

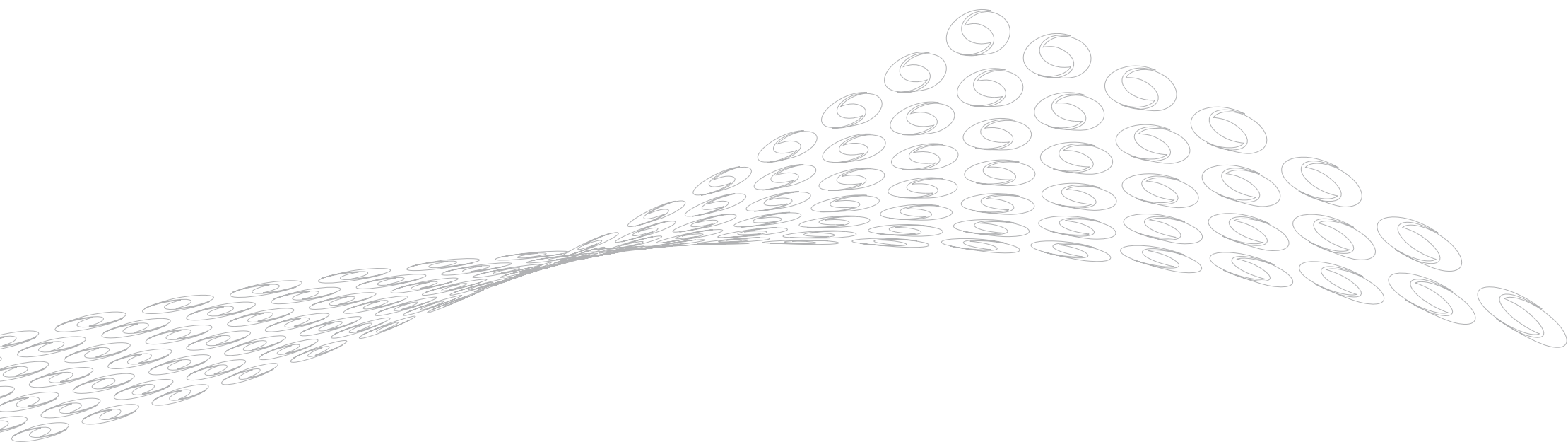
Ferrous Non Ferrous Metals Textiles Paper Stainless Steel & Special Alloys Plastics Tyres

Annual Report

2005



Bureau of International Recycling



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Fernando Duranti
BIR President

A Word from the President

At our Convention in Barcelona, which took place in May 2005, I was honoured to be asked by the Nominations Committee to serve as your President for a second term. I wish to thank all the people for approving my leadership, and for having accepted and reconfirmed my nomination to such an important position as President of your worldwide association.

This being my third year in office, I would like to thank you all for the great support you have given to our association during the course of this year. This must be considered a memorable year for our organisation and I sincerely hope we can enjoy similarly rewarding periods for many years to come.

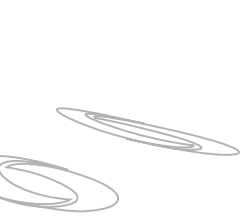
Special thanks are directed, of course, to all my fellow officers, to all the members of the Advisory Council, to our Director General and, last but not least, to all the BIR staff based in Brussels who dedicate so much time and energy to running our association in a very efficient manner. We now have a strong team of people dedicated to the work of BIR, ensuring that our members receive the most up-to-date information to enable them to keep abreast of all the latest developments taking place in our industry.

I will tell you briefly about the quite ambitious plans for my second term, which I will obviously look to pursue with the help of all the members of my team who have offered me their close co-operation during my time in office. I will also ask you for your support and patience so that we can share in the success of achieving the goals set out for the association.

My first aim concerns the Young Traders Group (YTG), which is composed of a successful and well co-ordinated band of young people who get along very well together. I will be trying to increase participation in the group and to set up new projects to help grow their interest in our association, such that YTG membership becomes a real attraction for younger people around the world. May I remind you that a young trader sits on each Divisional Board and Committee, thereby allowing young traders to become acquainted with the work being carried out across BIR while also providing them with an opportunity to put forward new ideas and projects of their own. The young traders also enjoy an evening together with dinner and drinks. They should not only sit on committees but should also be given more responsibilities and higher positions within our organisation.

Another objective I have in mind is to increase contacts between our national member associations so that they can come to know each other better and to learn more of what each association is doing in its own country. They should also exchange information on each other's activities and divulge news of important developments to their counterparts in different countries. Obviously, it is our intention to convince non-member associations – for example, in South America – to join BIR so that they too can expand into efficient organisations to help increase recycling in their own countries.

An initiative known as the International Trade Council (ITC) created great interest when raised at our Spring Convention. This project proposed the setting-up of a new committee to monitor and exchange information between our members on non-environmental, trade-related issues – such as customs duties, quotas, etc – which could impact or hinder the international exchange of recyclables. The main idea was to collect information from members in each commodity area and to compare them within the new ITC for possible further action by BIR at national authority or supranational body level. This project has yet to be implemented but is very much alive, and hopefully we will be able to launch it at our next Convention.



The Divisions of BIR are the life-blood of our association and of the various groups that compose it. As you will read in the commodity reports contained within this document, 2005 was a great year for virtually all of our materials. Moreover, the Ferrous Division underwent a change in its leadership with a new nomination taking place just before our Spring Convention in Barcelona. We were expecting a strong revival in the plastics market following the launch of futures trading on the LME but the world plastics business did not behave according to expectations. I believe we will have to be patient and wait for a few more months before something takes place along these lines. A proposal to have the BIR Plastics Committee elevated to Division status has been discussed in depth, especially because of the implications of ELV and WEEE legislation on plastics recovery and recycling. Consequently, Committee members are undertaking a gradual re-organisation process to prepare for the setting-up of this Division.

Other initiatives have been proposed by members through the various committees and you will be kept informed of all the latest developments. Our New Projects Committee is constantly on the look-out for creative ideas to submit to our various Divisions. Its latest proposal is to establish an award for selected candidates proposed by BIR national federations. The Committee believes this award, to be given perhaps every four years, will contribute to the wider promotion of BIR throughout the world of recycling.

I am delighted to say that we enjoyed two wonderful Conventions last year – in Barcelona last May and Milan in October. Not wanting to anticipate the remarks of our Convention Committee Chairman, I am nevertheless very pleased to say that both these events were a tremendous success, helped by their location and of course the very good weather which attended both occasions. Work on our 2006 Conventions in Beijing, China, and in Brussels, Belgium, is already well under way and we expect to welcome large attendances, especially to the Beijing event.

At this point, I would like to re-emphasise that, while based in Europe, BIR is a world organisation. However, this does not discharge BIR from its obligation to assist all of its European members with regard to relevant legislative and environmental matters. These issues are not dealt with by BIR directly but through three daughter European federations: EUROMETREC in the non-ferrous scrap sector, EFR in the ferrous scrap sector and ERPA in the recovered paper arena. All are based in Brussels. These three federations, each comprising member associations from all 25 EU countries,

deal with all relevant legislative and environmental matters in Europe and maintain contacts with the European Commission so as to keep members informed about problems arising within the various sectors of our industry.

We made a successful start to our sponsorship campaign at the Barcelona Convention where sponsoring was undertaken only on a limited number of events. In Milan, we welcomed a larger number of sponsors and obtained very positive results. At our Beijing Convention, we expect to enjoy even larger participation and expect some good results for both our members and sponsoring companies.

We are battling day after day to have what we consider as our daily bread – i.e. recyclables – approved as indispensable raw materials required by all consuming industries. Yet we also face difficulties in our daily operations because governmental authorities around the world do not take into consideration all the benefits our industry affords to the environment. Instead, they insist on trying to penalise our industry by declaring that all our scrap is “waste” and should be dealt with as such, with all the negative consequences for our members. We must convince them that scrap is a special raw material which is transformed into new products through, most often, a melting process. Its shape can change, but not its composition or characteristics. And this process can go on forever. So how can scrap be described as waste?

I look forward to meeting you at both of this year's Conventions in Beijing and Brussels. I sincerely hope business opportunities will arise for your companies during these events and that they prove sufficiently profitable and exciting to convince you of the importance of being a member of our association.



Francis Veys

BIR Director General

Director General's Report

After a year 2004 that could already be considered as exceptional by most of our members, 2005 confirmed the vital importance of our products for the supply of the world industries.

In the same way as primary raw materials, all our commodities such as ferrous and non ferrous scrap, recovered paper and board as well as plastics – but with the exception of textiles – experienced a wild demand by the steel industry, smelters, paper mills and plastics recyclers from all over the world.

Recovering and recycling companies were struggling to keep up with this gigantic demand from all over the world and particularly from those new emerging countries that for three or four years now are engaged in incredible industrial development programmes. After the new members of the European Union and China, India and Brazil will be the main cause for the structural upheaval that the traditional industrialised countries witness against their will.

For the past two years, China's industrialisation went hand in hand with a literal explosion of its need for metals, for energy and agricultural and industrial commodities. In order to build roads,

bridges, harbours, cities and factories, China needs wood, concrete, steel, aluminium, nickel, zinc and many other metals.

In a world economy that was considered to be committed to a radical change towards the immaterial, China reminds us that the human activity is still first and foremost resting on the

material. This return to the palpable is a nice revenge for the "old economy". This situation contributed to the increase of the collection and the processing of our recyclables as well as their commercial exchanges at an increasingly global level.

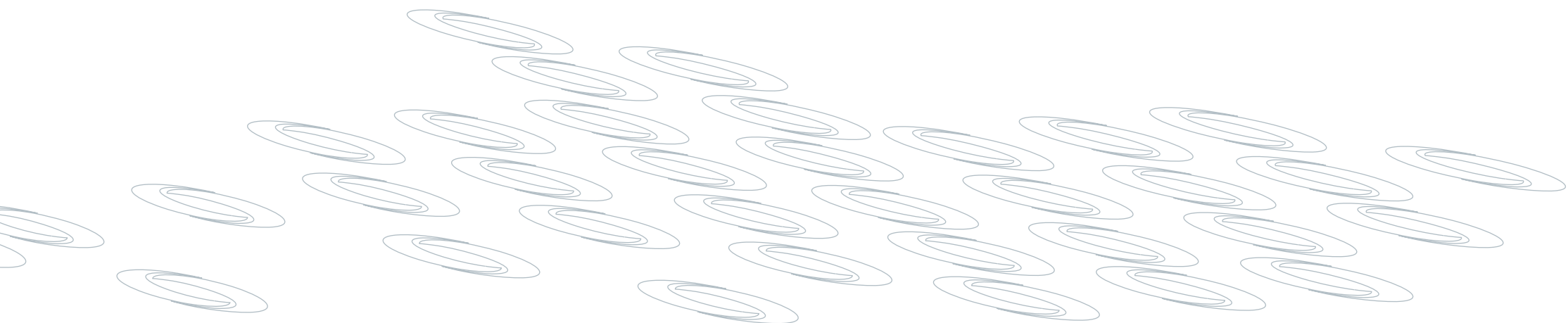
These worldwide exchanges took place despite more and more stringent regulations for the management and transport of recyclables and despite the protectionist attitude of several governments. This development shows that the recovery and recycling sector adapted to this situation and that it adopted an efficient international structure that allows the supply of processors and producers world wide at market value. By the way, these producers are often those that we were supplying not long ago just next to our operations but in the meantime they either changed places or groups in the process of globalisation.

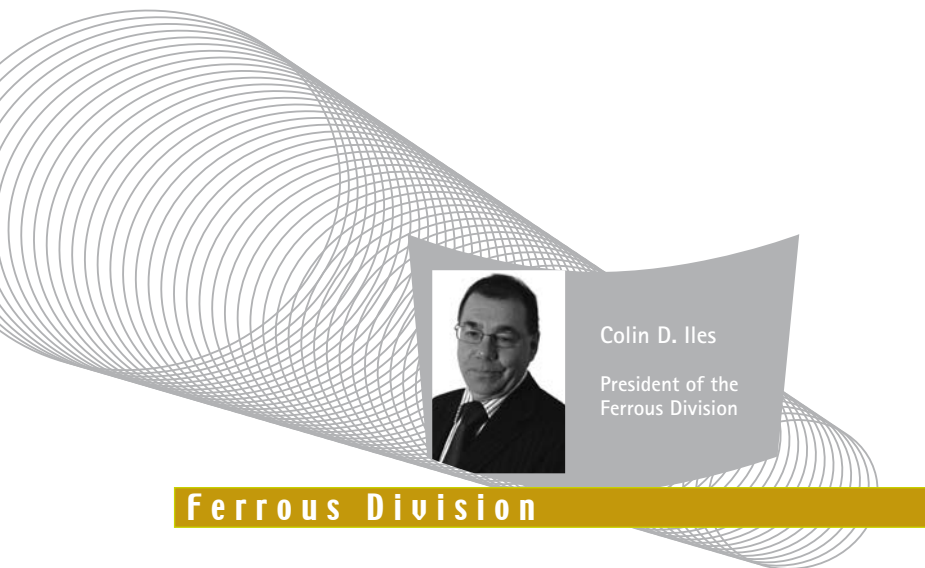
As world recycling federation with members in almost 60 countries, BIR has always had as main objective the promotion of recycling, free and fair trade and the environmentally sound management of these materials that are less and less 'secondary' for those who need them.

In consequence, BIR keeps defending the economic interests of its members towards the international organisations that regulate the product and recycling market by participating in meetings of the United Nations, the OECD and the European Union. BIR helped all its member federations and commercial companies to solve the problems encountered in the framework of their activities, be it in China, India, South Africa, Venezuela, USA, Russia, Ukraine or Europe. These initiatives have without any doubt attracted the new members that we could welcome in 2005. Because their number continued to rise despite the disappearance of certain types of activities or the increasing concentration of the sector.

The record attendance at both our conventions in Barcelona in May and in Milan in October confirmed the trust that our members put in their world organisation and their need to meet twice a year to better understand the new challenges of the sector and to adopt a commercial strategy. Throughout the year, the Brussels Secretariat is providing our members with a wealth of information on our website www.bir.org which is increasingly visited. And our office will continue to increase its staff or take on external consultants to satisfy members' requirements.

For 2006, we have chosen two ideal destinations: Beijing for the reasons explained above, and Brussels for its central location and easy access. We strongly believe that this year will also be very successful.





Ferrous Division

World steel production established yet another record high in 2005 but it proved to be a more mixed year in terms of ferrous scrap pricing. Not for the first time, the market was subject to some startling fluctuations: in the USA, for example, the domestic price of HMS 1 heavy steel scrap was at its peak of around US\$ 250 per gross ton at the very start of 2005 but, by the middle of the year, the price had dwindled as low as US\$ 120. A solid late-summer recovery was then followed by a small decline such that the price ended 2005 around the US\$ 220 mark. The story in Europe was broadly similar, although the August/September recovery carried fob Rotterdam prices above their starting point for the year.

The ferrous scrap industry maintained a fairly optimistic outlook throughout 2005. Even when prices were in sharp decline, it was recognised that market fundamentals would probably trigger an upward correction before too long. In particular, there was a constant belief that the strength of steel production would underpin global demand for ferrous scrap, especially as competing raw materials – for example, iron ore – were the focus of huge price increases last year.

Despite this generally favourable outlook, a number of issues are certainly of concern to the ferrous scrap sector, including energy costs and their impact on margins, as well as the fragile demand experienced by some key steel industry customers. Over-production of steel in China also has the potential to damage the global market; if this Asian giant were to become a major exporter of steel, then this could have a dramatic impact on steel production – and hence, scrap consumption levels – throughout the rest of the world.

China's steel output has effectively doubled in the space of four years, with domestic capacity leaping 35% to 419 million tonnes in 2004 alone. The country's authorities have announced plans to establish a maximum annual steel production capacity of 400 million tonnes during the latest of its five-year plans starting in 2006; their aim is to phase out some 55 million tonnes of annual steelmaking capacity by 2010. China's success in achieving these goals will have potentially major ramifications for the world steel and scrap industries.

The bid by Mittal, the world's largest steelmaker, to acquire its closest rival in steel production terms – namely Arcelor – emphasises the global trend towards consolidation, which will undoubtedly impact on scrap pricing and qualities. The pace of this consolidation has been particularly marked



in the EU where five steel producers are responsible for more than two thirds of total production in the 15 established member states. This trend also applies to the EU-15 scrap industry, with the leading five scrap companies accounting for around 50% of the merchant scrap market.

At our divisional meeting Barcelona last May, guest speaker Josep Giné of Spanish steel producer CELSA made the interesting point that China relies heavily on the BOF steel production route and that increases in domestic scrap recovery will probably be sufficient to meet an upturn in the country's EAF production. As a result, China's ferrous scrap imports may not grow much – if at all – over the next five years. He also suggested that energy shortages in both China and India would slow down the global trend towards EAF production.

But while China has set itself the target of capping its production capacity, India is moving in the opposite direction. Currently consuming below 40 million tonnes of steel per annum, this developing economy expects to increase domestic steel production to 60 million tonnes by 2011/12 and to more than 100 million tonnes by 2020. It was interesting to learn from our Round-Table meeting in Milan last October that India had replaced Turkey as the leading buyer of EU scrap in the first half of last year. At the same meeting, guest speaker Antonio Gozzi of the Duferco Group estimated that Asia would account for some 60% of world steel demand by 2010.

As indicated at our Barcelona meeting, the European Commission's thematic strategy on the prevention and recycling of waste contains an undertaking to clarify "when waste ceases to be waste" for a limited number of material streams. The importance of extricating our products from the "waste" definition cannot be overstated, and BIR will be applying all of its efforts towards achieving this long sought-after goal.

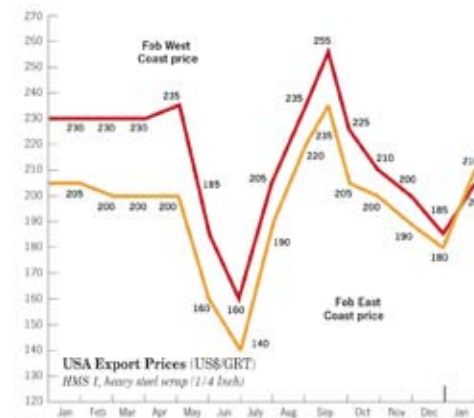
The BIR Shredder Committee, under the chairmanship of Jens Hempel-Hansen, has been grappling with a number of important issues, including: the contents of shredder waste; post-shredder technology; and end-of-life vehicle recovery and recycling targets. It is feared that moves in a number of countries towards banning the landfilling of shredder residues could reduce the volumes processed.

In considering the immediate future, 2006 seems to me to have a similar feel to the market as experienced in 2005. Therefore, I would anticipate strong underlying fundamentals, but with some price volatility occurring both universally and in some specific geographic regions.

In closing, I would like to express my gratitude to our Brussels staff and my Ferrous Board colleagues for the unquestioned support that I have received over the past year.



(source: Recycling International)



(source: Recycling International)



Marc Natan
President of the
Non-Ferrous
Metals Division

Non-Ferrous Metals Division

As observed on many occasions, the life of a market analyst is far from straight-forward. In the latter months of 2005, just when everyone was preparing themselves for a severe correction in non-ferrous metals prices, the market rediscovered the vigour with which it had been infused for most of last year. Copper hurtled through the US\$ 4000 per tonne barrier with brass hanging on to its coat-tails; aluminium went some distance towards shaking off its prolonged lethargy; zinc reaped some of the benefits of positive fundamentals; while the lead price made giant strides during the latter months of 2005 after a mid-year dip.

When we held our divisional meeting in Barcelona last May, we could have been forgiven for wondering if the long run of prosperity was about to come to an end. However, the pace was sustained by the low level of world stocks and rampaging demand growth among some of the world's emerging economies, notably China. By the time we arrived at our Round-Table meeting in Milan last October, copper and zinc prices had risen by, respectively, more than 30% and 22% since the start of 2005, while aluminium had gained 5% over the same period. And by the end of 2005,

many analysts were predicting that the non-ferrous metals price juggernaut would maintain its momentum into 2006. Of course, we should always remember that nothing lasts forever.

Yes, 2005 was a truly stellar year for the non-ferrous metals community.

The impact of China on the non-ferrous markets remained pre-eminent last year. In July-September 2005, the Chinese economy registered growth of more than 9% for its ninth consecutive quarter - a truly astonishing performance which, as we all know, has had a profound impact on the global non-ferrous metals market. In many instances, European consumers have struggled to match the prices paid for supplies of scrap by their counterparts in Asia. The former argue that "domestic" scrap suppliers should look after the interests of their local consumers; indeed, it would be short-sighted of us to ignore their concerns. At the same time, however, we have continuously sought to impress upon them the need for the scrap industry to purchase and to sell its products at realistic prices.

I do not use the word "products" lightly. The recycling industry has long maintained that, through professional expertise honed over many decades and substantial investment in technological advances, "waste" is transformed into a valued product which is tailored to the needs of raw material consumers around the world. After many years, there is evidence that this argument is finally gaining the respect it merits: in its long-awaited thematic strategy on the prevention and recycling of waste, published in the final days of 2005, the European Commission accepts that the current definition of waste "sets no clear boundaries for when a waste has been adequately treated and should be considered a product". The strategy aims to set environmental standards that specify the conditions under which certain recycled materials "are no longer considered waste but high-quality secondary materials instead".

But for every piece of good news that comes along, the non-ferrous metals sector hears of another challenge that must be overcome if its continued health and vitality are to be ensured.

Issues in 2005 included: the EU's REACH legislation and the potential impact on the recycling industry of this evaluation of all chemical substances; new registration procedures in China, The Netherlands and Italy; the implementation of the EU Directive on Waste from Electrical and Electronic Equipment (WEEE); and the revision of EU waste shipment regulations.

In this context, BIR and its sister organisation Eurometrec have continued to play a major role in safeguarding the interests of our sector. Taking the example of China's new AQSIQ registration regime for overseas suppliers of recyclables, the concerted efforts of our representative organisations have smoothed the registration procedure for thousands of scrap exporters. By holding its forthcoming Spring Convention in the Chinese capital Beijing, BIR is also maximising opportunities for recyclers to network and to nurture new contacts in the world's most dynamic marketplace.

Now more than ever, your continued support of BIR and its member federations is essential if the recycling industry is to realise its full potential.

2005 surprised metal industry professionals, and 2006 - which we expected to be rather dull - has enjoyed a bright start. Non-ferrous metals, in particular copper and zinc, are at their height. Does this mean we will be seeing one record after another for the rest of the year?

Non-ferrous metals are regarded as an excellent indicator of the world economy. Emerging markets are strong consumers of primary materials and are witnessing growth indices that are showing no signs of weakening. Non-ferrous metals will always be volatile and subject to significant drops. The balance normally based solely on supply and demand has been broken - be it either for just one year or for many years to come.

Non-ferrous metals bend like a reed but never break.





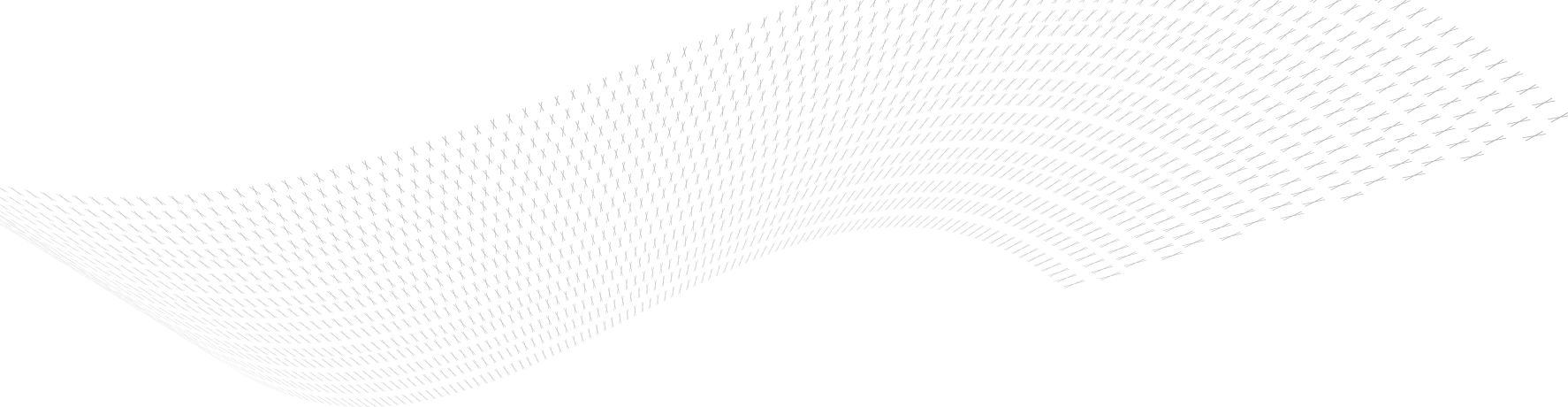
Frithjof Schepke

President of the
Textiles Division

Textiles Division

It makes a welcome change to note some slight improvement in the fortunes of the textiles recycling sector during the course of 2005. However, we were still subject to a range of financial pressures and uncertainties last year.

For example, we had to cope with: the impact of fluctuating exchange rates on our all-important export business; payment problems among many of our key customers; substantial increases in transport costs; and fears of a massive increase in the import duties imposed by some African nations. We even found ourselves rebutting ridiculous media allegations that our exports are costing jobs in some importing nations even though studies have demonstrated that the trade has helped to provide employment and cheaper clothing alternatives for many of Africa's poorer people. In Kenya alone, it has been calculated that the second-hand clothing trade directly or indirectly affects 5 million people in terms of employment and income generation. Given that the country's unemployment rate is around 40%, the beneficial impact of this trade is clear for all to see.



Amid all of the pressures bearing down on us, one of the most crucial problems facing textile recyclers on a day-to-day basis concerns the quality of the material from collection containers. It has been estimated that only 40% of collected material can be worn again while 45% enters the recycling stream and the remaining 15% constitutes waste for which ever-higher disposal fees have to be paid. Thus, the textiles recycling sector is battling to earn sufficient income from the reusable material to cover the costs associated with handling the other 60%. As a result, our margins have come under intolerable pressure.

The proportion of low-quality material arising from collections appears likely to rise still further in the long-term, not least because of the flood of cheaper new clothing heading to the West from Asia. Clearly, therefore, we have not been battling a temporary downturn in our market or feeling the effects of a recession, but rather we have been experiencing a fundamental change in the structure of our sector that threatens its long-term health.

Throughout 2005, we have put together a concerted argument in favour of textiles recyclers receiving a fee for their work. To us, the issue seems absolutely clear: for many decades, the textiles recycling sector has been providing environmental services free of charge but now requires some form of payment to cover the cost of operations that have become commercially unviable.

We have aired our concerns with the EU Commission's DG Environment but have received little encouragement to date. We have also taken an interest in the OUVERTES project. At our divisional gathering in Barcelona last spring, guest speakers explained that the aim of this multi-country initiative was to assess the potential for securing a financial contribution for the services provided by textile recyclers. We were perhaps unsurprised to hear their estimates that between 10 and 20% of Europe's textile recycling firms had closed down within the previous three years.

Companies in our sector are not well placed to boost income by pushing up their sales prices. At our autumn meeting in Milan, guest speaker Alessio Bertozzi of Italy's Unione Industriale Pratese highlighted the results of a survey which suggested textiles consumers were unwilling to pay more for a recycled product, despite campaigns to highlight how recycling leads to huge savings in energy and colouring agents.

In 2006, we will continue to promote the idea of imposing a fee for our services to help underpin the vital environmental service we provide. And last but not least, we shall have to fight for a change in environmental legislation, and especially for more free trade opportunities for used textiles.



Dominique Maguin

President of the
Paper Division

Paper Division

2005 proved to be another disappointing year in terms of price progression. While some recyclers – notably in the field of non-ferrous metal scrap – were enjoying record price levels, the recovered paper sector experienced only moderate movements within a relatively tight band. Lack of price development has meant ever more pressure on our margins given that key costs have continued to escalate, including labour, energy and transportation. In Germany, for example, trucking costs have been rising on average by 5-10% per quarter; such fuel price increases threaten the development of our collection activities at a time of healthy, long-term demand for our products.

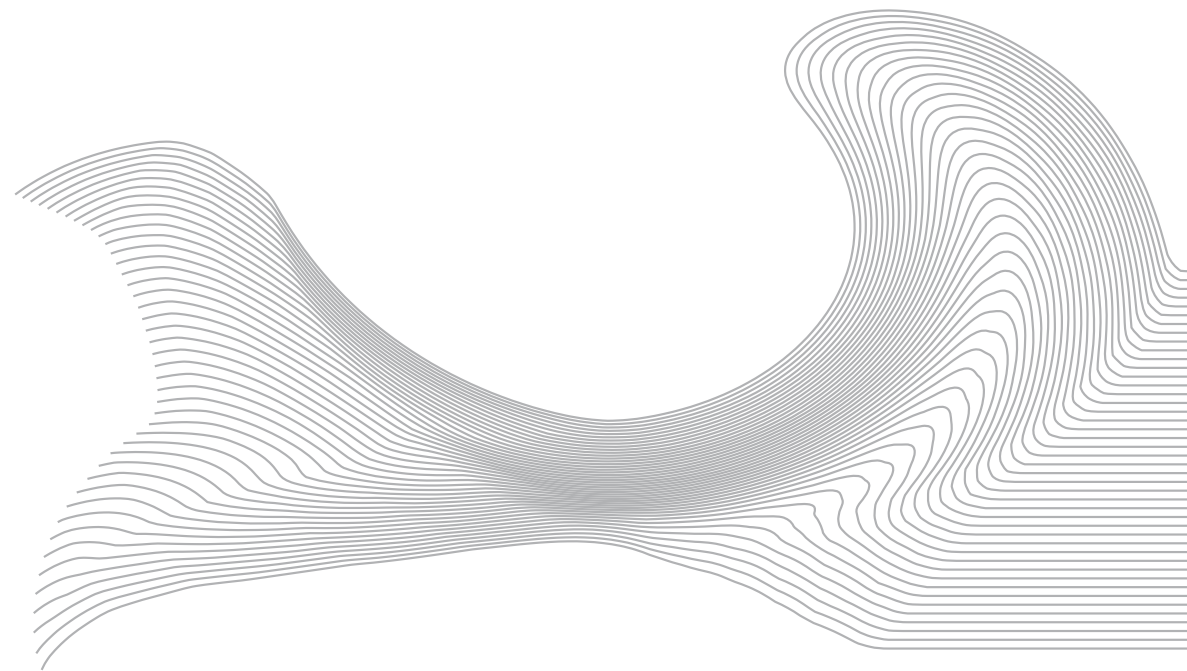
Unlike in many other industries, we find ourselves in no real position to pass on cost increases to our customers, who are struggling to deal with the higher costs of energy in particular. At the same time, the mills are seeking to impose ever more stringent controls on the quality of raw material supplies.

The guest speaker at our Round-Table meeting in Milan was Philippe Chalmin, Professor at the Paris Dauphine University and President of commodity research organisation CyclOpe. He identified paper as "the only commodity not to have boomed" during the recent global price surge, adding that there was evidence of excess production in Europe and North America. The market would see increased globalisation and therefore more international trade in recycled papers, he suggested.

Global trade in recovered paper and board exceeds 160 million tonnes per annum. One of the most striking developments of recent years has been the altered flows of recovered paper, with Asia now absorbing a large proportion of the exports coming out of Europe and the USA. China alone was expected to import more than 16 million tonnes of recovered paper last year.

In 2004, exports of recovered paper from Europe as a whole increased by a massive 48% to 4.9 million tonnes. This demonstrates that Europe's recovered paper sector has quickly become adept at exporting its products all around the world. Our industry has also developed an expertise in handling the various rules and procedures that have been adopted by importer nations. China's AQSIQ requirements, for example, have been assimilated into our daily operations with few difficulties.

India, too, has looked to impose stricter controls on imports. In September last year, India's finance ministry issued a circular outlining tougher penalties on companies supplying banned municipal and other wastes "in the guise of recovered paper or paper board". Over 70% of Indian mills depend on recovered fibre for their paper production and this country will continue to develop as a prime export location for the recovered paper industry. Expansion programmes and new projects announced for the period 2005-2008 will add more than 500,000 tonnes to the country's annual recovered paper requirements.



Of course, growth in demand for recovered paper is not confined to Asia. For example, Luis Del Molino of Spanish recovery and recycling association Repacar pointed out at our divisional meeting in Barcelona last May that his country would be adding an extra 1.3 million tonnes of recovered paper consumption capacity over the ensuing three years.

The international nature of our business was underlined by another guest speaker at the Barcelona meeting. Darren Pillai is General Manager of Mama She's Waste Recyclers in South Africa and, during the Barcelona convention, became the latest recipient of BIR's coveted Gold Medal in recognition of his social inclusion work in recycling of paper and other materials. The aim of his organisation, which provides direct or indirect employment for more than 1000 people, is to enhance the workforce's sense of dignity by involving them in the "green" revolution and also to provide people with a reliable source of income.

As you will know, the recovered paper industry has encountered problems over many years as a result of having its professionally produced products erroneously described as "waste". But to end on a positive note, some potentially good news emerged on this front in December with the publication of the European Commission's thematic strategy on the prevention and recycling of waste. This promises to re-visit the vital question of when a waste ceases to be a waste. Hopefully, this will prove to be a first but crucial step towards achieving a more fitting status for our products.



Sandro Giuliani

Chairman of the
Stainless Steel &
Special Alloys
Committee

Stainless Steel & Special Alloys Committee

After several years of significant growth, world stainless steel production fell by 1% last year. Having increased by 7.5% and 3.6% in the first and second quarters respectively, output slid 8.2% lower in the third quarter. However, the final three months of 2005 produced something of a recovery owing to the elimination of surpluses built up in 2004/early 2005 and to an unexpected increase in orders. Indeed, there is reason to hope that stainless steel production and scrap demand will resume their longer-term growth trends in the first half of 2006.

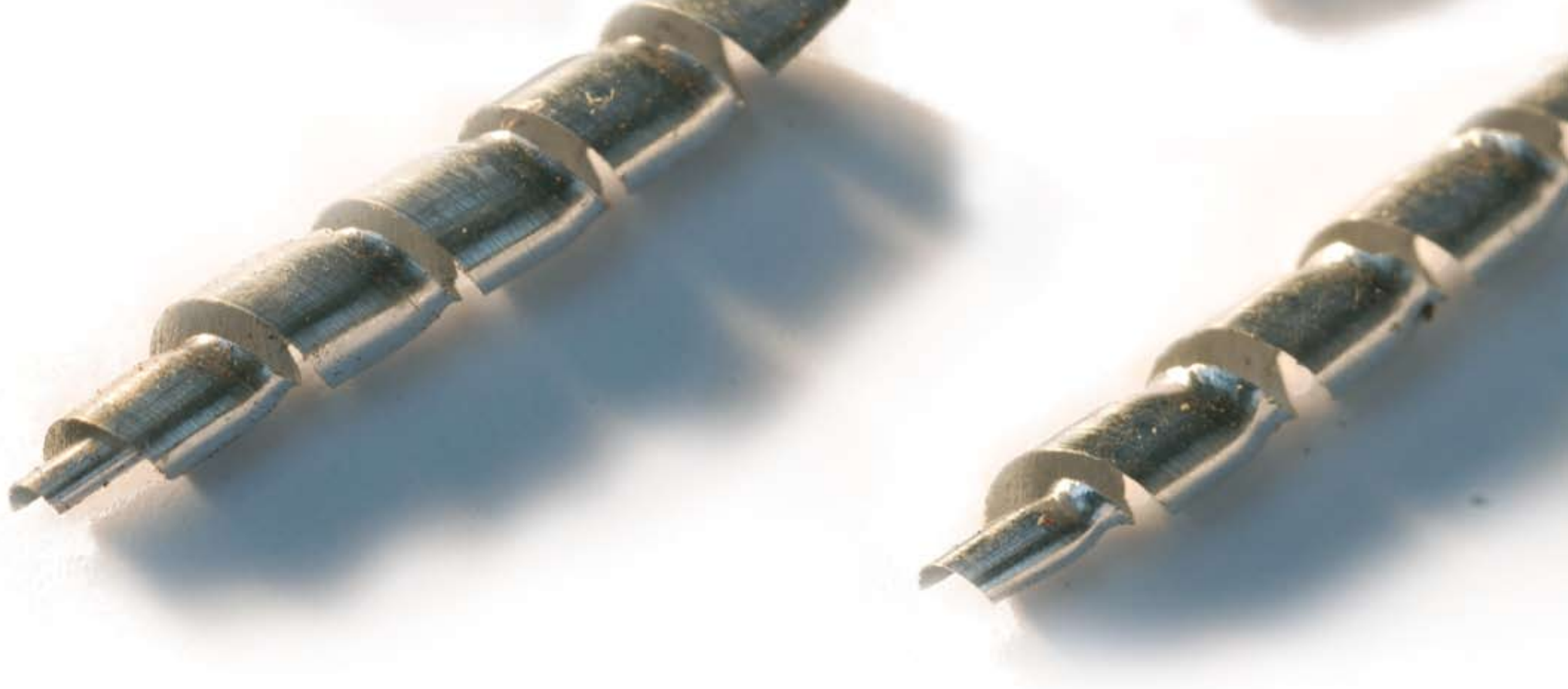
A 5% jump in Asian output during 2005 was offset by production declines in both Europe and the Americas. Thanks in particular to expansion in China and India, approaching 50% of world production is now based in Asia and this trend is expected to become even more pronounced in the years to come.

Of course, this shift in world stainless steel production had had a major impact on scrap flows. Michael Wright of ELG Haniel gave further details of this trend at our Round-Table meeting held during last year's BIR Autumn Convention in Milan. He noted that Asia's output of crude stainless steel had increased from less than 6 million tonnes in 1995 to 12.4 million tonnes in 2004; this equated to 49.5% of world production. China's mills are currently producing around 2.8 million tonnes of crude stainless steel per annum but the figure is expected to rise to 8 million tonnes by 2010 and to exceed 14 million tonnes by 2015. The country's annual stainless scrap requirement could rise over the period from around 900,000 tonnes to 4.5 million tonnes, or 27% of global availability. As a result, China would need to import 1.6 million tonnes per annum by 2015, or 10% of world stainless steel scrap availability.

Highly-respected analyst Heinz Pariser, owner of HHP Alloy Metals & Steel Market Research and Publications in Germany, confirmed in Milan that, without the increase in Chinese production, the stainless steel industry would have recorded a 10% decline in 2005. Having predicted that Asia would account for around two-thirds of global stainless steel consumption by 2015, Mr Pariser went on to emphasise the substitution risks facing the austenitic grades and suggested this process could not be reversed.

Our guest speaker in Barcelona during the 2005 Spring Convention offered us a fascinating insight into major stainless steel producer Acerinox SA. Juan Garcia confirmed that his company was investing in a new electric arc furnace at the NAS operation in the USA. He also underlined the importance of the Asian market to the entire stainless steel sector.

Also in 2005, many of the metals used in alloyed steel grades initially suffered the effects of weakness in the stainless steel market, but they were mounting a fair recovery even ahead of the improvement in stainless steel market conditions. Molybdenum proved to be highly volatile:



first, prices went close to their 2005 peak on the back of higher demand for molybdenum alloyed steel; subsequently, however, values weakened as a result of an increased supply of minerals from China. Titanium quotations initially dropped but quickly recovered while demand for high-speed steel was somewhat weaker in the latter part of 2005. Prices for vanadium, tungsten and hard metal slowly retreated from the peak values of earlier in the year, but they have now resumed their upward trend.

Last year was also characterised by discussions aimed at conferring divisional status on our Committee within the BIR set-up, but – for the time being – without coming to any solution.

The current year will be marked by the important Spring Convention in China, the engine room of worldwide economic growth. I hope that delegates will attend in large numbers and that no-one will miss our economic analyses of the impact of China – and the rest of Asia – on the global stainless steel market. They will also be able to sense for themselves the effervescence of business activity in this country.

My mandate as Committee Chairman will expire at the Convention in Beijing. I would like to thank the members of my board for all their support and trust over the last four years. I am confident that the new Chairman will also benefit from their support.



Peter Daalder

Chairman of the
Plastics Committee

Plastics Committee

One of the undoubted highlights of 2005 was the proposal for the Plastics Committee to be elevated to the status of a BIR Division. Of course, such a move would serve as a tremendous boost for everyone involved in the committee and would hopefully add to our lobbying power in those forums where matters of crucial interest to us are under discussion. In order to increase our chances of being granted divisional status, we need support from members and greater participation from those countries which heavily influence the world plastics recycling sector, such as China and the USA.

Our meetings held during last year's BIR Conventions in Barcelona and Milan generated the usual wealth of information. We learned, for example, about: growing demand for plastics scrap from China, which is now the world's largest consumer and importer of plastics; licensing issues surrounding many of India's plastics scrap importers; Germany's implementation of a ban on the landfilling of burnable and recyclable materials; and the progress of the LME's polyethylene and polypropylene contracts. And of course, the meetings provided us with an opportunity to chart latest price movements in various markets around the world.

We were particularly delighted to welcome Dr Mike Biddle to our meeting in Milan. The founder and Managing Director of USA-based MBA Polymers, Inc., Dr Biddle told us about latest developments involving his company, which recycles plastics from consumer durables such as cars and electronic goods. He explained that, immediately prior to the convention, his firm had opened a joint-venture processing plant in China capable of handling 40,000 tonnes per annum and would shortly open a plant of similar size in Austria.

The techniques employed by MBA Polymers ensure the separation not only of different plastics but also of different grades, for example, the extrusion and injection grades of polystyrene. Such advances, backed by millions of dollars of investment, reflect the forward-thinking and expansive approach now being adopted by the major players in the global plastics recycling sector.





Barend
Ten Bruggencate
Chairman of the
Tyres Committee

Tyres Committee

In common with virtually every other arm of the recycling industry, the tyres sector is experiencing difficulties with the definition of "waste", not least because customs officials often have different interpretations of what is - and what is not - waste. And as we heard at our most recent Round-Table meeting in Milan last October, controls on shipments of materials designated as waste are set to become even stricter over the next few years. Air quality and noise regulations are also likely to become tighter and to impact on the tyre recycling community.

Amid this legislative maze, tyre recyclers are going about their business and are continuing to assist in the development of an ever wider array of outlets and applications for their products. For example, the cement industry is taking ever larger quantities of used tyres while the use of granulated scrap tyres in sports pitches has gained momentum in a number of countries. The guest speaker at our Tyres Committee meeting in Barcelona last May - Maarten van Randeraat, CEO of Granuband BV in The Netherlands - had an excellent tale to tell. His company manufactures a range of products from used tyres including Granufill infill material for synthetic sports pitches and Granuflex tiles for children's playground areas, horse stable floors and other indoor/outdoor applications. His company alone recycles approximately 25,000 tonnes of used tyres per annum and is planning a major expansion programme over the next few years.

In Milan, our guest speaker Dr Pier Clemente Mantegazza of Italian tyre recycling consortium EcoPneUs explained how whole tyres are being used in civil engineering projects as erosion barriers, artificial reefs, off-coast breakwaters and embankment stabilisers, while the aggregate derived from shredding tyres is being used as a foundation for roads and railways, or as a drainage material in place of sand and gravel. End-of-life tyres are even being employed as a source of carbon and steel in the manufacture of steel. Meanwhile, tyre-derived crumbs and powders are being converted into moulded rubber products, shock-absorbent mats and roofing products.

Compared to the recent past, a far larger proportion of Europe's scrap tyres are now destined for material and energy recovery rather than for landfilling. European countries have introduced a range of free market, producer responsibility and tax-based schemes designed to boost tyre recovery. But while some EU member states are achieving very high recycling rates, others are still languishing well below the 50% mark. The scale of the challenge is reflected by the fact that, of the 10 countries that joined the EU in 2004, half had landfilled/disposed of all their used tyres in the previous year. In many ways, Eastern Europe is now having to confront many of the same used tyre problems encountered by their Western European counterparts several decades ago.





Alvaro Rodriguez
Martinez

Chairman of the
International
Environment Council

International Environment Council

2005 was a year marked by our sustained efforts to contribute to more sensible environmental legislation that serves its primary goal: to improve environmental standards and companies' performance in this area. The groups and forums in which the International Environment Council participated have benefited from our expertise. In the years to come, we will most likely be witnessing legislative change stemming directly from the work carried out in 2005.

At UN-EP Basel Convention level, the 4th Open Ended Working Group in July discussed the complexity of general trade rules for the transboundary movement of non-hazardous wastes. A minority of countries have responded to a Basel Convention Annex IX questionnaire; although some have given consistent responses, others have contradicted their industrial requirements or their responses given in other forums. BIR has persisted in its efforts to sort out these inconsistencies.

Along with a number of its members, BIR has been active with regard to the Basel Convention's Mobile Phone Partnership Initiative. The working group is continuing attempts to finalise its guidance document on the Environmentally Sound Management (ESM) of end-of-life mobile phones, which describes the processes for recycling mobile phones. In principle, any prescription of recycling procedures should be of interest to many BIR members.

BIR has also expended considerable effort working with the UN Stockholm Convention which deals with Persistent Organic Pollutants (POPs). The process of car shredding was incorrectly captured by the draft Convention, despite the fact that shredders produce POPs neither intentionally nor unintentionally. A better understanding of the process has been reached although this remains a Convention of concern. BIR is working to ensure impacts are focused on materials that are most likely to be contaminated rather than on those unlikely to be contaminated.

BIR has been invited to continue its work with the UN-ECE on the monitoring of radioactively contaminated scrap metal. The goal is to develop an International Radiation Monitoring Protocol which, when implemented, will increase the capture of radioactive material in scrap metal, reduce the potential contamination and aid in the disposal, reuse or recycling of the materials found. A first draft is scheduled to be considered in mid-2006.

Within the OECD Working Group on Waste Prevention and Recycling, BIR is continuing to promote the enhancement of transboundary movement rules in order to harmonise them within industrialised countries. The OECD is also considering the concept of sustainable materials management (SMM), in which recycling has an important role. Various OECD member countries have initiatives working towards SMM, for example, the EU with its strategies on resources and wastes.

After some two decades spent addressing problems caused by waste regulations, BIR and its daughter federations were handed some promising news at the very end of 2005 with the publication of the European Commission's thematic strategy on recycling and the prevention of waste. This document acknowledges not only the importance of recycling but also the need to



re-visit the scope of the definition of waste with the issue of when waste ceases to be waste. The Commission concedes that the current definition of waste 'sets no clear boundaries for when a waste has been adequately treated and should be considered a product'. Of course, BIR will be closely monitoring the progress of the strategy document.

Meanwhile, the revision of the EU's Waste Shipment Regulation has thrown up some potentially problematic amendments for the recycling industries. Notably, measures have been put forward that would infringe commercial confidentiality, with competent authorities publishing details of recyclers' customers where national or EU legislation does not determine such information as confidential.

The shredding sector of the European metals recycling industry was active last year in the Stakeholder Working Group set up by the European Commission in order to determine whether targets set out in the EU's End-Of-Life Vehicles Directive for 2015 require revision in the light of changes to vehicle material composition or other relevant environmental factors. With regard to the EU Directive on Waste Electrical & Electronic Equipment (WEEE), there has been slippage in its implementation among some Member States. Some member state companies are feeling pressure from producer responsibility organisations to contract for processing WEEE at very unfavorable terms. In other countries, the method of implementation has meant that, owing to competition from government-favoured municipalities, some scrap companies are being denied access to metal-bearing WEEE scrap that they had previously collected and processed.

The IEC meetings held at last year's two BIR Conventions provided a welcome opportunity to exchange information and discuss legislative developments from around the world. On a positive note, we learned in Barcelona that, as part of an initiative involving the US Institute of Scrap Recycling Industries (ISRI), the state of Arkansas had passed the Mercury Switch Removal Act which requires car manufacturers to report steps taken to design vehicles and their components for recycling. This represents the first legislation containing 'Design for Recycling' language to pass either a state or federal legislature in the USA. We also organised an interesting workshop on the recycling and management of waste from electrical and electronic equipment (WEEE).

On the downside, we heard examples at our subsequent meeting in Milan of how different interpretations of environmental laws were restricting the free circulation of scrap in the host country. It was argued that a review of Italy's environmental law has neither clarified nor overcome the issues facing the recycling sector.



Peter Mathews CMG

Chairman
of the Convention
Committee

Convention Committee

I am very pleased to say that, in 2005, the number of people attending our gatherings continued to rise, thereby confirming a trend which emerged three or four years ago. We had tremendously successful Conventions in Barcelona in May and Milan in October. The Barcelona event enjoyed a previously unheard-of attendance exceeding well over 900 delegates. Hotel accommodation was sold out in a flash, all social functions were packed out, and even the exhibitors – and I thank them for their support – came in greater numbers than usual.

Close to 750 delegates supported the Milan Convention, which was an excellent attendance for an autumn event. The cocktail party to celebrate our Convention was held at the Palazzo Reale next to the Duomo and attracted almost a thousand people. Milan will also be remembered for the golf tournament organised for members and guests, the first event of its kind for a long while. We also took good care of our Young Traders Group at these two Conventions, arranging visits to a scrap yard in Barcelona and to a brass mill on the outskirts of Milan. Both these visits proved to be of great interest to those young traders who registered for them.

Plans for this year's Conventions are already well advanced and we expect to enjoy yet more large attendances – especially at the event in Beijing, China, which takes us beyond our normal boundaries and has involved a lot of preparation time. However, we will make sure this is a memorable gathering. The Autumn Convention will be held in BIR's home of Brussels where we are accustomed to meet every four years. This city always brings in large attendances because of its location in the heart of Europe and its easy accessibility.

We meet in Brussels on October 29–31 this year and then in the historic city of Athens on May 20–23, 2007, before visiting Warsaw in October 2007. For BIR's 60th anniversary in May 2008, we plan to go to one of our favourite destinations, namely Monte-Carlo. Future destinations include places such as The Netherlands, India, Dubai and other countries or cities that our members are interested in; and, at some point, we need to look again at North and especially South America. Planning is important and, as you can see, we look many years ahead in order to ensure the best venues and framework conditions for our Conventions.

Sponsorship was a new concept introduced at the beginning of 2005, the benefit of which is twofold. On the one hand, it provides BIR with additional funds to enhance the quality of our meetings and social programmes. On the other, it provides excellent visibility for those companies which decide to take the 'financial step forward'.

Without a doubt, the BIR World Recycling Conventions are the best of their kind. In this respect, our main concern is to serve our members in the best possible way by maximising their business opportunities and making our Conventions worth their while. With this in mind, we work incessantly on the development of interesting speaker programmes and topical workshops designed to attract an even greater number to the trading sessions, which are at the core of all networking activities.

I can only encourage our members to come forward with new ideas or requirements to enhance the scope of our organisation.





Elisabeth Christ
BIR Communications
Director
On behalf of Andy
Wahl, Chairman of
the Communications
Committee

Communications Committee

"Juggling priorities" was motto of the BIR Communications Department in 2005.

The most pressing item on the communications agenda was the Membership Toolkit which was finally completed for the Milan Convention. The Toolkit can be considered the most important and comprehensive set of information ever produced for BIR; it took over a year to compile, edit and present a wealth of information that even we did not know existed. The main objective behind its creation, which was mandated by the Membership Committee, was to provide each member with all he or she ever needed to know about our world federation in a single folder. The Toolkit includes the Membership Directory, both in hard copy and electronic format (on a CD-ROM), as well as a CD-ROM with various forms (membership application, arbitration, etc.) and artwork (BIR logos in various formats, screensaver, etc.). The official introduction of the Toolkit to the membership is planned for the Spring Convention in Beijing.

Preparing well in advance for the Beijing Convention was another item that came top of an already very busy agenda. In order to encourage our membership to attend the 2006 Spring Convention, the BIR Communications Department prepared a multimedia presentation for the Barcelona Convention which was designed to build a sense of anticipation for the event in China. At both 2005 Conventions, this presentation was shown before and after the plenary sessions to make a maximum of attendees aware of this upcoming event.

Very special care was taken over the provisional programme for Beijing. We wanted it to be informative and attractive, and I believe the result was well worth the effort. We also created an exclusive "Beijing" website (beijing.bir.org) containing all the information about the programme, visa formalities, tours, as well as regular updates on, for example, guest speakers and workshops.

2005 also brought the very active participation of BIR representatives in international exhibitions and conferences. In April, BIR had a booth at the Annual Convention and Exposition of US federation ISRI in New Orleans. Other events were "Recycling Istanbul 2005" (Turkey) at the end of June, "Reciclaje 2005" in Cuba at the end of July, "Made in Steel" in Brescia (Italy) in the middle of September, and two international steel recycling forums in China during March and November. For all these events, we created brochures, folders and special posters in the appropriate language, either advertising BIR in general or our next event in particular. It is our intention to continue participating in as many events as possible since we believe that this will result in increased awareness of our international recycling federation.

BIR continues to maintain a good relationship with the press. Throughout 2005, over 20 press releases were sent out and found a very good response in the international trade press. On average, some 15 publications send editorial staff to our Conventions and the coverage is in general excellent. Throughout the year, the Brussels secretariat receives queries and interview requests, which we either handle ourselves or channel through to the appropriate person within the relevant commodity sector.

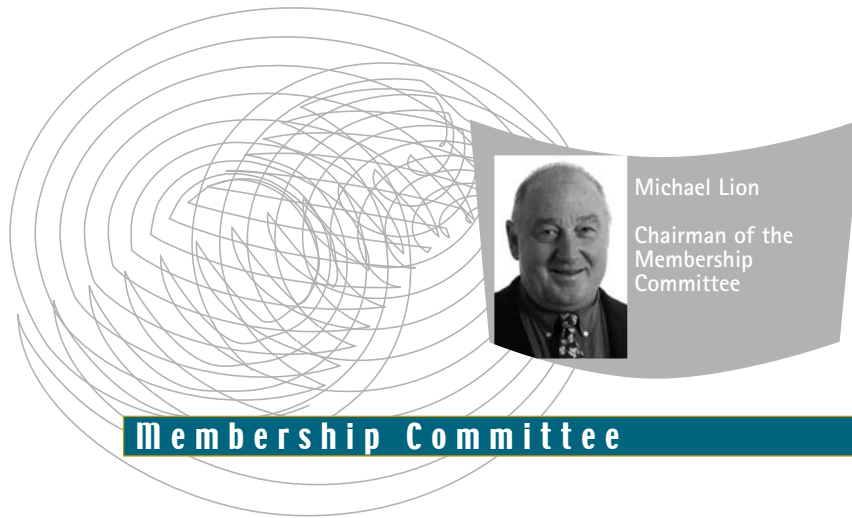
The new sponsorship concept introduced in 2005 also had its impact on communications activities. Our members' financial contributions to our conventions obviously deserve appropriate acknowledgement, which in general materialises in the form of posters, table cards, inserts in the final programmes and participant lists, special mentions on our website, etc. All this needs to be managed in a very careful and conscientious way since no-one must be forgotten or represented in the wrong way. For Milan, quite a large amount of additional layout and printing matter had to be prepared and coordinated with the respective members and the company handling sponsorship negotiations at the time.

Work on our website has been on-going, and we tried to keep our membership abreast of any news likely to impact on the international recycling business. To this end, we published over 70 news items on the BIR homepage – an average of around six per month. In order to increase our members' awareness, we sent out numerous "Headline News" bulletins. Moreover, the commodity pages featured in the "All about Recycling" section were updated for the first time in a long while to reflect the up-to-date situation in the respective commodity fields. The "Members Only" pages, and in particular the section on Chinese legislation, was the focus of many updates throughout the year as we tried to keep our members informed about the AOSIQ registration situation.

We also maintain a steady flow of publications: apart from our trilingual publications such as the annual report, convention programmes, convention proceedings and newsletters, we push for an increasing output of World Mirrors. Moreover, our small, promotional brochure now exists in eight languages – English, French, German, Spanish, Italian, Russian, Chinese and Turkish – and we will endeavour to do more in this respect over the years to come.

Last but not least, I am happy to announce that we have added a new member to the BIR staff: Amélie Carnevali joined the Communications Department in December 2005, and I am convinced that she will be of tremendous help.





By almost any standard, 2005 was a spectacular even stellar year for demand and activity in raw materials, and in this regard this was equally true for almost all the underlying recycled and recyclable forms of these items handled, processed, traded and marketed by the membership of BIR.

This factor was surely contributory in ensuring that our organization enjoyed a headline and benchmark year in terms of both newly accredited and total BIR membership totals.

With 68 new members joining our ranks during 2005, our total membership now stands at 570 members (42 associations and 528 individual companies) representing 55 countries around the world, justifying beyond doubt the organization's claim to be the global voice of the recycling industry.

The quality and diversity of our membership provide to our members both the opportunity to network with and the belief that they are in contact with commercial peers that respect and understand the obligations and high standards of our industry at the international level.

Membership of BIR confers on our constituents equally both status and responsibilities to a commitment to maintaining the highest ethical efforts in both commercial and environmental terms for our global industry.

It is BIR and its members adherence to these fundamental beliefs that enable the organization to command the authority, engagement and respect it enjoys in representing the global recycling industry's interests in interaction with government, supra-governmental bodies and NGO's around the world, most especially with regard to the ever increasing volume and burdens of legislation that so vitally impacts on our members.

The Membership Committee is constantly committed to developing and refining both fresh and existing opportunities for members to enhance the benefits they can derive from participating in our organization.

The recent completion of the "Membership Toolkit" developed in coordination with the BIR Communications Committee provides an invaluable additional contribution and roadmap to optimizing the membership experience and this new facility will be officially unveiled and explained to the membership at our upcoming Beijing Spring Convention.

BIR's bi-annual marquee events, the spring and fall conventions have always provided to our members one of the key ingredients to participation in our organization - the chance to cement existing and develop new contacts and relationships from around the world, frequently in original and always stimulating international venues - the diversity of the selected multi-continent destinations both past and future underscores the truly global nature of our organization.

With immaculate timing BIR holds its upcoming Spring Convention in Beijing, China, at a time when both in general commercial terms and for commodities and recycling in particular this country is the concentrated focus of so many of our members' current activities.

This event, with its spotlight on the Asian region in general and China in particular should provide a unique watershed opportunity for BIR to extend and expand its membership recruitment from this area and the Membership Committee is especially focused on optimizing the benefits accruing from this occasion and its location.

The Membership Committee is actively examining the development of a partnership membership category to enable companies that are interactively engaged in providing ancillary business and services to our members to build relationships that will be of value to our active industry members and in the process provide to the BIR a targeted group for sponsorship contributions to the programs we are building to underwrite, sustain and support our organization and its growing list of benefits, activities and membership services.

The work and achievements of the Membership Committee while much indebted to the voluntary time and devotion of its officers is as always primarily and at heart the result of the magnificent and unstinting efforts of BIR's Brussels secretariat.

In this regard, we have been privileged to enjoy the marvelous contribution of Raïssa Wolteche, who joined as our new Membership Administrator in 2005, and has been tireless and unrelenting in coordinating the work of membership matters during her initiation period where the challenges of record inquires and demand have illustrated her capability and industry - and along with our thanks to her, we must note that it is the dedication and persistent devotion of the entire secretariat team and especially our Director General, as well as the contribution of Elisabeth Christ, our Communications Director that have enabled the work and progress of our membership programs to proceed effectively.

If the membership of an organization is its heart and soul, then the Membership Committee is pleased to report that the "vital signs" of BIR are presently healthy indeed.





Guest Speakers at BIR Events in 2005

Barcelona, 23–25 May 2005

FERROUS DIVISION

Josep Giné
CEO, CELSA (Spain)

SHREDDER COMMITTEE

Juan Antonio del Moral
President, SIGRAUTO (Spain)

MEDIA & METAL SEPARATION COMMITTEE

Prof. Wijnand Dalmijn
Delft University (The Netherlands)

PLASTICS COMMITTEE

Guiseppe Lacchini
Managing Director
Cell-Data (Italy)

STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE

Juan Garcia
Head of Investor and Media Relations
Acerinox (Spain)

WORKSHOP "RECYCLING OF ELECTRIC & ELECTRONIC EQUIPMENT"

Jaime Alexandre

Director General for Environment Quality
And Assessment, Spanish Environment Ministry (Spain)

Dr. Pierre Portas

Deputy Executive Secretary,
Secretariat of the Basel Convention (Switzerland)

José Ramón Carbajosa

Director General
ECOLEC (Spain)

José Perez Garcia

General Manager
ASIMILEC (Spain)

NON FERROUS METALS DIVISION

Miguel Llonch

Director
Gremi de Recuperación de Catalunya (Spain)

Ion Olaeta

General Manager Deydesa 2000 SL
President of FER (Spain)

TEXTILES DIVISION

Pierre Duponchel

Le Relais (France)

TYRES COMMITTEE

Maarten van Randeraat

CEO, Granuband (The Netherlands)

PAPER DIVISION

Luis Del Molino

General Secretary
REPACAR (Spain)

Darren Pillai

Owner
Mama She's (South Africa)

Guest Speakers at BIR Events in 2005

Milan, 24–25 October 2005

PAPER DIVISION

Philippe Chalmin
Professor at Dauphine University &
President of CycLOPe (France)

PLASTICS COMMITTEE

Dr. Michael Biddle
Founder & Managing Director
of MBA Polymers, Inc. (United States)

NON FERROUS METALS DIVISION

(Panel)
Loretta Forelli
Forelli Pietro Snc (Italy)

Marco Vedani
Vedani Carlo Metalli Spa (Italy)

Harvey Rosen
Alpert & Alpet Iron & Metal Inc. (United States)

(Moderator)
Robert Garino
Director of Commodities
ISRI (United States)

STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE

Heinz Pariser

Editor and Owner of HHP Alloy & Metals & Steel Market
Research and Publications (Germany)

SHREDDER COMMITTEE & FERROUS DIVISION

Antonio Gozzi

Managing Director of Duferco Group (Italy)

TYRES COMMITTEE

Bertolotti & Mantegazza

Federazione Gomma Plastica / Ecopneus (Italy)

TEXTILES DIVISION

Alessio Bitozzi

Unione Industriale Pratese (Italy)



List of BIR Member Federations

AUSTRIA

- Austria Recycling Verein zur Förderung von Recycling und Umweltschutz in Österreich
- Bundesgremium des Sekundärrohstoffhandels Recycling und Entsorgung

BELGIUM

- Confédération belge de la Récupération (COBEREC)

BRASIL

- Associacao Nacional dos Aparistas de Papel (ANAP)

BULGARIA

- Bulgarian Association of Metal Traders (BAMT)

CHINA

- China Association of Metal Scrap Utilization (CAMU)
- China National Resources Recycling Association (CRRA)

CUBA

- Union de Empresas de recuperacion de materias primas (UERMP)

CZECH REPUBLIC

- Svaz Prumyslu Druhotnych Surovin (SPDS-APERKO)

FRANCE

- Fédération de la Récupération, du Recyclage et de la Valorisation (FEDEREC)

GERMANY

- Bundesvereinigung deutscher Stahlrecyclings- und Entsorgungsunternehmen e.V.(BDSV)
- Deutscher Abbruchverband e.V.
- Bundesverband Sekundärrohstoffe und Entsorgung e.V. (bvse)
- Fachverband Textilrecycling e.V.
- Verein Deutscher Metallhändler e.V. (VDM)

HUNGARY

- National Association of Recyclers (HOE)



IRELAND

- Metal Recycling Association of Ireland

ITALY

- Associazione imprese di servizi ambientali (FISE-ASSOAMBIENTE)
- Associazione Nazionale dei Commercianti in Ferro e Acciai, Metalli non ferrosi, Rottami ferrosi, Ferramenta e Affini (ASSOFERMET)
- Associazione Nazionali degli Operatori del Recupero e dei Servizi Connessi (ASSORECUPERI)
- Consorzio Por Il Riciclaggio •

JAPAN

- Paper Recycling Promotion Centre

KAZAKHSTAN

- Association of National Metal Recyclers

MACEDONIA

- Zaednica Makedonska Surovina

THE NETHERLANDS

- Metaal Recycling Federatie (MRF)
- Federatie Nederlandse Oudpapier Industrie (FNOI)
- Vereniging Herwinning Textiel (VHT)
- Vereniging VACO – Bedrijfstak-Organisatie voor de Banden en Wielenbranche

PORTUGAL

- Associação nacional dos recuperadores de produtos recicláveis (ANAREPRE)

ROMANIA

- Federation Patronale Si Profesionala (REMAT)
- Asociata Nationala a Intreprinzatorilor Dindomeniul Reciclarii (NAPEFERM)

RUSSIA

- General Council of the Scrap Processing Industry (GCSPI)
- Far Eastern Recycling Association (FERA)

SCANDINAVIA

- Nordic Recycling Federation (NRF)

SOUTH AFRICA

- Recycling Association of South Africa

SPAIN

- Asociación Espanola de Recuperadores de Papel y Carton (REPACAR)
- Federación Española de la Recuperación
- Gremi de Recuperacio de Catalunya

UKRAINE

- Ukranian Metal Scrap Association (UMSA)

UNITED KINGDOM

- British Metals Recycling Association (BMRA)
- Confederation of Paper Industries (CPI)
- The Textile Recycling Association (TRA)
- Independent Waste Paper Processors Association (IWPPA)

UNITED STATES

- Institute of Scrap Recycling Industries (ISRI)

Calendar of Future BIR Conventions

2006

(28) 29-31 May

Beijing, China
China World Hotel

(29) 30-31 October

Brussels, Belgium
Sheraton Hotel & Towers

2007

(20) 21-23 May

Athens, Greece
Hilton Hotel

(21) 22-23 October

Warsaw, Poland
Marriott Hotel