the brilliant future that awaited our industry and that our role in the global economy as raw material providers was one of the planet's best-kept secrets, calling on us to communicate the importance of our work to the whole world. I am convinced that he was absolutely right in saying this.

Once hit by what became recognised as the biggest economic crisis in history, I urged the industry not to relax its efforts to gain recognition for its contribution and to safeguard the free movement of the raw materials we produce. This is absolutely vital for our businesses.

What was the impact on BIR of the world financial and economic crises?

2009 was marked by financial measures and injections of capital by the major nations in a bid to avoid the worst: the financial collapse of certain countries leading to a catastrophic chain reaction. In this period of painful uncertainty, BIR continued to welcome a growing number of recycling professionals to our Conventions in Dubai (our first in the Middle East) and in Amsterdam. This was an encouraging sign for our industry as BIR members resisted the temptation to shun such gatherings during difficult times for us all. For me, it is important to thank our members for their support and trust in us; their continued presence gave us the desire to continue to serve BIR with passion and determination.

Very happily, 2010 enabled us to rediscover the growth path thanks to material prices returning practically to their historic highs of 2008. However, the volumes handled by our businesses have not returned to pre-crisis levels and remain affected by the general slow-down in the world economy.

What other key developments have taken place during your second two-year term?

At our 2010 Conventions in Istanbul and Brussels, we were able not only to improve our understanding of our markets but also to rubber-stamp an essential revamp of our statutes and by-laws. Our adoption of new statutes and the adaptation of our internal rules bring us into line with latest legal demands on international organisations.

“Once hit by the biggest economic crisis in history, I urged the industry not to relax its efforts to gain recognition for its contribution and to safeguard the free movement of the raw materials we produce.”

It's a delicate task to revisit the founding text of an organisation which, over the years, has welcomed new members from different countries as well as various national federations. Our membership comprises many different types of enterprise, all with different but legitimate needs; it is therefore a difficult proposition to bring all these together without creating distortions.

Most importantly in conducting this process, we surrounded ourselves with experts in this field and first carried out a review of the rules adopted by some of the world's major professional organisations.

The process was undertaken without complacency, sometimes with difficulty, but always with a sense of unity.

Overall, do you feel you have met the targets you set for your presidency?

My second term of office is almost at an end. The objectives I set in 2007 were ambitious and economic conditions during the intervening period have not always been easy, to say the least. But I am pleased to be able to say: mission accomplished. Entrusted to world expert Professor Philippe Chalmin, the Statistical Observatory has published its first results; our carbon dioxide emissions study earned BIR an invitation to a summit attended by heads of state in Copenhagen at which the problems of global warming were discussed.

Meanwhile, BIR's International Trade Council immediately proved its worth in the face of problems such as order cancellations and attempts to introduce protectionist measures. We have also modernised our arbitration rules and aligned them with current legal requirements.

What will be the key challenges facing BIR in the future?

During this entire period, and despite several notable collapses in the financial and banking sectors, we have succeeded in consolidating and growing our assets and financial positions, allowing us to look fearlessly to the future. We must still work hard to ensure the definitive removal of our products from their association with "waste"; and we must also be vigilant in the face of the never-greater temptation for governments to introduce protectionist measures.

“We are the only global recycling organisation: some try to copy us, but no other body can match BIR in its knowledge base or in its breadth of membership.”

What makes BIR such an enduringly robust organisation?

Our world federation is unique while the work it has accomplished since its formation in 1948 has been immense, and so we must remain true to this heritage. We are the only global recycling organisation: some try to copy us by organising conventions and by reproducing our work on occasions, but no other body can match BIR in its knowledge base or in its breadth of membership.

For this reason, our organisation will continue to attract new members in the years ahead. We are not a “club” that puts people on a waiting list but a professional body with an obligation to welcome all new recruits who conform to our laws, rules and customs. It is partly for this reason that BIR succeeds in its mission.

Other reasons are equally well understood: our protection of the planet; and the dwindling supplies of primary raw materials available for extraction from the earth at a time when demand for those same raw materials has never been greater given the world’s ever-growing number of hungry consumers. Back in 1948 at the birth of BIR, the global population was around 3bn; today, the figure is almost 7bn and is estimated to exceed 9bn by 2050. Every day, the world population grows by another 210,000 people.

But you don’t believe BIR’s position of strength should be taken for granted?

We must continue to improve the quality of our services by remaining attuned to the changing needs of our members, by monitoring and analysing potential new legislation, and by remaining alert to economic developments and to international relations. This vital work is being carried out by an excellent team of passionate professionals who our members have charged with the responsibility of representing and defending the interests of their companies and organisations. As my tenure as BIR President draws to a close, I offer once again my deepest respect and thanks, in particular to the BIR General Secretariat in Brussels.

2010 was a “special” year for all the world’s industries which, after the collapse of 2008, were again faced with a fantastic rise in raw material prices. The recycling sector – which BIR is proud to represent through 40 national trade associations and over 750 commercial companies throughout 70 countries – did not escape this phenomenon.

On-going demand for new infrastructure and consumer goods within emerging countries – particularly China and India – combined with the ever-growing role of speculative funds to boost the prices of primary materials, recyclables and recycled materials to record levels in some instances. Meanwhile, climatic conditions and natural catastrophes hampered the smooth supply badly needed to meet high demand.

Undoubtedly, the need for our recycled materials over the last decade has grown to such an extent that our member companies have progressively established themselves as the leading suppliers of raw materials. This fantastic development will create interesting challenges for our sector.

Satisfying over 50% of the world’s raw material needs, the recycling industry has indeed an exceptional opportunity to proudly proclaim its active and long-standing contribution to sustainability.

The report on world markets for recovered and recycled commodities which we published last year with the expert input of Prof. Chalmin from the Dauphine University in France, as well as our “Steel scrap – a raw material for steelmaking” study compiled under the auspices of the BIR Ferrous Division, clearly illustrate the economic and environmental roles performed by our materials which, more than ever, must be allowed to circulate freely to feed the growing appetite of the producers of new goods worldwide.

As a responsible international trade organisation, BIR has continued to facilitate free and fair movements of recycled materials and to ensure that non-hazardous recyclables are subject to neither trade nor technical barriers. To fulfil this role in 2010, BIR – with the help of its membership – undertook successful actions with governmental authorities in East Africa, India, Russia, Algeria, China, Sri Lanka and South Africa to oppose measures which would have prevented steel mills, foundries, smelters or paper mills from being properly supplied.

Pursuing its educational mission with regard to the environmentally sound management of recyclables and the quality production of recycled materials, BIR also widely circulated its “Tools on ESM” (soon to be available in Chinese) which integrate the OECD’s six core performance elements into a tailored management system.

Director General's Report



*Francis Veys,
BIR Director General*

“Satisfying over 50% of the world’s raw material needs, the recycling industry has indeed an exceptional opportunity to proudly proclaim its active and long-standing contribution to sustainability.”

In addition, our organisation decided to produce a guidance document to help all operators to develop a quality management system implementing ISO standards.

BIR also informed all of its affiliates about the new requirements of the DGFT in India and the CCIC/AQSIQ in China, helping them to comply with their legislation relating to recyclables and recycled material imports. And as a guide for scrap operators around the world, BIR produced a poster in all the major languages – including Hindi and Chinese – giving advice on unwanted radioactivity entering scrap yards and recyclables.

On the European front, BIR co-operated with its daughter associations in the EU – namely EFR (steel recycling), Eurometrec (non-ferrous metals recycling) and ERPA (paper recycling) – in the EU Commission’s work on “end of waste”. This work will soon bring legal certainty with respect to a range of recycled materials – such as iron and steel scrap, aluminium and copper scrap, and paper – as an EU Council regulation will adopt clear criteria to distinguish waste/recyclables from our end products, i.e. recycled materials. Such criteria should encourage EU companies to increase investment in technologies and Best Available Techniques and produce cleaner products while simultaneously reducing the risks of “illegal” shipments – a negative term adopted by EU mills to prevent shipments of recyclables and recycled materials to other competing markets.

This Council regulation, which will become official in 2011, is the result of more than 20 years’ effort by the EU recycling sector and our world organisation is proud of what has been achieved by its daughter associations in the EU.

BIR’s efforts to ensure a better quality of both recycled materials and operators worldwide will continue during this new decade.

In order to provide our organisation with an even more professional framework, BIR refreshed its statutes and internal regulations in 2010 and these now meet latest statutory requirements applying to international trade associations. Officially ratified last October, these statutes address important issues such as respect of anti-trust rules as well as simpler and more efficient decision-making processes, and also impose stricter conditions for joining and remaining part of our organisation. These new statutes also grant greater recognition of our arbitration services and recommend BIR arbitration as an easy way to settle commercial disputes.

Over the last ten years, BIR has enjoyed an almost 50% increase in its membership, with a growing number of affiliates from emerging countries where recycling is making consistent progress. This trend is not expected to slow down over the coming years as it reflects the need for raw materials in new regions of the world.

As a world trade association, BIR will continue to hold its meetings in key business locations. We met in Dubai in 2009 and in Turkey in 2010, and in 2011 we will hold our Spring Convention in Singapore. Those interested in identifying new commercial outlets and customers in the booming South Asian market will be joined by people from that region who want to learn from the industrialised world’s experience, thereby creating the best forum for the world’s leading raw material suppliers.

2010 Review Calendar

The following calendar reflects some of the BIR news as well as trade press headlines and quotations that caught the eye in 2010.

"AS WE ENTER 2010, IT IS CLEAR THAT THE WORST IS BEHIND US"

Metal Bulletin begins the year in positive vein with a quotation from Aditya Mittal, CFO of the world's largest steelmaker ArcelorMittal.

COPPER CONTINUES TO BLAZE THE TRAIL

Copper sets the tone for 2010 by making a strong start to the year in price terms.

BIR MEETS WITH AQSIQ IN BEIJING

Director General Francis Veys and BIR's Ambassador for China David Chiao obtain an important clarification of application procedures for the AQSIQ registration of overseas suppliers of recyclables to China.

PRICES RAMPANT AS DEMAND RISES

As the first quarter draws to a close, ferrous scrap price increases are described as "breathtaking" in their magnitude.

STAINLESS BEGINS TO FLOURISH AGAIN

After the steep drop in global production in 2009, industry experts point to clear signs of an improvement in stainless steel's fortunes.

JANUARY

FEBRUARY

MARCH

CHINESE OVER-CAPACITY WILL CONTINUE TO WEIGH ON MARGINS

Although 2010 witnessed record global steel production, over-capacity in China was to remain an issue throughout the year, as suggested by this Metal Bulletin headline.

RECYCLED METALS SHOULD NEVER BE REGARDED AS WASTE

As the European Commission inches towards "end-of-waste" criteria for certain recyclables, the British Metals Recycling Association's Director General Ian Hetherington makes plain his own opinion to the UK's MRW magazine.

PRICES MARCH ONWARDS AND UPWARDS

The ferrous scrap price momentum of late-2009 is carried forward into 2010.

PAPER EXPORTERS HIT BY CONTAINER HEADACHE

Restricted availability of containers hampers the international flow of recovered paper.

LA FLOTTE REPREND LA MER (THE FLEET RETAKES TO THE SEA)

French magazine Recyclage & Récupération acknowledges the widespread reactivation of container shipping capacity which had been idled in the aftermath of the global economic crisis.

IS COPPER BALANCING ON A TIGHTROPE?

As the second quarter begins, the extravagant movement of the copper price continues to command trade press headlines.

BIR FERROUS DIVISION REACTIVATES WORLD MIRROR

For the first time since 2005, the board of the BIR Ferrous Division decides to recommence publication of the Ferrous Mirror to provide members with a regular overview of global scrap markets.

REVISION OF BIR STATUTES AND BY-LAWS

BIR upgrades its statutes and by-laws so as to achieve better governance and to address important issues resulting from the organisation's continuous development and globalisation.

NEW E-SCRAP EXPORT POLICY AT ISRI

The US Institute of Scrap Recycling Industries approves a new and "aggressive" e-scrap export policy designed to protect health, the environment and worker safety.

BIR RECORD-BREAKER BY THE BOSPHORUS

Istanbul hosts the most successful BIR Convention ever: the 2010 Spring Convention attracts almost 1600 participants from a total of 59 countries.

BIR REINFORCES LEGAL AND REGULATORY MONITORING IN INDIA AND CHINA

Customs and trade consultancy Bryan Cave International Trade Pte Ltd is commissioned by the world recycling body to provide legislative and regulatory intelligence regarding the recovery and recycling of BIR commodities in these two major developing economies.

APRIL

"CRAZY" NICKEL PRICE VOLATILITY SET TO STAY

A top industry analyst tells the US Institute of Scrap Recycling Industries' Annual Convention in San Diego that the nickel price is likely to remain in "choppy" waters for the foreseeable future.

SCRAP SHORTAGE DESTINED TO BE LONG TERM

Also at the event in San Diego, the ferrous scrap industry is warned to expect an on-going struggle to secure material.

MAY

PROGRESS IN INDIAN SCRAP IMPORT DEBATE

Pressure from the Metal Recycling Association of India in particular helps win the removal of ferrous and non-ferrous scrap from the “hazardous” category.

**STAINLESS STEEL
SCRAP AVAILABILITY
WILL BE TIGHT
IN 2010**

Industry expert Heinz Pariser issues a warning that could equally apply to many other secondary raw materials.

PLANET WILL INCREASINGLY DEPEND ON RECYCLING

This headline from Recycling International offers a positive summary of the findings of a report compiled by Veolia Environmental Services and CycloPe.

BIR PAPER DIVISION'S PAPYRUS PRIZE GOES TO MANFRED BECK

Manfred Beck, founder of Recycling International, is awarded the BIR Paper Division's Papyrus prize for the magazine's global dissemination of the news, views and achievements of paper recyclers.

**CHRISTIAN RUBACH
SPEAKS AT
JISRI FORUM**

BIR Ferrous Division President Christian Rubach accepts an invitation to address the Japan Iron & Steel Recycling Institute (JISRI).

JUNE

**BIR FERROUS DIVISION PUBLISHES
FIRST-EVER STATISTICS ON STEEL
SCRAP MARKETS**

The Ferrous Division publishes its initial statistical overview of the global markets.

**CHINESE BLACKLIST TO TARGET
OVER-CAPACITY**

The Chinese government informs many of its steelmakers to stop operating certain facilities or risk penalties, according to a report in Metal Bulletin.

**EAST AFRICAN SCRAP
METAL EXPORT BAN:
BIR CONTACTS
GOVERNMENTS**

BIR writes to the relevant governments to express its concern about the announcement that the East African Community (EAC) intends to ban scrap metal exports in order to support its own metals industries.

JULY	AUGUST	SEPTEMBER
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**BIR MONITORS LEGAL AND REGULATORY
LANDSCAPE IN INDIA AND CHINA: FIRST
REPORT**

Customs and trade consultancy Bryan Cave International produces its first report for BIR covering the latest relevant legislative and regulatory developments in China and India.

CHINA PLOTS RECYCLING REVOLUTION

China's national government is reportedly looking to turn the tide in its battle against waste by implementing pro-recycling laws and regulations.

EUROPE SHOWS GLOBAL LEADERSHIP IN RECYCLING

The European Recovered Paper Association responds to news that Europe has achieved a world record 72.2% paper recycling rate.

**EXCELLENT TURN-OUT FOR
BIR AUTUMN CONVENTION
IN BRUSSELS**

BIR's 2010 Autumn Convention proves to be one of the most successful in the organisation's history, bringing in more than 900 delegates and 250 accompanying persons.

**INDONESIAN PAPER
MILL RECEIVES
BIR PAPYRUS PRIZE**

The BIR Paper Division's Papyrus prize is presented to APP's Indah Kiat Serang mill in Indonesia for substantially increasing recovered fibre use and for promoting partnerships with the recovered paper industry.

**SRI LANKA BANS SCRAP
METAL EXPORTS**

Another government follows the worrying trend seen in 2010 towards protecting its domestic industry's scrap metal supplies.

**THE TWISTING
PATH TOWARDS
"END OF WASTE"**

One trade magazine reflects on the progress made – and the ground still to be covered – towards achieving "end-of-waste" status in the EU for some leading recyclables.

**BIR SUCCEEDS IN OBTAINING
EXTENSION OF AQSIQ RENEWAL
DEADLINE**

After an approach from BIR, AQSIQ in China agrees to a 90-day extension of the renewal application deadline relating to the registration of overseas suppliers of recyclables.

**THE PROGRESS
AND THE PAIN OF
PLASTICS RECYCLING**

The Identiplast conference in London gives rise to a headline acknowledging the rapidly-rising rate of post-consumer plastics recycling – as well as the challenges lying ahead of this sector.

OCTOBER**NOVEMBER****DECEMBER****BIR TEXTILES DIVISION: MARGINS
CONTINUE TO FEEL THE SQUEEZE**

Sales prices achieved on sorted used clothing do not adequately reflect the high costs of buying in originals, it is argued at the BIR Autumn Convention in Brussels.

**MORE RECYCLING "COULD CREATE
500,000 EU JOBS"**

A study from environmental group Friends of the Earth estimates the job-making potential if EU member states were to recycle 70% of their waste.

**MARKETS "CONTINUE
TO AMAZE" IN PIVOTAL
YEAR**

BIR Non-Ferrous Metals Division President Robert Stein tells the Autumn Convention in Brussels that, in 2010, the non-ferrous markets have exceeded the expectations of most industry experts.

**COPPER TO
BREACH
US\$ 11,000
BARRIER?**

The question on the lips of industry experts when analysts predicted substantial gains for the red metal in 2011.

**COBALT FLIES
BUT MOLY LINGERS**

Metal Bulletin's take on the first nine months of the London Metal Exchange's cobalt and molybdenum contracts, with trade in the former easily surpassing that in the latter.

**CHINA TO WIDEN ITS SCRAP
IMPORT NET**

Policy-makers confirm at the CMRA's Secondary Metals International Forum in Ningbo that China plans to expand the scale and variety of its scrap metal imports.

**2010 ENDS ON BULLISH
NOTE FOR FERROUS SCRAP**

With a perfect eye for symmetry, the ferrous scrap market ends the year as it had begun – with further upward price momentum.

Membership Spread



Western Europe

- Austria
- Belgium
- Cyprus
- Denmark
- Finland
- France
- Fr. Reunion
- Germany
- Greece
- Iceland
- Ireland
- Italy
- Luxemburg
- Monaco
- Netherlands
- Netherlands Antilles
- Norway
- Portugal
- Spain
- Sweden
- Switzerland
- United Kingdom

Russia & Eastern Europe

- Albania
- Bulgaria
- Czech Republic
- Estonia
- FYRO Macedonia
- Hungary
- Latvia
- Poland
- Romania
- Russia
- Slovakia
- Slovenia

North America

- Canada
- USA

Central & South America

- Argentina
- Brazil
- Cuba
- Haiti
- Honduras
- Mexico
- Uruguay

Australia & Pacific Rim

- Australia
- New Zealand

Turkey & Middle-East

- Bahrain
- Egypt
- Iran
- Israel
- Jordan
- Kuwait
- Lebanon

- Saudi Arabia
- Turkey
- UAE
- Yemen

Asia

- Bangladesh
- China
- India
- Japan
- Korea
- Malaysia
- Pakistan
- Singapore
- Taiwan
- Thailand

Africa

- Algeria
- Morocco
- South Africa
- Tunisia



EU 27

Other Europe & Russia

North America

Central & South America

Africa

Turkey & Middle East

India, Pakistan & Bangladesh

China & other Asian countries

Australia & Pacific Rim

Membership Highlights

MORE THAN

800

BIR MEMBERS ALL OVER THE WORLD!

50%

MEMBERS INCREASE
WITHIN THE LAST 10 YEARS!

90

NEW MEMBERS
IN 2010...

39

NATIONAL FEDERATIONS

70

COUNTRIES

BIR IS GLOBAL!

MORE THAN

40%

MEMBERS OUTSIDE THE EUROPEAN CONTINENT

Ferrous Division

After 2009's sharp downturn, 2010 proved to be a stand-out year for world steel production. Global output leapt 15% from 1.229bn tonnes to a record high of 1.414bn tonnes, not least because of a sustained steelmaking recovery across most of the developed world...

*Christian Rubach,
President of the Ferrous Division*



... China continued to lead the way in terms of output volumes with another increase of 9.3% last year to 626.7m tonnes, according to statistics from the World Steel Association. However, the Asian giant's share of world crude steel production actually declined from 46.7% in 2009 to 44.3% last year as America's share climbed from 4.7% to 5.7% and the EU-27's from 11.3% to 12.2%.

However, it should also be mentioned that, in 2010, production in those traditional steelmaking heartlands of Europe, the USA, Japan and Russia failed to recover to the levels recorded in pre-recession 2007. In contrast over the same three-year period, Asia maintained its remorseless upward march in steel production; in 2010, and most obviously thanks to China, the continent produced 897.9m tonnes of steel compared to around 805m tonnes in the previous year. The combined impact of the so-called BRIC nations (Brazil, Russia, India and China) on global steel production is nothing short of immense: together, these four produced approaching 800m tonnes last year.

The Chinese government is pursuing efforts to weed out some of the country's older and less efficient steelmaking capacity, but at least one analyst is predicting further domestic output growth of around 60m tonnes in 2011. China's success in streamlining capacity and in boosting consumption of domestic scrap will clearly have major ramifications for our industry as a whole.

As ever, worldsteel's figures offer us a profound and meaningful insight into the world of steelmaking. But through the efforts of the BIR Ferrous Division and its Statistics Advisor Rolf Willeke, a far greater degree of factual certainty has now been brought to the global steel scrap industry in the form of a statistical overview based on a model developed in co-operation with the German steel association Wirtschaftsvereinigung Stahl. We are convinced that this delivers a far more accurate set of scrap-specific figures for the industry to digest than the largely approximated values of the past.

With scrap statistics, of course, China can never be very far from our thoughts. Our figures for the last year reveal a 57.3% slump in Chinese steel scrap imports from 13.7m tonnes to 5.9m tonnes. In contrast, the world's largest importer, Turkey, is understood to have upped its overseas purchases of steel scrap in 2010 by 22.5% to 19.2m tonnes. The USA remained the world's leading exporting country in the last year even though its overseas shipments slid 8.4% to 20,6 m tonnes whereas EU exports in 2010 surged 20.2% to 19m tonnes.


Our figures also reveal that steel scrap usage in the USA and the EU last year failed to keep pace with the growth in crude steel production.

KEY FACTS

1.414bn tonnes – a record-breaking year for world crude steel production in 2010.

The BRIC countries produced almost 800m tonnes of steel in 2010.

China's steel scrap imports plummeted 57.3% in 2010.



“Last year, many in the ferrous scrap industry celebrated the best business conditions they had encountered for some considerable time.”

In addition to this new statistical service, the BIR's Ferrous Division board has also decided to resume its publication of market reports after a gap of five years; the BIR World Mirror on Ferrous Metals provides the world body's members with a regular overview of the worldwide scrap markets via reports written by regional experts.

Accurate statistics are a useful tool in our business lives, helping us to identify trends and providing a basis for important business decisions; however, they do not have the power to insulate us against market forces. In 2010, we witnessed an explosion in the prices not only of scrap but also of all the other raw materials used in steelmaking.

Ferrous scrap prices plunged to lows of US\$ 130 per tonne shortly after the onset of the global recession; by the start of 2010, shredded and HMS were attracting nearer US\$ 350 on a cfr basis – a figure which had climbed to around US\$ 500 by early 2011.

Last year, many in the ferrous scrap industry celebrated the best business conditions they had encountered for some considerable time. However, high sales prices were accompanied by the far higher costs of attracting material to our yards; indeed, steelmaking growth was so rapid that scrap collection volumes struggled to keep pace and tight availability became the norm. Among other challenges in 2010, our industry was forced to contend with volatile currency exchange rates and the occasional scarcity of all-important container capacity in which to ship our products.

15%

INCREASE OF GLOBAL
STEEL PRODUCTION



Non-Ferrous Metals Division

I am not a betting man and I certainly know enough about the non-ferrous scrap markets to resist any bold predictions about the course they might take in the next few days, let alone the rest of this year. However, I am prepared to wager that, in the handful of weeks between writing this report and its appearance in print, the non-ferrous markets will have surprised – or even astounded – in some shape or form. Volatility has not so much seeped into our daily lives; it has become a constant companion who, like it or not, dogs our every step in the modern business world...

***Robert Stein,
President of the Non-Ferrous
Metals Division***



“Many governments appear determined to erect obstacles to free movement of the non-ferrous scraps that are often vital to their national development.”

... For this same report last year, I thought it would be interesting to compare some LME cash prices from the start of the year with those at the end. It's an exercise worth repeating this year, but with the twice-underlined caveat that price progress between these two points in time was neither smooth nor uni-directional. LME cash copper began 2010 at around US\$ 7400 per tonne but ended the year at over US\$ 9000, with its sights firmly set on five-figure territory and with some researchers predicting US\$ 11,000 for the current year. Over the same period, the LME tin price effectively gained US\$ 10,000 per tonne while zinc broke ranks with most other non-ferrous metals in suffering a small decline in its value over the 12-month period.

The dramatic price hikes for some of our most prominent non-ferrous commodities stem from a number of factors, including the allure of our markets for the financial sector and also industrial expansion in the developing world. Most notably, China's on-going, big-number GDP growth has continued to bolster physical demand across a range of metals. Even when the Asian giant's copper scrap demand was impaired by a weighty arbitrage disadvantage, buyers in Europe ensured that world purchasing momentum was more than adequately maintained.

Despite the significant stocks of aluminum, the light metal's fortunes have been substantially enhanced by a sharp recovery in vehicle sales in the USA and elsewhere. Here too, the growing influence of China cannot be ignored: the country's total vehicle sales leapt 32% last year to over 18m units, making it the largest single market in the world. There is strong evidence to suggest that sales in China could overtake those of the USA and the EU combined by the end of the decade. The automotive sector in India and other Asian countries also recorded huge growth during 2010.

But like many other industries, vehicle production in many parts of the developed world has still to recover to its pre-recession peaks. These lower production levels duly placed a significant stress on scrap supplies around the globe, thereby helping to drive already upwardly-mobile prices and to entice into the marketplace material that had been hoarded since late 2008.

Of course, no annual review would be complete without reference to the fresh injection of rules and regulations with which our industry is forced to contend. China effectively confused the world with its Article 21 decree covering mixed scrap loads which was never properly explained and was never universally enforced.

32%

CHINA'S TOTAL VEHICLE SALES LEAP 32% LAST YEAR

MAKING IT THE LARGEST SINGLE MARKET IN THE WORLD

In contrast, the license renewal process for exporters of recyclables to China has proceeded relatively smoothly, although it was hampered by computer software problems for the country's General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ). It is testament to a solid working relationship that BIR was able to persuade AQSIQ to relax the renewal extension deadline – a move that was undoubtedly in the best interests of suppliers and their customers alike.

Meanwhile, many other governments around the world appear determined to erect obstacles to free movement of the non-ferrous scraps that are often vital to their national development. As a standard-bearer for free and fair trade, BIR will continue to lobby against excessive governmental restrictions.

In this same spirit of fairness, the re-writing of BIR's statutes and by-laws in 2010 represented a significant forward stride by the world body. In a process initiated at the request of the Non-Ferrous Metals Division, the development of a new framework surrounding the admission, suspension and expulsion of members will help preserve the interests and the image of the many against the unreasonable commercial actions of the few.

KEY FACTS

LME cash copper started 2010 at around US\$ 7400 per tonne but the year concluded with medium-term price predictions of US\$ 11,000.

32% increase: 18m vehicles sold in China last year.



“As a standard-bearer for free and fair trade, BIR will continue to lobby against excessive governmental restrictions.”

Textiles Division



In the recycling community, we are sometimes guilty of excessive bleakness in our assessment of actual market conditions. But in reviewing the events of 2010, I would prefer to start by accentuating the positives from last year...

*Olaf Rintsch,
President of the Textiles Division*

... One of the biggest pluses for the textiles recycling sector was that, in contrast to many previous years, we were able to sell virtually everything we produced. We may not always have obtained the price that we craved or the price that reflected our professional endeavours, but at least there were no major volumes of practically unsaleable goods building up in our warehouses.

In previous years, we had good reason to complain that wipers, feathers and recycling grades were proving almost impossible to move at any price. We could legitimately lament that covering our operating costs was dependent solely on the proceeds from our sales of used clothing.

But 2010 produced a generally more encouraging set of circumstances: wipers, feathers and the recycling grades gained substantially in value while used clothing sales were consistent at healthy levels. Indeed, demand for used clothing was sufficiently high and widespread that the payment problems suffered in previous years inflicted a far less severe impact on our businesses.

For Western Europe's sorting companies, their export volumes flowed reasonably smoothly to Africa and to Eastern Europe. However, we should pay close attention to talk in certain countries of imposing restrictions on used clothing imports. Such moves would disrupt long-established business links and would threaten the free and fair trade in recyclables which BIR has staunchly defended throughout its history.

10%

HIGHER COLLECTION/

SORTING VOLUMES

IN FRANCE
COMPARED TO 2008

“We should guard against over-optimism and maintain our vigilance when it comes to payments.”

Market conditions have generally improved but, as I said at our BIR Convention meeting in Istanbul last June, we should guard against over-optimism and maintain our vigilance when it comes to payments. We should not forget that our margins remain under pressure because of the high costs of attracting original material. Given such conditions, the importance of effective credit control measures cannot be overstated. At the same time, collectors of original material should be mindful of the fragile profitability of sorting companies and therefore resist the temptation to push their sales prices too high.

One completely uncontrollable force acting upon collections is, of course, the weather. Last year began and ended with severe winter conditions undermining collection volumes in Europe, North America and various other parts of the world. In Japan, for example, the weather was chiefly responsible for cutting the supply of originals by around 20% and forcing the country's sorters to trim their capacities. If we are to believe many of the experts, such harsh winters may become the norm – and so perhaps we need to plan accordingly.

Two familiar topics were aired at our meetings at the two BIR Conventions in 2010. We learned that France's Eco Tlc initiative designed to boost sorting activities is now beginning to take shape:

the availability of financial support has already attracted dozens of sorters to the scheme and collection/sorting volumes in France are some 10% higher than they were in 2008.

The other issue is one which has dogged our industry for decades, namely the misguided description of our products as “waste”. Firm action within the European Union to identify when a so-called waste ceases to be a waste has focused thus far on other recyclables such as iron and aluminium scrap; however, the matter continues to be debated with gusto in textiles recycling circles.

At our Brussels meeting in 2010, guest speaker Dr Thomas Probst of *bvse* in Germany suggested the complex efforts to achieve an “end-of-waste” definition for other recyclables could ultimately provide a template for textiles to follow. However, there are others who believe used clothing should never be considered in these “waste” deliberations because a member of the public consigns an item to a collection system on the strict understanding that it will be worn by someone else – a clear case of reuse which features at a higher stage of the waste hierarchy.

Perhaps 2011 will bring greater clarity to this vexed issue – and hopefully too, a continuation of the decent market conditions witnessed in 2010.

KEY FACTS

Following the introduction of the Eco Tlc initiative in France, domestic collection and sorting volumes are around 10% higher than they were in 2008.

In Japan, adverse weather conditions cut the supply of originals by around 20% early in 2010.

Paper Division



Over recent years, we have become accustomed to reporting on an ever-rising trend in China's recovered paper imports...

*Ranjit Baxi,
President of the Paper Division*

... Even when most of the rest of the world was grappling with a severe economic downturn in 2009, the Chinese succeeded in raising their fibre imports by an impressive 14% from just over 24m tonnes to 27.5m tonnes – a total far higher than that recorded by any other importing country on earth.

And so what are we to make of the loss of momentum in 2010 when China's recovered paper imports dropped back to around their 2008 levels? Without doubt, the slowness of the recovery in some of China's key export markets has applied the brake to its finished product shipments and therefore to its related packaging production. At the same time, the country's linerboard mills have been able to call increasingly on generally cheaper domestic supplies of recovered fibre as collection systems inside China itself continue their steady development.

Despite the decline in China's recovered fibre imports, world market prices seemed to suffer few ill-effects. Last December, indeed, international OCC prices concluded their undulations for the year by reaching perhaps their highest levels in the whole of 2010. Clearly, other factors are at play in the global market, not least the widespread reduction in collection volumes which has forced mill buyers around the world to think more deeply about where their fibre requirements will be sourced in the long term. At an international paper recycling conference late last year, hugely-respected industry analyst Bill Moore, President of US-based consultancy Moore & Associates, put the matter in perfect context when he said that supply of recovered fibre will be "the mega-trend issue of the next decade".

Hopefully, one of the positive outcomes of this "mega-trend" will be a greater understanding of the importance of the paper recycling industry. Within BIR's

Paper Division, we continued in our mission to boost the profile of our noble industry by awarding our Papyrus prize in 2010 to both an individual and a company who have played their part in furthering the cause of paper recycling.

Looking ahead to 2011, there is a reason to believe that anti-inflationary measures adopted by the Beijing government will have some dampening effect on its paper and board industry's sales prospects. At the time of writing, however, there is no evidence that China's mill groups are responding by shelving the massive capacity expansion plans already on the books. In short, there is no reason to suspect that China will suddenly lose its appetite for imported fibre.

30%

OF WORLD RECOVERED
PAPER CONSUMPTION
OCCURS IN CHINA

China tends to grab most of the headlines in paper recycling circles. The reasons for this are obvious but were put in stark statistical terms at our meeting in Brussels last October by Finland-based independent consultant Ilpo Ervasti: China now accounts for around 30% of world recovered paper consumption, he stated, compared to nearer 7% as recently as 1995.

However, we should remember that a host of other developing countries are on a healthy growth curve and, as a result, will help drive forward the global recovery. Some of those same countries are already significant importers of recovered

KEY FACTS

China accounts for 30% of world recovered paper consumption compared to 7% in 1995.

Chinese recovered fibre imports: 24m tonnes in 2009 but perhaps nearer 27.5m tonnes in 2010.

India's consumption of recovered paper predicted to climb from 5m tonnes in 2010 to 6.5m tonnes by 2014.

fibre and are expected to boost their overseas purchases in the years ahead. For example, it has been predicted that India's annual consumption of all grades of recovered paper will leap from around 5m tonnes in 2010 to nearer 6.5m tonnes by 2014. And the growing secondary fibre requirements of a number of other Asian countries such as Indonesia, South Korea, Taiwan, Thailand and Vietnam are already well documented.

But this upward trend extends well beyond India and Eastern Asia. At our Paper Division meeting in Istanbul last June, it was interesting to hear a prediction from the Chairman of the Turkish Pulp & Paper Industry Foundation, Erdal Sükan, that his country's recovered paper recycling rate is likely to jump from around 40% to more than 50% by 2015. If you add in the fact that the global economic recovery is now seemingly well entrenched, I believe we have good reason to approach the future with cautious optimism.

And perhaps some of that caution should be reserved for a subject raised at that same meeting in Istanbul by Peter Clayson, Business Development Manager of UK-based Severnside Recycling. He touched on a subject dear to my heart when calling on fibre suppliers to gain an understanding of reproprocessors' specific requirements. Supplies of recovered fibre have become generally shorter but there is no reason to believe mills around the world will want to import a secondary raw material that is not of good quality or is unfit for their purpose.

Overall, we entered 2011 with a general feeling of optimism and a sense that growth among leading emerging economies should bolster confidence throughout the rest of the world.

“I believe we have good reason to approach the future with cautious optimism.”

Papyrus Prize

Despite the fact that hundreds of millions of tonnes of recovered fibre are consumed each year in the production of paper and board, the BIR Paper Division is concerned that the sector does not receive due recognition for its massive environmental and social contribution, not least in terms of conserving resources and creating jobs.

To help redress this perceived omission, it was decided three years ago to create an award to honour the “champions” of the paper recycling sector. Criteria assessed in selecting the winners include: service to the industry; innovation in the use of recovered fibre; promotion of partnership along the supply chain; achievement of substantial growth in recovered fibre consumption; and leadership in social, quality and environmental management.

This accolade soon became known as the Papyrus prize in reference to the writing material produced by the Ancient Egyptians from the pith of the papyrus plant. It was agreed that the award would be made to a deserving individual during the Paper Division meeting at each BIR Spring Convention; and then at every BIR Autumn Convention, the prize would be conferred on a meritorious company or organisation.

The award was first made at the 2008 Spring Convention in Monte-Carlo at which BIR celebrated its sixtieth birthday. Fittingly, the recipient was BIR World President Dominique Maguin of France who was recognised for his career-long services to paper recycling.

Subsequently, there have been five winners of the Papyrus prize.



“An award to honour the champions of the paper recycling sector.”

PAPYRUS PRIZE ROLL OF HONOUR

2008 AUTUMN CONVENTION

Family-owned mill operator and recovered paper consumer Emin Leydier of France was recognised not only for growth in its recovered paper consumption and for promoting partnership with its suppliers but also for its efforts to reduce its transport-related carbon dioxide emissions.

2009 SPRING CONVENTION

Jogarao Bhamidipati of leading Indian paper producer ITC was rewarded for his work in developing the Wealth out of Waste (WOW) initiative which aims to promote segregation of recyclables in line with his company's economic, social and environmental objectives while also boosting employment opportunities in his country.

2009 AUTUMN CONVENTION

For its increasing use of recovered fibre as well as its healthy partnership with companies in the supply chain, the award went to the SAICA Group of Spain. Formed in 1946, the family-owned group has relied solely on secondary fibre for its raw material needs since 1997.

2010 SPRING CONVENTION

Manfred Beck, the founder and Editor of Recycling International, became the fifth recipient of the award for his foresight in creating a global title which conveys paper recyclers' news, views and achievements to readers in more than 120 countries around the world.

2010 AUTUMN CONVENTION

APP's Indah Kiat Serang mill in Indonesia, a producer of paper and packaging products, was acknowledged for substantially increasing its recovered fibre use over the last five years and for its efforts to promote sustainability and partnerships with the recovered paper industry.

Stainless Steel & Special Alloys Committee



In these volatile and unpredictable times, a moment of hesitation tends to precede any overtly bullish prediction about the market...

*Michael G. Wright,
Chairman of the Stainless Steel & Special Alloys Committee*

... But following an extremely difficult 2009 for the world's stainless steel industry in which production sank below 26m tonnes, few experts were betting against a substantial improvement in 2010. In the event, they were proved to be correct as output smashed through the 30m-tonne barrier and ended the year 18.9% higher at 30.869m tonnes.

Back in 2009, China had rendered a disappointing world production total far more palatable with a 32.8% increase in output to 9.75m tonnes from 7.34m tonnes in the previous year. The same comparison revealed that production in the rest of the world fell 15% from a shade over 19m tonnes to just 16.22m tonnes.

So while Chinese production gained a further 11.9% last year to reach 10.9m tonnes, it was the scale of the improvement among some of the previously beleaguered developed economies that provided the main impetus for stainless steel production growth in 2010: compared to 2009, output climbed last year by 24% in the EU, by 28.1% in Japan and by a remarkable 44.2% in the NAFTA region.

Given the lack of clarity surrounding forward demand as we reached the final quarter of 2010, predictions of further stainless steel production growth in 2011 were built on slightly less stable foundations. At the time of

writing, however, the best guess is that world output will grow by upwards of 1.8m tonnes this year to above 32.6m tonnes – thanks in large part to the forecast that China's output could well exceed 12m tonnes.

Volume-wise, the world's leading three stainless steel producers in 2009 were all based in Asia, according to top analyst Steel & Metals Market Research. Despite the West's recovery in 2010, there is no doubt that the balance in stainless production power has continued its seemingly inexorable shift further east. In this context, it is worth noting that China is not the only emerging powerhouse: in 2011, total output from South Korea, Taiwan and India is expected to overtake that of the NAFTA region and Japan combined.

Cengiz Onal of Turkey-based Eti Krom Inc. told the Stainless Steel & Special Alloys Committee meeting at BIR's 2010 Spring Convention in Istanbul that India could well become the world's third-largest stainless producer in 2011 and that China could account for half of the world's stainless steel production by 2015 and beyond. Fellow guest speaker David Wilson, Director of Metals Research at Société Générale Corporate & Investment Banking in the UK, suggested that China's annual output of stainless steel could be approaching 16m tonnes by 2014.

Scrap was available in sufficient quantities last year to satisfy the increase

KEY FACTS

World stainless production up 18.9% in 2010 to 30.869m tonnes.

Stainless scrap availability up 17.7% in 2010 to 8m tonnes-plus.

Chinese stainless production could exceed 12m tonnes in 2011.

17.7%

INCREASE OF


SCRAP AVAILABILITY

in global stainless steel production: having fallen more than 11% in 2009 to little more than 6.8m tonnes, availability rebounded strongly in 2010 with an increase of 17.7% to just over 8m tonnes. Once again, China is something of a wild-card in this equation given that, unlike in other leading producer countries, scrap is in direct competition with the growing domestic production of nickel pig iron.

A factor that cannot be excluded from the mix in 2011 is the value of nickel. In recent times, the metal has displayed a volatility trending very much towards the upside; having dropped back into four-figure territory at the height of the global economic downturn, the metal appears to have taken residence once again above US\$ 20,000 per tonne, thereby increasing the prospect of further switching to the ferritic grades of stainless steel. There is still a long way to go before nickel threatens the US\$ 50,000-per-tonne price peaks of early 2007, but even at current levels the metal is generally considered to be significantly overvalued in relation to its fundamentals.

Another major development for our markets in 2010 was the introduction of LME cobalt and molybdenum contracts, and we were fortunate to hear an update on their progress at our Autumn Convention meeting from the Exchange's Chief Executive Martin Abbott. Clearly, these nascent contracts will continue to attract scrutiny in 2011.

Although trade improved mightily in 2010, conditions afforded scrap suppliers little room for relaxation as demand for their products reacted to consumers' short-term order situations and the vagaries of the nickel price. And while we are certainly anticipating further growth in 2011, consistency of demand may prove to be a wish too far.



“Scrap was available in sufficient quantities last year to satisfy the increase in global stainless steel production.”

Plastics Committee

I take great pride in restating my profound belief that plastics recycling is one of the most exciting and dynamic industries in the world today. We are truly riding high on the crest of a “green” wave that is sweeping into almost every aspect of our daily lives...

*Surendra Borad,
Chairman of the Plastics Committee*

... Our sector is experiencing robust growth at a rate far stronger than global gross domestic product, but it can already be claimed to operate on the grand scale: if we combine the estimated 18m tonnes of domestic plastics recycling around the globe with an international trade of approximately 14m tonnes, this equates to an overall trade value of around US\$ 15bn. And our industry also delivers a massive social benefit in that it provides direct and indirect employment for around 20 million people worldwide.

Not so many years ago, the epicentre of plastics recycling activity and innovation was in the developed world. However, over the last decade in particular, many more nations – notably include the BRIC giants – have fixed their attention on plastics recycling; from Dubai to Delhi and on to Beijing, the business of sorting plastics is booming.

Demand and prices nowadays are influenced far more by developments in China than by market movements in Europe or North America. Indeed, it could be argued that developed countries in the West have become far too dependent on China's hunger for plastics scrap imports and that, as a result, opportunities to develop business in other emerging countries might not be fully exploited. In this context, it is important that we as an industry put forward logical arguments aimed at removing the restrictions on imports of our products into other countries such as India or regions like the Middle East.



US\$ 15 bn

OVERALL TRADE

VALUE

OF PLASTICS
RECYCLING
WORLDWIDE

KEY FACTS

US\$ 15bn – the estimated overall trade value of the plastics recycling industry.

Globally, the industry offers direct and indirect employment for around 20 million people.

Without doubt, the rules and regulations operating at both national and regional level – many of which have been devised by people with little in-depth knowledge of our business – often stand in the way of our normal and legitimate trading activities. In Europe, for example, the end-user information required on the Annex VII form clearly undermines the confidentiality which has underpinned the role of traders for many decades.

New regulations seem to come at us with almost as much regularity as orders for plastics scrap from China; but far more disconcertingly, our industry is regularly falling victim to a lack of uniform interpretation of those rules. In 2010, these regulatory uncertainties and inconsistencies coincided with sometimes extreme business pressures, such as from massive fluctuations in prices, currencies and sea freight rates.

As mentioned earlier, the recycling of plastics has long been making a fundamental contribution to the “greening” of our lives. If we take the ubiquitous motor car as our example, engineers are constantly devising new ways to increase vehicles’ secondary plastics content. Under the EU’s End-of-Life-Vehicles Directive, 85% of a car by weight must be reused or recycled by the close of 2014; and since the average vehicle contains around 9% plastics by weight, the importance and scale of plastics recycling becomes absolutely apparent.

At our BIR Convention meetings in 2010, our guest speakers reflected on some of the massive progress made in plastics recycling. In Istanbul, the President of Turkey’s Seta Group, Semih Tugay, explained the scope for recycled PET compounds to replace engineering polymers. And Ed Kosior, Managing Director of UK-based Nextek Ltd, highlighted some of the value-adding technologies available for both segregated and mixed plastics streams. Technology has advanced so quickly that adoption of the recycling route to make food-grade PET and HDPE “is not rocket science any more”, he memorably told us.

The issue of the plastics recycling industry’s role in the “greening” of our planet brings me back to a point which is close to my heart and on which I have spoken on various occasions: to my mind, no other industry is more deserving of carbon credits given the spectacular environmental contribution it has made and continues to make, not only in terms of resource conservation but also through reduced emissions of greenhouse gases.

In this regard, it was encouraging to hear last year that Axiom Polymers in the UK has been accredited to use a “carbon reduction label”. Such recognition places the plastics recycling industry at the very heart of the drive towards reducing carbon footprints and could be an important step towards our industry becoming financially rewarded for its efforts through carbon credits.

“Our sector is experiencing robust growth at a rate far stronger than global gross domestic product.”

The “Holy Grail” of a 100% recovery rate for end-of-life tyres (ELTs) is almost within sight in Europe. Latest figures from the European Tyre and Rubber Manufacturers’ Association (ETRMA) confirm that the 27 member states of the EU plus Switzerland and Norway recovered a prodigious 2.494m tonnes of scrap tyres in 2009 – equivalent to a recovery rate of 96%...

*Barend Ten Bruggencate,
Chairman of the Tyres Committee*

Tyres Committee



...Over the years, tyre recovery in Europe has certainly become a big-number business. This latest percentage compares favourably with, for example, the 91% ELT recovery rate in Japan and the similar figure achieved in the USA. Without doubt, therefore, Europe can be considered the world leader in recovering tyres that have reached the end of their useful lives.

Of course, none of this success could have been achieved without the necessary building blocks having been put in place. Crucially, EU legislation banned the landfilling of whole tyres in 2003 and then shredded tyres in 2006, thereby incentivising the development of a robust infrastructure capable of handling the massive volumes of ELTs arising every year.

Key to this infrastructure creation process has been the emergence of 14 different ELT management companies in Europe. Established by tyre producers, these have been handed the responsibility of collecting and organising the treatment of

96%

RECOVERY RATE OF THE
EU-27 PLUS SWITZERLAND
AND NORWAY

“Widening the use of, and applications for, materials obtained from ELTs will be crucial to sustaining and nurturing the recycling loop.”

ELTs on the basis of a tyre recovered for every one sold collectively by the manufacturers.

Looking beyond the leading developed nations of the world, tyre recovery in many countries is still in an early development phase. At our meeting in Istanbul during the 2010 BIR Spring Convention, it was appropriate that we heard a tyre recycling status report from our Turkish hosts, delivered by Bahadır Ünsal. The Secretary General of Turkey's ELT producer responsibility organisation Lasder, he explained that ELT material derived from granulators in Turkey is already being used in sports and play surfaces, speed bumps and shoes. Also, some of the country's cement factories are burning ELTs as an alternative fuel; and it was particularly encouraging to hear that these factories are prepared to pay for the used tyres.

In the same region of the world, Israel opened a US\$ 16m facility capable of processing some two thirds of the estimated 3 million tyres discarded domestically each year. Encouragingly, Israel's Environmental Protection Minister Gilad Erdan underlined that the success of any such venture is hugely dependent on developing markets for the secondary raw materials it produces.

Of course, widening the use of, and applications for, materials obtained from ELTs will be crucial to sustaining and nurturing the recycling loop. Already, whole tyres are widely used in civil engineering applications while crumb and powdered rubber is becoming an increasingly popular constituent of sports pitches and children's play parks. In many cases, the environmental benefits of tyre recycling extend beyond resource conservation and a reduction in landfill volumes: for example, the ETRMA maintains that tyre-derived aggregate drains 10 times better than well-graded soil; and when it comes to energy recovery applications, ELTs not only have a calorific value equivalent to that of high-quality coal but also result in far lower emissions of (heavy) metals.

At present, Europe's decision-makers are attempting to devise criteria to determine when certain “wastes” cease to be waste. The ELT stream is relatively small compared to other recyclables such as iron scrap and so is unlikely to be prioritised by the European Commission for “end of waste” scrutiny. But with so many environmental pluses to its name, a review of its status under EU law is perhaps long overdue.

KEY FACTS

96% – the end-of-life tyre recovery rate across the EU-27 plus Switzerland and Norway.

14 different ELT management companies in Europe.

Tyre-derived aggregate drains 10 times better than well-graded soil.

International Environment Council



As with all complex technical exercises, there was never going to be a “quick fix” in the European-level process of defining when a so-called “waste” ceases to be a waste. However, we can certainly report that progress was made in 2010 towards a goal to which the recycling industry has aspired for several decades...

*Olivier François,
Chairman of the International
Environment Council*

... Iron and aluminium scrap were chosen as the starting point for developing “end-of-waste” criteria proposals. Speaking at our meeting in Brussels last October, the European Commission DG Environment’s Andreas Versmann indicated that the prospects for these proposals would become clearer in the first quarter of 2011.

Encouragingly, the process of creating “end-of-waste” criteria has not been restricted solely to iron and aluminium scrap. Following along the same trail at a respectful distance have come copper scrap and recovered paper, for which criteria proposals ended 2010 at an advanced stage.

Progress towards defining the end of waste may seem slow to the untrained eye, especially as the intricate workings, procedures and protocols operating at the top level of European decision-making are not generally understood. But the BIR certainly brings the necessary depth of expertise to ensure that the recycling industry’s interests are represented at every important step along the way.

“The end-of-waste debate has legitimately captured much attention at BIR because of its potential to create a legal certainty.”



The “end-of-waste” debate has legitimately captured much attention at BIR because of its potential to create a legal certainty surrounding definitions which will benefit the movement of our industry’s materials and potentially remove many of them from the full complexity of waste legislation.

Events in India have highlighted the dangers inherent in inappropriate nomenclature relating to “waste”. Somewhat out of the blue, the country’s Ministry of Environment and Forests issued a notification classifying ferrous and non-ferrous scrap as “hazardous”, thereby putting at risk imports of scrap crucial to the country’s burgeoning industrial growth; indeed, it has been estimated that India imported around 5m tonnes of ferrous scrap in the 2009/10 fiscal period. Fortunately, the lobbying skills of the Metal Recycling Association of India, among others, helped convince government officials to change their minds and overturn the notification.

As in previous years, the International Environment Council has monitored a plethora of diverse issues appearing on its radar screen. Our meeting in Istanbul last June provided an opportunity to review experiences with extended producer responsibility (EPR) schemes and the potential for market distortions. Several speakers compared

management systems and certification schemes that recycling companies adopt for their respective environmental and/or quality and/or health & safety benefits. Those management and certification systems are provided either by trade associations, other national bodies, or national and international standards organisations.

Our gathering in Brussels four months later directed the spotlight on to radioactive material in scrap and to the current emergence of Sustainable Materials Management (SMM) as a means of ensuring that material resources are managed sustainably and used efficiently throughout their life-cycle. With regard to the former, it was underlined that recycling companies should be entitled to report the discovery of a radioactive source in supplied scrap without fear of penalisation.

Of course, a host of other issues were monitored and many more meetings were attended by representatives of BIR in 2010 with a view to ensuring that our industry’s opinions were heard when recycling-related projects, regulations and legislation were tabled for discussion. With the end-of-waste process entering a critical phase and with new recycling-related regulations and initiatives emerging all the time, 2011 will be another challenging but fascinating year for the IEC.

WORKSHOPS

Over recent years, BIR has sought to maximise the value to delegates attending its **twice-yearly Conventions** by developing tailored **workshops** on issues either of the moment or of emerging importance. Two such workshops tackled **environmental themes** last year – one dealing with producer responsibility and the other with quality management systems.

Held in **Istanbul**, the former updated delegates on **producer responsibility** initiatives in the UK, Germany and host country Turkey. The latter focused on the **development and spread of the Recycling Industry Operating Standard (RIOS)** in the USA and France’s **Certirec quality management system**. It was suggested that companies interested in pursuing a quality management accreditation should begin by assessing the bespoke schemes developed for the recycling industry.

International Trade Council



The International Trade Council (ITC) is in its third year of existence – and what a busy third year it has been. Although we held no symposium or workshop at the Istanbul Convention, this in no way reflected the workload undertaken by the ITC during the first half of 2010...

*Robert Voss,
Chairman of the
International Trade Council*

... The increasing number of protectionist measures being taken by different countries around the world continues to concern us, and the ITC reacted rapidly and strongly when being notified of continued or new import and export controls on our secondary raw materials; duties, tariffs, taxes or outright bans have been included amongst the various attempts to establish trade barriers. We continued to assist the Metal Merchants Association in South Africa with some success, as well as writing to the various ministries and departments of the five East African Community countries which have attempted to impose a ban in the name of trying to combat metal theft.

Other areas where protectionism was countered by the ITC included Russia, Turkey, and Central and South America. We also continued our watching brief throughout Europe and the rest of the world.

In the second half of the year, arbitration became one of our main focus points, as it was felt that the arbitration service

offered by BIR, which is becoming more and more regularly used by our members, needed a “revisit” and update. We employed the services of a renowned international law firm and spent some time reviewing the requirements of our arbitration service with them, to enable them to prepare a totally new set of rules and procedures. This was presented at the Brussels Convention with great success, and those rules are now being refined and will shortly offer members a far more efficient, effective and professional arbitration service. It is hoped that all the members (and others) will incorporate these into their contractual terms and that the BIR will prove to be the main forum for the settlement of disputes around the world by experts within our trade.

There was considerable liaison with the Chinese authorities over the renewal of AQSIQ registrations. Numerous members were assisted and suggestions were made through the BIR secretariat to the Chinese authorities as to how

“Our aim remains the same: to ensure the free and easy flow of our goods worldwide and the best possible trading conditions for us all.”

this could be made easier in future. However, it now seems that most members have successfully received their licence renewals.

Shipping, logistics and transportation will form the basis of our meeting at the Singapore Convention. We anticipate looking at all aspects of moving our materials, including shipping, inspections and importations.

In conjunction with other committees, the ITC has worked hard with the Bryan Cave consultancy to continue to monitor the regulatory situations in India and China (and in Asia as a whole) and regular reports have been issued. It is hoped, once again, to have a report from Bryan Cave during the ITC meeting in Singapore.

The issues faced by our industry which concern the ITC are numerous and very much on-going; these include availability of up-to-date data, contracts, continual monitoring of trade barriers for our materials and relationships with the financial sector, as well as other issues brought to our attention by members.

Once again, I would like to thank all my colleagues on the International Trade Council, together with the Director General and his Brussels staff, for their continued hard work and input into council matters.

Our aim remains the same: to ensure the free and easy flow of our goods worldwide and the best possible trading conditions for us all.



Statistical Observatory



“Independently-verified figures enable the recycling industry to build its case on statistically solid ground.”



At the General Assembly held during BIR's sixtieth birthday Convention in Monte-Carlo three years ago, President Dominique Maguin outlined his desire for the world recycling body to focus its efforts on collating facts and figures that would crystallise the industry's achievements and environmental contribution.

This new mission for BIR would lead to the creation of a "Statistical Observatory", from where the industry's impacts and successes could be measured, compared and made available for all to see. One of the key benefits of this exercise would be to make independently-verified figures instantly available to BIR and others when fighting on the industry's behalf. In other words, they would be able to build their case on statistically solid ground.

Given the ever-brighter spotlight on carbon footprints, it was decided at a very early stage to quantify the savings in harmful carbon dioxide emissions that resulted from the recycling industry's efforts. BIR duly commissioned world-renowned Imperial College of London, England, to compare emissions relating to production of paper and seven metals from both primary and secondary sources; the metals considered were steel, aluminium, copper, lead, nickel, tin and zinc. It was discovered that adoption of the recycling route leads to combined emission savings of at least 500m tonnes of carbon dioxide equivalent per annum – or approaching 2% of worldwide fossil fuel emissions.

Professor Philippe Chalmin of the CycloPe research institute in France has been

of invaluable assistance in building the recycling industry's statistical database. At BIR's 2010 Spring Convention in Istanbul, he provided an update of scrap price developments in the context of more general steelmaking raw material movements. Through such reports, the industry is able not only to assess where it has been but also to chart its future direction with greater confidence.

Even before the first foundation stone was laid for the Statistical Observatory, a number of BIR's divisions and committees have invested huge effort in providing their members with valuable market insights on a regular basis. In 2011, the Non-Ferrous Metals Division is celebrating the 100th edition of its monthly World Mirror which features expert feedback on market developments in all five continents. Also well established is the quarterly Paper Mirror as well as the twice-yearly Mirror compiled by board members of BIR's Stainless Steel & Special Alloys Committee.

Last year also brought a significant advance in statistical reporting from the BIR Ferrous Division. After an absence of five years, it was decided to reactivate the World Mirror comprising ferrous scrap market reports from all the key regions around the globe. But in addition, the Ferrous Division also announced the launch of a statistical overview of the steel scrap sector based on a calculation model developed in co-operation with the German steel association Wirtschaftsvereinigung Stahl. The data will be updated electronically every six months.



Convention Committee



As always, I begin my report as Convention Committee Chairman with a thank-you to all those who work behind the scenes to make our conventions memorable events. First of all, our Director General Francis Veys and the team at BIR deserve much credit because they tirelessly strive to make our events as successful as possible. Their teamwork and attention to detail are always admirable. Our Convention Officer Yolande Joret is vastly experienced and is central to the success of these events...

*Mark Sellier,
Chairman of the Convention Committee*

... I also thank my colleagues on the Convention Committee who give up their valuable time to provide advice, guidance and creative input. Their time is given freely and without remuneration. Many chair and serve on other committees, and their time is limited and in great demand, yet they continue to appear at an early hour the day before the convention to begin a day of meetings with the Convention Committee. Our organisation is the success it is because of this group working with the secretariat.

To all our sponsors and advertisers who have made generous financial contributions towards making our events a success, a massive thank-you. Without you, many memorable events and services at our conventions would not be possible. We have endeavoured to create a win-win situation in sponsorship/ advertising, and judging by the number of repeat sponsors at each event we appear to have succeeded to some degree.

We welcome, of course, any suggestions as to how we can improve our service to our sponsors; please feel free to contact me at any time in this regard.

“I am pleased to report that the conventions held in Istanbul and Brussels were a success.”

This year has not been without its challenges in terms of our conventions but I am pleased to report that, in spite of them, the events held in Istanbul and Brussels were a success.

The Swissôtel in Istanbul provided us probably with one of the best venues in terms of what the organisation requires from a convention hotel: quality accommodation, meeting rooms, restaurants, bars and overall space. Regrettably our local convention organiser was not as good as we had expected and this caused considerable extra work behind the scenes for the BIR staff. We were also subject to local VAT which we were not able to reclaim and this had a significant impact on the financial results of the convention. It remained, however, a financial and event success, attracting close to 1200 delegates and over 300 accompanying persons. The spectacular Welcome Reception on the banks of the Bosphorus and the view from the rooftop of the hotel will remain an enduring memory for many.

In October, we bid “au revoir” to Brussels as a venue for the foreseeable future. The accommodation currently available in the city is simply not able to accommodate us comfortably and although we previously tried to meet every four years in October in Brussels, we will no longer follow that pattern. With over 900 delegates and 250 accompanying persons, Brussels simply does not meet our needs. In spite of the squeeze, the convention was a success.

As we move further into the paperless age, your Committee is trying to provide, wherever possible, electronic means of communication and registration in respect of conventions. The current online registration is smooth and easy to use, and we would encourage you to use it wherever possible.

Presently, we are unable to offer credit card payment online as an option other than via Ogone, a “Paypal” account or via a separate downloadable credit card form for signature and scan and return to the local organiser. The volume of transactions that we have, linked to the fact that we work with different local convention organisers, does not make online credit card payments a viable option for BIR. We are exploring different methods of payment and will keep you advised of progress as it happens.

European regulations are providing us with a challenge at BIR as we may in the near future have to charge VAT on conventions organised within the EU. We will keep you advised of developments.

This year we look forward to a superb venue and programme in Singapore in May, with a “Symposium on Copper” organised by the Non-Ferrous Metals Division and with an excellent speaker at the General Assembly. We also visit a solid European destination, Munich, in October. We have also decided on the following destinations looking forward:

Spring 2012	Rome
Autumn 2012	Barcelona
Spring 2013	USA
Autumn 2013	Warsaw

A convention in India is being explored for Spring 2014 and more details regarding this will follow our meeting in Singapore.

In closing, I would like to extend my thanks to the delegates who attend our conventions and support our organisation, and to my colleagues on the BIR Advisory Council for their leadership and dedication.



Communications Committee

BIR – recycled and improved! This was the slogan that advertised the launch of the new BIR website, which marked a major change in the corporate image of our world organisation. For 2010, BIR had set itself the task of boosting its communications efforts by harmonising its key messages as well as its look and design, while critically assessing the way the recycling industry was perceived by the general public...

Elisabeth Christ,
BIR Communications Director

on behalf of Andy Wahl, Chairman of the BIR Communications Committee

... With the relaunch of the BIR website in the first half of 2010, our organisation began a process of rebranding its visual identity in order to enhance the scope and the main objectives of the organisation.

While free and fair global trading of recyclables continued to be at the forefront of BIR's mission, the international recycling industry represented by our world organisation had started a gradual move to centre stage in terms of raw material supply, sustainable development and environmentally sound management of resources.

During many months prior to its relaunch, the BIR website had undergone a detailed inventory, revealing an incredible wealth of information that needed careful sorting

and restructuring. In addition, a critical appraisal took place of how BIR was positioning itself in relation to its members and the outside world.

A survey carried out among the BIR leadership underlined the pre-eminent importance of the world organisation's role as the voice of the international recycling industry in a sustainably competitive world economy, enhancing the crucial role of BIR members as the leading raw material suppliers of the future.

The new website also boosts BIR's role as a service provider in terms of conference organisation with the introduction of an online registration system that remains operational for all future BIR conventions, offering members the obvious advantage of automatically bringing up their details

While free and fair global trading of recyclables continued to be at the forefront of BIR's mission, the international recycling industry represented by our world organisation had started a gradual move to centre stage in terms of raw material supply, sustainable development and environmentally sound management of resources.

KEY FACTS

- **Rebranded image**
- **New website**
- **Extensive general media work**

“Our organisation began a process of rebranding its visual identity to enhance the scope and the main objectives of the organisation.”

when logging on while offering secure online payment either by PayPal or Ogone.

In line with this rebranding strategy, BIR conventions also underwent a graphics make-over. Each event was given a very distinct graphic theme which was consistent across all printed materials, special convention website, on-site panelling, etc. In a survey carried out among convention participants, 68% commended this new visual approach as an excellent initiative.

Another pillar of external communications was reinforced in 2010. BIR put increased efforts into improving its visibility with the general media in order to flag up our world organisation as a potential resource for information relating to recycling. A special media consultant was tasked with identifying and contacting journalists of key European and international business media outlets. In parallel, a wide range of publications were continuously monitored to pinpoint opportunities to pitch BIR stories and/or comments. A move towards a deeper involvement of BIR Ambassadors with the local press in their respective regions was also kicked off through a media training session held at BIR's Autumn Convention in Brussels.

In parallel to all these fundamental improvements, BIR continued to issue a wealth of information for its members throughout the year, such as regular news and updates on legal and trade issues as well as market information in the form of the highly-valued World Mirrors. At the same time, we were at our members' disposal on a daily basis for any query or concern, as well as for information about the two conventions we organise each year.

Recycling – A global industry, essential for the environment and a key player in the world economy.



Today's recycling industry already recycles up to 30% of the world's raw material needs and saves more than 100 million tonnes of CO₂ emissions. Increasing the re-use of our resources is essential to our planet's future. It's the only way to preserve the environment and develop a sustainable world economy.

THE RECYCLING INDUSTRY: THE FUTURE LEADING RAW MATERIAL SUPPLIER



Membership Committee

Last year witnessed both a recovery in economic conditions in general and in the case of commodity markets, especially metals, many new all time record high prices...

*Michael Lion,
Chairman of the Membership
Committee*



... None the less, conditions economically, fiscally, and politically were both volatile and turbulent, thus underscoring that one of the many virtues of membership of the BIR as the world's pre-eminent global voice of the international recycling industry is the umbrella of support it provides in navigating both the increasingly challenging commercial and regulatory conditions of our times.

“It is evident that both the variety and range of our significant membership benefits have enticed the on-going interest of new applicants as well as sustaining our existing roster of members.”

While undoubtedly the significant array of membership benefits plays its part in both attracting new members and maintaining the commitment and enduring loyalty of our existing membership base over decades and generations, perhaps the real testimony to the organization's future prospects lies in its evidence of adaptability and transformational ability to evolve as the nature of global trade and commerce particularly within the recycling community has and continues to transpire.

Embodying this situation the membership's composition this year saw 90 new members added to our roster amounting to a total of more than 800, with that membership comprised of those from 70 nations around the world. Nothing could articulate the true and increasingly global nature of our organization more succinctly than those statistics. The growth of our membership footprint from our initial base in Europe in our formative years to the four corners of the globe today has truly underscored our universal membership representation, and consequent imprimatur as the global international recycling industry authority.

It is evident that both the variety and range of our significant membership benefits have enticed the on-going interest of new applicants for BIR membership as well as sustaining our existing roster of members, and we as an organization continue to endeavor to anticipate and reflect through our

programs the expectations of our members, always remaining consciously sensitive to evolving conditions in our industry and ready to adapt accordingly.

It remains clear that first among equals in the benefits of BIR membership is the opportunity to participate in the unique forum for networking that our bi-annual conventions provide. The close liaison between the Convention Committee and the Membership Committee has ensured both excellent opportunities for our existing members to view wide-ranging important new areas to grow their business and contacts, but also has provided a bounty of new companies to join our ranks and expand the truly global reach and constitution of our organization.

The potential for engaging with the leading global players in the international recycling industries at our bi-annual meetings is truly unrivaled – offering encounters and interaction with industry counterparts that enable members to develop their international connections, share new technical research and industry data, and identify the many new international commercial and legislative developments that constantly impact our industry. Rounding off the Committee's work, a host of other programs, including multinational company memberships, partner memberships, the Membership Toolkit and many other initiatives, have been undertaken in the past year, and modifications of these along with new initiatives are under further review in the period ahead.

Guest Speakers at BIR Events in 2010

ISTANBUL,
31 MAY - 2 JUNE
2010

STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE

Cengiz Onal, Sales Manager, Eti Krom Inc. (Turkey)
David Wilson, Director – Metals Research, Société Générale (United Kingdom)

FERROUS DIVISION

Martin Abbott, Chief Executive, London Metal Exchange (United Kingdom)
Ugur Dalbeler, Colakoglu Metalurji AS (Turkey)
Dr Veysel Yayan, Secretary General, Turkish Iron and Steel Producers Association DCÜD (Turkey)

SHREDDER COMMITTEE

Ferdinand Kleppmann, President, Confederation of European Waste-to-Energy Plants CEWEP (Belgium)

NON-FERROUS METALS DIVISION

George Voyadzis, Director – Metals Division, Halcor Metalworks (Greece)
Robin Bhar, Crédit Agricole Corporate Investment Bank (United Kingdom)
Sedat Göksu, General Manager, Özel Copper Company (Turkey)

GENERAL ASSEMBLY

Hamish McRae, The Independent newspaper (United Kingdom)
Doug Woodring, Co-Founder, Project Kaisei (USA)
Prof. Philippe Chalmin, Cyclope (France)

PAPER DIVISION

Erdal Sükan, President, Pulp & Paper Industry Foundation (Turkey)
Om Bhatia, Managing Director, Macquarie Bank Limited (USA)
Peter Clayson, Business Development Manager, Severnside Recycling (United Kingdom)

PLASTICS COMMITTEE

Semih Tugay, President, Seta Group (Turkey)
Edward Kosior, Managing Director, Nextek (United Kingdom)

TEXTILES DIVISION

Carlo Longo, President, Prato Chamber of Commerce (Italy)

TYRES COMMITTEE

Bahadır Ünsal, Secretary General, Lasder (Turkey)

**BRUSSELS,
25-26 OCTOBER
2010**

STAINLESS STEEL & SPECIAL COMMITTEE

Martin Abbott, Chief Executive, London Metal Exchange (United Kingdom)

NON-FERROUS METALS DIVISION

Bob Garino, Director of Commodities, ISRI (USA)

William Adams, Head of Research, BaseMetals.com (United Kingdom)

PAPER DIVISION

Bill Moore, President, Moore & Associates (USA)

Peter Hall, Managing Director UK + Ireland, APL (United Kingdom)

Ilpo Ervasti, Independent Consultant (Finland)

Hubert Neuhaus, Managing Director, Neuhaus Handels GmbH & Co.KG (Germany)

FERROUS DIVISION

Stefan Schilbe, Director and Chief Economist, HSBC Trinkaus und Burkhardt AG (Germany)

INTERNATIONAL ENVIRONMENT COUNCIL

Eric Reber, Radiation Safety Specialist, International Atomic Energy Agency (Austria)

PLASTICS COMMITTEE

Faisal Baig, Product Marketing Professional, Buhler Sortex Limited (United Kingdom)

Dirk Segers, Managing Director, Marsh Marine Practice, Marsh S.A. (Belgium)

List of BIR Member Federations*

AUSTRIA

Austria Recycling (AREC)

BELGIUM

Confédération belge de la
Récupération / Confederatie
van de Belgische Recuperatie
(COBEREC)

BULGARIA

Bulgarian Association of
Recycling (BAR)

CANADA

Canadian Association of
Recycling Industries (CARI)

CHINA

China Association of Metal
Scrap Utilization (CAMU)
China Non-ferrous Metals
Industry Association Recycling
Metal Branch (CMRA)

CUBA

Union de Empresas de
Recuperacion de Materias
Primas (UERMP)

CZECH REPUBLIC

Svaz Průmyslu Druhotných
Surovin (SPDS-APOREKO)

FRANCE

Fédération des Entreprises
du Recyclage (FEDEREC)

FYRO MACEDONIA

Zaednica Makedonska
Sekundarna Surovina (ZMSS)

GERMANY

Bundesvereinigung Deutscher
Stahlrecycling- und
Entsorgungsunternehmen e.V.
(BDSV)

Bundesverband
Sekundärrohstoffe und
Entsorgung e.V. (BVSE)

Fachverband Textil-Recycling
e.V. (FTR)

Verband Deutscher
Metallhändler e.V. (VDM)

HUNGARY

Hulladékhaznosítók Országos
Egyesülete (HOE)

ITALY

Associazione Industriale
Riciclatori Auto (AIRA)
ASSOFERMET
Associazione Nazionale
Imprese Recupero
(FISE – UNIRE)

JAPAN

Japan Iron & Steel Recycling
Institute (JISRI)

THE NETHERLANDS

Vereniging Afvalbedrijven
(DWWA)

Federatie Nederlandse
Oudpapier Industrie (FNOI)
Metaal Recycling Federatie
(MRF)

Vereniging VACO
Vereniging Herwinning Textiel
(VHT)

POLAND

Izba Przemysłowa – Handlowa
Gospodarki Złomien (IPHGZ)

Izba Gospodarcza Metali
Nieżelaznych i Recyklingu
(IGMNiR)

PORTUGAL

Associacao Nacional dos
Recuperadores de Produtos
Reciclaveis (ANAREPRE)

ROMANIA

Organizația Patronală Și
Profesională „REMAT”

SOUTH AFRICA

Metal Recyclers of South
Africa (MRA)

Recycling Association
of South Africa (RASA)

SPAIN

Federación Española de
la Recuperación (FER)

Gremi de Recuperació
de Catalunya

Asociación Española de
Recuperadores de Papel
y Cartón (REPACAR)

TURKEY

Dönüştürülen Ambalaj
Malzemeleri Toplayıcı ve
Ayrıcıları Derneği (TÜDAM)

UNITED KINGDOM

British Metals Recycling
Association (BMRA)

Confederation of Paper
Industries – Recovered Paper
Sector (CPI)

The Recycling Association
Textile Recycling Association
& Recyclatex (TRA)

UNITED STATES

Institute of Scrap Recycling
Industries, Inc. (ISRI)

* In addition to its 750+ member companies.

Calendar of Future BIR Conventions

2011

- *Singapore, (22) 23 - 25 May*
- *Munich, (23) 24 - 25 October*

2012

- *Rome, (29) 30 May - 1 June*
- *Barcelona, (28) 29 - 30 October*



BIR – REPRESENTING THE FUTURE LEADING RAW MATERIAL SUPPLIERS

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