

iron industry international environment metals quality  
non-ferrous paper raw materials energy consumption  
economy aluminium plastics report  
ge responsibility recovery  
tyres  
2013



# Annual report 2013

## CONTENTS

- 02 Words from the President
- 04 Director General's Report
- 07 Membership Spread
- 08 Membership Highlights
- 10 List of BIR Member Federations
- 12 Ferrous Division
- 14 Non-Ferrous Metals Division
- 16 Textiles Division



**18** Paper Division

**20 Case Study:**

E-Scrap Recycling: BIR's Way Forward

**22** Stainless Steel & Special Alloys Committee

**24** Plastics Committee

**26** Tyres Committee

**28** International Environment Council

**30** International Trade Council

**32 Case Study:**

BIR Sharpens its Focus on Latin America

**36** Convention Committee

**38** Communications Committee

**40** Membership Committee

**42** Guest Speakers at BIR Events in 2013

**44** Calendar of Future BIR Conventions

# WORDS FROM THE President



I assume that most of us within the recycling industry would like to forget 2013, but in an Annual Report we need to make at least some observations about the past before talking about the future.

**Björn Grufman**  
BIR President

Besides the bad economic conditions for our sector, there were of course some general circumstances that we should remember.

- **Wars and unrest:** In Syria, for instance, how long must its people continue to suffer? Without even trying to have an opinion about who is right and who is wrong, I just wonder for how long the rest of the world will just stand on the sidelines. Finally now, in 2014, we are seeing some kind of initiative that might lead to peace negotiations, but that should have happened long ago.
- **Weather conditions:** These continue to bring chaos to various parts of the planet. On November 13 last year, for example, a terrible hurricane smashed into the Philippines, killing thousands of people and leaving hundreds of thousands homeless. We all ask the same question: is this a result of climate change? Let us hope that our leaders will agree some fresh global initiatives at the 20th session of the Conference of the Parties (COP-20) to the United Nations Framework Convention on Climate Change, taking place in Peru this coming December.

In 2013, economic conditions for the recycling industry must have been the worst for many years. Let us once and for all blame the financial markets

for our difficulties. It all started during the second half of 2008; we thought our problems had ended in 2010/11 but that was not the case. Then the debt crisis and the unbalanced budget in the USA became an issue for the financial markets at almost the exact same moment that the Euro crisis flared up. In 2012, Europe more or less stopped functioning from the wider financial perspective and, by last year, its industrial production had become substantially reduced. One of the consequences was that the steel industry found itself with an enormous overcapacity of, some say, 30%.

The metals recycling industry witnessed a reduced availability of scrap owing to lower levels of industrial activity and lower prices as a result of the overcapacity among our customers. The outcome of this is easy to understand: an even larger overcapacity in our sector than in the steel industry.

Only time will tell what the full impact will be on Europe's scrap industry. But as always, we are more optimistic about the current year than the one just past.

Let us continue in this optimistic frame of mind. Let us hope for successful peace talks for Syria; for successful negotiations at the COP-20 meeting, with substantial agreement among world

# contribution

“We will inform decision-makers about the importance of our industry from every different perspective, including as raw material suppliers, as employers, as guardians of the environment.”

leaders on strides towards reducing greenhouse gas emissions; and for a recovery in the global economy that will restore our industry's belief in future profitability.

BIR will continue to serve its membership in diverse ways, notably by organising the best Conventions which offer supreme global marketplaces for the recycling industry and which continue to attract our members' support in great numbers.

We will continue to support the industry with all kinds of information from all corners of the globe. We will increase our presence in the world's major hubs and will represent the recycling industry to the best of our ability in all the vital forums. We will inform decision-makers about the importance of our industry from every different perspective, including as raw material suppliers, as employers, as guardians of the environment, as reducers of greenhouse gas emissions, and so on.

The list of our positive contributions is long and we as an industry are developing all the time - maybe faster than most other industries.

Within BIR, our members are always welcome to contribute and we look forward to seeing new faces within our leadership ranks in the future.

# BIR'S FINANCIAL SITUATION



**Ranjit Baxi**  
BIR Treasurer

The financial situation of our world organisation remained solid throughout 2013. Despite some additional costs generated by partial refurbishments of our office in Brussels, the overall result was in line with our expectations. With a slight increase of the number of individual company members and good attendance figures at both conventions, revenues were stable. The BIR Finance Committee also handled our financial investments with great care, thus leading to a satisfactory return here too.

As a result, our organisation has continued to increase its statutory funds in accordance with BIR's objective of constituting enough reserves in order either to develop new programmes to promote our industry worldwide and assist our membership, or simply to be able to potentially address any financial difficulties encountered by our organisation in case of serious economic turmoil. The 2014 annual budget, which will be proposed for the approval of BIR effective members at the Annual General Assembly in Miami this June, will once again take this objective into consideration.

In my capacity as BIR Treasurer, I would like to thank all BIR members for their support and trust in 2013.





# Director General's REPORT



September 1, 2013 marked a sea-change at our world organisation's Brussels-based secretariat because, on that date, I succeeded Francis Veys as BIR Director General. Under the helpful and constructive guidance of BIR Executive Committee members, Francis, his team and I had been working together since October 2012 on preparing carefully for that moment.

**Alexandre Delacoux**  
BIR Director General

When I was interviewed for this position in May 2012, it was made clear that I would not be spending a large proportion of my time behind a desk. By the time 2013 came along, I had already travelled to meet the current leaders of BIR within the Executive Committee and the Advisory Council, as well as past leaders, whenever the chance arose. These visits included former Presidents whose dedicated work helped shape the BIR of today. At the beginning of 2013, I reached out to the leading organisations in BIR's 43-strong network of national associations and am continuously enlarging the scope of my engagement with all of our members.

During this introductory phase, I have listened and learned a lot about our organisation, its leaders, BIR's successes and challenges, and also about you, my colleagues. Above all, I have become aware of the essential role that our industry will play in the 21st century. As we know, society has high expectations of our industry, and these expectations are played out - for better or for worse - when developing or revising regulations.

BIR's leadership made it abundantly clear to me that I was to build on the success of my predecessor, and was not to change anything for the sake of change. In short, they wanted me to lead an evolution and not a revolution. With this precept in mind, we decided on a number of "evolutions" in 2013 which would constructively impact BIR's future. This strategy for BIR was presented in Shanghai last May where it met with the support of the Advisory Council.

We have done a great job in building a solid reputation within the industry for our high-quality Conventions and we must work continuously on improving our service if we are to keep this "gold standard". A major aim is to expand non-metals sector participation in the increasingly competitive arena of recycling conferences.

Europeans provided the impetus for the formation of BIR 66 years ago. Now, companies outside the EU make up approaching half of our membership: Turkey and the Middle East, for example, provide us with upwards of 10% of our members while a

# Recovery

“BIR has never been so well supported and so global in its coverage. We now have 830 member companies as well as 40-plus national member associations, in total spanning over 70 countries.”

further 20% are based in China, India and other parts of Asia. And it is the non-EU, non-North American proportion of our membership that has been growing most rapidly over recent years.

Under my leadership, the BIR secretariat will continue to sharpen its focus on international trade matters and statistics, notably but not exhaustively at the OECD and UN levels. BIR is holding fast to the precepts of free and fair trade without exception or exclusion, defending the right of recyclers around the world to engage in trade with each other so that secondary raw materials find their way to where they are most needed.

BIR has never been so well supported and so global in its coverage. We now have 830 member companies as well as the 40-plus national member associations, in total spanning over 70 countries. BIR was the first, and remains the only, recycling organisation that can rightly lay claim to the adjective “global”, providing the framework to promote the development of recycling in emerging as well as in developed markets.

BIR is also the single global voice of the recycling industry, not least because we represent so many national federations. Through this network, we estimate that BIR also indirectly represents well over 1.5m people working in the recycling business.

We needed a strategy for the management and expansion of the BIR network of national federations, as well as a specifically-defined approach and service that would be of value to those federations. Last year's two meetings of the Executive Directors, held in Shanghai and Warsaw, enabled us to define a possible framework. We now need to develop solutions and create the service for them.

We needed a strategy to increase our influence and impact through an ambitious focus on communications that addresses the reputation of the recycling industry. The implementation of this strategy is linked to a re-birth of the collaboration with our network of national federations and is to receive more attention in 2014.

## competitive

“BIR was the first, and remains the only, recycling organisation that can rightly lay claim to the adjective ‘global’, providing the framework to promote the development of recycling in emerging as well as in developed markets.”

Within the BIR secretariat, we have developed a strategy to develop ourselves and our capabilities to increase our impact on BIR initiatives and to grow as individuals. I have noted with a deep sense of respect for the current BIR team and my predecessor that all have presided over a 50% surge in BIR membership over the past ten years without adding noticeable costs to the secretariat's operations.

On behalf of the BIR secretariat, I wish to take this opportunity to thank each and every person within BIR who has helped me find my footing in this amazing position so as to enable me to engage with those challenges and opportunities that lie ahead of us with trust, dedication and confidence.

“BIR is holding fast to the precepts of free and fair trade without exception or exclusion, defending the right of recyclers around the world to engage in trade with each other so that secondary raw materials find their way to where they are most needed.”

quality



# Membership Spread 2013



## WESTERN EUROPE

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

## RUSSIA & EASTERN EUROPE

Albania  
Bulgaria  
Czech Republic  
Estonia  
FYRO Macedonia  
Georgia  
Hungary  
Latvia  
Lithuania  
Poland  
Romania  
Russia  
Slovenia  
Ukraine

## ASIA

China  
India  
Japan  
Republic of Korea  
Malaysia

Pakistan  
Singapore  
Taiwan (China)  
Thailand  
Vietnam

## CENTRAL & SOUTH AMERICA

Argentina  
Brazil  
Chile  
Cuba  
El Salvador  
Haiti  
Honduras  
Mexico  
Uruguay

## TURKEY & MIDDLE-EAST

Bahrain  
Egypt  
Iran

Israel  
Jordan  
Kuwait  
Lebanon  
Saudi Arabia  
Turkey  
United Arab Emirates  
Yemen

## NORTH AMERICA

Canada  
USA

## AUSTRALIA & PACIFIC RIM

Australia  
New Zealand

## AFRICA

Morocco  
Senegal  
South Africa  
Tunisia

# 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 Nonferrous Metals Industry Association Recycling Metal Branch (CMRA)
- China National Resources Recycling Association (CRRA)
- China Scrap Plastics Association

## CUBA

- Union de Empresas de Recuperación 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)
- Verband Deutscher Metallhändler e.V. (VDM)

## HUNGARY

- Hulladékhasznosítók Országos Egyesülete (HOE)

## INDIA

- Metal Recycling Association of India (MRAI)

## ITALY

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

## JAPAN

- Japan Iron & Steel Recycling Institute (JISRI)
- Japan Recovered Paper Association (JRPA)

## THE NETHERLANDS

- Vereniging Afvalbedrijven (DWMA)
- Federatie Nederlandse Oudpapier Industrie (FNOI)
- Metaal Recycling Federatie (MRF)
- Vereniging VACO
- Vereniging Herwinning Textiel (VHT)

# Energy consumption

## POLAND

- Izba Gospodarcza Metali Niezależnych i Recyklingu (IGMNiR)
- Scrap Economy Chamber of Industry and Commerce (IPHGZ)

## PORTUGAL

- Associação das Empresas Portuguesas Para o Sector do Ambiente (AEPSA)

## ROMANIA

- Organizatia Patronala Si Profesionala (REMAT)

## RUSSIA

- Non-Profit Partnership of Scrap Processors (RUSLOM)

## SOUTH AFRICA

- Metal Recyclers of South Africa (MRA)

## SPAIN

- Federación Española de la Recuperación (FER)
- Gremi de Recuperació de Catalunya
- Asociación Española de Recuperadores de Papel y Cartón (REPACAR)

## TURKEY

- Dönüşebilen Ambalaj Malzemeleri Toplayıcı ve Ayırıcıları Derneği (TÜDAM)
- Recovered Paper & Recyclers Association (AGED)

## 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)

# responsibility

# Membership Highlights

**Around 900** BIR Members  
all over the World!

**50%** Increase within  
the last 10 years!

**66** New Members in **2013...**

**43** National Federations

**72** Countries

More than **40%** Members  
outside the European Continent

# Divisions & Committees

Each Commodity Division and Committee represents a specific material. They are headed by an elected board and a president/chairman. Two additional BIR committees cover cross-commodity issues pertaining to trade and environmental matters: the International Environment Council and the International Trade Council.

# Ferrous DIVISION



2013 was a poor year for the steel scrap industry; indeed, the majority of participants would probably describe it as one of the worst in decades. It will be remembered as a year of financial difficulties for our industry, and one in which the very essence of free and fair trade came under multiple threat from protectionist forces.

**Christian Rubach**  
President Ferrous Division

Global crude steel production may have risen by 3.5% to an all-time-high 1.607bn tonnes but mills were forced to remain highly competitive if they wanted to make sales, leading to financial pressures on a steel industry still burdened by massive overcapacity. And in a bid to alleviate the steel industry's struggles, some of the world's decision-makers were persuaded to adopt populist but ill-conceived measures such as scrap export restrictions in South Africa.

In the EU, there was open discussion of scrap export monitoring and the mandatory certification of non-EU steel mills and foundries which receive EU scrap. Such moves have been camouflaged as attempts to address environmental concerns such as "carbon leakage". And yet a Laplace Conseil study part-funded by BIR and the European Ferrous Recovery & Recycling Federation (EFR) has emphasised that such moves could have the unwanted effect of damaging an EU scrap

collection and processing industry that is already delivering a clear environmental advantage: the scrap/electric arc furnace industries are responsible for 42% of all EU crude steel production while accounting for only 22% of the entire EU steel sector's energy usage and just 15% of its carbon dioxide emissions.

Higher global crude steel production did not mean increased international movements of scrap as many of the leading buyers cut their imports sharply. For example, runaway steel production leader China bought in only 4.46m tonnes of steel scrap last year for a drop of 10.2% over 2012. India, meanwhile, imported a record of almost 7m tonnes of ferrous scrap in the year to end-March 2013 and yet, in the ensuing six months, slashed its overseas bookings by more than 30% on an annualised basis in response to poor demand, a weaker domestic currency and damaging import duties.

industries steel



## KEY FACTS

CRUDE STEEL PRODUCTION

+3.5% IN 2013 TO 1.607BN TONNES

### JANUARY-NOVEMBER 2013:

TURKEY'S STEEL SCRAP IMPORTS

-13.5% YEAR ON YEAR

US STEEL SCRAP EXPORTS

-14.5% YEAR ON YEAR

EU STEEL SCRAP EXPORTS

-16.1% YEAR ON YEAR

And Turkey, the world's largest importer of steel scrap, saw domestic crude steel production slip from 35.9m tonnes in 2012 to 34.7m tonnes last year. With its domestic collections of scrap on the increase and overseas buying activity hampered in the latter part of 2013 by the weakness of its lira, it is believed Turkey's steel scrap imports will have fallen last year by perhaps 3m tonnes - thus dealing a blow to the international trading community.

In many countries, scrap processors continued to struggle to attract sufficient material to keep their machinery anywhere near fully occupied. In effect, the overcapacity afflicting our main customers is also prevalent in our own industry. Competition for raw material among scrap operators remained fierce last year, with some of them reporting volumes down by as much as 50%. Less material, rising costs and squeezed margins go to make a poor business cocktail.

But rather than end on a bleak note, we should perhaps remember what Peter Marcus of World Steel Dynamics told us at our meeting in Shanghai last year: that the global steel environment could improve significantly from 2015 onwards. The World Steel Association, meanwhile, forecasts an increase in global apparent steel use of more than 3% in 2014, with all regions expected to show growth. While these are indicators of potentially better times ahead, I confess that I am anticipating a year of few major changes in trading trends.

“Less material, rising costs and squeezed margins go to make a poor business cocktail.”

trends

production

# Non-Ferrous Metals DIVISION



**Robert Stein**  
President Non-Ferrous  
Metals Division

As in most of the years recently past, 2013 was characterised by an inverse relationship between the amount of work we put in and the amount of reward we extracted. On the plus side, analysts tell us 2014 is shaping up to be a better year economically, particularly in some of the older, developed countries. However, we should not forget that some of the leading outlets for our products are enduring less helpful conditions: for example, China has been recording significantly slower economic growth while the business community in India has struggled to overcome a weak currency, poor demand and an unfavourable political environment.

The situation in India was not helped last year by the raising of import duties on aluminium and brass scrap. Given the reliance on imported scrap to feed the country's secondary industry, this move upped its raw material costs at a time when finished goods were trapped in a hugely competitive environment. And of course, such duties are a contradiction of the principle of free and fair trade which is locked into the DNA of our world organisation.

Worse still, the duty changes in India were unexpected. Governments have a sovereign right to enforce policies - but surprise shifts can disrupt material flows and undermine a supplier's confidence in a market while often increasing his costs. Therefore, the even application of readily-understandable procedures, imposed with an appropriate period of notice and suitable guidance, would be a welcome courtesy to an international trade that helps keep the wheels of industry turning in scrap-importing countries.

**“For most of us, it was a year of narrow scope both for profit and for investing in the future of our businesses.”**

Delayed enforcement of policies - such as with China's Green Fence operation of 2013 - can have a similarly disruptive effect. Green Fence impacted all those foreign companies looking to export valuable secondary raw materials to China; but it should also be remembered that it is China's own consuming sector that ultimately pays the price for all the obstacles put in the way of overseas suppliers.

In some instances, governments listen to the sensible, closely-argued free-and-fair-trade argument put forward by BIR and others - but still persist with measures that are an open invitation to market distortion. A salient example from 2013 was the decision by the South African government to restrict scrap exports by first requiring it to be offered to domestic consumers at a 20% discount to the international price.

# flows valuable economy aluminium

2013 may have proved to be a busy but largely unrewarding year for our companies, but our labours within the BIR Non-Ferrous Metals Division bore far healthier fruit. For example, we looked to add to the sum of statistically-verified recycling knowledge by commissioning and publishing “Global non-ferrous scrap flows 2000-2011”, a study prepared by CRU Strategies which painted a detailed picture of scrap’s massive contribution to global copper and aluminium production.

Last year also saw the first meeting of BIR’s new E-Scrap Committee, which is operating under the auspices of the Non-Ferrous Metals Division and which will support the interests of the rapidly-emerging electronic scrap recycling industry. Our division was also behind the decision within BIR to engage one of China’s foremost recycling industry experts, Ma Hongchang, to report on changes in policy and regulations that could have an impact on our industry. And we continued to provide impetus and support in the fight against the global scourge of metal theft and fraud.

Undoubtedly, many of the problems encountered in 2013 have followed us into 2014. But as I had occasion to say in a late-2013 edition of the always-excellent BIR Non-Ferrous Metals World Mirror, we should take what lessons we can from last year regarding, for example, efficiency improvements and seeking out the most viable outlets for our material. In this way, we will be well-positioned to take best advantage from any positive economic developments that come along this year.

## KEY FACTS

### WORLD COPPER SCRAP USAGE:

7M TONNES IN 2000  
10.1M TONNES IN 2011

### WORLD ALUMINIUM SCRAP USAGE:

10.9M TONNES IN 2000  
18.3M TONNES IN 2011

# Textiles

## DIVISION



**Olaf Rintsch**  
President Textiles Division

Towards the end of last year, there was finally some downward movement in the prices of originals after a prolonged period of sustained firmness. However, this reduction in buying price pressure came too late for a number of businesses in our sector. For example, we were told at our meeting in Shanghai last May that the UK's Textile Recycling Association had lost more than 10% of its membership over the course of the previous 12 months because of the inability of some collectors to meet prevailing market prices for originals. By the time we met again in Warsaw last October, a further two of the association's members had exited the textiles recycling business with the loss of hundreds of jobs and associated skills.

Despite some of the heat escaping from the price of originals, issues and challenges still remain - not least with regard to maintaining access to supplies. Take my home country of Germany, for example, where the authorities are attempting to gain access to all used textiles collections, regardless of the contribution of our industry and the expertise it has developed over many generations. My own view is that harmonised legislation is required across Europe to prevent differing approaches among Member States to this issue of access, and thus to eliminate the uneven application of regulations and the confused market pricing that can result.

While we do not ask to be showered with praise, it is nonetheless discouraging to hear how little attention is sometimes paid to our industry's genuine problems and concerns. In 2013, the used textiles sector continued to fall victim to thefts not only from containers but also from door-to-door collections. And even though there is strong evidence to suggest the hand of organised gangs in many of these crimes, the response from the police

and from the authorities in general has been mixed and in some instances almost non-existent.

The textiles recycling industry makes a huge environmental, commercial and social contribution in developed and developing regions of the world. For example, we heard at our divisional meeting in Shanghai of textiles recycling initiatives in China. And in the USA, efforts are being made to boost the diversion of used textiles from landfill; in effect, the nation's Secondary Materials and Recycled Textiles Association (SMART) has developed a package of documents designed to help local governments considering measures to manage clothing collection bins in their communities. SMART is trying to educate government officials and the public that used clothing and textiles are eminently recyclable, just like aluminium cans, plastic bottles, newspapers and cardboard.

Americans are huge consumers of textiles and so additional efforts to achieve greater recognition of the domestic recycling industry and of its

re

# collections sustainable

“It is discouraging to hear how little attention is sometimes paid to our industry’s genuine problems and concerns.”

environmental contribution are to be welcomed. The scale of the challenge in the USA is highlighted by statistics from the Environmental Protection Agency indicating that 22.18 billion pounds of textiles (or around 10m tonnes) are consigned to municipal landfills every year whereas only 4 billion pounds (1.8m tonnes) are recovered for reuse or recycling. And yet of those 22 billion-plus pounds, an estimated 95% could have been reused or recycled.

## KEY FACTS

### TEXTILES IN THE USA:

10M TONNES LANDFILLED EACH YEAR  
1.8M TONNES RECOVERED FOR REUSE  
OR RECYCLING

Earlier, I spoke of the loss of talent from our industry that comes with company closures. And 2013 brought a sad departure for our own BIR Textiles Division when our Honorary President and staunchest of industry allies Klaus Löwer confirmed his intention to retire. The divisional board has responded by conferring on him the title of Honorary Member, not only because he is eminently deserving of this great accolade but also because we would hope to count on his profound knowledge, expertise and, of course, friendship for many more years to come.

landfill  
reuse  
recycling

# Paper DIVISION

fibre



In recent years, many people from various walks of life have stepped forward to praise our industry for its stunning environmental contribution over the course of many decades. And yet, certain of the developments in 2013 must lead us to question whether our efforts have earned us the full respect we deserve.

**Reinhold Schmidt**  
President Paper Division

In my own country of Germany, the Closed Substance Cycle Act has effectively handed municipalities a larger role in recycling at the expense of our industry, effectively weakening the commercial positions we have painstakingly nurtured over many years by presenting us with a whole new layer of hostile competitors. And on the EU level, more than five years of effort by our industry and others to establish end-of-waste criteria for paper came to a hugely disappointing conclusion in December when a proposal supported by our representatives and other interested parties became undermined at a late stage in the process and was subsequently rejected in a European Parliament vote. Our industry does not intend to give up on the quest for end-of-waste status but, it must be acknowledged, the road ahead looks long and winding.

On the positive side, work has been completed on another long-standing project, namely the updating of the EN 643 European list of standard grades of paper and board for recycling - something which should help us all in our every-day activities.

For our industry, 2013 was further complicated by China's Operation Green Fence import quality controls, a programme which officially ran from February to November but whose ethos is likely to endure for a long time to come. Green Fence enforced regulations that had been on the statute books for a number of years but initially led to confusion, with uneven interpretation by the Chinese authorities prompting many recovered fibre exporters to adopt a cautious approach when shipping to China. Indeed, China's total imports were slightly lower in the first half of 2013 when

process  
environment  
raw mater



## KEY FACTS

EUROPE'S PAPER RECYCLING RATE 71.7%

### CHINA'S RECOVERED FIBRE IMPORTS:

FIRST-HALF 2012

15.032M TONNES

FIRST-HALF 2013

14.924M TONNES

“If the customer is king, as the saying goes, then quality has become queen for paper for recycling.”

compared to the same period in 2012. Over time, however, most exporters around the world have become far more finely attuned to China's requirements and have responded accordingly, achieving an appreciable overall improvement in the quality of shipped material.

If the customer is king, as the saying goes, then quality has become queen for paper for recycling. Indeed, the controls enforced by China have undoubtedly caught the attention of some of Asia's other leading fibre-importing nations such as Indonesia and India, with the end result perhaps being the implementation of tighter quality controls of their own.

Last year also saw the continuation of a number of macro trends in our industry, including overcapacity among graphic paper producers. At our meeting in Warsaw last October, renowned industry analyst Bill Moore of Moore & Associates highlighted the impact of changing consumer trends in describing old newspapers (or ONP) as “a disappearing grade” in the USA, with US and Canadian newsprint production expected to tumble from 7.84m tonnes in 2010 to 5.86m tonnes by 2016.

The European Recovered Paper Council (ERPC) also had occasion to spotlight the sharp decline in newspaper consumption, adding that it “will affect the overall paper recycling levels as newspapers are traditionally one of the most recycled paper products along with corrugated boxes”. The comment was made in light of the 71.7% paper recycling rate achieved by Europe in 2012 compared to a world average of below 60%. But in celebrating this undoubted achievement, the ERPC warned that the recycling rate “is starting to level out” and that keeping it high “is becoming challenging”.

RISI economist Minnie Kong made a similar point at our meeting in Shanghai last May. She predicted that such high recycling rates in Europe and the USA would limit growth in their exports, leading to upward pressure on fibre pricing given Asia's continuing heavy dependence on imports for the foreseeable future.

t

ials

competitors  
improvement

## CASE STUDY:

# E-scrap recycling- BIR's way forward

Electronics are ubiquitous. There is barely a corner of human activity that electronics have failed to penetrate, not only in the developed world but also increasingly in the many other parts of our planet where people aspire to ever-improving lifestyles. And wherever there are electronics, of course, there is going to be the challenge and, many would argue, the opportunity that is e-scrap.

In recognition of the growth of e-scrap, as well as of its uniqueness and complexity, BIR took the decision to reconstitute its dedicated E-Scrap Committee under the auspices of the BIR Non-Ferrous Metals Division in order to promote debate and keep its membership informed about a rapidly-changing sector which has attracted a raft of regulations all of its own. Vindication of this BIR initiative came at the first full meeting of the reconstituted committee during the world body's Convention in Warsaw last October; the high-quality but frank exchange of differing expert views confirmed that the new forum has a role to play in evaluating the challenges facing e-scrap recycling, in obtaining consensus and in paving the way for progress.

The need for a globally-workable approach to the issue of electronics recycling is underlined by the fact that e-waste volumes are increasing not only in the developed world but also in developing countries. Eric Harris, the US Institute of Scrap Recycling Industries' Associate Counsel, Director of Government and International Affairs, told the Warsaw meeting that the electronics recycling industry in the USA alone is worth more than US\$ 20bn and processes over 4m tonnes each year, providing direct and indirect employment for 45,000-plus people. He also stressed, however, that the developing world would go on to produce far more e-scrap than developed countries; indeed, it has been suggested elsewhere that, within the next four years, Africa will be generating more e-waste than the whole of the EU.

committees

certification

electronics

“The new committee  
is well-placed to identify  
best e-scrap practices  
and policies from around  
the world”

experts

progress

Specifically, the new BIR committee is well-placed to identify best e-scrap practices and policies, and also to evaluate the pros and cons of the various e-scrap certification standards and programmes from around the world. Certification of e-recyclers has been gaining traction over recent years and is seen by its supporters as the best means of improving operational practices and controls, creating accountability and boosting customer confidence that e-scrap has been handled appropriately. Others are concerned about the proliferation of certification systems, their use to ring-fence markets and the costs of maintaining multiple certifications.

Of course, another of the key roles for the E-Scrap Committee will be to keep the BIR membership informed of the very latest developments - for example, proposals for new legislation - in what is a dynamic and rapidly-changing e-scrap sector. Targets around the world are subject to regular review, with the EU's new Waste Electrical and Electronic Equipment Directive, for instance, enshrining a collection goal as from 2019 of 65% of what has been put on the market.

BIR recognises the importance of taking a responsible lead given that e-scrap is not only the fastest-growing stream for recycling but also a magnet for sensationalist media headlines. By bringing together experts in the field, the aim must be to ensure: that the realities of e-scrap are uncovered and highlighted; and that accurate messages are disseminated to policy-makers and the wider world.

And one of these messages must surely be that electronics continue to generate one of the most complex waste streams, with products comprised of an intermingled mix of metals, plastics, glass, wood and hazardous materials. Despite the entreaties of the recycling industry and its representatives over several decades, many producers of electronic equipment fail to prioritise ease of recycling when designing their products. To optimise recycling, a change in this mindset is sorely needed.

lifestyle

# Stainless Steel & Special Alloys COMMITTEE



**Mark Sellier**  
Interim Chairman Stainless  
Steel & Special Alloys  
Committee

Over the last few years, BIR has invested substantial efforts and resources into building its reputation as a source of pertinent, reliable information about the recycling industry globally. Reports and studies have been commissioned that shine a more penetrating light on various aspects of recycling, thus providing our industry's representatives with a greater arsenal of statistical ammunition when defending our interests with decision-makers at national, international and supranational level.



But for members of BIR, there is another source of highly-prized data that we should not forget or underestimate, delivered in the form of expert presentations to our twice-yearly Conventions. Indeed, we were particularly fortunate at the BIR Stainless Steel & Special Alloys Committee to hear from two of the world's most renowned analysts at our meetings last year in Shanghai and Warsaw.

Markus Moll, Managing Director of Austria-based Steel & Metals Market Research, gave it to us straight at our gathering in Shanghai: profitability is way below target levels for scrap processors and traders - a situation that cries out for further consolidation within the sector. And in Warsaw, Heinz Pariser - the founder and head of Heinz H. Pariser Alloy Metals & Steel Market Research in Germany - underlined that steady growth in global stainless steel production should not be allowed to mask the fact that, for the time being at least, this is a "not very profitable" industry.

For 2014, Mr Pariser predicted that global melting production would climb perhaps 6.5% to beyond 40m tonnes thanks to growth of more than 10% in China and 5.3% in India - but only 2.7% across the longer-established producer countries of the world. In Europe, he pointed out, stainless steel production was at only 72% of its peak level of 2006.

And the same speaker dwelt on another issue that could become of major relevance to our own sector: an increase in global external stainless scrap availability. The world's scrap reserve was around 150m tonnes in 2012 but could well exceed 260m tonnes by 2025, it was suggested. And in China, growth in the country's internal and external scrap volumes is threatening to create a stainless scrap "bubble" over the coming five to 10 years as its domestic reserves soar from less than 20m tonnes in 2012 to a projected 164m tonnes by 2030.

The prospect of a scrap "bubble" will not be encouraging for our trade which, clearly, is already enduring very challenging times. As we learned

## KEY FACTS

GLOBAL STAINLESS STEEL DEMAND +4.5% IN 2013

IN 2013, CHINA PRODUCED MORE THAN 50% OF THE WORLD'S STAINLESS STEEL

# crap bubble tonnes climate change challenge

at our Shanghai meeting, China was home to the world's top five stainless steel producers in 2012. Indeed, the Asian giant went on to account for more than half of global stainless steel production last year - and yet provided no major outlet for the rest of the world's scrap, opting instead to source most of its nickel units in the form of nickel pig iron.

In most other countries, meanwhile, discussions in stainless steel producer boardrooms centred on cost-cutting rather than on investment plans.

So while global stainless steel demand growth approached an apparently healthy 5% in 2013, the industry in many parts of the world, notably Europe, is stagnant at best and continues to be weighed down by a substantial structural overcapacity. We may have moved a year further on, but the conclusion reached in our previous annual report remains as true today as it was back then: that higher capacity utilisation numbers, economies of scale and other streamlining efforts are essential for those companies looking to achieve a sustainable footing in the stainless steel sector.

“Profitability is way below target levels for scrap processors and traders.”

reserve  
challenge

# Plastics COMMITTEE

controls  
vol



Around the world's conference halls, much was made last year of the negative impacts of China's Green Fence import quality controls. According to the initiative's many critics, it was responsible for a sharp drop in the prices of lower-quality recovered plastics and for constraining the volumes shipped to China by some of its traditional suppliers, leading to storage and logistics problems in some of those exporting countries.

**Surendra Borad**  
Chairman Plastics Committee

Indeed, statistics support such arguments: comparing the first half of last year with the same period in 2012, Chinese imports of plastic scrap from the USA fell by 11% while volumes received from Germany slumped 24%. Some - but by no means all - of the "lost" tonnages were diverted to other importing countries such as Vietnam, Thailand and Malaysia.

It would also be true to say that either over-enthusiasm or caution among the Chinese customs authorities led to the rejection of some material of a perfectly good quality. But rather than wringing our hands in consternation and exasperation, perhaps we should be taking a step back and regarding Green Fence from a different perspective - as the bringer of short-term disruption for long-term gain. It is my opinion, and one I was happy to express to the 10th China Plastics Recycling Exhibition and Conference in Hangzhou late last year, that Green Fence is in the best, long-term interests of the trading community, the Chinese recycling industry, the users of reprocessed plastics and, last but not least, the environment.

In effect, the controls enforced under the Green Fence initiative will ensure not only better sorting but also an increased availability of sorted materials. With volumes bound to exceed the processing capacities of recyclers in many of the developed parts of the world, better-segregated plastics will ultimately find their way to China. However, it should also be mentioned in the same breath that exports to Asia as a whole from Europe, the USA and other parts of the world will decline in the coming period owing to localisation of the scrap recycling business.

consum



## KEY FACTS

### GLOBAL CONSUMPTION OF RECOVERED PLASTICS:

2007

15M TONNES

2013

42M TONNES

PÖYRY FORECAST FOR 2020

85M TONNES

“We should be regarding Green Fence as the bringer of short-term disruption for long-term gain.”

That said, China is - and will remain - an important market for recovered plastics and, in this context, we were delighted to welcome the China Scrap Plastics Association into BIR membership last year. Research from CBI China indicates that the country's annual demand for recovered plastics could reach 29m tonnes by 2015; it is currently importing around 9m tonnes of plastics scrap each year. Meanwhile, estimates from leading industry consultant Pöyry reflect an impressive global growth outlook for our dynamic industry: world consumption of recovered plastics has already soared from 15m tonnes in 2007 to 42m tonnes by 2013, with 85m tonnes seen as a realistic figure for the year 2020 - equivalent to a value growth of US\$ 40bn in the space of just seven years.

Regulatory initiatives have not been confined to China, it should also be stressed. If approved, a Green Paper proposal from the European Commission's Environment Directorate to ban the landfilling of plastic waste has the potential to promote plastics recycling in general, improving quality and boosting exports. Already, seven EU Member States plus Norway and Switzerland have outlawed the landfilling of plastic waste. More worrying, however, are attempts to reduce plastic scrap exports to non-OECD countries through certification of recycling facilities and more stringent waste shipment regulations.

In 2014 and beyond, we must remain attuned to developments around the world and be prepared to react accordingly both as businesses and as an industry. If we do so effectively, I remain convinced that the outlook for plastics recycling is profoundly positive.

# mption

# recovery

# Tyres

## COMMITTEE



2013 was a year symbolised by the extended hand of friendship and co-operation. At the BIR Tyres Committee meeting in Shanghai, for example, we welcomed as our guest speaker Pang Shuhua, Vice President and Secretary General of the China Tyre Retreading, Repairing and Recycling Association. Not only did he provide us with a fascinating insight into the tyre recycling sector in China, but also he stressed a desire for closer ties between his own organisation and the BIR.

**Barend Ten Bruggencate**  
Chairman Tyres Committee

Such co-operation is to be welcomed, not least because of the size of the Chinese market and its massive influence on almost all of the world's resources. Indeed, the country's tyre arisings are on a sharply rising trend because of strong growth in domestic car ownership.

And that same spirit of co-operation was rekindled later in 2013 when BIR held a ground-breaking meeting with the European Tyre and Rubber Manufacturers' Association (ETRMA) at which several mutual-interest issues were identified. The two organisations agreed to collaborate on, among other matters: the attempt to win end-of-waste status at EU level for used tyres; and, in a link to the possible achievement of this status, the challenges presented by the EU Regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals (REACH). The meeting's agenda also extended to discussion of CEN TC 366 standardisation work and to the export situation for tyre-derived materials such as granulate and powder.

Over recent years, end-of-waste has become a point of focus for a host of BIR divisions and committees because this status has the potential

to reduce administrative burdens while creating jobs and economies of scale. Tyres are among those commodities to have been listed by the EU authorities as a possible category for which end-of-waste criteria should be developed. To date, efforts have focused on securing this status for two specific categories: tyre casings suitable for retreading; and granulate, powder and chips obtained from the processing of the rubber fraction from tyres.

These two streams would appear to tick all the right boxes for end-of-waste in that a ready market exists for the material, their use entails no overall adverse environmental or human health impacts, and the products are fit for use and meet standards or specifications for trading. Early experience has taught us, however, that we can expect no short-cut to end-of-waste; the process can be a lengthy one and the EU authorities' response to initial approaches on this matter have been disappointing. But given the newly-opened possibility of collaboration between BIR and ETRMA on this issue, we should allow ourselves to hope that more progress will be made during 2014.



ories

# responsibility

## KEY FACTS

EUROPEAN END-OF-LIFE TYRE RECOVERY IN 2012: 95%

THE EU RECOVERY RATE HAS EXCEEDED 90% EVERY YEAR SINCE 2007

CEMENT KILNS ABSORB 91% OF THE END-OF-LIFE TYRES USED FOR ENERGY RECOVERY

We already have reason to be indebted to the ETRMA in that, for many years, the organisation has supplied figures to illustrate Europe's steep tyre recycling progress. As recently as the start of this Millennium, only around 40% of the continent's end-of-life tyres were directed into material or energy recovery, while almost exactly the same proportion was consigned to landfill or to some unknown fate (the remainder were destined for retreading, reuse or export). But according to the ETRMA's latest statistical review covering the year

2012, material recycling accounted for 39% of the 2.765m tonnes of arisings in that year while energy recovery took care of a further 37%.

The proportion of Europe's used tyres that are either landfilled or otherwise lost to the statisticians is now a mere 5% while recovery rates above 90% are also routinely recorded in the likes of the USA and Japan - a cause for genuine celebration across all sectors of the tyre industry.

“Early experience has taught us that we can expect no short-cut to end-of-waste.”

collaborate

ures

# International Environment COUNCIL



**Olivier François**  
Chairman International  
Environment Council

It is a question often asked, but what single act would provide the best conditions for recycling to thrive? One possible answer lies in the Action Plan for Raw Materials in Europe which mentions the possible application of a landfill ban on materials that could be recycled. We discussed this notion briefly at the International Environment Council meeting in Warsaw last October, and it is worth adding that the seven countries whose legislation makes it difficult – or, indeed, almost impossible – to landfill recyclables are also the ones that are achieving the continent's highest material valorisation and recycling rates. The statistics proving this point should be compulsory reading for decision-makers in Europe and around the world.

Also at our meeting in Warsaw, I pointed out that France alone had generated 80,000 pages of new regulations in 2012, many of them relating to the environment; I can only imagine what the figure must be for the EU or for the world as a whole. With regulations generated at such a prodigious rate, it is inconceivable that the authors have had the time to evaluate every nuance and to explore every potential downstream effect. The inevitable result is what we have had cause to refer to regularly as “unintended consequences”.

And even though these regulations were mostly well-intentioned, it is surely an impossible task for enforcement agencies to digest this volume of information and then interpret it in exactly the same way as their counterparts in other states. And here, the inevitable result is uneven application and the undermining of our old friend, the level playing field.

At the International Environment Council, one of our key roles is to sift through this mass of new regulations, uncovering any - whether they be good, bad or indifferent - that may have implications for the recycling industry locally, regionally or globally. It is then our task to supply our membership with the information about these regulations that it needs to know, as evidenced at our meeting in Shanghai last May when we invited Jin Jie from CIQ to provide a review of China's AQSIQ registration renewal and future new-application procedures for overseas suppliers of recyclables.

“Every year is a busy year for the International Environment Council - and 2013 proved to be particularly challenging.”

“With regulations generated at such a prodigious rate, it is inconceivable that the authors have had the time to evaluate every nuance and to explore every potential downstream effect.”

# Consequences regulations overseas

Owing to the aforementioned huge annual output from legislators, every year is a busy year for the International Environment Council - and 2013 proved to be particularly challenging. This fact will have been apparent to anyone attending our meetings in Shanghai and Warsaw where the subject matter switched from management of radioactive sources detected in scrap and the UN-EP Basel Convention's "Framework for the Environmentally Sound Management (ESM) of hazardous waste and other waste", to the Basel Convention's Partnership for Action on Computing Equipment (PACE), transboundary movements, sustainable materials management, resource productivity, critical materials and a review of guidance on extended producer responsibility.

Valuable progress was made on some fronts last year, such as complete industry agreement - and the agreement of all countries but one - on the draft of the Code of Conduct on the Transboundary Movement of Radioactive Material inadvertently incorporated into scrap metal and semi-finished products of the metal recycling industries.

But it is also a sad fact that we encounter disappointments too when it comes to regulation. In 2013 for example, and after a number of years of hard work, the EU proposal setting forth end-of-waste criteria for paper was defeated in the European Parliament under controversial circumstances. However, we remain committed to the cause of pursuing end-of-waste not only for paper but also for the likes of plastics and tyres, to which end work has already begun.

slators radioactive  
global

# International Trade COUNCIL



In a difficult year of trade for most BIR members, the International Trade Council (ITC) has been as busy as ever.

**Robert Voss CBE**  
Chairman International Trade Council

qua

Its main event, held in May last year at the BIR World Convention in Shanghai, was most timely as it was entitled “The Cost of Doing Business”. Attended by more than 400 people, the workshop looked at different aspects of the costs involved in trading, including risk management, insurance and foreign exchange. At this same gathering, the ITC was also given an insider update on China’s Green Fence initiative and especially the inspection procedures involved.

Our relationship with the International Maritime Bureau (IMB) continues to flourish and more members are using its database to verify the validity and good standing of new customers and shipping companies. We would still encourage members to contact IMB with information to enable it to enhance its database and also to use IMB information to help in their own businesses. This service is, of course, free of charge to members.

The ITC continues to monitor and protest any attempts to interrupt the free flow of our raw materials around the world. And over the last

12 months, we have been contacted by a number of countries to assist in the response to potential protectionist measures in their areas. This looks set to become an ongoing problem as more countries try to protect their valuable materials, often under great pressure from local industry. This has been particularly evident recently in South Africa where, despite the assistance given by the ITC and BIR, a punitive restriction on exports has been imposed.

Unfortunately, one issue that continues to affect our industry on a regular basis is theft on both a small and larger scale. While some countries have tried to combat the smaller, micro-level crimes with such measures as cashless trading of scrap metal, there remains the macro-level problem of containers being broken into and material stolen in bulk. Many members are taking greater security measures with their materials in transit - but there is more to be done. The ITC will continue to monitor the theft situation worldwide and to advise members on how best to protect themselves. Another questionnaire may soon be prepared to quantify the problem.

W



# customers monitor identify local

The new BIR arbitration service continues to be used by members and has been welcomed by those who have been involved as being a highly professional and effective method of dispute settlement.

Once again, I would like to thank the members of the ITC committee for their continued support. In addition, I am indebted to Alexandre Delacoux and his entire team in Brussels for their continued hard work in support of the ITC. Special mention must also be made of our recently-retired Director General Francis Veys - an avid supporter of the ITC from its inception - for the huge amount of work he did over the years to ensure that workshops were relevant and well received, and that our members' trade interests were well represented around the globe.

2014 may well be another difficult year for trade but the ITC will continue working hard to ensure the best possible trading conditions for all BIR members.

“The ITC will continue to monitor the theft situation worldwide and to advise members on how best to protect themselves.”

# worldwide

# CASE STUDY:

## BIR sharpens its focus on Latin America

BIR represents the interests of around 850 member companies and 43 national associations in over 70 countries - a coverage which has expanded markedly even during the recent years of widespread economic downturn. However, we are always looking to widen our reach and to attract new members through a package of services which speaks to their particular needs.

Since before the turn of the Millennium, for example, our world organisation recognised the importance of China to the global secondary raw material markets. We set about building close links with the country so that our trader members could better understand China's needs and so that, in turn, China could better appreciate what our members had to offer it. The result has been a sharp increase in membership numbers not only in China and across Asia but also in countries wanting to trade there.

And now BIR has identified another point of focus on the map: Latin America, a region which is emerging strongly as an economic force but whose recycling infrastructure is still largely in the developmental phase. In effect, BIR is reaching out to the region's recycling industry and to its local government agencies with a view to informing them about the benefits of establishing responsible and sustainable recycling practices.

Latest figures underline the growing importance and dynamism of the region: Latin America is home to 20 countries and a total of around 600m inhabitants, almost twice as many as the USA, while Brazil is seventh and Mexico eleventh in the world GDP league table. Also importantly, Latin America has a higher-than-average proportion of younger people, many of whom are receptive to the pro-environment message of resource conservation and who therefore would like to see progress on recycling.

Against this background, BIR has formed a dedicated Latin America Committee to examine ways of increasing its support to recyclers in the region - a process given added impetus by BIR's staging of a Latin America workshop at our flagship Convention in Shanghai last year. The event identified several areas where BIR might assist Latin America in driving forward its recycling development, including taxation and environmental legislation.

# pro-environment

“BIR has formed a dedicated Latin America Committee to examine ways of increasing its support to recyclers in the region.”

# issues community

And in 2014, BIR will further sharpen its focus on this part of the world by staging its main Convention (on June 2-4) in the southern US city of Miami - a location chosen with the deliberate intention of encouraging wider participation from anyone in Latin America with an interest in recycling, be they processors, suppliers, legislators or academics. The Convention programme will be designed to reflect the status of the recycling industry in Latin America, the specific issues and challenges it faces, and the opportunities and advantages of forging closer links with BIR members in other parts of the world.

In the development of closer ties with the region, BIR has benefitted greatly from the input of impressive professionals with an in-depth knowledge of Latin America and of its recycling markets, both in terms of opportunities and challenges. These include Mexico's Alejandro Jaramillo and Brazil's

Bianca Vicintin Abud, both of whom are established members of the BIR Non-Ferrous Metals Division board. But through such initiatives as the Miami Convention and the Latin America Committee, the hope is that many more recyclers in the region will feel encouraged to play a full role in our world organisation in the years to come.

Increasingly, the recycling industry is a global community sharing many of the same ideals, aspirations and challenges. Through regular interaction within BIR, a world of expertise can be brought to bear not only on recycling problems but also opportunities. Formation of the Latin America Committee underlines once again the importance attached by BIR to enhancing its worldwide representation and to fostering a spirit of inclusiveness to the benefit of recycling globally.

# focus members





# Special Committees

The BIR Special Committees deal with organisational and administrative matters concerning the general structure of the organisation.

# Convention COMMITTEE



Change is often extremely challenging for so many of us and managing change is equally challenging. This year has seen a significant change in BIR leadership with the retirement of Francis Veys as Director General and a new man at the helm of our association, Alexandre Delacoux.

**Mark Sellier**  
Chairman Convention Committee

Conventions are the public face of our organisation and an invaluable business market information and networking tool. They are where we showcase what we are about as BIR and where we deliver a Convention product that keeps delegates returning. Francis Veys has exceptional experience in this area and, although retired from the leadership, we are delighted he has been retained as a consultant to the organisation in the Convention area.

Mr Veys conducts the vital due diligence necessary once a destination is put forward for consideration, regularly updating the committee on progress and plans that are often in place up to four years in advance.

Despite the difficult global economic climate in which our industry generally witnessed cost-cutting and contraction, we hosted two very successful Conventions in 2013. The Shangri-La in Pudong, Shanghai, provided us with excellent accommodation and facilities as well as service. There was ample space for networking but traffic through the exhibition area was disappointing; as a result, we have formed a small working group involving our exhibitors to ensure that we deliver the best exhibition possible with what is available in the chosen location. A wide range of topics was covered in the commodity sessions, with the event

also offering a workshop on Latin America and the first meeting of BIR's newly-formed E-Scrap Committee. The pressure on the programme to cover all necessary presentations, workshops, etc. continues to mount: there were a staggering 22 speakers during the event.

In October, we returned to Warsaw six years after our previous visit. The event was well attended given the economic climate. Our organisation hosted an extremely successful reception at the Castle which was oversubscribed. The mood amongst delegates was definitely subdued.

During the year and over the course of these two meetings, the Convention Committee has been very active. We have decided that, for the moment, India remains a difficult destination for BIR to host a May Convention. Our special adviser undertook extensive research into potential venues, logistics, etc. and, after discussing his findings, the committee decided that we should postpone a planned Convention in India until the right venue had been identified.

We have actively discussed the rise of "competing events" and how BIR Conventions differentiate themselves and how we can continue to do so. We have discussed the possibility of extending the



“Conventions are the public face of our organisation and an invaluable business market information and networking tool.”



Autumn Convention to three days from time to time instead of the usual two days. This is necessary as we attempt to accommodate more and more items in the programme.

We will next meet in Miami, hosting a Convention in the USA after an absence of more than 14 years. October 2014 will see us in Paris and the venue for May 2015 has yet to be fixed. We have a few possible venues: Bangkok, Dubai and Abu Dhabi are currently the front-runners and a decision will be made in the run-up to the Miami event.

As always, I am extremely mindful of the hard work that the Brussels secretariat put into our Conventions. Their dedication is evident through the long days of preparation leading up to the Conventions and the even longer days during the Conventions themselves. On behalf of the Convention Committee, I extend our thanks for their efforts.

Lastly, I would like to thank BIR's World President, the Treasurer and my colleagues on the BIR Advisory Council for their continued support and invaluable input, freely given when all have extremely demanding paid jobs.

I look forward to seeing you all in Miami and wish you a successful 2014.



# Communications COMMITTEE



2013 was a very busy and eventful year, with the rapid pace of daily business life making us feel like we are on fast-forward. This is partly influenced by the way we communicate: we are reachable and connected to the world almost 24/7. This prompts us to ask questions like: Are we over-communicating? And are we communicating in the right way?

**Kamiel Van Wijk**  
Chairman Communications Committee

The BIR Communications Committee is constantly assessing how we can better facilitate communication with and among our members. We aim to bring people, companies, associations, governments and all others related to our global network ever closer together. It is all about sharing information and making the facts available for the benefit of our businesses.

In 2013, the BIR Communications Department in Brussels took special care to implement many ideas brought up by our Communications Committee. Through the professional work of Elisabeth Christ and her assistant Michèle Noukam, my job as Committee Chairman could actually be considered “easy”.

Last year, we issued many press releases to the international trade press and selected general media, which resulted in the publication of a vast number of articles and news items relating to BIR. Also for the benefit of our members, we emailed and posted on our website around 70 news items covering a wide variety of topics, some of paramount importance to our members’ every-day business activities.

We held two very successful Conventions in Shanghai and Warsaw for which the Communications Department developed an individual branding, a dedicated Convention website and all the Convention materials such as brochures, invitations and programmes, some of which were in the three official BIR languages. A total of 37 guest speakers provided fascinating insights into a variety of topical subjects, and again it was the Communications Department that managed and promoted their participation.

BIR World Mirrors on ferrous and non-ferrous metals, paper and stainless steel continued to provide members with a snapshot of the global recycling markets straight from the “coal face”, while BIR’s Statistical Observatory was expanded to include detailed publications covering non-ferrous

“It is all about sharing information and making the facts available for the benefit of our businesses.”





metals and paper. Meanwhile, the Ferrous Division continued with its highly successful market analysis entitled “World Steel Recycling in Figures”.

2013 also saw the release of several videos, produced by BIR to illustrate concisely a series of key points. A generic video highlighted the importance of material recyclers to the environment and the global economy, as well as their contribution as service providers and employers. Introduced during last year’s General Assembly in Shanghai, the video has since been put on the BIR website and also sent to members in several formats for uploading on to their own websites.

Shanghai was also the backdrop for the release of the video version of the 2012 Annual Report (which is also on our website), a video on the benefits of the BIR Arbitration Service, as well as an introductory video highlighting the most important features and sessions of that particular Convention.

The BIR website was also updated to include a special page on the Young Traders Group and translations of all static pages into Chinese and Spanish. Given BIR’s ever-expanding membership

and in preparation for the 2014 World Recycling Convention & Exhibition in Miami, a large proportion of the BIR website was translated into Spanish to reach out to Latin American countries. And translations into Mandarin reflect the fact that Chinese companies and associations are becoming an important part of BIR membership.

During the Shanghai Convention, we said an official goodbye to BIR Director General Francis Veys who had led our organisation for almost 40 years. At the same time, we welcomed Alexandre Delacoux as the new Director General and we look forward to a long and prosperous co-operation with him as well as to the realisation of many new projects and ideas.

# Membership

## COMMITTEE



**Michael Lion**  
Chairman Membership  
Committee

The history of BIR is one of progressive growth and adaptability to the changing shape and needs of the recycling industry at the global level. This continues to be underscored by the constituents of our membership base both at the individual and national federation level. Today, the worldwide membership structure of BIR reflects both the complete diversity and economic flows of the international recycling industry drawn from all corners of the globe. This universal base enables BIR not only to pursue and articulate the needs and aspirations of the recycling industry as its one global voice at the supra- and intergovernmental levels, but also to do so with a unique degree of credible authority, unfettered by individual sovereign interests but as the sole multinational voice of the international recycling industry.

The diversity of our global membership, as well as providing worldwide authority, enables our members to enjoy a global reach through the crucial commercial benefits of networking exemplified in our bi-annual Convention meetings both in terms of exposure to personal interaction as well as fresh and diverse locations around the world, providing truly global experiences.

The Membership Committee is tasked with the combination of constantly forging new and worldwide additions to its membership roster, while rigorously examining each application to ensure such aspirants are wholly committed to adhering to the high standards and ethical requirements that are a key feature of the organization's rules and regulations and membership obligations.

While as exacting as such vetting is, it is neither practical nor realistic to anticipate such measures can ever be an all-encompassing guarantee of

individual performance; nonetheless, it is the overwhelming adherence and commitment of our members themselves to the highest standards that is the ultimate primary guardian of this objective.

The membership's increasingly global composition in 2013 included on 31.12.2013 66 new members added to our roster, amounting to a total of 870 from 72 nations around the world. Our growing membership footprint from our initial base in Europe in our formative years to the four corners of the globe today more than ever underscores our universal constituency.

Maintaining sensitivity to the transformational and evolving nature of our industry and the consequent needs of our membership in this context is a continuous priority of our membership programmes, and while maintaining a constant vigilance in this regard, we recognize the high priority of reinforcing and invigorating those aspects



“Today, the worldwide membership structure of BIR reflects both the complete diversity and economic flows of the international recycling industry.”

and features already so highly valued by our members as essential elements.

Among the most highly prized of those services are: networking opportunities, most valuable of which are our twice-yearly Conventions, located to reflect both the regional relevance and global diversity of our membership, trade and regulatory interaction and engagement; as well as and where required arbitration services and mediation.

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.

Given the potential for engaging with the leading global players in the international recycling industries, whether it be via our bi-annual meetings that provide truly unrivalled potential encounters

and interaction with industry counterparts and consequent international connections; the chance to share new technical research and industry data, and identify the many new international commercial and legislative developments impacting our industry; or ultimately participating in the work of the organization's Divisions and special Committees, the opportunities offered by BIR membership are persuading a bounty of new companies to join our ranks and expand the truly global reach and constitution of our organization.

A compendium of programmes including multinational company memberships, partner memberships and the Membership Toolkit continue to provide, along with modifications of these, further new initiatives that are presently emerging, an energizing prospect for 2014.

# Guest Speakers at BIR Events in 2013

## SHANGHAI 27-29 MAY 2013

### STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE

- **Markus Moll**, *Managing Director*, SMR-Steel & Metals Market Research (Austria)

### PLASTICS COMMITTEE

- **Steve Wong**, *Managing Director*, Fukutomi Company Ltd. (Hong Kong)

### NON-FERROUS METALS DIVISION

- **Guo Xun Min**, *Executive Vice-President*, Dongying Fangyuan (China)
- **C.S. Huang**, *Chairman & CEO*, Ye Chiu Taicang (China)

### WORKSHOP ON E-SCRAP

- **Li Jinhui**, *Executive Secretary*, Basel Convention Coordinating Center for Asia & Pacific, Tsinghua University (China)

### PAPER DIVISION

- **Alan Bog**, *Commercial Manager Asia*, Euroports Asia Terminals (China)
- **Minnie Kong**, *Associate Economist*, Fiber, RISI (China)
- **Daniel Guillanton**, *Export Manager*, Sita Negoce (France)

### KEYNOTE SESSION

- **Yan Cheung**, *Chairlady*, Nine Dragon Paper Group (China)
- **Chandran Nair**, *Global Institute for Tomorrow*

### FERROUS DIVISION

- **Peter Marcus**, *Managing Partner*, World Steel Dynamics (USA)
- **Stefan Schilbe**, *Chief Economist*, HSBC Trinkaus & Burkhardt AG (Germany)
- **Jason Sun**, *General Manager*, Sinosteel Raw Materials Co. Ltd. (China)

### SHREDDER COMMITTEE

- **Andres Albuja**, *General Manager*, Adelca Steel Mill (Ecuador)
- **Liu Jianmin**, *Chairman*, CRRA (China)

### INTERNATIONAL ENVIRONMENT COUNCIL

- **Jin Jie**, CIQ (Shanghai)

### INTERNATIONAL TRADE COUNCIL

- **Paul Lam**, *Deputy General Manager*, HSBC Jiang Tai Insurance Brokers Co. Ltd. (Hong Kong)
- **See-Toh Khan Horng**, CFA, The Royal Bank of Scotland (Singapore)
- **Cui Lei**, *General Manager*, China Certification & Inspection Group Inspection Co. Ltd

### TEXTILES DIVISION

- **Lin Shidong**, *Secretary General*, CCFA Recycled Fiber Commission (China)

### TYRES COMMITTEE

- **Pang Shuhua**, *Vice-President & SG*, China Tyre Retreading Repairing & Recycling Association (China)

# WARSAW

## 28-29 OCTOBER 2013

### PLASTICS ROUND-TABLE

- **Simon Dziak-Czekan**, *Co-founder*, Kalman Plastic (Poland)
- **Paweł Połonecki**, *Marketing Specialist*, BYŚ-Wojciech Byskiniewicz (Poland)

### TEXTILES ROUND-TABLE

- **Pailak Mzikian**, *Group Recycling & Sustainability Director*, SOEX International AG (Switzerland)

### FERROUS ROUND-TABLE

- **Dr Veysel Yayan**, *Secretary General*, Turkish Steel Producers Association (Turkey)
- **Marcel Genet**, *Founder & Manager*, Laplace Conseil (France)

### INTERNATIONAL ENVIRONMENT COUNCIL

- **Dr Joachim Wuttke**, *Umweltbundesamt (UBA)*, Germany

### STAINLESS STEEL & SPECIAL ALLOYS ROUND-TABLE

- **Heinz Pariser**, *Founder*, Heinz H. Pariser Alloy Metals & Steel Market Research (Germany)

### NON-FERROUS METALS ROUND-TABLE

- **Martin Abbott**, *former CEO*, London Metal Exchange (UK)
- **Alexey Alipchenko**, *Head of the Representative Office of CIS*, Central Asia and the Baltic countries of Trimet Group, Trimet AG (Switzerland)

### E-SCRAP COMMITTEE

- **Norbert Zonneveld**, *Executive Secretary*, European Electronics Recyclers Association
- **Eric Harris**, *Director Governmental & International Affairs*, ISRI (USA)

### PAPER ROUND-TABLE

- **Bill Moore**, *President*, Moore & Associates (USA)
- **Ilpo Ervasti**, *Senior Advisor*, Indufor Oy (Finland)

### TYRES ROUND-TABLE

- **Kees Van Oostenrijk**, *Director*, RecyBEM (The Netherlands)
- **Grzegorz Karnicki**, *Operational Director*, CUO-Polish Producers Responsibility Organisation
- **Hans van Mameren**, *Manager Tyre Recycling*, Ragn-Sells AB (Sweden)

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# Calendar of future **BIR Conventions**

## 2014

### MIAMI

(1) 2-4 June

### PARIS

(26) 27-28 October

## 2015

### DUBAI

(17) 18-20 May

### PRAGUE

(18) 19-20 October

miami  
prague  
paris



recycling sustainable copper contributing  
aps textiles steel trade committed no  
flows ferrous rubber ec  
alloys climate cha



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**BIR** – REPRESENTING THE FUTURE LEADING RAW MATERIAL SUPPLIERS

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