

Annual Report

08



Bureau of International Recycling



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A Word from the President



Dominique Maguin
BIR President

From opulence to crisis

When one actually takes the time to analyse the current situation, it is surprising to note how much our minds are eager to focus on the present and the future without actually looking to understand what mistakes we made and why we did not see the crisis coming.

In giving my report the title "From opulence to crisis", I took inspiration from two books written by the economist John Kenneth Galbraith (1908-2006) and simply inverted his chronology given that he published "The 1929 crisis" in 1951 and "The Era of Opulence" in 1961. Although many may have preferred Milton Friedman (1912-2006), Galbraith has suddenly come back into fashion.

I would like to point out that the deep crisis of 1929 was followed by a period of opulence and that economies tend to be subject to balancing forces. Brilliant economists will write in a few years' time



about the crisis we are currently going through - a crisis which the media tells us over and over again is the worst the modern world has ever experienced.

We do not know anything for certain and it is reasonable to suggest that many a theory constructed today will be disproved tomorrow.

We do not know how long it will take for the world economy to recover and for its indispensable driving force, namely trust, to be restored. It is essential that we ready ourselves for the new beginning that our companies will see coming before other sectors. Isn't this the privilege of an industry whose role is to prepare raw materials?

We did not see this crisis coming, but we shouldn't blame ourselves because nobody else saw it coming either. Our modern world seemed to be enjoying a magnificent era, with an average annual growth rate of 5% for five straight years! Markets appeared insatiable, monetary reserves climbed to levels never seen before, and the world's population became greedy for progress and consumption. This was the era of opulence.

We did not know and could not have anticipated that part of this economic growth had been created in a virtual manner.

Today's awakening has been brutal. And while we are all suffering from a "hangover", worry is often one step ahead of reason. It is now that we need to question our convictions and assess our ability to react, organise and develop, because our businesses will be in the vanguard of the economic upswing.

Two years as President of our organisation has strengthened me in my belief that we possess the instruments and means to prepare a more solid future for our companies - on condition that we understand the need to build our future together.



First of all, we must bear in mind that cycles change; many times during recent years, we had mentioned the potential for markets to decline when everything seemed to be going too well and, more particularly, growing too fast. But sometimes, we did not want to acknowledge those first signs: credit notes that were more difficult to negotiate, less encouraging financial information from consuming industries, etc.

Reinforcement of ethical rules and those of good governance should not be the sole prerogative of the larger financial or industrial organisations. We should have the same preoccupations and force ourselves to adopt criteria adapted to the size of our companies. We should also reinforce our professionalism by enhancing: the quality of our products; our respect for the environment; and the training and safety of our employees.

The raw materials that we produce should correspond to contractual agreements - precisely and in accordance with material standards of which we



should promote the implementation and use by all operators within our industry. This matter concerns all of us.

We should also redouble our vigilance and our efforts in support of free trade given that the current crisis may lead to protectionist behaviour by certain states. Our recently-created International Trade Council is the ideal vehicle for addressing these issues and was created for this very reason.

The imminent publication of the study commissioned and validated by us on carbon dioxide emission savings achieved through recycling proves the importance of our activities from an environmental perspective which, when combined with economic criteria, form the basis for the future of companies in our sector. Soon, we should also publish statistics relating to some of the larger countries of the world which will confirm the importance of our activities to the global economy and also their perfect alignment with sustainable development.

It will not surprise you to learn that, during these times of crisis, our world organisation has ceaselessly continued on its mission to represent the interests of the recycling industry in dealings with international institutions.

Our European daughter associations - EFR, EUROMETREC and ERPA - fulfil their role perfectly with the EU authorities, while our relationship with ISRI is also very important and enables the real-time follow-up of issues of interest to our American colleagues. Our meetings bring together professionals and are particularly important during this period for exchanging and challenging ideas; but above all, these gatherings enable us to produce comprehensive analyses that truly reflect all the latest developments impacting on our sector. Whatever the size of a company, it lives off its market and needs to understand every relevant international issue so as to ensure its development.

This justifies your personal involvement in the life of our organisation.

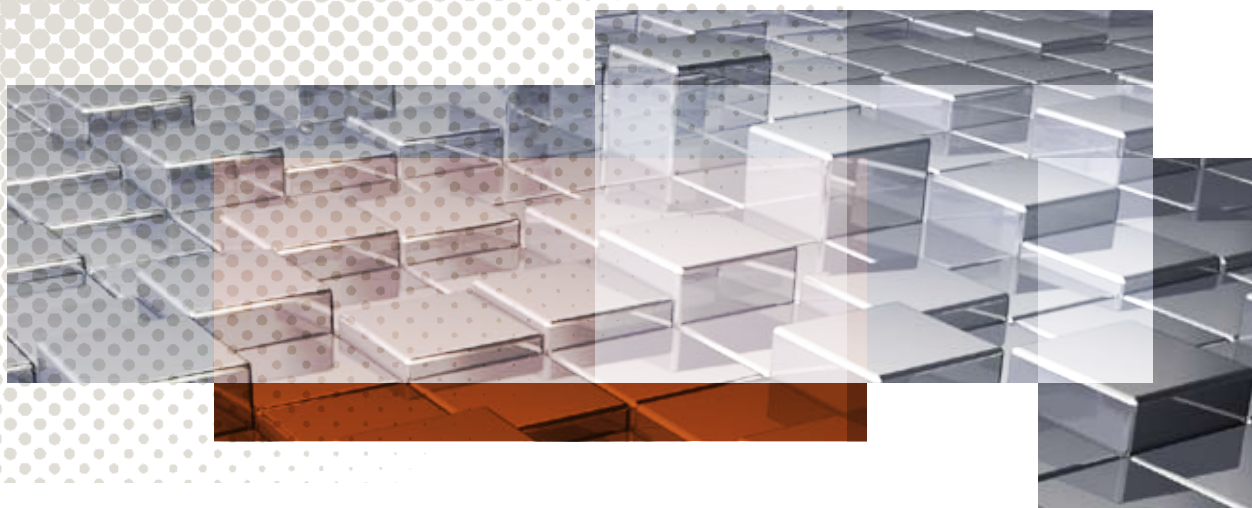
BIR draws its membership from more than 70 countries in the form of national federations and around 750 directly-affiliated companies. It is the only world organisation that can claim to help you - thanks to its twice-yearly Conventions - to understand the needs of your business and to anticipate developments that will affect your activities, while at the same time fostering business contacts between members.

The opinions we express have earned the reputation of being the voice of our profession. Therefore, it is vital that you maintain an on-going and trustful relationship with those who you have mandated to represent you. Do not hesitate to submit questions or to contribute on any topic.

During the past couple of years, we have appointed new Presidents and Chairmen of our Divisions and Committees: passion, perseverance and devotion are the words that best describe their approach to this task. I am proud to be able to count on a team that is both motivated and available - even in difficult times. I would like to thank them all for their commitment.

We also have an excellent team of permanent staff at our offices in Brussels. They are exposed to many challenges and their determination is vital with regard to our capacity to respond to all the requests coming from our national federations and from individual members. I would like to thank them for their work and their loyalty. It is rare to have the chance to work with so many talented people who are fuelled by so much conviction.

It is with great pleasure that I look forward to seeing you in May at our 2009 World Recycling Convention in Dubai.





Francis Veys
BIR Director General

Director General's Report

In 1948, when the founding fathers of BIR set up the first international body to look after the interests of the recycling sector, they could not have hoped - even in their most optimistic dreams - that the infant BIR would grow over the ensuing years into such a well-respected world organisation.

When we celebrated our 60th anniversary in Monte Carlo in June 2008, we welcomed a record attendance of almost 2000 participants from most of BIR's 70 member countries around the globe. The general atmosphere was exceptionally good and our meeting programmes and social events brilliant.

Boosted by the industrial growth of the last five years in Asia and in other emerging countries, our sector had indeed experienced a big boom which had positively influenced the recycling industry's health and the BIR's membership. The fast pace of consumption and investment in many newly-industrialised countries led to an exceptional demand for products necessary to sustain this development; and our industry's materials, which were required to meet these needs, achieved price levels never seen before.

We all knew, and even acknowledged, that this situation would sooner or later become unsustainable.

A few months later, when we met for our Autumn Round-Table Sessions in Düsseldorf, the tsunami which had engulfed the world's economy and finances after the summer break was already severely impacting our own sector. Times became increasingly difficult with all our members being affected by cancelled contracts, huge price discounts or simple non-payment. People who had experienced only an upward business spiral since the beginning of this century discovered that the fundamentals of the markets, hidden for years by the smoke-screen of a virtual world, should never be ignored.

The economic and financial world of the future might indeed look quite different - maybe for a very long time. However, there is a Chinese saying which goes: "When the winds of change blow, some people build windmills while others build walls." I am confident that we will belong to the former group.

It is more and more obvious that the recycling industry and its operators around the world find themselves in an exceptional situation from which

they can undoubtedly take advantage. Our planet's continuous economic development and demographic explosion are causing ecological catastrophes which our sustainable activities can definitively reduce or stop.

More than ever, the recycling industry must proudly proclaim its active and long-standing contribution to the saving of resources and energy, the reduction of air and water pollution and - more importantly in the context of the new challenge to address climate change - the reduction of carbon dioxide emissions, the gas mainly responsible for the greenhouse effect.

The positive impact of our activities deserves more recognition, and Lord Stern of Brentford, author of the world-famous Stern report on climate change and our keynote speaker at the Monte Carlo General Assembly, was very clear about that when he referred to our contribution as "the best-kept secret".

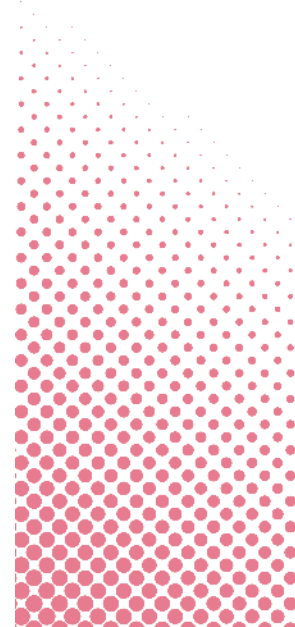
In the coming months and years, together with our national member federations and member companies, we must continue to demonstrate the importance of our environmental role.

We will continue to facilitate and encourage the free and fair trade of all non-hazardous recyclables

to ensure the sustainable development of the blue planet. We will make use of our International Environment Council and of the recently-created International Trade Council to assist our membership in achieving this objective and in developing an ever-greater understanding of the environmental and commercial value of recycling among legislators and government representatives at OECD and UN level.

In 2009, for the first time in its history, BIR will convene in Dubai - not only one of the world's most important business hubs but also a place which has been often criticised by environmentalists because of the daring architectural shaping of its coastline and the huge energy consumption associated with its incredible growth.

We will offer recyclers from the Middle East and from the Indian sub-continent a unique opportunity to learn more about BIR's objectives and about its leading role within the world recycling industry. With primary raw materials being scarce and huge environmental challenges ahead, consumption of our either domestic or imported (secondary) raw materials represents for these countries an alternative which they cannot ignore.



Ferrous Division



Christian Rubach
President of the
Ferrous Division

We all suspected that the prolonged run of healthy scrap prices and margins could not last forever, but the turn-round in fortunes witnessed in the latter stages of 2008 proved to be more abrupt than we could ever have imagined.

In the first eight months of 2008, crude steel production in the 66 countries reporting to the *worldsteel Association* (formerly the International Iron and Steel Institute) was running 5.6% ahead of that for the same period in 2007 and was on course to exceed 1.4bn tonnes for the year as a whole. But at the end of a monumentally difficult fourth quarter, production in 2008 as a whole had totalled just short of 1.33bn tonnes, equivalent to a decrease of 1.2% when compared to 2007. This decline occurred despite China becoming the first country in history to produce more than 500 million tonnes of steel in a calendar year.

Mill buyers responded to the fourth-quarter downturn by adopting an ultra-cautious approach to purchasing, notably in the leading import market of Turkey. As the year came to a close, steelmakers and market analysts were reluctant to commit to solid financial forecasts for the months ahead.

The impact of this collapse on the ferrous scrap industry was inevitable but still breathtaking; prices slumped 80% and more in the space of a few short weeks while processors were left sitting on high-priced scrap for which there was no immediate outlet. As recently as our 2008 Spring Convention in Monte Carlo, we had been celebrating the fact that steel scrap prices were trading at "record levels", with the HMS I/II (80/20) fob Rotterdam price soaring from US\$ 340 per tonne in mid-December 2007 to US\$ 655 by mid-May. But as an indicator of the precipitous market decline, the Iron Age composite price for HMS I in the USA plummeted from US\$ 523.16 per long ton delivered mill in mid-July to just US\$ 97.50 by early November.

Perhaps more worrying was the fact that some of our consumers - including names well known throughout the world - took the decision to re-negotiate or even to cancel existing contracts. This approach was particularly disappointing given the sterling efforts and considera-



ble investments undertaken by the recycling industry in recent years to keep pace with steelmakers' ever-greater hunger for scrap. The failure of some consumers to observe good business ethics must not be allowed to destroy the bond between the scrap and steel industries built up over many decades.

Issues thrown up by the world economic and financial crisis were discussed at length during our most recent gathering, held in Düsseldorf last October. With everyone needing some clear insight, we were fortunate to hear from Professor Dr Norbert Walter, Chief Economist at Deutsche Bank Group and Head of Deutsche Bank Research, who predicted with a 75% probability that the recession in the USA, Europe and Japan will have run its course by the mid-point of 2010. And it was certainly encouraging to hear fellow guest speaker Dr Jost Massenberg of ThyssenKrupp Steel confirm that his company is sufficiently confident in the future to persist with its longer-term investment plans.

Such contributions are welcome but, as we are constantly reminded, the world has entered uncharted territory and few guarantees can be given. What can be said with some assurance, however, is that the world will not lose its appetite for ferrous scrap. We should take encouragement from the certainty that emerging economies such as Brazil, Russia, India and China will underpin growth in steel consumption in the longer term. To this list we should add the Middle East which undoubtedly has a significantly longer distance still to travel along its development curve. Prior to the market slump at least, many countries and regions - including Russia, the Ukraine, Poland, Germany, Turkey, India, Vietnam and the Middle East - had been planning the introduction of new electric arc furnace (EAF) capacity.

Also on the plus side, international legislation is increasingly conferring priority status on the use of secondary raw materials as a means of, for example, reducing greenhouse gas emissions. It was profoundly encouraging to hear recyclers described as environmental "heroes" at BIR's 2008 Spring Convention in Monte Carlo. At that same event, the International Iron and Steel Institute's (now: *worldsteel Association*) Deputy Secretary General Mika Saarioho argued that climate change represented the biggest long-term challenge facing the steel industry and that, as a result, "maximum" recycling was crucial to its future. According to the institute's own calculations, steel recycling is responsible for saving some 900m tonnes of carbon dioxide emissions every year.

What can be said about the early months of 2009 is that crude steel production began at very low levels. Many mills halted their output while others produced only in line with new order intake. All steelmakers attempted to reduce their raw material inventories, especially their scrap reserves, and even scrapped semi-finished material in order to minimise new scrap purchases. Thus, during the early part of 2009, scrap sales fell some 60-70% while the volume of material flowing into scrap yards was correspondingly lower owing to price reductions and to winter weather conditions.

If steel mills' production remains at these levels, scrap prices will fall further and the whole steel industry - as well as their scrap suppliers - will find themselves engaged in a fight purely for survival.

Let's hope that the longer-term development of the market will contradict the current gloomy picture.

Non-Ferrous Metals Division



Robert Stein
President of the
Non-Ferrous Metals Division

It has taken a cataclysm in world markets to confirm to us who our true friends are. While other consumers were effectively ripping up agreed contracts and throwing the pieces in the air, there has been a larger band of steadfast customers who have been prepared to honor their commitments to the letter.

To use a proverb with a suitably metallic theme: every cloud has a silver lining. And for all of us in the non-ferrous scrap business, the silver lining is to have been made aware - beyond any doubt - who we can trust and who we cannot. And this information will act as a guiding light when choosing our business partners not only during these difficult times but also in the years beyond.

Now, more than at any other time during my career in this industry, the reliability and loyalty of customers have become of paramount importance. And it should be stressed that the recent spate of unsavory contract cancellations and renegotiations has not been restricted to one corner of the globe: China attracted many of the headlines but companies in Europe, North America and other parts of Asia were by no means guilt-free.

The year 2008 had started relatively well but, even in its earliest stages, uncertainty was creeping up on us on the back of tight credit markets and volatile currency markets. In the January 2008 edition of the BIR Non-Ferrous Mirror, the sustainability of China's growth was called into question - and the answer was duly provided in the final months of the year. China is and will likely continue to record above-average GDP growth in global terms, but for the moment the locomotive of world growth has pulled into a station and its suppliers throughout the world have felt the adverse effects.





At our 2008 Spring Convention in Monte Carlo, I suggested that the era of cheap scrap was at an end and that wiser, strategically-minded consumers would recognise how the supply side of the equation would dominate their economic model for many years to come. In effect, prices have suffered a severe adjustment - indeed, as we headed into 2008, who could have envisaged that the LME copper cash price would slip below US\$ 3000 per tonne before the year was through. However, the essence of that earlier comment holds true: metal units of almost any description are likely to prove increasingly difficult to source in the years ahead. In this context, it is interesting to note that, in many instances, the price slump has reduced the flow of non-ferrous scrap into processors' yards to little more than a trickle.

The same meeting was furnished with a wealth of interesting guest presentations. The LME's Chief Executive Martin Abbott contended that exchanges such as his reflected rather than created the market, effectively delivering a basis price to which everyone in the market could relate. He also argued that funds and speculators brought liquidity to the marketplace and often smoothed out volatility. Ujjwal Munjal, CEO of Rockman Industries, emphasised the largely untapped metals consumption potential of India while Thomas Tumoscheit, Director European Metals Group of Alcoa Europe, urged scrap suppliers to strive for consistency of grade and quality. Everard van der Straten, Deputy Administrator at Metallo-Chimique NV of Belgium, underlined continuing concerns over the impact on commercial confidentiality of the EU's Annex VII waste shipment document.

Similarly valuable guest contributions were forthcoming at our Autumn Convention in Düsseldorf. Profes-

sor Dr Paul Thomes of Aachen University's Faculty of Business and Economics in Germany made an argument for a certain level of systemic control of economic players while leaving "space for creative entrepreneurial action"; and the Chairman of the LME's Copper Committee, Christian Schirmeister of RBS Semptra Metals, suggested that the influence of the financial community had partially side-tracked the metal markets from the fundamentals of supply and demand.

The economies of the world are currently facing the most severe challenges in decades, and the markets for our scrap have been very negatively impacted. It will take time before any of the stimulus packages that have been and will be instituted have a positive effect on our business; clearly, such measures take time to instill confidence in the financial and consumer markets.

The non-ferrous scrap markets, so significantly damaged by the commercial anarchy of the last quarter of 2008, will also take time to recover - but they shall, just as they always do. However, from what levels that recovery begins is unknown. 2009 will not be a stellar year for our business, and we all need to be increasingly diligent in our choice of viable and appropriate trading partners. But also, with the world's legislators becoming increasingly enamored with recycling, we should not be gloomy about our ability to meet and beat the challenges presented by the current downturn.

Many economists are looking for improved conditions in the second half of the year. Let's hope that by the time we get together in Dubai, we'll have just cause for optimism.



Textiles Division



As everyone in the sector will know to their cost, the textiles recycling industry has not been immune to the economic downturn that swept the globe during the latter months of 2008. For example, the decline in car sales impacted not only on vehicle makers but also on their suppliers who include, of course, manufacturers of wiping cloths.

Compared to the earlier months of 2008, when our major concerns were rising fuel, freight and buying-in costs, demand became more uncertain for many of our other products too. Notably, sorted used clothing sales to developing regions of the world became more difficult, with some buyers struggling to finance their intended purchases owing to reduced purchasing power and, more specifically, a lack of foreign exchange.

Weighed down by demand pressures, our industry was also forced to contend with difficult issues at the supply end. Overall costs have continued to increase such that sorting companies in some of the developed regions of the world - including Europe and the USA - have continued to shift capacity to countries where the financial burden is less onerous.



Olaf Rintsch
President of the
Textiles Division

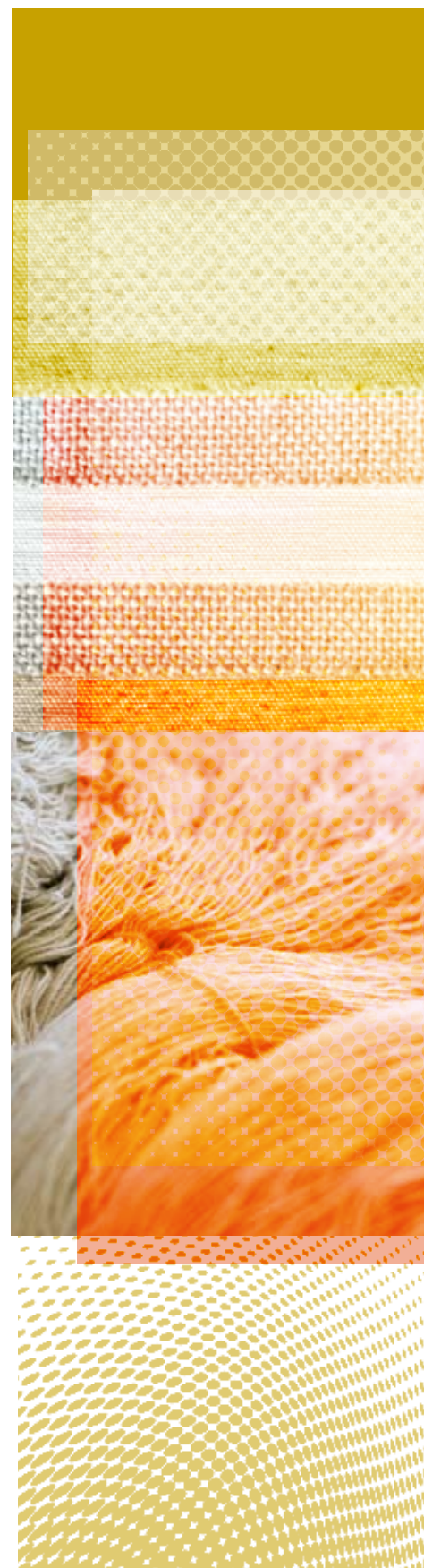
As 2008 drew to a close, a significant near-term improvement in conditions for our sector appeared unlikely. At the same time, another source of uncertainty loomed on the horizon: France's introduction of a much-debated eco-levy on distributors and other companies responsible for putting new clothing and shoes on the market. As we learned at our BIR Spring Convention meeting in Monte Carlo from guest speaker Bertrand Paillat, Director General of the French Chamber of Commerce, the aim of this scheme is to double the country's 2005 sorted volumes by the year 2011.

We were updated on the progress of the eco-levy at our Autumn meeting in Düsseldorf when our own divisional Vice President Mehdi Zerroug explained that the levy money would be used to support the French sorting sector via campaigns to make the public aware of what should be put in collection bins; and research and development projects covering, for example, potential new outlets for upgraded materials.

Textiles recyclers across Europe have greeted this development in France with a mixture of fascination and concern. Many are worried about the potential for this scheme to de-stabilise markets in other countries and feel some reaction may be required from BIR itself. In this uncertain world, we can be sure of one thing: that the issue of the eco-levy in France will be firmly on the agenda at our meetings in 2009.

Undoubtedly, our discussions will also be occupied by another perennial topic: the recycling industry's uneasy relationship with the concept of "waste". During last year's Monte Carlo Convention, at which BIR celebrated its 60th birthday in glorious style, we learned from Dr Andreas Jaron of the German Environment Ministry that the text of the revised EU Waste Framework Directive establishes a hierarchy in which recycling is placed unequivocally above all other recovery routes such as energy generation. Tilman Baehr of Hamburg's Ministry of Urban Development and Environment reiterated the importance of this development in his guest presentation to our subsequent meeting in Düsseldorf.

This year, the European Commission will begin setting out criteria to establish at what point certain processed materials - including used textiles - cease to fall under the definition of "waste". For many years, we as an industry have maintained that our products should not be considered "waste"; in the case of used clothing, for example, a person taking the trouble to place an item in a collection container rather than in a refuse bin clearly intends the garment to be recycled to the benefit of someone else. Hopefully, in the very near future, this argument will at last receive official recognition and support.





Paper Division



Ranjit Baxi
President of the
Paper Division

Despite a positive start to the year, 2008 will go down in history as one of the most challenging for the recovered paper industry. In addition to the sudden slump in demand and prices during the fourth quarter, we were also buffeted by volatile freight and currency markets. With the global economic slowdown likely to last for some time, partnership will be required along the entire supply chain to ensure that we all emerge strongly from this current downturn.

The final quarter of last year proved to be a particularly testing time for our industry, with some media reports suggesting that the recovered paper system in Europe was on the verge of collapse owing to a slump in prices and to the virtual disappearance of orders from our customers due to the weakening global demand. Clearly, such reports were not only inaccurate but also potentially damaging to the public's enthusiasm for recycling. It would be sad indeed if the paper recycling habit were to be lost by householders and business managers who had become accustomed to diverting their paper and board - along with other recyclables - from the waste stream.

Recovered paper prices ultimately regained a great-

er measure of stability by the end of the fourth quarter - albeit at lower levels than earlier in 2008. However, throughout this period, good-quality material continued to move to customers both domestically and in export markets.

There is no doubt, however, that the paper industry faces a tough 2009 as the world economic downturn undermines demand for their finished goods. Of particular regret is that companies and production capacities have already been forced into closure, with the result that jobs have been lost. Sadly and almost certainly, this trend is set to continue in 2009, with market leaders suffering from the economic downturn and the credit crunch.

But on a positive note for the longer term, an increasing world population and the growth of consumerism in developing nations will ensure a continued improvement in demand for paper and board products - and therefore for recovered fibre. For example, the all-important Chinese economy may not be enjoying the same growth figures as in the recent past but it will remain a huge magnet for the world's recovered paper. Both the Chinese and Indian economies are forecast to enjoy GDP growth of over 5% for 2009.

2008 was a significant year in many ways for our industry, not least for the creation of a new award scheme by the BIR Paper Division to recognise outstanding contributions to paper recycling. At our meeting in Monte Carlo last June, the first of these was presented to my predecessor as divisional President, namely current BIR World President Dominique Maguin of France, for his lifelong services to our industry. And then at our Autumn Convention in Düsseldorf, the first-ever Papyrus Prize was awarded to family-owned mill operator Emin Leydier of France - a company which has distinguished itself by growing its recovered paper consumption and by promoting partnership with its suppliers.

To my mind, this initiative serves a dual purpose: firstly, the awards ensure that the paper recycling industry and its champions gain more of the recognition they undoubtedly deserve, particularly for their massive environmental contribution; and secondly, the accolades emphasise the importance of innovation in the use of recovered fibre, of partnership along the supply chain, of boosting recovered fibre consumption and of leadership in social, quality and environmental management.

Our meetings in 2008 also emphasised progress on a number of fronts, including towards a revision of the EN 643 standard grades list in Europe. They also gave us an opportunity to benefit from the experience and expertise of a number of guest speakers. In Monte Carlo, for example, Holger Alwast of Germany-based Prognos AG informed us that each tonne of paper recycled led to a carbon dioxide emission saving of 840kg - a supremely valuable contribution to the future of our planet. At the same gathering, Ilpo Ervasti, Leading Advisor - Poyry Forest Industry Consulting of Finland, pointed out that consumers are no longer reluctant to discuss their use of recovered paper and are now proud to publicise their "green" credentials. He also pointed out that recovered paper has increased its global share of paper-making fibres by

around 10 percentage points in the last decade. But while there is a huge appetite for recovered paper, it is essential to maintain high standards of collection and sorting to avoid losses to energy generation, he warned.

In Düsseldorf, the President of the US Institute of Scrap Recycling Industries' Paper Stock Industries chapter George Chen also underlined the importance of supplying mills and markets with a quality recovered paper product. A similar message was conveyed by fellow guest speaker Horst Menge, Raw Materials Co-Ordinator at Myllykoski Continental GmbH in Germany, who also called for practical co-operation to help overcome issues between recovered paper suppliers and their mill customers.

And this returns me to one of my earlier points. The future success of our sector is inextricably linked to the well-being of our consumers around the world. At the same time, we need the services of a healthy logistics chain to ensure that our products reach their destination on time and in good condition. It is therefore vital that, in these difficult economic times, we work together and ensure a brighter future for all of us. Close co-operation with our logistics partners in the shipping lines is all the more necessary for us to jointly understand the changing market conditions. The dissolution of the FEFC has now opened doors for exporters to enter into individual contracts with the various shipping companies.

The global economic downturn is projected to continue throughout 2009, leading to a deep recession and even deflation in many countries. We will also be witnessing a rising trend in unemployment. Sustained economic recovery will not be possible unless the functioning of the financial sector is fully restored. In spite of all the challenges that 2009 brings, I am sure a steady, sustained and balanced approach will see us through the year.

Stainless Steel & Special Alloys Committee



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

At the beginning of 2008, a range of industry experts predicted a sharp improvement in demand for all grades of stainless steel and alloy scrap. And by May, we were still forecasting annual global production of between 30 and 32m tonnes, which would have been equivalent to an increase of between 8% and 15% when compared to 2007. However, at no stage of the year did world output gather and sustain the momentum anticipated by many people in the industry.

Even before the credit crunch became global in its proportions, we were noting signs of caution in the European market where stainless steel stockists were proving reluctant to hold high inventories in view of nickel price uncertainty and skyrocketing chrome and iron prices. In the USA, mills were enjoying relatively healthy business but were also keeping a vigilant eye on their inventories. And as early as our June 2008 meeting in Monte Carlo, we heard that some Asian manufacturers were planning to implement production cuts of up to 20% from the third quarter.

We have always been fortunate in welcoming esteemed and enlightening guest speakers to our twice-yearly meetings at BIR Conventions. And at our gathering in Monte Carlo, Markus Moll of Austria-based Steel & Metals Market Research was already warning us that growth in the European and US stainless steel industry was likely to be no better than moderate in 2008 while China was not expected to achieve a double-digit annual output increase because producers were encountering ever-greater difficulty in finding markets for their end products.

By end-October and our meeting at the BIR Autumn Convention in Düsseldorf, a new and rather unpleasant reality was indeed entrenching itself in our consciousness. World demand for almost all products was locked in a downward spiral that severely affected orders for stainless steel and therefore scrap. In South East Asia, for example, it was reported that stainless steel production had been cut by up to 50% and that China had not completed any significant imports of stainless scrap since the early summer. With a market changing almost by the hour, we predicted that world stainless steel production could be expected to struggle to 27.2m tonnes in 2008 and to just 26.3m tonnes in 2009.

Also in 2008, the price of nickel continued to demonstrate almost staggering volatility. Having started 2006 at around US\$ 14,000 per tonne, the LME nickel value blazed a trail to US\$ 50,000-plus towards the end of the first half of 2007, partly on the back of speculator interest. By the end of 2008, however, the LME nickel price had retreated below its early-2006 level and was even failing to command US\$ 10,000 per tonne.

Throughout the latter months of 2008, we were fed an almost ceaseless diet of bleak economic news and forecasts. And indeed, there can be little room for expecting a major turn-round in our industry's fortunes at any point during 2009. The beginning of the year saw the continuation of mills' low demand for stainless steel raw materials on a global basis. However, this was more than compensated by the low levels of scrap arisings throughout the last quarter of 2008 and in early 2009. Volumes are between 30 and 40% lower, with very little material in the supply chain. We are anticipating no major change in availability until at least the second half of 2009.

However, as our Past Chairman Barry Hunter reminded us in Düsseldorf, there are reasons to be bullish about longer-term prospects: stainless steel is not about to go out of fashion; and limited availability of scrap will eventually result in an upturn in demand, competition and prices. Furthermore, Mr Moll point-

ed out in Monte Carlo that many of the emerging economies of the world - notably in Brazil, India, the Middle East and Eastern Europe - will undoubtedly increase their requirements for stainless steel.

Last year's BIR Convention in Düsseldorf also provided us with an opportunity to discuss an issue of huge dimensions not only for the stainless steel scrap industry but also for the world's metals recycling industry as a whole. Our committee sponsored a workshop which served to highlight the dangers of radioactivity in scrap and to warn governmental bodies that the major responsibility for dealing with the consequences of a radiation incident of this kind is currently falling - unfairly in our minds - on the shoulders of the recycling industry. Governments must accept their own responsibilities in this area while consumers must recognise that their demands for scrap supplies which are "free from radiation" are scientifically impossible to meet.

We have called on BIR-affiliated associations to carry these messages to relevant government bodies in their own parts of the world. Hopefully, a momentum on this crucial issue will be developed during 2009.





Plastics Committee



Surendra Borad
Chairman of the
Plastics Committee

During the course of 2008, we witnessed the emergence of solid evidence to support the continuation and intensification of the world's recycling efforts.

We learned from preliminary research conducted by Imperial College in London that the recycling of just seven metals plus recovered paper is responsible for reducing emissions of the greenhouse gas carbon dioxide by at least 500 million tonnes per annum, which is equivalent to approaching 2% of global fossil fuel emissions. Other studies are leading us to believe the emission savings due to recycling as a whole must be substantially higher.

A research project in Germany involving leading recycler Interseroh and the well-respected Fraunhofer Institute looked at the same issue and came up with emission savings for a number of recyclable materials, including low-density polyethylene (LDPE). It was concluded that the recycling route cuts carbon dioxide emissions by 1.19 tonnes for every tonne of LDPE produced, a reduction of 70% when compared to following the primary production route. And for PET granulate, the study revealed that recycling slashes carbon dioxide emissions by almost 85%.

In the past, sceptics have queried the environmental sense in transporting large volumes of recyclable materials to distant markets. But research published in 2008 by the UK-based Waste & Resources Action Programme suggests that the amount of carbon dioxide produced in exporting materials from Europe to China for reprocessing is significantly lower than would be emitted by landfilling them and using brand new materials.

Bearing in mind all these highly-persuasive research findings, it would seem eminently appropriate to reward the environmental efforts of the plastics recycling industry with the same carbon credits received by other organisations whose environmental contribution is perhaps significantly smaller than that of our own industry. As I pointed out at our 2008 Spring Convention in Monte Carlo, recycling a tonne of plastics is thought not only to reduce greenhouse gas emissions but also to save an estimated 1.8 tonnes of oil.

The guest speakers at our Autumn Convention in Düsseldorf - Dr Joachim Wuttke of Germany's Federal Environmental Agency and Markus Götz of carbon credit specialist FutureCamp GmbH - provided us with an insight into the system for awarding carbon credits and avenues plastics recyclers may wish to examine. We were left in no doubt that the process of applying for these credits is not straight-forward, but I still feel it is one well worth pursuing.

In Monte Carlo, meanwhile, our guest speaker Christian-Yves Crepet of French plastics recycler Sorepla Industrie observed that users of plastics scrap are achieving ever-greater efficiencies as a result of improvements in sorting technologies. He also reminded us that we should always strive to better the quality of our secondary raw materials.

Turning to market developments in 2008, there were distinct signs of nervousness long before the crash of the fourth quarter. By the time we met in Düsseldorf during late October, the market was virtually sound asleep and price determination had become almost impossible. Our traditional round of market reports revealed a number of depressing trends, including plummeting prices and a substantial fall in plastics recyclers' sales when compared to the corresponding period of the previous year.

In January 2009, substantial cuts in production of primary materials brought price stability to virgin materials. During the first quarter, there was a steady increase in Asian prices of polyethylene and polypropylene, with several Chinese and Indian buyers in the market for scrap. Contrary to expectations of a downward trend in prices after the Chinese New Year, the market was looking upwards. It seems that there were insufficient shipments of material during previous months, and that traders and recyclers were looking to replenish their stocks.

Arisings of waste are directly linked to economic activity and so I expect a substantial drop; if there is less input for the collectors, prices may continue to rise. The recycling industry has earned a reputation for its ability to adapt to changing market circumstances, although I expect 2009 to be normal in terms of prices and volumes, and a year with not too many swings.





Barend Ten Bruggencate
Chairman of the
Tyres Committee

Tyres Committee

Latest figures from the European Tyre & Rubber Manufacturers' Association (ETRMA) confirm a continuation of the steady improvement in volumes of scrap tyres being diverted from landfill. In 2007, some 91% of Europe's end-of-life tyres came forward for either recovery or recycling compared to around 87% in the previous year. Similarly high landfill diversion rates are also being achieved in other parts of the world, including Japan (89%) and Canada (80%).

According to ETRMA, the markets for tyre-derived products have become sustainable and economically viable - a significant claim when we remember the struggle to achieve momentum in the tyre recycling markets only a few years ago.

In 2007, Europe generated approaching 3.4 million tonnes of used tyres, with the proportions going into energy recovery and retreading remaining relatively stable at around 32% and 12%, respectively. The big surge has come in material recycling with 39% of Europe's end-of-life tyres following this path in 2007 compared to 34% in the previous year.

One area of developing usage for scrap tyres is as an ingredient in artificial sports pitches. It is therefore particularly encouraging that recent research has answered concerns over the health and environmental consequences of incorporating scrap tyres in this application. Addressing our meeting in Düsseldorf



last October, guest speaker Dr Ulbert Hofstra of Intron BV in the Netherlands confirmed that, according to his research, weathering of such sports surfaces does not cause leaching of zinc in quantities exceeding permissible threshold values. Meanwhile, exposure tests have revealed no significant health risk to players resulting from the use of rubber infill from recycled car tyres in artificial pitches.

Indeed, we were very fortunate in welcoming excellent guest speakers to both our meetings in 2008. In Monte Carlo, Pierre Henri Remy of France-based Aliapur spoke about his organisation, whose span of responsibilities includes scrap tyre collection, transportation and traceability. Aliapur also involves itself in research into new applications for used tyres - an important endeavour if the percentage of tyres diverted into materials recycling is to continue to increase.

And in addition to hearing from Dr Hofstra, delegates to our Düsseldorf meeting were provided with a valuable insight into the EU's Registration, Evaluation and Authorisation of Chemicals (REACH) regulation by Kees Wielenga of FFact Management Consultants in Belgium. The likely impact of this regulation on the recycling industry is not fully known and this will continue to require careful monitoring during 2009.

Another piece of EU legislation that merited our industry's close attention in 2008 was the revision of the Waste Framework Directive. We can state with confidence that the final wording is something of a triumph for our industry, not least because recycling is given precedence over all other forms of recovery.

With regard to our own segment, scrap tyres are among those recyclables for which specific "end-of-waste" criteria will be developed by the European Commission. Therefore, at some point hopefully in the near future, we will receive welcome legal certainty of the precise point at which used tyres switch from being a "waste" to being a product or secondary raw material.



International Environment Council

After decades of struggle, the recycling industry can celebrate a significant breakthrough in the "waste" debate. At the same time, it has good reason to look forward to further progress on this front during the course of 2009 and 2010.

The EU's revised Waste Framework Directive 2008/98/CE was formally adopted on November 19, 2008 and officially recognises the vital role of recycling by placing it above all other forms of recovery - including energy recovery - in a legally-binding waste management hierarchy. Perhaps more importantly, the revision of this directive offers the welcome prospect of defining the point at which a material designated as "waste" ceases to be a waste and therefore attains product status.

In this latter context, 2009 promises to be a hugely significant year for the recycling industry because the European Commission will begin the process of setting out the precise criteria which identify with legal certainty when a certain processed "waste" or scrap material ceases to be considered a waste. It has already been decided that specific "end-of-waste" criteria will be developed for metal, paper, glass, metals, textiles and tyres, among other materials. We are now given to understand that the agreed criteria could begin to emerge before the end of the current year.

Clearly, this is particularly positive news since it arrives at a time when, from the commercial perspective, the recycling industry can do with it most.

During 2008, the Waste Framework Directive revision was not alone in reflecting the crucial environmental role played by recycling. At our Spring Convention in Monte Carlo, we learned from guest speaker Roger Brewster of UK-based Metal Interests Ltd that our industry's efforts lead to a massive reduction in greenhouse gas emissions. More specifically, preliminary research conducted at Imperial College in London has revealed that the recycling of seven leading metals plus recovered paper prevents a minimum of 501 million tonnes of annual carbon dioxide emissions - a tremendous perform-



Olivier François
Chairman of the
International
Environment
Council

ance that equates to almost 2% of worldwide fossil fuel emissions.

At the same meeting, Henrik Harjula of the Environment Directorate/National Policies Division of the Organisation for Economic Co-operation and Development (OECD) confirmed that recycling was likely to become increasingly important as global population growth imposed ever more stress on the planet's natural resources. He also argued that recycling would play a key role in the transition to a new material economy.

Also in Monte Carlo, Dr Katharina Kummer Peiry from the Secretariat of the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal praised BIR and the US Institute of Scrap Recycling Industries (ISRI) for their input into the Basel Convention partnership initiative which has resulted in a guidance document on the environmentally sound management of used and end-of-life mobile phones. A new partnership initiative, relating to the potentially far more complex issue of computing equipment, will merit the close attention of BIR and key stakeholders within the recycling industry during 2009.

Every year, issues emerge from the background to loom large on the recycling industry's radar screen. In 2008, it was the EU's new regulation on Registration, Evaluation and Authorisation of Chemicals - known as REACH - which propelled itself into the foreground and dominated discussions at our Autumn Convention meeting in Düsseldorf.

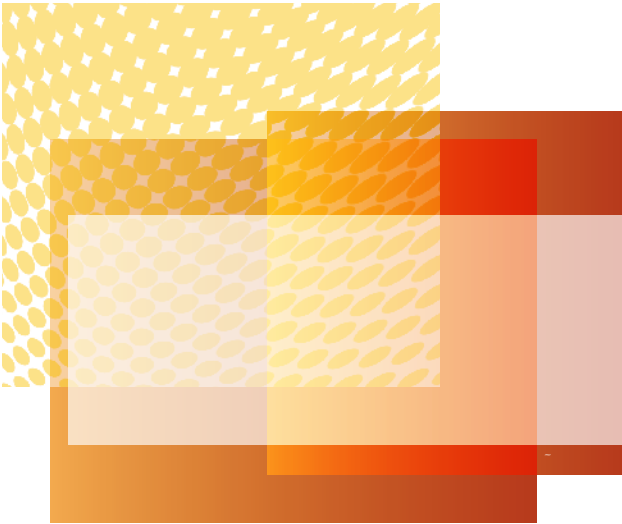
Dr Otto Linher of the European Commission's DG Enterprise and Industry, along with fellow guest speaker

Kees Wielenga of FFact Management Consultants in Belgium, shed considerable light on this new regulation and on the best course of action for recyclers. The key message to recyclers was that, as a safe approach, substances should be pre-registered before December 1 2008. Many among us did so in due time, and BIR will continue its close monitoring of REACH-related developments throughout 2009.

But let us end this review of last year as we began it - on an unequivocally optimistic note. The EU's revised Waste Framework Directive effectively embodies a modernised approach to waste management which explicitly favours recycling in a way never before seen in a legal text. At the same time, the document affords welcome legal clarity to the definition of terms such as "recycling" and "recovery". Maybe for the first time in waste legislation history, the European Parliament overruled the European Court of Justice (ECJ); many of you will remember the decision taken by the ECJ a few years ago that recycling of metal was undertaken by the consumers of our products (EAF operators and smelters, etc) and that we cannot claim ourselves as "recyclers". That was really a hard time for all of us - but that time has now ended: since November 19, 2008, we have been duly recognised as "recyclers" and we no longer have to hide in the shadows.

In effect, the revision represents a massive step towards the EU's goal of creating a Recycling Society. And so despite the adverse impact of the global economic downturn on our member companies' balance sheets, we may yet look back on 2008 as one of the most positive in our industry's history.





Robert Voss
Chairman of the
International
Trade Council



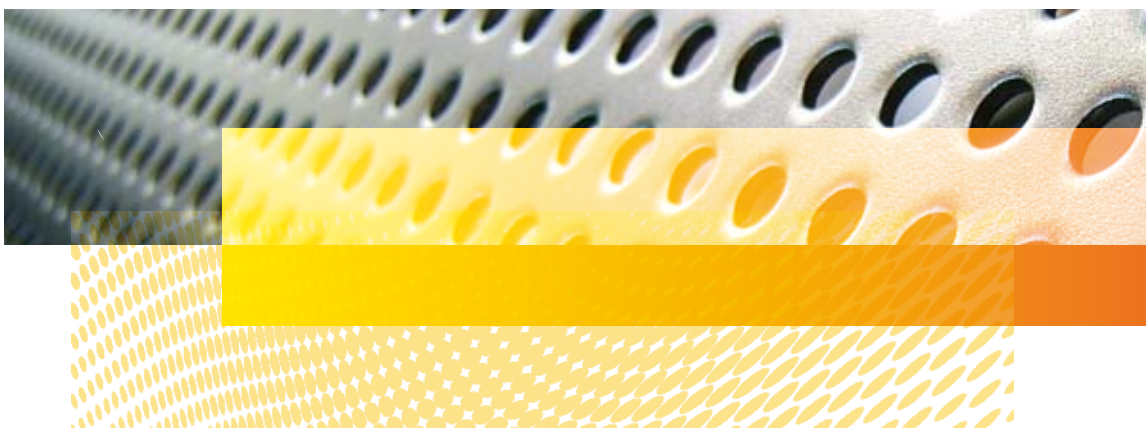
International Trade Council

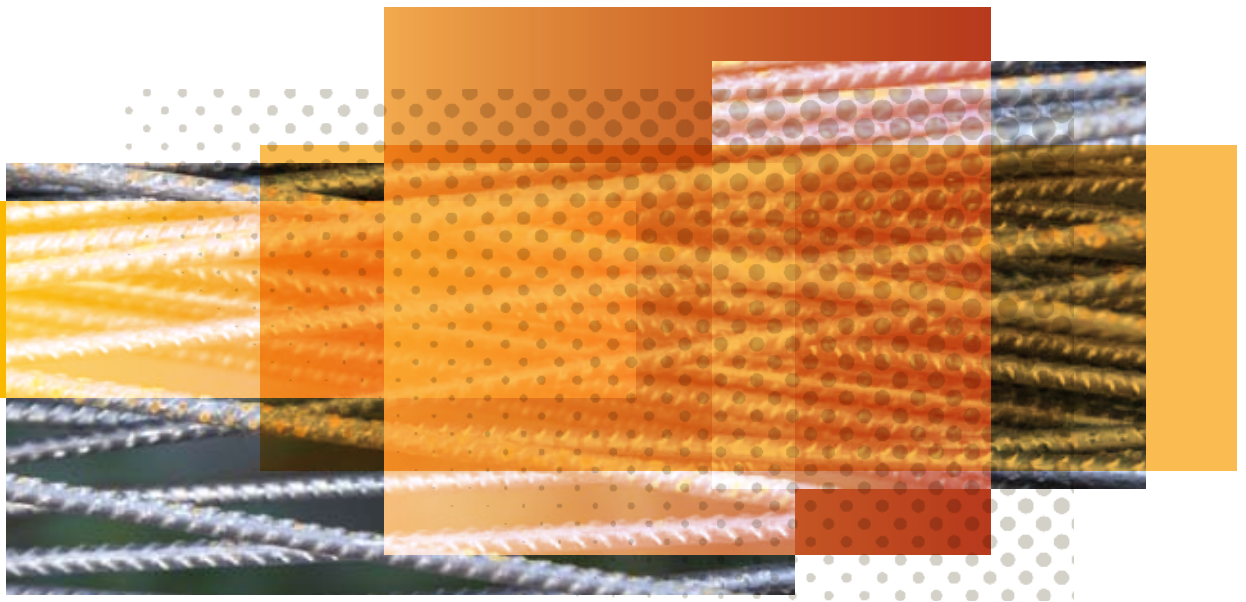
When the idea of establishing an International Trade Council (ITC) of BIR was first discussed between the President, the Director General and myself, I was told I had a free hand to decide what items would be included for discussion.

It was the Spring of 2008.

By the time our Autumn Convention arrived in Düsseldorf in 2008, it seemed that the only discussion around the Convention was about trade and the dramatic effect that the financial crisis was having on it. Therefore, the first priority for the newly-established International Trade Council was to find a point of common ground between the various commodity divisions and to put out a strong statement on where BIR stood on the issues which had arisen.

Since then, it seems things have become increasingly difficult with almost all members being affected by cancelled contracts, huge price discounts and simple non-payments. It has been a very difficult time for all - and it seems none of our members in any division have escaped without some trauma over the last few months.





Apart from helping and advising members on dramatic trade issues, the ITC is also looking at the following key points:

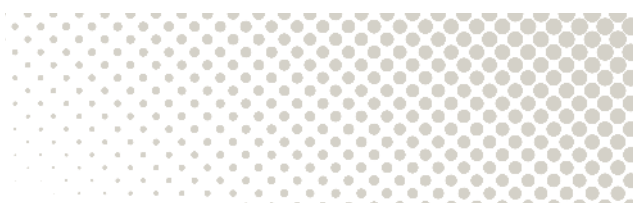
- We are re-establishing the arbitration service to be much more effective and efficient, and adding a mediation service which we feel will be of equal or greater importance to our members.
- We are trying to establish a database of world statistics to be used by all our members in their regular meetings and presentations to various governments around the world.
- We are also looking to set up a database detailing import and export restrictions worldwide. It is one of the functions of the ITC to look at these restrictions to ensure the free movement of our goods worldwide. We have already helped several members and associations overseas to overcome potential threats to free world trade for our materials - but there is more to be done.
- We are hoping to establish a closer relationship not only with shipping lines but also with banks (assuming there are some left in the world!) and insurance companies to establish how we can work more closely to ensure they have a greater understanding of our business.

Discussions have taken place amongst the members of the Council regarding contracts and the relevant contract clauses, and this matter will be discussed further at our next meeting.

The first plenary meeting of the ITC in Dubai in May 2009 promises to be a lively one; we will be looking at how the dramatic events of the last few months have affected us and what lessons have been learned, as well as at the question "Where do we go and how do we trade from here?"

I would like to thank all my colleagues on the International Trade Council, together with the President, Treasurer and Director General, for their continued strong input to this new Council.

The timing of the establishment of the ITC could not have been more poignant and, as Chairman, I hope the coming year allows us to concentrate on more positive trade issues.





Convention Committee

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

I also want to thank all our sponsors who have made generous financial contributions towards making our events a success, and without them many things would not have been possible. We have endeavoured to create a win-win situation in sponsorship where value for money, exposure and brand-building provide for a successful partnership. We welcome, of course, any suggestions as to how we can improve our service to our sponsors.

Thanks should also go to this office's previous incumbents, Peter Mathews and Robert Voss, as I benefit from their insight and leadership in reporting to you on the success of Conventions that were planned more than four years ago and prior to me taking over the reins.

Monte Carlo proved to be our most successful Convention ever, with almost 1300 registered delegates and some 600 accompanying persons. Many were able to enjoy a spectacular Gala celebration of 60 years of BIR. Clearly, business conditions and the venue contributed to this success; however, there were significant challenges that had to be addressed as a result of that success! For example, there were 27 speakers that required co-ordination and translation - also a record for a BIR Convention. The Communications Department also produced a 60th Anniversary video, a book on "Recycling through the ages", and a brochure on the history of BIR - all of which were available at the Convention. The atmosphere was buoyant, the sponsors were content, the exhibition was a success and the number of delegates set a record! A few months later, the mood would be very different - although records would still be broken.

Our Düsseldorf Convention was also a success given the record number of registered delegates for an Autumn event, but compared to Monte Carlo the atmosphere was significantly different. Notwithstanding the mood, the BIR Convention proved itself again as



Mark Sellier
Chairman of the
Convention Committee

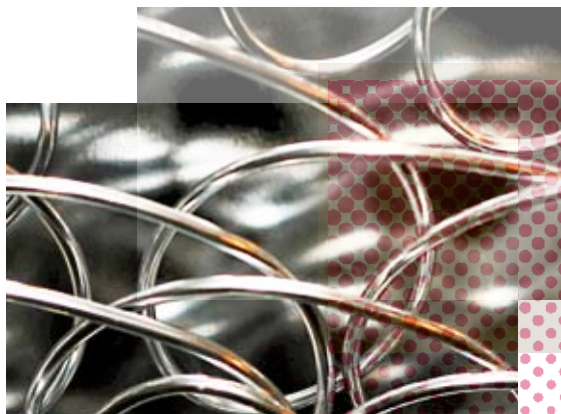
the premier meeting place and forum for the world recycling industry. It illustrated that BIR Conventions are the place to discuss and resolve difficult issues as well as a place to make contacts and transact business.

Our challenge with BIR Conventions is to provide quality venues that are geographically suitable with appropriate facilities to accommodate our members and provide a forum for networking and discussion of industry-related issues. We also put all our efforts into devising programmes with interesting speakers and workshops on topics of worldwide interest. We achieved this in 2008, and our task going forward in difficult economic times is to continue to provide the service and continually to improve.

In 2009, we will meet in Dubai and Amsterdam. Dubai is an exciting venue and, in spite of the economic climate, interest in this Convention is already high. It will be the first BIR Convention in the Middle East; and with India being so close by, many participants from this important market for recycled products are expected to attend. Each division is hard at work securing quality speakers on industry-appropriate issues.

Regarding future Conventions, preparations for 2010 are well under way. We will be looking at Istanbul or Paris for the Spring Convention and Brussels for the Autumn. Beyond next year, a return to the North American continent seems likely. We continue to put the emphasis on going to different parts of the world where existing or emerging recycling markets represent a strong business interest for our members.

In the meantime, I look forward to greeting you in Dubai and Amsterdam.



Communications Committee

What began as yet another year of high spirits and exceptional prices within the recycling industry ended as one of the - if not THE - biggest disasters any of us has ever experienced.

For BIR, 2008 was meant to be the most special year of the last decade since it marked the 60th Anniversary of the organisation's creation in 1948. All eyes were turned to Monte Carlo where this milestone was to be celebrated. When the year began, all our efforts were put into preparing an outstanding Convention that would live up to such an important occasion, and the aim was to put together an array of speakers, publications and social gatherings that would leave all attendees speechless.

To start off, our initial programme document became one of the most prestigious we have ever created. To reflect our 60th Anniversary in a visual way, we combined the BIR logo with photos from the past, of Monte Carlo and of our commodities. All ensuing Convention documents (exhibitor manual, invitations, final programme, luncheon vouchers, etc.) were based on the same graphic scheme.

Moreover, we decided to dedicate a special publication and a four-minute video to the history of BIR. On the basis of old photographic material from BIR and members' archives, we retraced the development of BIR since shortly after World War II. Both productions turned out to be of exceptional quality and will forever represent a precious testimony of our intriguing past.

With the same backward glance in mind, we also created a book on the history of recycling entitled "Recycling through the ages". Once again, I would like to thank the author of this book and also of the history of BIR, Alfred Nijkerk, who kindly put his wealth of knowledge at the



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



service of our organisation. Mr Nijkerk, the only person alive today who was present at BIR's launch, has been granted an Honorary BIR Membership by our Advisory Council.

The 2008 Spring Convention itself was put under the auspices of the Principality of Monaco through an exceptional gesture by HSH Prince Albert of Monaco, who also agreed to address our General Assembly. Although conflicting schedules eventually prevented him from attending in person, he nevertheless demonstrated his huge support by sending one of his senior officials to speak at the Assembly and by offering our delegates a stunning Welcome Reception.

For the General Assembly, we secured a speaker of international renown - Lord Nicholas Stern of Brentford, who gained global recognition for his highly-respected "Stern Report" on climate change. He gave an excellent presentation on the implications of climate change in which he described the recycling industry as "heroes" in the battle to reduce greenhouse gas emissions and thereby to avoid drastic climatic consequences. All in all, 27 guest speakers provided a precious insight into a variety of topics and markets.

The Monte Carlo Convention also featured the announcement of the preliminary results of a very important study initiated by BIR: a report from Imperial College in London revealed that the recycling of seven metals plus recovered paper reduces emissions of carbon dioxide - the leading greenhouse gas - by over 500 million tonnes per annum, which is equivalent to approaching 2% of global fossil fuel emissions. These findings were subsequently announced at a press briefing to the Paris-based national and international general media, and to media specialising

in environmental issues. At this event, the main interviewees were BIR World President Dominique Maguin and Director General Francis Veys. The news generated a very high level of interest among attending journalists, bringing BIR and its activities more into the public eye.

After the summer break, the gloomy picture referred to at the beginning of my report overshadowed the preparations for our Autumn Convention in Düsseldorf. Many companies contacted us with complaints about contract breaches and re-negotiations by their customers. On behalf of our members, we took action at international level and informed the authorities and the press of these unacceptable practices. In various issues of our World Mirrors that go out to the international press and to over 2000 contacts in the recycling industry, clear objections to these bad practices were raised.

During the Autumn Convention, the global crisis and its implications for our members were very much at the centre of all the agendas. Again, the quality of our speakers and the excellent market reports given by our divisional board members created a lively programme that attracted an excellent number of attendees - despite the difficult times.

In 2008, our website remained one of the pillars of our internal and external communication. News were posted on average twice a week, informing members and the wider public of important actions, statements, market developments and legislative updates pertaining to recycling. However, the re-design of the website is now at the forefront of our considerations, and hopefully we will be able to offer our members a new-look www.bir.org in the first half of 2009.



Membership Committee

The membership of the BIR yet again in an enduring testimony to its global leadership of the recycling industry added a further 100 new members to our ranks to a total of 774, drawing its membership from 70 countries around the globe.

The majority of the expansion of the membership base occurred in the context of the effervescent business conditions that pertained during the first three quarters of 2008, and the much more challenging global economic environment in the last quarter of the year and thereafter will likely serve to underscore the value and importance to our membership of the collective stability that our world industry body provides in a variety of ways during demanding times.

The variety of benefits of BIR membership continues to grow and encompass many aspects including providing a unique forum for networking with leading global players in the international recycling industries at our bi-annual conventions, where interaction with industry counterparts enables members to develop their international connections, share new technical research and industry data, and identify the many new international commercial and legislative developments that constantly impact our industry.

The vital need in these demanding times to enjoy as membership benefits the strength of BIR as the leading global voice of our industry with its dedication to defining, informing, upholding, and protecting the aspirations and needs of our recycling membership worldwide, through its dialogue and interaction with government, supra governmental bodies and NGOs, has gained greater significance than ever.

With such benefits and privileges come responsibilities including the maintaining of the highest ethical standards both commercially and environmentally, and while BIR can never act as a specific and unqualified guarantor of its members' performance or activities, the Membership Committee and Brussels secretariat are especially conscious of



Michael Lion
Chairman of the
Membership
Committee



the need to influence, through services such as the body's own arbitration service, fair and expert due process in the resolution of commercial differences among members of our group, as well as emphasising the recognition of the primacy of the highest ethical, environmental and commercial standards.

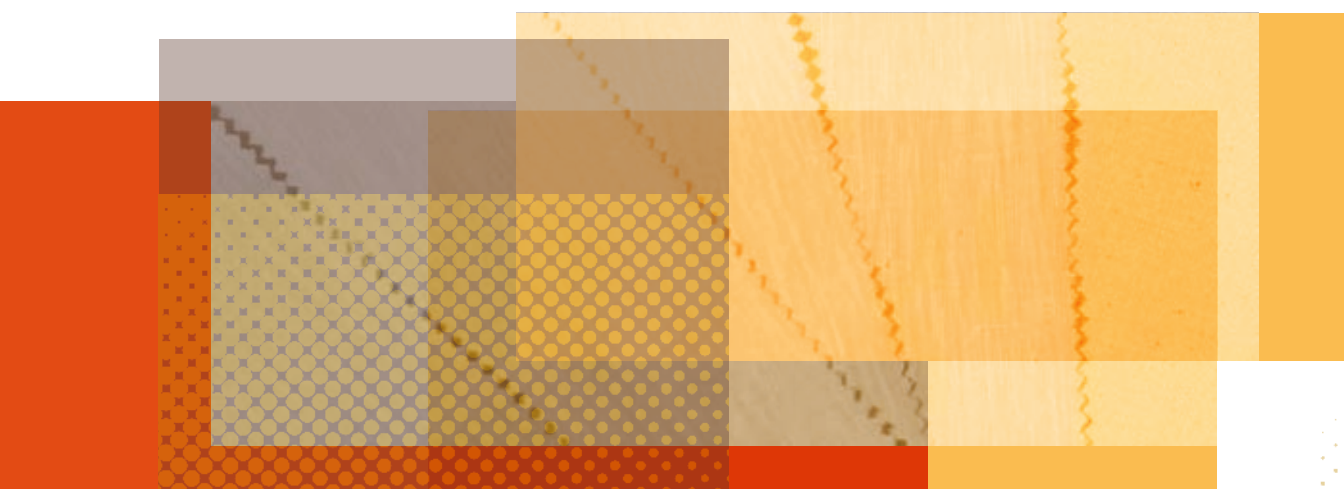
In addition to new membership recruitment, the Membership Committee is constantly committed to the development of new and the enhancement of existing programs including respectively our electronic services and resources guide, the Membership Toolkit, and the development of new tiers of membership that can benefit the ever-evolving needs of our industry.

This latter initiative presently includes the on-going development of a multi-national membership tier to enable more convenient services access that has become increasingly relevant with the numerous cross-border mergers in our industry to ensure their on-going engagement in the organization, with a program roll-out timing objective suited to appropriate industry conditions. Similarly, an expanded Partnership membership tier to encourage interactive contact and communication with those providing

ancillary activities and services to our members, who themselves may particularly benefit from profile-raising BIR sponsorship programs, while also enhancing the organization's revenue streams in the mutually-beneficial process, is under development.

The work and achievements of the full Membership Committee during the last year are a testimony not only to the voluntary time and devotion of its officers, but primarily and overwhelmingly these emanate from the enormous and enduring contribution of BIR's Brussels secretariat.

Special thanks and acknowledgement are due to Raissa Wolteche, our Membership Administrator, who in constantly providing us with such diligent, competent and professional support in her role spearheads the membership service's daily activities. The Membership Committee also registers our great appreciation for 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 continue its commitment and mission of on-going service and benefits-enhancing initiatives.



Guest Speakers at BIR Events in 2008

Monte Carlo, 2-4 June 2008

STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE

- Markus Moll, Senior Consultant, SMR (Austria)

FERROUS DIVISION

- Mika Saarioho, Deputy Secretary General, IISI (Belgium)

WORKSHOP ON "THE EU ELV DIRECTIVE AND THE CHALLENGES FOR CAR MANUFACTURERS AND SHREDDER OPERATORS"

- Rozenn Leborgne, Environment Department, PSA Peugeot Citroën (France)
- Jean Philippe Hermine, Director Recycling Implementation, Renault (France)
- Manuel Burnand, Environment Director, Derichebourg Environnement (France)
- Jim Schwartz, Vice-President Sales, Metso Lindemann (USA/Germany)

GENERAL ASSEMBLY

- Robert Calcagno, Minister for Public Works, the Environment and Urban Development, Government of the Principality of Monaco
- Lord Nicholas Stern of Brentford (United Kingdom)
- Philippe Chalmin, Professor, CyclOpe (France)

INTERNATIONAL ENVIRONMENT COUNCIL

- Katharina Kummer Peiry, Executive Secretary, United Nations
- Henrik Harjula, Principal Administrator, OECD
- Roger Brewster, Consultant, Metal Interests (United Kingdom)

NON-FERROUS METALS DIVISION

- Martin Abbott, Chief Executive, London Metal Exchange (United Kingdom)
- Round-Table discussion:
 - Everard Van der Straten, Deputy Administrator, Metallo-Chimique NV (Belgium)
 - Ujjwal Munjal, CEO, Rockman Industries (India)
 - Thomas Tumoscheit, Director European Metals Group, Alcoa Europe (Switzerland)

WORKSHOP ON PROBLEMS AND SOLUTIONS CONCERNING SHIPMENTS TO INDIA AND TO THE FAR EAST

- Ikbal Nathani, Nathani Industries (India)
- Ivo Dolk, Mil International (The Netherlands)
- Tom Bird, Sims Group (United Kingdom/Australia)
- Ranjit Baxi, J&H Sales International LTD (United Kingdom)
- John Chen, Tung Tai Group (USA/China)

TYRES COMMITTEE

- Pierre-Henri Rémy, Logistics Manager, Aliapur (France)

TEXTILES DIVISION

- Dr Andreas Jaron, Head of Division, Federal Ministry for the Environment, Nature Conservation and Nuclear Safety (Germany),
- Bertrand Paillat, General Delegate, Conseil du Commerce de France

PLASTICS COMMITTEE

- Christian-Yves Crepet, Director General, Sorepla Industrie Company (France)

PAPER DIVISION

- Ilpo Ervasti, Leading Advisor, Pöyry Forest Industries (Finland)
- Holger Alwast, Consultant, Prognos AG (Germany)

Düsseldorf, 30-31 October 2008

NON-FERROUS METALS DIVISION

- Prof. Dr Paul Thomes, Professor for Economic History, Aachen University (Germany)
- Christian Schirmeister, Senior Account Executive, RBS Semptra Metals (United Kingdom)

TEXTILES DIVISION

- Tilman Baehr, Department for Transboundary Shipments of Waste, Ministry of Urban Development and Environment of the city of Hamburg (Germany)

INTERNATIONAL ENVIRONMENT COUNCIL

- Dr Otto Linher, Head of Sector, DG Enterprise and Industry, European Commission
- Kees Wielenga, Consultant, Ffact Management Consultant (Belgium)

FERROUS DIVISION

- Dr Jost A. Massenberg, Member of the Executive Board, Thyssenkrupp Steel AG (Germany)
- Prof. Dr Norbert Walter, Chief Economist, Deutsche Bank Group (Germany)

PAPER DIVISION

- Horst Menge, Director Supply Center Recovered Paper, Myllykoski Continental GmbH (Germany)
- George Chen, President ISRI Paper Division (USA)

WORKSHOP ON RADIOACTIVITY

- Stephanie Mansourian-Stephenson, Associate Expert, UNECE
- Paul De Bruin, Quality Manager, Jewometaal Rotterdam (The Netherlands)
- Dr Torsten Passvoss, Managing Director, GHS Strahlenschutz (Germany)
- Martin von Gehren, Lawyer, ELG Haniel GmbH (Germany)

PLASTICS COMMITTEE AND TYRES COMMITTEE - JOINT MEETING

- Dr Joachim Wuttke, Head of Section, Federal Environment Agency (Germany)
- Markus Götz, Consultant Emissions Trading and Climate Projects, FutureCamp (Germany)
- Dr Ulbert Hofstra, Consultant, Intron B.V. (The Netherlands)
- Kees Wielenga, Consultant, Ffact Management Consultant (Belgium)

List of BIR Member Federations

AUSTRIA

- Austria Recycling

BELGIUM

- 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)
- The China National Resources Recycling Association (CRRA)

CUBA

- Union de Empresas de Recuperacion de Materias Primas (UERMP)

CZECH REPUBLIC

- Svaz Průmyslu Druhotných Surovin (SPDS-APOREKO)

FRANCE

- FEDEREC

FYRO MACEDONIA

- Zaednica Makedonska Sekundarna Surovina (ZMSS)

GERMANY

- Bundesvereinigung deutscher Stahlrecycling- und Entsorgungsunternehmen e.V. (BDSV)
- Bundesgütegemeinschaft Recycling-Baustoffe e.V.
- Bundesverband Sekundärrohstoffe und Entsorgung e.V. (BVSE)
- Deutscher Abbruchverband e.V.
- Fachverband Textil-Recycling e.V.
- Verband Deutscher Metallhändler e.V. (VDM)

HUNGARY

- National Association of Recyclers (HOE)

ITALY

- Associazione Industriale Riciclatori Auto (A.I.R.A.)
- ASSOFERMET
- FISE-UNIRE (Associazione Nazionale Imprese Recupero)



JAPAN

- Paper Recycling Promotion Centre

THE NETHERLANDS

- Dutch Waste Management Association
- Federatie Nederlandse Oudpapier Industrie (FNOI)
- Metaal Recycling Federatie (MRF)
- VACO
- Vereniging Herwinning Textiel (VHT)

POLAND

- Scrap Economy Chamber of Industry and Commerce
- Polskie Stowarzyszenie Recyklingu Metali

PORTUGAL

- Associação nacional dos recuperadores de produtos recicláveis (ANAREPRE)

ROMANIA

- Organizatia Patronala Si Profesionala (REMAT)

SOUTH AFRICA

- Recycling Association of South Africa (RSA)

SPAIN

- Federación Española de la Recuperación (FER)
- Gremi de Recuperació de Catalunya
- REPACAR

SWEDEN

- Nordic Recycling Federation (NRF)

UNITED KINGDOM

- British Metals Recycling Association (BMRA)
- Confederation of Paper Industries – Recovered Paper Sector (CPI)
- Independent Waste Paper Processors Association (IWPPA)
- Textile Recycling Association & Recyclatex (TRA)

UNITED STATES

- Institute of Scrap Recycling Industries (ISRI)



Calendar of future BIR Conventions

2009

(24) 25-27 May

Dubai, United Arab Emirates
Grand Hyatt Hotel

(25) 26-27 October

Amsterdam, Netherlands
Okura Hotel

2010

(30) 31 May - 2 June

Istanbul, Turkey (tentative)
Swissôtel The Bosphorus

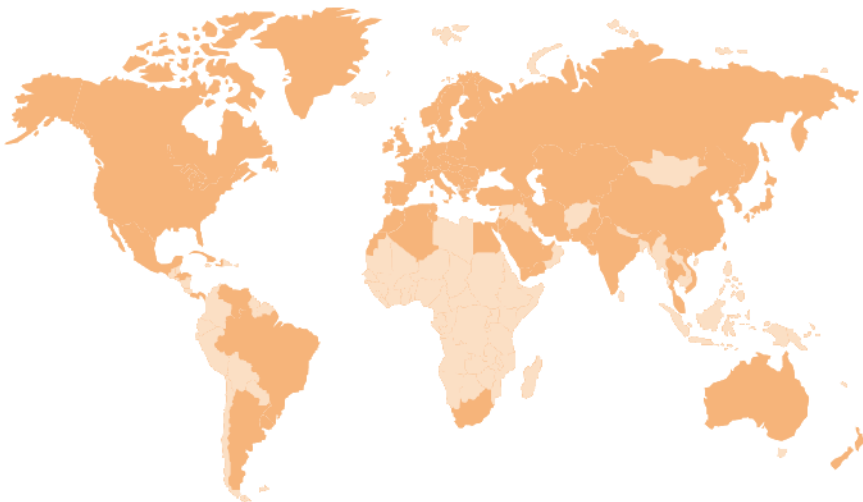
(24) 25-26 October

Brussels, Belgium
Sheraton Hotel

Countries, in which BIR is represented

Associations and/or individual member firms:

Algeria – Argentina – Australia – Austria – Bahrain – Belgium – Brazil – Bulgaria – Canada – China – Cuba – Cyprus – Czech Republic – Denmark – Egypt – Estonia – Finland – France – Germany – Greece – Haiti – Honduras – Hungary – Iceland – India – Islamic Republic of Iran – Ireland – Israel – Italy – Japan – Jordan – Kazakhstan – Republic of Korea – Kuwait – Lebanon – Luxembourg – The Former Yugoslav Republic of Macedonia – Malaysia – Mexico – Monaco – Morocco – Netherlands – Netherlands Antilles – New Zealand – Norway – Pakistan – Poland – Portugal – Réunion – Romania – Russian Federation – Saudi Arabia – Serbia – Singapore – Slovakia – Slovenia – South Africa – Spain – Sweden – Switzerland – Taiwan – Thailand – Tunisia – Turkey – United Arab Emirates – United Kingdom – Uruguay – USA – Venezuela – Viet Nam – Yemen



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