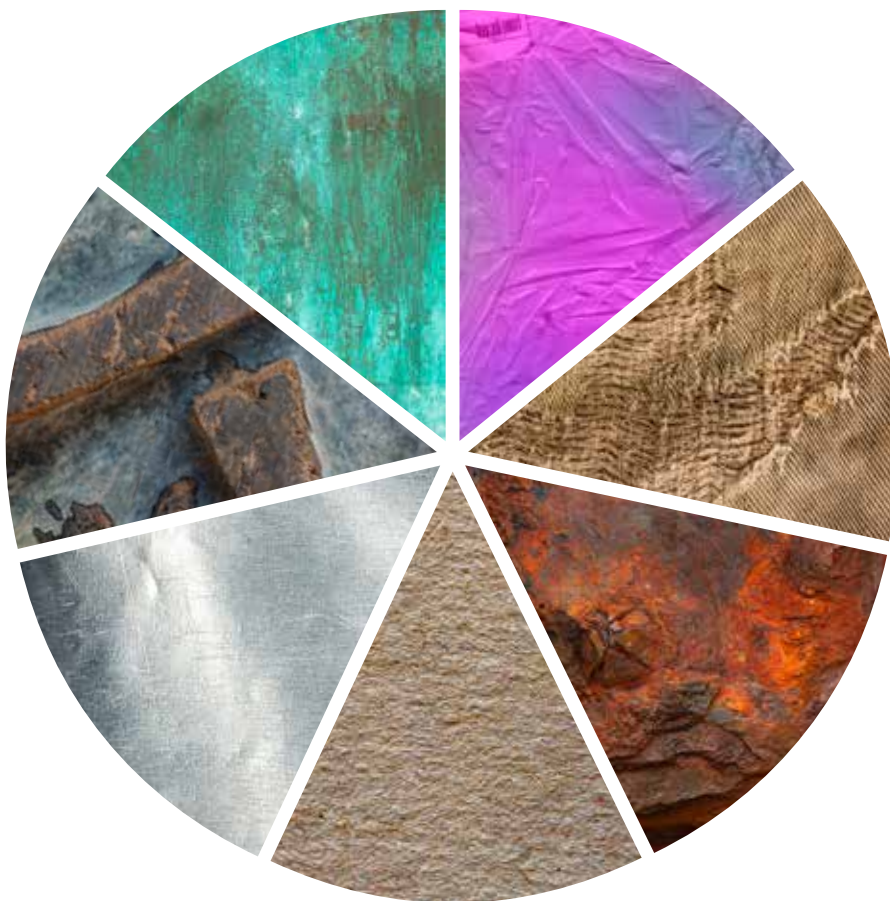




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Words from the President

We will remember 2012 for:

- *The Euro crisis and the recessionary pressures it inflicted on Europe.*
- *The stimulation of the US economy by, among other factors, the Presidential Election.*
- *The soft landing for the Chinese economy and its recent renewed impetus.*
- *The Middle East suffering a variety of serious problems and unrest, most notably in Syria.*
- *Several weather-related catastrophes around the globe which, it is widely believed, might have been caused by climate change.*

“The recycling industry will grow – and that is a necessity for the future. We need to conserve our virgin raw materials and we need to reduce energy consumption, hopefully helping to limit climate change in so doing.”

Despite generally unfavourable economic and business conditions in 2012, the Bureau of International Recycling (BIR) once again substantially increased its membership over the course of the year. Our Spring Convention in Rome was the best attended since our 2008 gathering in Monte Carlo when we celebrated BIR's 60th anniversary.

During the Rome Convention, our International Trade Council (ITC) convened a workshop on theft and fraud. These are perhaps the biggest problems faced by our industry in recent months – with the possible exception of the difficulties experienced by some of our European members as a consequence of the poor economic climate. As a member of the International Chamber of Commerce, BIR made



Björn Grufman
BIR President

an agreement with its International Maritime Bureau to share information on theft and fraud, a partnership which hopefully will assist our members to avoid many of these problems.

This is just one of the services offered by BIR – in addition, of course, to organising the world's best marketplace for our industry twice a year. It is a very good example of how BIR is continuing to introduce and enhance important services that our members can utilise.

In the future, BIR will continue to draw additional members both from existing and new geographical catchment areas; it will represent not only those materials we are recycling today but also the new materials that undoubtedly will be developed. The recycling industry will grow – and that is a necessity for the future. We need to conserve our virgin raw materials and we need to reduce energy consumption, hopefully helping to limit climate change in so doing.

Even though new individuals will join our secretariat as well as our divisional and committee boards, BIR will remain constant in its goal of serving and representing the future leading raw material suppliers, leading their fight for free and fair trade globally.

Ranjit Baxi
BIR Treasurer



BIR'S FINANCIAL SITUATION

BIR's 2012 finances were quite healthy, with overall receipts exceeding annual expenditure despite special costs for "executive search" relating to the appointment of an additional senior staff member at the BIR secretariat.

This good result was due in particular to an increase in the number of individual company members and to good attendance figures at our Spring and Autumn Conventions. Our financial investments were also handled with care by our Finance Committee, thus leading to a satisfactory return here too.

As a result, our organisation has continued to increase its statutory funds in accordance with BIR's objective of constituting enough reserves in order either to develop new programmes to promote our industry worldwide and assist our membership, or simply to be able potentially to address any financial difficulties encountered by our organisation in case of serious economic turmoil.

BIR's two-year statutory reserves have still not been reached but, with the help of all our membership, this aim should be achieved soon. The 2013 annual budget, which will be proposed for the approval of BIR effective members at the Annual General Assembly in Shanghai this May, once again takes this objective into consideration.

In my capacity as BIR Treasurer, I would like to thank all BIR members for their support and trust in 2012.

Director General's Report

*In 2013, BIR celebrates **65 years of existence**. An organisation initially involved in the reconstruction of a Europe devastated by World War II, over time BIR has developed into a world-class federation established today in 72 countries, helped by the growing importance of materials recovery and recycling for the global economy.*

I had the opportunity to join BIR 38 years ago, and since my appointment in 1981 as Secretary-General prior to becoming its Director General, I had the great privilege to lead an organisation – with the help of members and colleagues – which has allowed collectors and recyclers worldwide over the past two decades to assert themselves as key players in the global economy.

In this respect, and as you will indeed read in the activity reports of the Presidents of our Divisions and of our Committee Chairmen, 2012 constituted another important step in the development of BIR. Our federation is today represented by **42 national associations** and **nearly 900 trading companies on all continents**, and it continues to grow.

Even though applications for membership continue to flow in, we accept new members only after a rigorous process of checks and recommendations because the “**quality**” of our new members is our primary concern, and we have to protect and inform them of the best business opportunities offered to them in an economic environment that is ever more accessible to non-professionals and ephemeral trade.

Under pressure from emerging countries, global demand for raw materials has indeed sparked the interest of criminal organisations. Theft of metals and other recyclables as well as large-scale fraud threaten the image of the profession and the success of our operations. Both in Rome in May 2012 and in Barcelona last October, these veritable scourges were on the agenda at our plenary meetings. With the help of the International Maritime Bureau, which BIR joined in 2012, and in collaboration with the Criminal Investigation Unit of the International Chamber of Commerce, we not only denounced but also made strides to identify those criminals who prevent professionals in our trade from fulfilling their role as suppliers of raw materials.

This role remains essential.



Francis Veys
BIR Director General

“More than ever, it is indeed the global demand for our recyclable goods that will influence their collection and use. Not any artificial market regulation.”

Even though the global economy stays on a slow growth path, notably as a result of the financial crisis still affecting key regions, **the recycling sector has continued to play its catalytic role in important global markets**, especially in those newly-industrialised countries that are the main drivers of the global economy. These “New World” markets have indeed averted a major global recession.


BIR showed that it understood about the mission and about the future business opportunities of its members by creating its International Trade Council (ITC) three years ago. Offering its members a forum to share information on trade regulations and represented at the working sessions of major inter-governmental organisations, the ITC applies itself to **the task of ensuring free trade of recyclable and recycled materials throughout the world and of abolishing all trade/technical barriers**.

These “green” materials that some countries would like to be regarded as “strategic” are becoming the focus of protectionist measures, in line with pressure from producing industries or governments that are almost claiming the right to ‘own’ these materials. But all economists will confirm: preventing or impeding cross-border trade for monopolistic reasons will simply lead to a decrease in their market value and to shortages.

More than ever, it is indeed the global demand for our recyclable goods that will influence their collection and use. Not any artificial market regulation.

By choosing to meet in Shanghai in May 2013, despite the Chinese dragon being rather breathless at present, and then by heading to Warsaw in October 2013 and therefore to a region where European industry might still foresee a boost, **BIR continues to offer its members exceptional trade platforms**.

In spring next year, with a General Assembly to be held in Miami, all eyes will be on Latin America where we aim to open up new business horizons to our members and to those who will come and meet them. To achieve this, BIR created the Latin America Committee (LAC) last year which, thanks to the active involvement of our members, will aim to convince regional



businesses in this important economic zone to join the only global organisation dedicated to recycling.

But even though we must continue to encourage the free exchange of our materials, **the environmentally sound management of the recyclables that we divert from landfill or incineration must remain our main concern.**

In this respect, we continue to educate our members and publish documents advocating the best way to manage our resources, with the help of our International Environment Council. We also help supranational organisations to adopt realistic and workable legislation relating to our industry by participating in their work – such as at the OECD, the United Nations and the International Atomic Energy Agency.

The members of BIR contribute massively towards the saving of virgin raw materials, as well as to the reduction of air and water pollution, energy consumption and carbon dioxide emissions. **What other industrial activities can claim such a contribution to the health of our planet?** Yet our profession remains largely unknown. More than ever, it is our responsibility to inform governments, other industries, legislators, the media and the general public of the key role of the recycling industry.

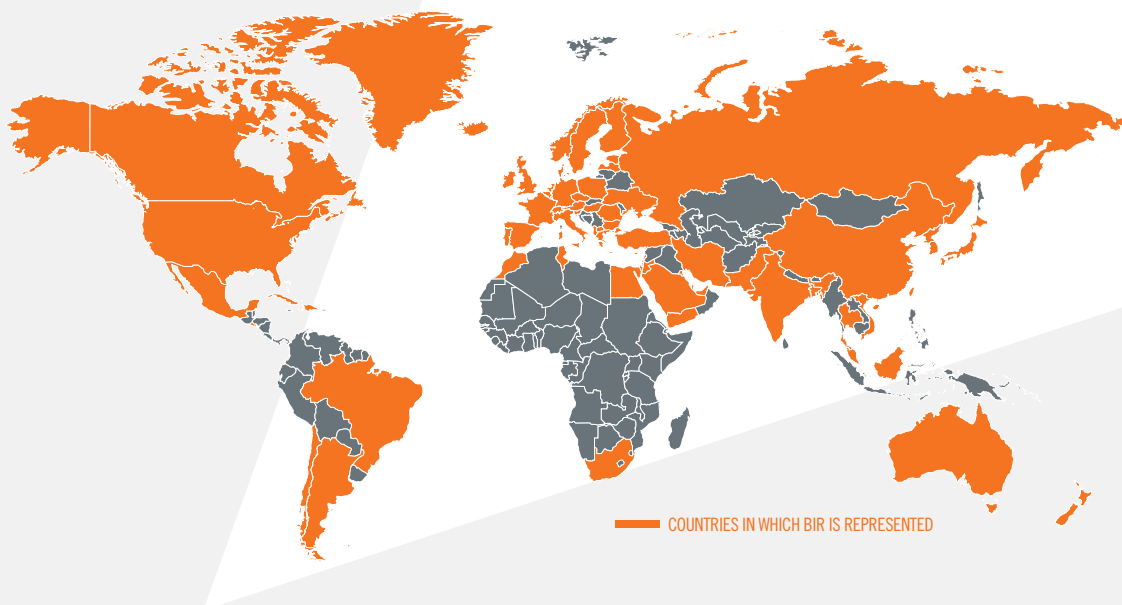
Recyclers, do not let anyone run off with your job!

New means of communication can help you. BIR has a duty to use them to make everyone aware of the paramount importance of your business.

May BIR and its members – both current and future – make a deep imprint on this century. **Let the 21st century come under the sign of recycling, a recycling that knows no borders.**

In a few months from now, I will hand over the reins to my successor as Director General after 38 years of service and of advising this fantastic organisation that is the Bureau of International Recycling. And I would like to say without pretension that I am proud to have contributed in some way to BIR's enduring success.

Membership Spread 2012



Western Europe

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

Russia & Eastern Europe

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

Asia

China (PRC)
India
Japan
Korea
Malaysia
Pakistan
Singapore

Taiwan (China)
Thailand
Vietnam

Central & South America

Argentina
Brazil
Chile
Cuba
El Salvador
Haiti
Honduras
Mexico
Uruguay

Turkey & Middle-East

Bahrain
Egypt
Iran
Israel
Jordan
Kuwait
Lebanon
Saudi Arabia

Turkey
United Arab Emirates
Yemen

North America

Canada
USA

Australia & Pacific Rim

Australia
New Zealand

Africa

Morocco
Senegal
South Africa
Tunisia

List of BIR Member Federations

AUSTRIA

- Austria Recycling (AREC)

BELGIUM

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

BULGARIA

- Bulgarian Association of Recycling (BAR)

CANADA

- Canadian Association of Recycling Industries (CARI)

CHINA

- China Association of Metal Scrap Utilization (CAMU)
- China Nonferrous Metals Industry Association Recycling Metal Branch (CMRA)
- China National Resources Recycling Association (CRRA)

CUBA

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

CZECH REPUBLIC

- Svaz Průmyslu Druhotných Surovin (SPDS-APOREKO)

FRANCE

- Fédération des Entreprises du Recyclage (FEDEREC)

FYRO MACEDONIA

- Zaednica Makedonska Sekundarna Surovina (ZMSS)

GERMANY

- Bundesvereinigung Deutscher Stahlrecycling- und Entsorgungsunternehmen e.V. (BDSV)
- Bundesverband Sekundärrohstoffe und Entsorgung e.V. (BVSE)
- Verband Deutscher Metallhändler e.V. (VDM)

HUNGARY

- Hulladékhasznosítók Országos Egyesülete (HOE)

INDIA

- Metal Recycling Association of India (MRAI)

ITALY

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



JAPAN

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

THE NETHERLANDS

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

POLAND

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

PORTUGAL

- Associação Nacional dos Recuperadores de Produtos Recicláveis (ANAREPRE)

ROMANIA

- Organizatia Patronala Si Profesionala (REMAT)

RUSSIA

- Non-Profit Partnership of Scrap Processors (RUSLOM)

SOUTH AFRICA

- Metal Recyclers of South Africa (MRA)

SPAIN

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

TURKEY

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

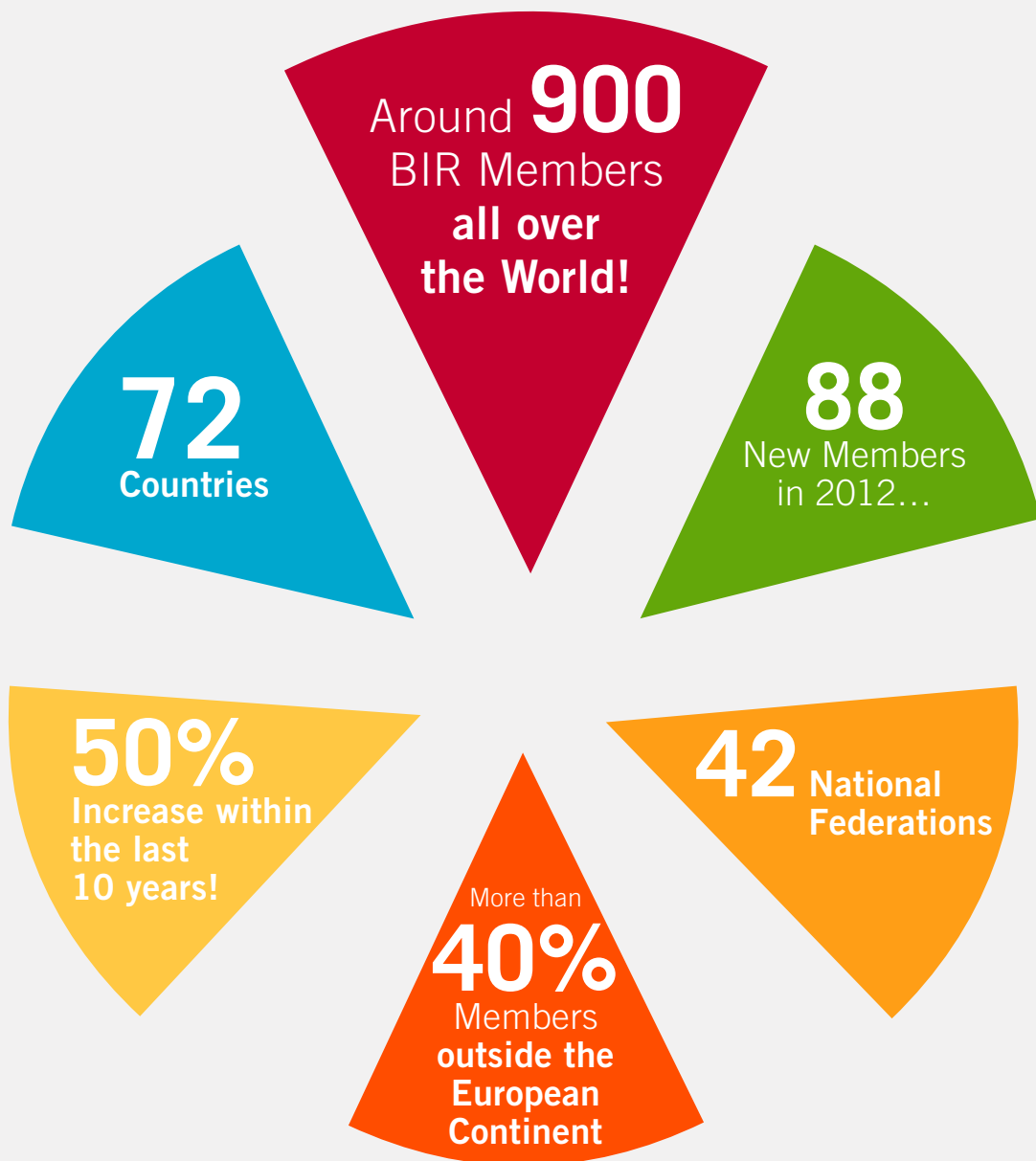
UNITED KINGDOM

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

UNITED STATES

- Institute of Scrap Recycling Industries, Inc. (ISRI)

Membership Highlights



Divisions & Committees

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



Christian Rubach
President Ferrous Division

Ferrous Division

To casual observers, it may seem odd to talk of 2012 being a difficult year given that crude steel output reached dizzying heights never before attained. They must scratch their heads and wonder why record production for the industry that supplies us with the vast majority of our business is not the best news we could ever receive.

The true perspective, however, is an altogether more painful one. The fortunes of our leading customer, the steel industry, are being badly scarred by heavy debts in many instances and also by a monumental capacity overhang which is thought to exceed 200m tonnes per annum in China alone. Making money out of steelmaking is tough wherever you are in the world. As we heard at our meeting in Barcelona last October from guest speaker Ralph Oppenheimer of Stemcor, the steel industry “is not a happy place at the moment.”

Steel production improved in the USA last year as its domestic economy continued to make tentative progress. However, in many other parts of the developed world, and most notably in Europe, the long-standing economic malaise continued to undermine steel demand and therefore output; in Spain, for example, production plummeted more than 12% last year.


The problems endured by many of our customers were mimicked in our own sector: economic and financial uncertainty; job losses; and substantial processing overcapacity. Even worse, the world’s leading steel producer by far, China, slashed its steel scrap usage by almost a sixth in the first three quarters of last year even though its steel output climbed more than 3% in 2012 as a whole to 716.5m tonnes. Russia, another

of the steelmaking giants, also upped its steel production but used less scrap in so doing.

Scrap processors’ profitability has also been impaired by the reduced availability of feed material, largely as a result of the squeeze on economic activity. With their suppliers demanding higher prices to part with the smaller volumes arising and with steel mills attempting to drive down their scrap purchasing costs in a bid to shore up their own balance sheets, processors’ margins were caught in a pincer movement.

The global challenges for our industry are not confined to overcapacity – trade barriers and export restrictions remain an ever-present threat, for example. At our meeting last May, OECD’s Barbara Fliess identified 30 countries which impose export restrictions on iron and steel scrap, with estimates suggesting 19% of the world’s iron and steel scrap exports in value terms are subject to a restriction of some sort.

There are still some positives to be found out there: for example, growth in the international purchases made by the world’s leading steel scrap importer, Turkey, continued to outstrip the country’s steel production increases. India, too, reported record steel scrap imports of more than 6m tonnes in the 2011/12 fiscal year.



“The problems endured by many of our customers were mimicked in our own sector: economic and financial uncertainty; job losses; and substantial processing overcapacity.”

Looking to the future, other developing countries are also likely to absorb ever larger quantities of overseas scrap to fuel rapid growth in domestic steel production; only recently, for example, an expert in Mexico predicted that the country's overseas purchases would soar from around 700,000 tonnes per annum to nearer 4m tonnes as early as 2016. If this duly happens, it will be interesting to note the impact on scrap flows from the world's largest exporter, the USA.

Despite there being some room for optimism, it seems likely that the current year will prove almost as tough as its predecessor.

KEY FACTS

World crude steel production in 2012:
+1.2% at 1.548bn tonnes

Ferrous scrap usage (January-September 2012 versus January-September 2011):

China	-16.9% to 60.6m tonnes
EU-27	-6.7% to 72m tonnes
Turkey	+9.7% to 24.7m tonnes
USA	+2.2% to 42.5m tonnes

19% of the world's iron and steel scrap exports are subject to restriction of some sort.

Non-Ferrous Metals Division

Over the years, the non-ferrous scrap industry has adapted to an ever-changing and challenging operating environment, displaying time and again its renowned resilience and flexibility. In 2012, we again tackled a number of challenges head on, perhaps most notably that of scrap theft and fraud. The Non-Ferrous Metals Division has been a keen advocate for a robust BIR response to this growing menace to our livelihoods; we are therefore delighted with the close working relationship developed between our world organisation and the International Maritime Bureau (IMB), a crime-fighting specialist which is helping us to assess the detail of theft and other criminal activities perpetrated against BIR members and to establish an early-warning system for the benefit of our future trading activities.

Indeed, we must be prepared as an industry to share information with specialists like the IMB if we are to create an environment in which theft and fraud struggle to prosper.

The Non-Ferrous Metals Division has also taken a lead role in the development of scrap flow data which will assist members in their longer-term planning. We commissioned CRU Strategies to gather statistical information, initially on copper and aluminum scrap flows, and some of the company's early findings were revealed to us at our meeting in Barcelona last October. Most notably, it was suggested that our industry should perhaps look to focus more heavily on export markets beyond China given that this pre-eminent buyer of our scrap is likely to become more self-sufficient as it continues along its staggering growth curve.

KEY FACTS

Some production plants in Europe saw scrap supply fall up to 40%.

US automotive production is predicted to reach 16m units in 2013.

“We cannot afford to ignore the possibility that, one day, the world’s leading importer by far will become substantially less dependent on scrap generated by the outside world.”



Robert Stein
President Non-Ferrous Metals
Division

We will analyse this subject in more detail at our meeting in Shanghai this May. It may be uncomfortable, but we cannot afford to ignore the possibility that, one day, the world’s leading importer by far will become substantially less dependent on scrap generated by the outside world. But for the moment at least, China remains a considerable presence in our markets.

Some of the challenges facing us are more intractable than others. For example, we have continued to see unwarranted government interference in the free flow of our materials, and the lasting effects of economic downturn have left many scrap companies struggling to maintain volumes of metal to trade. Some plants in the south of Europe, for example, have been reporting typically 40% less scrap heading their way.

Although economic conditions in Europe remain mired in uncertainty, there are fervent hopes that China has seen out the worst of its downturn and that it will continue to register impressive growth figures. And the signs are more encouraging too from one of the other engine rooms of world growth, the USA, where

automotive industry production, home starts and job figures have all been giving cause for greater optimism in recent months. For 2013, the Chairman and CEO of a leading aluminum producer recently forecast that US automotive production would return almost to pre-recession levels and that the nation’s housing starts would soar to 27%.

As a footnote to 2012, I would also like to draw attention to the fact that we expanded the international representation on our Non-Ferrous Metals Division board in order to provide our members with a broader-based knowledge of the world’s non-ferrous scrap trade. This extended representation is also reflected in our Non-Ferrous Metals World Mirror, which has become universally recognised as an invaluable source of feedback from those experts who daily work at the frontline of the non-ferrous scrap industry.



Textiles Division

In 2012, the used textiles industry became increasingly powerless in the face of a relentless rise in prices of originals.

Perhaps partly because the economic downturn persuaded many members of the public to hold on to their clothes for longer, availability of originals was compromised and the supply/demand law took its inevitable course.

Already burdened by high transport and energy bills, sorters around the world struggled to pass on these additional costs in their own selling prices. The pressures were particularly acute in the high-wage countries of the developed world.

The value of originals has climbed so steeply that our industry's raw material has increasingly become a target for criminals, many of whom are organised and sophisticated in their approach. Across Europe, examples have emerged of contents being stolen from collection containers or, even worse, of the entire container vanishing seemingly into thin air. Industry members who have fallen prey to such thefts have been urged to report incidents to the appropriate authorities; at the same time, the police must pursue the culprits with vigour and the legal system must hand down appropriate penalties. By their very nature, token punishments will do nothing to stop organised crime.

“Many people simply do not realise that, just as with metals and paper, the infrastructure exists to give another life to used clothing and other forms of textiles.”



Olaf Rintsch
President Textiles Division

Unfortunately, this crime wave does not reflect well on the used textiles industry – even though reputable collection/sorting businesses are regularly the victims. It is therefore in the interests of textiles recyclers to ensure that unscrupulous operators are driven from our midst and that illegality of any kind is brought to the attention of the authorities.

The high value of originals also had another noticeable effect in 2012, with newcomers attracted into our field in the hope of making a quick profit. But these new entrants often fail to do their homework and so do not fully appreciate the relative worth of the goods in which they find themselves dealing. Quite often, this can lead to prices being kept artificially high.

Last year also saw a continued widening of interest in what our industry does. For example, a spokeswoman for the European Outdoor Group – an association representing the common interests of the continent's outdoor apparel industry – spoke at our meeting in Rome last May of efforts to improve the “eco-design” of their members' products. Ms Dina Mehta recognised that the initiative would benefit greatly from our industry's input given the skills and expertise we have developed over many decades.



KEY FACTS

95% of all clothing and textiles can be recycled.

Using France as an example, textiles collection volumes fell upwards of 15% in the second half of 2012.

The average UK household owns around Euro 5000 worth of clothes, of which some 30% have not been worn for at least a year.

In another initiative, the US Secondary Materials and Recycled Textiles Association (SMART) created educational materials to highlight the fact that 95% of all clothing and textiles can be recycled. These were presented to more than 750,000 educators, 15m students and 20m parents in a huge outreach initiative that served as a timely reminder of the need to have a consistent and regular dialogue with the general public regarding the recyclability of textiles.

Many people simply do not realise that, just as with metals and paper, the infrastructure exists to give another life to used clothing and other forms of textiles. The untapped resource is immense: research conducted in the UK last year suggested, for example, that the average household owned around Euro 5000 worth of clothes, of which some 30% had not been worn for at least a year.

Paper Division

A myriad of factors conspired to make 2012 yet another difficult year for businesses throughout the recovered fibre sector: sub-par growth in many of the world's developed economies and its negative impact on recovered fibre collection volumes; a slowdown in China where the growth of recent years has provided much of the impetus for our markets; mill closures, notably in Europe; signs of creeping protectionism and the associated threat to the free movement of our material; stricter import controls adopted in key markets; a growing number of claims over fibre quality, most notably affecting material originating in Europe; and, of course, price volatility.

However, it would be inappropriate to dismiss last year as a wholly negative experience for our industry. China, which imports ten times more recovered fibre than any other country on the planet, bought record volumes on the international market, easily surpassing the previous record of 27.6m tonnes set in 2009 despite the fact that its consuming mills struggled throughout the year with high levels of competition, low margins and limited scope to raise their finished product prices.

Given the importance of the Chinese market, the thoughts of many analysts have been occupied with where the country's import curve may be heading next. There is some difference of opinion on the actual numbers, but all are agreed on the direction: China will continue to import higher volumes in the short to medium term. For example, a figure of 35m tonnes has been posited for 2014, with many experts anticipating that the 40m tonnes barrier will be breached around the turn of the decade.

Despite its long-term need for imported recovered fibre, 2012 taught us beyond any doubt that China is not prepared to accept sub-standard material from its overseas suppliers, some of which have been blacklisted by major

buyers for what they have deemed an excessive moisture or non-paper component content. The pressure is already particularly acute on European exporters, for whom recovered paper shipments to China have grown at only half the pace enjoyed by their US counterparts over recent years.

Of course, the appeal of our industry's recovered fibre products can be felt throughout many other developing countries of Asia. As we heard at our meeting in Rome last May, experts in India believe the country will grow its imports from between 3m and 4m tonnes at present to perhaps 6.5m tonnes by the end of the decade and even 10m tonnes by the year 2025.

KEY FACTS

US recovered fibre shipments to China have grown 66.6% over the last five years whereas the increase for Europe has been 35%.

The European paper recycling rate exceeds 70%, and the total volume of paper collected and recycled is nearing 60m tonnes.



Ranjit Baxi
President Paper Division

“2012 taught us beyond any doubt that China is not prepared to accept sub-standard material from its overseas suppliers.”

Western Europe, North America and Japan are widely regarded as nearing the limits of environmentally and economically viable recovered paper collection. At the same time, and as mentioned at the outset of this report, the world's stuttering economic progress has significantly undermined the volumes of new paper and board consumed, and therefore the quantities subsequently coming forward for recycling. In effect, recovered paper is in shorter supply because of the scarcity of another commodity, namely confidence deep in the root system of our society. It is no wonder that confidence is at a premium when jobs are being lost or put under threat and when household budgets are strained.

As we have learned during our careers in recovered fibre, optimism and opportunity often go hand in hand. Sentiment within our industry was perhaps a little more positive at the start of 2013, so let us hope that momentum is maintained and carries through into a better year for all our businesses.



Case Study

Shining a Light on Container Crime

***Theft from containers** has become a high-profile and unwanted side-effect of high metal prices, resulting in multi-million dollar losses for some of those engaged in shipping scrap around the globe, as well as higher insurance premiums and sometimes even difficulty in obtaining insurance. It is unsurprising that some of those companies to have suffered repeatedly at the hands of these thieves have decided – generally with deep regret – to sever their trading links with certain parts of the world.*

The BIR, in conjunction with its International Trade Council (ITC), has taken steps to mitigate the negative impact of this scourge on its members and on the recycling industry in general, notably by highlighting criminals' *modus operandi* and by helping towards the creation of a database that will help traders to sidestep theft hot-spots.

This issue was brought to the widest possible international prominence in May 2012 at BIR's Spring Convention in Rome when the ITC, under the chairmanship of Robert Voss, dedicated an entire session to discussion of this form of crime, how it is being perpetrated and what measures traders can take to avoid becoming its victim. Among the disturbing revelations, it was contended that there are at least seven ways to access a container without breaking the shipping line's original seal; and that agents and truck drivers have been coerced by organised gangs into participating in the theft of whole containers or of some of their contents – for example, by changing information on documentation.

In addition to highlighting the scale of the metal theft problem, BIR also made tangible efforts last year to counter these pernicious activities, notably by subscribing to the services of the London-based International Maritime Bureau (IMB) which forms part of the Commercial Crime Services, the anti-crime unit of the International Chamber of Commerce. A specialist in fighting crime relating to maritime trade and transportation, it is the role of the IMB to collate BIR members' reports of theft and other criminal activities relating to container shipments; once these reports have been verified, pertinent details can be made available to BIR members. In some instances, the IMB will circulate warnings and alerts to the membership.

BIR continues to urge its members to help build this growing database by feeding through relevant experiences, all of which will be treated in confidence. They are also asked to respond to the occasional questionnaires circulated by BIR as one method of identifying patterns in the crimes perpetrated, such as types of material



“In addition to highlighting the scale of the metal theft problem, BIR also made tangible efforts last year to counter these pernicious activities.”

stolen, ports of destination and stop-off points along the route. Members are also strongly advised to check regularly the information provided by the IMB as this has the potential to limit or even eliminate losses of time, money and reputation.

It is often said that knowledge is power. By such timely sharing of information, the IMB has been extremely effective in reducing risk in other sectors, and a similarly positive result is anticipated by BIR for the recycling industry. However, it has also been stressed by experts in this field – including the IMB – that there is

no substitute for diligence on the part of the trader and exporter. The advice imparted by BIR and the ITC includes: making maximum use of photography along the supply chain; and relying on a limited number of qualified partners with whom a level of trust has been built.

Or as Mr. Voss has said on a number of occasions: “The bottom line is know your business partner, know your trading partner.”



Michael G. Wright
Chairman Stainless Steel
& Special Alloys Committee

Stainless Steel & Special Alloys Committee

It seems appropriate to begin a review of 2012 by recognising that the year marked the centenary of the industrial material which has provided the focal point for many of our careers, namely stainless steel. Countless end users over the years will have had occasion to thank the likes of Professor Benno Strauss, Dr.-Ing. Eduard Maurer and Harry Brearley for their work towards the development of a steel, nickel and chrome hybrid blessed with resistance to heat, rust and acid, as well as with the hardness, toughness and elasticity of normal steel. And perhaps with the benefit of decades of hindsight, we should add that stainless steel is perfectly adapted to the needs of modern society by virtue of being an eminently recyclable material.

The gentlemen mentioned above would have been amazed at the scale and breadth of the industry to which their research efforts gave rise – even though last year was not one of the metal's most glittering. A relatively positive early portion of the year was followed by a significantly weaker performance in the third and, most particularly, fourth quarter. Naturally, stainless steel scrap was buffeted by the same trend, with processors and traders suffering the consequences of a downturn in demand and prices during the second half of last year. Life was made no easier by the now-familiar gyrations in the nickel price, which ended 2012 at a lower level than it started the year.

But in this, my final report as Chairman of the BIR Stainless Steel & Special Alloys Committee, I would prefer to dwell on the undoubted positives. Above all, demand growth in the developing world, and most notably in China

and India, should help ensure that world stainless production climbs an estimated 10m tonnes over the next four years. Indeed, Asia's emergence as the powerhouse of stainless steel production growth is underlined by predictions that the continent will account for 68% of world output in 2013. Of course, we need to recognise that growth in Chinese stainless production is not all good news for scrap suppliers given that the country's mills regard nickel pig iron as their preferred raw material option so long as nickel prices remain above US\$ 15,000 per tonne. Nevertheless, stainless steel scrap can still be expected to achieve annual growth rates of 4-5% in the long term.

Looking to the more immediate future, the new stainless steel production facility in America has the potential to completely alter scrap dynamics, possibly reducing the flow of US exports to Asia while sucking in more imports from Europe

“Stainless steel is perfectly adapted to the needs of modern society by virtue of being an eminently recyclable material.”

KEY FACTS

World stainless steel production:
approximately 34m tonnes in 2012

Global stainless steel production forecast to reach 42m tonnes by 2016.

Asia's share of world stainless steel production expected to reach 68% in 2013.

where the Outokumpu/Inoxum merger will lead to a cut in stainless steel overcapacity – and not a moment too soon given that the European stainless steel industry is struggling with operating rates as low as 60%. Higher utilisation numbers, economies of scale and other streamlining efforts are essential for those companies looking to remain in the stainless steel production sector by achieving profitability not only in the short term but also on a sustainable basis into the long term.

Such sustainability is essential not only for the stainless steel producers themselves but also for the scrap processors and traders who supply them.

Plastics Committee

Although numerous obstacles were strewn in our path last year, the events of 2012 still served as proof that we continue to work in a dynamic and evolving industry.

Almost every time we opened a trade magazine or visited a factory, we saw evidence of the on-going technological developments that enable our plastics recycling industry to become more efficient, more sustainable and hopefully more profitable.

Furthermore, the wider business press confirmed an increased flow of private equity into our sector last year while some of the biggest industrial and retail names, such as IKEA, made recycling-related announcements that emphasise the ever-wider appeal of the field in which we operate.

In the long term, there is every reason to suspect that the environmental and sustainability agenda will continue to capture the imagination, leading to increased trade in reprocessed plastics. In 2012, however, we witnessed a number of developments that hampered the free flow of our materials – which represent the lifeblood for consuming industries around the world.

In addition to strict enforcement of import regulations into the massively important Chinese market and a ban on shipments of plastics from Europe to Malaysia (which was subsequently revoked), the United Arab Emirates placed a prohibition on the importation of plastics scrap. Meanwhile, India has persisted in creating uncertainty around plastics scrap imports – for example, through delays in granting import licences. It is an unfortunate truth that the authorities in India continue to fail to understand the potential for our industry to convert what one man may regard as “waste” into what another will see as an essential raw material for which he is prepared to pay significant sums of money.





Surendra Borad
Chairman Plastics Committee

“In 2012, we witnessed a number of developments that hampered the free flow of our materials – which represent the lifeblood for consuming industries around the world.”

The importance of keeping open the export channel is exemplified in latest figures for Europe. In 2011, some 6.4m tonnes of the 25.1m tonnes of plastics scrap generated in Europe was destined for materials recycling – of which 3.4m tonnes, or more than half, was recycled outside the continent. Thankfully, efforts continued at EU level last year to develop end-of-waste criteria for scrap plastics – an endeavour which has the potential to change fundamentally the legislative landscape as it affects our businesses. By escaping the clutches of “waste” legislation, the reputation of our industry as a producer of valuable products would be supremely enhanced.

In addition to restrictions imposed on export outlets, businesses in Europe were also forced last year to contend with an increasingly disturbing level of pressure from interested parties to prevent plastics scrap from leaving the continent. As the standard-bearer for free and fair trade in recyclables, the BIR will continue to fight against the forces of protectionism. Export restrictions create the risk of oversupply on domestic markets, resulting almost inevitably in lower prices and an adverse effect on collection volumes. Given the ever-growing realisation of the benefits of plastics recycling, surely such restriction on trade can only be a backward step.

Hopefully, 2013 will bring not only improved trading conditions for plastics recyclers but also a more enlightened attitude towards their activities from authorities in many parts of the world. One of the keys to unlocking the flow of our materials is loosening their association with “waste”, and so it is our fervent wish to see major progress within the EU this year towards establishing the above-mentioned end-of-waste criteria.

KEY FACTS

Some 6.4m tonnes of the plastics scrap generated in Europe last year was destined for materials recycling – of which 3.4m tonnes was recycled outside the continent.



Tyres Committee

At its meeting in November last year, the End-of-Life Tyre Forum (ELT Forum) established its working priorities for 2013. Among the subjects at the top of the list was development of end-of-waste criteria for ELT-derived products.

“Within BIR and other well-informed organisations, there is a belief that ELT-derived products – such as the granulate used in artificial football pitches or children’s playgrounds – are well-placed to be rescued from the ‘waste’ category.”

Although waste is an inevitable result of most commercial activities, all those in the tyre industry chain have made massive efforts over recent years to ensure that the vast proportion of scrap tyres are destined to be transformed into new products or to be used for energy production, thus leaving an ever-smaller percentage to be consigned ultimately to landfill. Therefore, it is entirely appropriate at this advanced moment in tyre recycling history to push for recognition of these products as something other than “waste”.

Within the ELT Forum, which is composed of tyre corporate members of the European Tyre & Rubber Manufacturers’ Association (ETRMA) and of the 14 national ELT management companies set up to fulfil producer responsibility obligations, it is recognised that such recognition will not be won without a fight but that the goal is worth the effort. “Waste” status represents a huge burden, adding substantial costs over disposal and even acting as a barrier to improved resource efficiency.

Within BIR and other well-informed organisations, there is a belief that ELT-derived products – such as the granulate used in artificial football pitches or children’s playgrounds – are well-placed to be rescued



Barend Ten Bruggencate
Chairman Tyres Committee

from the “waste” category when viewed against the criteria laid down in the EU Waste Framework Directive. In other words, a market exists for the material and it is already commonly used for specific purposes, meeting related technical requirements, legislation and standards applicable to products. At the same time, use of the material has no adverse impact on the environment or on human health.

The need for a more enlightened and harmonised approach is perhaps best exemplified by the fact that neighbouring countries can have diametrically-opposed attitudes to such products. For example, the Dutch use large amounts of ELT-derived granulate in their sports pitches whereas neighbouring Belgium regard this as a waste. Undoubtedly, there are benefits to be gained from eliminating confusion and inconsistency.

On the same issue of harmonisation, another of the priorities for 2013 identified by the ELT Forum is standardisation of materials obtained from used tyres. Again, such initiatives speak to the growing maturity of the tyre recycling market, as well as to the efforts to maximise the quality of ELT-derived products in such a way as to boost customer confidence in them.

KEY FACTS

In 2011, 95% of the EU-27's used tyre arisings was destined for recovery versus 75% in 2004.

EU-27 tyre arisings climbed 3% in 2011.

Over a period of seven years, tyre recovery in Europe has soared to 38%.

For the record, Europe stayed just ahead of the USA and Japan in maintaining its 95% ELT recovery rate in 2011 – despite an increase of 3% in used tyres arisings. With Western Europe now finding added-value avenues for virtually all of its scrap tyres, progress towards the same goal is now being made in the newer EU member states, helped in no small measure by collaboration and advice from experts in those countries which have already gone down this path.

And in the USA, there is perhaps no more eloquent testimony to the widespread acceptance of ELT-derived materials than the fact that these featured in the synthetic turf at The Mercedes-Benz Super Dome in New Orleans where the 2013 “Super Bowl” was played.



Olivier François
Chairman International
Environment Council

International Environment Council

Even though the recent decades have produced a mass of regulations worldwide controlling waste, illegal activity and scandals continue to arise, flagging up the need for greater enforcement of existing legislation.

In some regions of the world, environmental legislation is as comprehensive as it will probably ever become; there is not much more that can be added. Therefore, the shift in focus to enforcement is a natural one. In other countries and regions, however, even the most fundamental legislation to tackle “waste” is still lacking. And so, it is apparent that some governments lack the resources to make this happen.


We have also seen a growing trend towards transferring controls normally exercised by customs or environmental police to companies themselves. But while governments may consider certification schemes that hand enforcement duties to industry a more cost-effective solution, this creates the potential to dilute the credibility of the enforcement system itself. There is plainly an argument in favour of governments maintaining a more direct involvement in the enforcement process.

Those company staff members who are handed the responsibility for environmental/quality management auditing and compliance have a very important role to play. But while representing a greater burden for our companies, this also presents an opportunity to raise our management standards and create a better picture of our industry. For this reason, BIR has been – and will remain – very active

in the fields of environmental and quality management, most notably through its “Tools for Environmentally Sound Management” and “Tools for Quality Management”, which includes “end-of-waste” procedures.

After iron, steel, aluminium and aluminium alloys achieved “end-of-waste” status in 2011, it was the turn of glass cullet in 2012 – a year in which efforts were also made at EU level to finalise end-of-waste criteria for copper, recovered paper and plastics. Work towards this end continues in the current year.

Several other issues assumed prominence in 2012. Regarding Extended Producer Responsibility (EPR), it has often been noted that such schemes lead to the recycler progressively losing ownership of the final sorted material prepared via his or her processes. But at our meeting in Rome last May, a presentation from Robin Wiener, President of the US Institute of Scrap Recycling Industries, highlighted the potential for introducing “sunset clauses” such that EPR schemes end once they have succeeded in delivering the desired effects and become sustainable without the further support of subsidies or the EPR framework. This concept is clearly one which we should examine closely with a view to its potential promotion and application in OECD countries and elsewhere.



Also in 2012, significant progress was made towards finalisation of the non-binding code of conduct relating to the transboundary movement of scrap metal and semi-finished metal that may inadvertently contain radioactive material. Developed under the umbrella of the International Atomic Energy Agency and benefitting from significant input from recycling industry representatives, the document reflects a healthy understanding of radioactivity issues as they affect the scrap industry, emphasising the inequity of punishing recyclers who discover radioactive sources of which governments had earlier lost control. Hopefully when we come to write the BIR Annual Report for 2013, we will be able to reflect on the adoption of a document that recognises this issue as one where collaboration rather than condemnation is required. However, concerns remain around introducing a pre-inspection routine for scrap and semis shipments that will generate perhaps millions of reports of no radioactivity found. After all, if unexpected radioactivity were found that required a response the shipment would be stopped at that point.

“BIR has been – and will remain – very active in the fields of environmental and quality management, most notably through its *Tools for Environmentally Sound Management* and *Tools for Quality Management* which includes end-of-waste procedures.”

International Trade Council

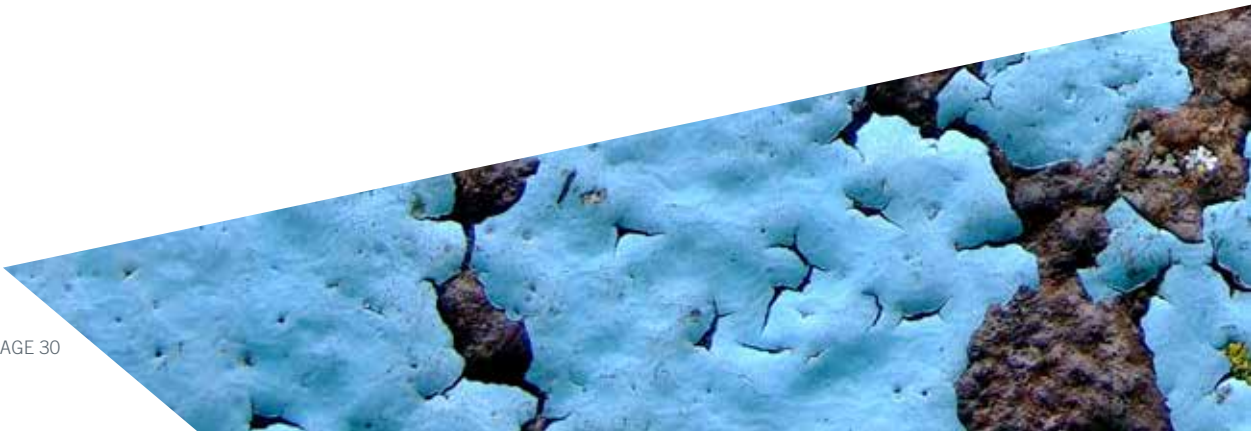
It has been yet another very busy year for the International Trade Council (ITC), centred around our highly successful and well-attended workshop on fraud and theft during BIR's Rome Convention in May. I am also pleased to confirm that, after a considerable amount of time and effort as well as many meetings, together with the internationally renowned law firm Bird & Bird, the BIR's new arbitration service is finally up and running.

Not only does BIR now have an efficient and effective arbitration service suitable for an industry of our size and stature, it now gives us a thorough and successful means of settling any disputes within the industry in a cost-effective and speedy manner through the intervention of peers and experts in the trade. It is fair to say that our arbitration service is now the envy of the industry worldwide.

In addition, the ITC has continued its efforts to ensure that any protectionist attempts to stem the free flow of our materials around the world are met with a swift and effective reaction as well as with assistance for those countries affected – the aim being to ensure that the free and fair trade of our secondary raw materials continues unencumbered. The ITC was called on to react to such measures on several occasions during the course of the year, and it will continue to monitor world flows at all times and to assist our members as and where necessary.

Returning to our highly successful workshop in Rome, this was attended by over 400 delegates and featured excellent presentations from representatives of shipping lines, the trade press and the International Maritime Bureau (IMB), as well as one of our own members. Their examples of theft and fraud, and how these could possibly be combated, certainly seemed to focus delegates' attention.

We were all shocked by a frightening example of a major fraud perpetrated within our industry, which was outlined in Rome by Gert-Jan van der Have, as well as by video evidence of how easy it is to break into a container without detaching the seals.



“The ITC has continued its efforts to ensure that any protectionist attempts to stem the free flow of our materials around the world are met with a swift and effective reaction.”



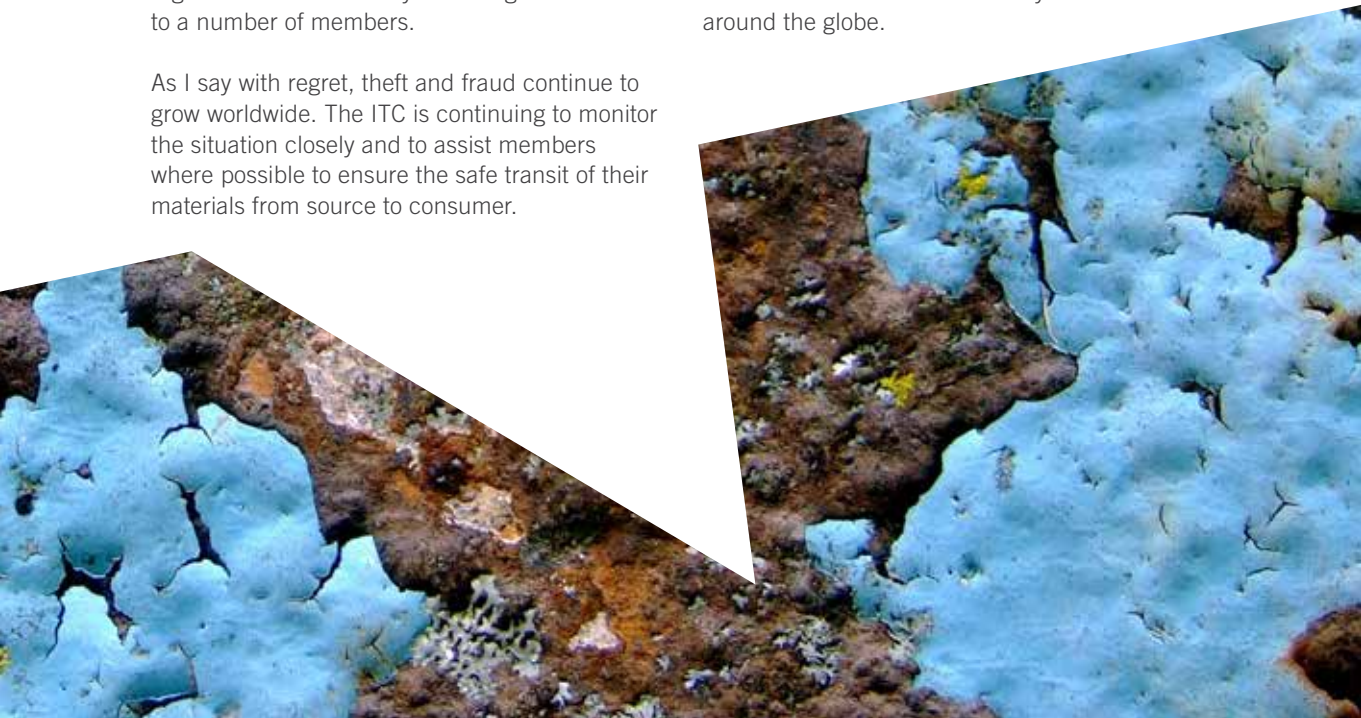
Robert Voss
Chairman
International
Trade Council

Unfortunately, theft and fraud continue to be major and worrying problems in our industry, with reports of both coming to BIR's attention on a regular basis. In response, we have established a working relationship with the Commercial Crime Services division of the International Chamber of Commerce's International Maritime Bureau, involving the sharing of information and advice on this on-going problem; BIR members are urged to utilise this service which is available to them free of charge. We are in very regular contact with our colleagues at the IMB and the dissemination of information between our two organisations has already been of great benefit to a number of members.

As I say with regret, theft and fraud continue to grow worldwide. The ITC is continuing to monitor the situation closely and to assist members where possible to ensure the safe transit of their materials from source to consumer.

Our workshop during this year's BIR Convention in Shanghai will focus on a variety of the financial aspects of our trade which also affect our day-to-day business.

I would like to thank the members of the Executive Committee for their continued support of the ITC's work and for agreeing to have representation on the Council from the various divisions. And I am also indebted, once again, to the Director General and his great team in Brussels for their on-going hard work in ensuring that the ITC continues to offer members full support to ensure the easiest possible trading conditions for our vital secondary raw materials around the globe.





“True to its objectives,
the YTG now enjoys
representation on all of
BIR’s major boards and
committees, giving the
emerging generation
a voice at the highest
decision-making levels of
the recycling industry.”

Case Study

Leaders of Tomorrow: the BIR Young Traders Group

BIR is celebrating its 65th birthday this year and is certainly not considering retirement! One has only to look around the meeting rooms at our twice-yearly Conventions to realise that the younger generation – the lifeblood of any industry – is becoming increasingly engaged in our activities. It is particularly gratifying to see some of these younger people not only in the audience but also on the top table, ensuring the views and fresh perspectives of younger members are fed into the major issues debated by our industry.

This has not happened by chance. BIR has always looked to encourage younger people to join its ranks as part of a process of renewal that safeguards the very vibrancy of our organisation. We have endeavoured to create a pathway for our leaders of tomorrow to follow, allowing them to familiarise themselves with our organisation, with their peer group and with BIR's leading lights.

Key to this mission was the formation of what was originally known as the Young Executives Committee, the aim of which was to enable recycling professionals aged 35 years or under to become ever more involved in the activities of the world organisation. First convened in London some 18 years ago, it subsequently broadened its framework to include regular networking evenings during BIR Conventions; group members gather in an informal and relaxing setting such as a restaurant or a night-spot, thus helping them to build their confidence and their contacts along the way.

As any member of this youthful band will be quick to insist, what has now become known as the Young Traders Group (YTG) is not some glorified social club. True to its objectives, the YTG now enjoys representation on all of BIR's major boards and committees, giving the emerging generation a voice at the highest decision-making levels of the recycling industry. At present, for example, **Sebastien Perron** of Canada-based American Iron & Metal Co. sits on the Non-Ferrous Metals Division board; **Alexandra Weibel Natan** of Manco SA in France occupies places on the Communications, Latin American and Membership Committees; **Graeme Cameron** of Sims Metal Management Asia is the YTG representative on BIR's increasingly influential International Trade Council; **Simon Isaacs** of UK-based L & P Trading is on the Convention Committee; and **Zain Nathani** of the Nathani Group of Companies in India was elevated to the position of Vice President of the BIR Ferrous Division at last October's Barcelona Convention. YTG members also have the opportunity to express themselves in the Young Traders Gazette.



The YTG helps to attract new members to the BIR – individuals who previously might have been daunted by the prospect of rubbing shoulders with recycling's leading players. The group provides a conduit for companies to introduce their top young executives to the higher echelons of the industry. BIR's young trader policy certainly seems to be working: at last year's Rome Convention, a record-breaking 250 of them were in attendance.

Paul Coyte of Hayes Metals in New Zealand, the YTG's current Chairman, is in no doubt about the value of the group. "In the current global environment, market conditions are challenging so the need for networking and creating business opportunities is even more important than perhaps it has been previously. As the group grows and expands, there are more opportunities to network and create business opportunities. I would encourage all young traders and potential young traders to contact the BIR and take advantage of the huge opportunity which is the Young Traders Group."

Danny Fischer of OneSteel Asia, who used to be active on the BIR Stainless Steel & Special Alloys Committee, is equally positive about the group's impact. "The YTG made me feel at home in a new and sometimes intimidating environment. It has helped me advance my career in the scrap metal industry."



Special Committees

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



Mark Sellier
Chairman
Convention Committee

Convention Committee

A great deal of the success of our Conventions can be attributed to the attention to detail paid by our team in Brussels, led by Mr. Francis Veys. A considerable amount of background work is done before a destination can be put forward to the Committee for consideration. The hotel conference/meeting room and exhibition facilities are first assessed to see if they can accommodate our exhibitors, committees, plenary meetings and divisional luncheons. Additionally, it needs to determine the maximum number of delegates the hotel can accommodate, and finally whether its guest facilities meet the expectations of the discerning BIR delegate.

When a destination is identified as suitable, then a local professional conference organiser is sought to assist with the liaison work and to provide local staff and transport arrangements where necessary.

Only then can complex contract negotiations begin, overseen by Mr. Veys. With his vast experience in these matters, he ensures that the BIR's risk in terms of advance payments to hotels and conference organisers is minimised, and that contractual terms and conditions are the most favourable possible.

Once again in 2012, Divisional Presidents and Special Committee Chairmen excelled in terms of the presentations, workshops and meetings arranged by them and their committee members. The BIR Spring and Autumn Conventions remain the premier events in the international recycling calendar. And thanks to the continued success of our membership programme so ably led by Membership Committee Chairman Mr. Michael Lion, the Conventions attract delegates from an increasing number of countries across all divisions.

The Cavalieri Hilton in Rome was a great venue for our 2012 Spring Convention, attracting a near-record 1600 attendees for a full three-day programme. The proximity of the Welcome Reception was a definite plus and a function that many will remember as one of the more spectacular hosted by BIR. Considering the limited number of hotels that can accommodate us, the overall product was a good one; however, if our typical number of delegates were to grow further, this venue would no longer be suitable.

The familiar setting of the Princesa Sofia in Barcelona attracted a near record for an Autumn Convention of 1200 attendees. Delegates filled the hotel bar most evenings and the city provided a superb backdrop.





“Judging by the increasing numbers attending our meetings, there is little doubt that BIR Conventions are the place to be.”

We will meet in Shanghai in May this year. Organisation of an event of this size and international visibility in China is a massive and very complex undertaking, presenting many challenges. We are all, however, confident that the meeting will be a success. Several years ago, it was suggested by the Convention Committee that we try to meet in Asia every three years or so if possible given that the continent is a major market for all recyclers, irrespective of commodity, and that this region continues to develop in size and importance.

Following Shanghai, we move on to Warsaw – a very successful destination for BIR in 2007. The hotel facilities and the local agency that assisted in organising the event were excellent.

As our premier recycling industry organisation expands to encompass recyclers from all corners of the globe, the Convention Committee works in conjunction with the Membership Committee to promote BIR. With this in mind, our Convention in Miami in the spring of 2014 will focus on Latin

America. We hope to encourage merchants and consumers from the region to join us in Miami in our bid to increase our profile and membership numbers in this developing part of the world.

Your Convention Committee is always trying to offer you, the delegate, the best product possible, and we appreciate your continued support. Judging by the increasing numbers attending our meetings, there is little doubt that BIR Conventions are the place to be to prospect for new clients, meet existing customers and equipment manufacturers, and keep abreast of market trends and developments influencing our industry.

However, we always remain open to suggestions, so feel free to contact me via the Brussels office or at a Convention.



Kamiel Van Wijk
Chairman
Communications Committee

Communications Committee

I ended last year's Communications Committee report – actually the first one I had drafted in my capacity as Chairman – by saying that I believed we would make 2012 a success. So did we achieve what I promised? From my personal perspective, we did, but only our members can confirm whether what they received from BIR lived up to their expectations.

Looking at a famous online encyclopaedia's definition of the word 'communication', it comes from the Latin "*communis*" – meaning "to share" – and describes the exchange of thoughts, messages or information through speech, visuals, signals, writing or behaviour.

Communication is the "*raison d'être*" of an organisation such as ours. An international trade federation is the hub for a wealth of information that needs to be shared both internally with its membership and externally with political decision-makers, legislators, the media and the wider public.

Nowadays, with social media at the forefront of instant communication, the power to disseminate information is in the hands of each and every one of us. But is it really necessary to tweet on an hourly basis about any thought, event or opinion that crosses our minds, irrespective of the information's value to the target group? Is it really necessary to communicate constantly just because we can?

The careful collection, analysis and processing of relevant news is the core task of any trade association. Members should not be inundated with information unless it is instrumental to their businesses. In return, the organisation should be able to respond to any query that their members, the media or the authorities have.

A lot of what BIR does on behalf and to the benefit of its members happens behind closed doors. We would like instantly to share with our members a lot of information about our actions within the various key international forums such as the OECD, the UN and the EU, but many details are highly sensitive and revealing their substance would jeopardise their success.

Today, more than ever, effective and reliable communication is of paramount importance. It is not the quantity but the quality that counts.

Looking back at 2012, BIR's communications activities encompassed a multitude of different elements which went towards forming a consistent image of a world organisation that defends the interests of its members, provides reliable market information and statistical data, and creates twice a year the most international gatherings of the recycling industry, thereby providing a unique forum for exchanges and business dealings.

Traditionally, much time and effort goes into the preparation and branding of these conventions. Creating a powerful visual imprint strengthens the overall image of our international events and illustrates their standard and value. Inviting and promoting high-profile speakers (in Rome, we reached the impressive number of 31) contribute to the attractiveness of our programmes, which are already extremely well-

“The careful collection, analysis and processing of relevant news is the core task of any trade association. Members should not be inundated with information unless it is instrumental to their businesses. In return, the organisation should be able to respond to any query that their members, the media or the authorities have.”

equipped owing to the first-hand expertise on offer from our divisional and committee board members.

During the General Assembly in Rome, the BIR Annual Report for 2011, which we also made available in German and French, was presented in the form of an animated video that summarised the key elements of our annual flagship publication, such as the main events and actions to have taken place within the industry and within BIR. Use of this new presentation tool illustrates BIR's efforts to employ electronic media wisely in order to simplify and aid the digestion of information. A similar work of animation was created on behalf of BIR's Membership Committee to effectively explain the process of applying to become a BIR member. We will certainly use animated videos more frequently in the future.

Between conventions, we sent more than 60 items of BIR Headline News to our members, took targeted media action in the form of 29 press releases, and provided first-hand market information with 17 different World Mirrors. BIR's first true statistical publication, the “World Steel Recycling in Figures”, saw the release of its 3rd edition and served as the model for a similar project launched by the Non-Ferrous Metals Division. This overview of “Global Non-Ferrous Scrap Flows” was finalised at the end of 2012 and is about to be published.

After the successful launch of the Young Traders Gazette in 2011, this ambitious group of young recycling executives produced two further issues. This is a very active and stimulating committee, and I am sure we have not yet seen the last of its great ideas and initiatives.

Much more could be said about the different aspects and results of our communications work. But any communicator is only truly satisfied if the audience responds. We continue to count on you, our members, to guide us towards what you expect from us by active participation in our different committees and boards.

Let me end by saying “thank you” to all of you who helped make 2012 a success, and my special thanks go to the dedicated BIR staff, the committee members and members of the Advisory Council.

May 2013 be as exciting as we want it to be!



Membership Committee

The increasing global reach of the BIR is demonstrated in many ways, and certainly the veracity of this is exemplified in the demographics and substance of its membership, which is truly universal in its content.

The implications of such a broad construction has multiple and interactive benefits to both the membership and the organization, providing a vast and influential global network to the former, and underscores the reality of the influence and legitimacy of BIR's unrivaled position, not least in its dialogue with governmental and supra-governmental bodies where recycling is concerned. This provides the quintessential influence to our members in protecting their interests and advancing the optimal course of understanding and definition of the regulatory aspects that increasingly impact their industry.

The uncertainty of both economic and political conditions continued to be an on-going dominant feature in 2012; thus, enduring trading party relationships with those able to provide continuity of the raw material supply chain and having fiscal stability were among the highest priorities of our membership.

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

While as exacting as such vetting is, it is neither practical nor realistic to anticipate such measures can ever be an all-encompassing guarantee of individual performance, but it is the overwhelming adherence and commitment of our members themselves to the highest standards that is one of many reasons why our organization is regarded as the leading voice of international recycling, both by its participants, governmental, supra-governmental and leading regulatory bodies worldwide.

As an indication of the membership's increasingly global composition, 88 new members were added to our roster this year, amounting to a total of 890 from 72 nations around the world. Our growing membership footprint from our initial base in Europe in our formative years to the four corners of the globe today more than ever underscores our universal constituency.



“Our growing membership footprint from our initial base in Europe in our formative years to the four corners of the globe today more than ever underscores our universal constituency.”



Michael Lion
Chairman
Membership Committee

Maintaining sensitivity to the transformational and evolving nature of our industry and the consequent needs of our membership in this context is a continuous priority of our membership programs, and while maintaining a constant vigilance in this regard, we recognize the high priority of re-enforcing and invigorating those aspects and features already so highly valued by our members as essential elements.

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

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

The potential for engaging with the leading global players in the international recycling industries, whether it be via our bi-annual meetings that provide truly unrivaled potential encounters and interaction with industry counterparts and consequent international connections; the chance to share new technical research and industry data, and identify the many new international commercial and legislative developments impacting our industry; or ultimately participating in the work of the organization's divisional and special committee contributions. All these opportunities provided by BIR membership are persuading a bounty of new companies to join our ranks and expand the truly global reach and constitution of our organization.

A compendium of programs, including multi-national company memberships, partner memberships, and the Membership Toolkit, continue to provide, along with modifications of these, further new initiatives that are presently emerging, an energizing prospect for 2013.



Guest Speakers at BIR Events in 2012

Rome, 30 May – 1 June 2012

Tyres Committee

- **Kees Van Oostenrijk**, *Director*, RecyBEM (The Netherlands)

Non-Ferrous Metals Division

- **Loretta Forelli**, *Co-Owner*, Forelli Pietro s.r.l. (Italy)
- **Shigenori Hayashi**, *Director*, Daiki Aluminium Industry (Japan)
- **Marco Valli**, *Chief Eurozone Economist*, UniCredit (Germany)

Stainless Steel & Special Alloys Committee

- **Pascal Payet-Gaspard**, *Secretary General*, ISSF (Belgium)

Workshop on WEEE

- **Daniel Ott**, *Project Manager LAC*, EMPA-Materials Science and Technology (Switzerland)
- **Otmar Deubzer**, *Scientific Consultant*, United Nations University
- **David Goosen**, *Business Development Manager*, Teck Metals Ltd. (Canada)
- **Peter Hagemann**, *Head of Production & Sales*, Sims Metals Management (Germany)

Workshop “Fraud and Thefts from Containers”

- **Pottengal Mukundan**, *Director*, International Maritime Bureau (UK)
- **Gert van der Have**, *Project Consultant*, ARN (The Netherlands)
- **Marc Beerlandt**, *CEO*, MSC (Belgium)
- **Bashar Ehsan**, *Director*, ALA Metals LLC (United Arab Emirates)

Keynote Session

- **John Authers**, *Senior Investment Columnist*, Financial Times (UK)

Ferrous Division

- **Barbara Fliess**, *Senior Economist/Analyst*, OECD
- **Tim Hard**, *Director*, Steel and Ferrous Scrap, The Steel Index (UK)
- **Ronobir Roy**, *General Manager*, ArcelorMittal (Luxembourg)

Shredder Committee

- **Herbert Zimmermann**, *Project Manager*, Keller Lufttechnik GmbH + Co. KG (Germany)

International Environment Council

- **Torsten Passvoss**, *Managing Director*, GHS Strahlenschutz (Germany)

Paper Division

- **Atul Kaul**, *Director Pulp & Paper*, Arab Paper Manufacturing (Saudi Arabia)
- **Jogarao Bhamidipati**, *Head of Procurement and Logistics*, ITC Ltd (India)

Plastics Committee

- **Stefano Fiore**, *Export Sales Manager*, Logistics Group s.r.l. (Italy)
- **Alessandro Danesi**, *Managing Director*, Stena Metall (Italy)

Textiles Division

- **Sandra Chinchilla**, *General Manager*, Fibertex (El Salvador)
- **Fabrizio Tesi**, *Managing Director*, COMISTRA spa (Italy)
- **Benjamin Marrias**, *Co-Managing Director*, Azimut Innovation (France)

Barcelona, 29-30 October 2012

Paper Division

- **Björn Voigt**, *Managing Partner*, S&P Mergers and Acquisitions GmbH (Germany)
- **Nuno Messias**, *Raw Materials Purchasing Manager*, Europac (Spain)

Ferrous Division

- **Ralph Oppenheimer**, *Executive Chairman*, Stemcor (UK)

Plastics Committee

- **Antonio García Gleiser**, *Marketing & Sales Department*, Marepa-FCC Ámbito (Spain)
- **Christian Elvers**, *Business Development Manager*, Fr. Meyer's Sohn (GmbH & Co.) KG (Spain)

International Environment Council

- **Alicia García-Franco Zuniga**, *Director General*, FER

Non-Ferrous Metals Division

- **Norberto Vidaña**, *Aluminium Purchasing Manager*, Nermak (Spain)
- **Christopher Stobart**, *Senior Consultant*, CRU Strategies (UK)

Tyres Committee

- **Jean-Pierre Taverne**, *EU Technical Coordinator End-of-Life Tyres*, ETRMA



Calendar of Future BIR Conventions

2013

Shanghai

(26) 27-29 May

Warsaw

(27) 28-29 October

2014

Miami

(1) 2-4 June

Paris

(26) 27-28 October



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