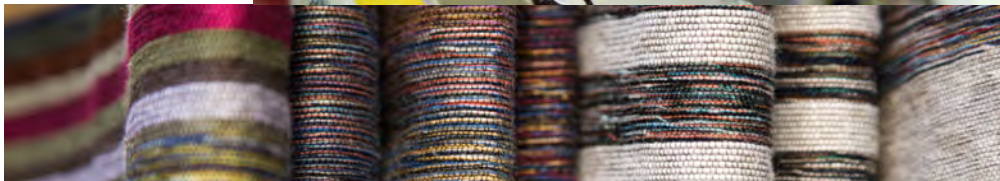
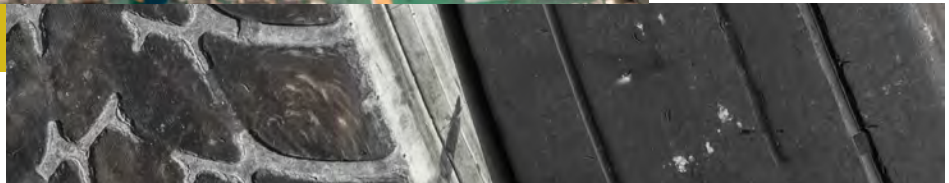


Annual Report 2017







CONTENTS

- 4 Words from the President
- 5 BIR's Financial Situation
- 6 Director General's Report
- 8 Membership Spread 2017
- 9 Membership Highlights
- 10 List of BIR Member Federations


Divisions and Committees

- 14 Ferrous Division
- 16 Non-Ferrous Metals Division
- 18 Textiles Division
- 20 Paper Division
- 22 *Case Study: BIR travelling far and wide*
- 24 Stainless Steel & Special Alloys Committee
- 26 Plastics Committee
- 28 Tyres & Rubber Committee
- 30 E-Scrap Committee
- 32 International Environment Council
- 34 International Trade Council



Special Committees

- 38 Convention Committee
- 40 Communications Committee
- 42 Membership Committee
- 44 Ambassadors Committee

- 
- 46 Speakers at BIR Events in 2017
 - 48 Calendar of future BIR Conventions

WORDS FROM THE **PRESIDENT**



Ranjit Singh Baxi

J&H Sales International Ltd (GBR)

BIR President

Looking back at my previous annual messages, it seems to me that our industry has been in almost constant strife with regulators and ever more restrictive legislation presenting us with new challenges. I wish last year had been different - but the struggles continued.

On the positive side, however, I am delighted to report that, thanks to the combined and determined efforts of BIR members, we continue to gain support for our global vision of free and fair trade of recyclables.

The prospect of trade wars in many different sectors and between different countries looms large as I write these words. To put it bluntly, any moves to restrict free trade in recyclables must be resisted, not only from an economic standpoint but also for the greater goal of protecting the environment. Ultimately, protectionism always fails.

We cannot duck the impact of tougher quality standards and demands imposed on imported recyclables into China which began to be phased in on March 1 2018. The answer is not simply to divert them to other countries. As our Director General, Arnaud Brunet, recently observed, our industry is under stress because replacing Chinese processing capacity "doesn't happen overnight".

It is only by driving home the message that we have to be smarter about how and what we consume, and critically how we choose to recycle unwanted material, that we will succeed. Surely no-one can remain ignorant of the devastating impact of plastic carelessly dumped in our oceans. One of the core issues is how we package our produce - and that also comes down to how much the consumer is prepared to pay in the supermarket.

Financial pressures are impacting everyone, every government and local authority. This is directly impacting our community collection programmes. Commingled or single-stream collection systems not only affect quality but also the costs of sorting and processing the recyclables. It is time for governments and local authorities to take ownership of the problem by extending special tax benefits to allow the industry the much-needed investment support to override the quality challenges imposed upon us.

"To put it bluntly, any moves to restrict free trade in recyclables must be resisted, not only from an economic standpoint but also for the greater goal of protecting the environment."

The launch of our first-ever Global Recycling Day on March 18 2018 has sparked a truly worldwide response, inspiring everything from local litter picks and community events to educational programmes and highly-effective petitions, prompting a positive reaction in terms of news coverage and on social media. The renewed focus on the importance of recycling and on the benefits it brings to all has been adopted by major brand names, expanding the reach of our message. This would never have happened without the support of our sponsors and the tireless work of the BIR Secretariat and our members.

However, we must not sit on our laurels and assume our work is done. We have to take advantage of the momentum we have built up and promote even greater

awareness of the Seventh Resource with our second Global Recycling Day on March 18 2019.

I am looking forward to joining you all at our World Recycling Convention in Barcelona on May 28-30 where we will celebrate the 70th anniversary of the founding of BIR. This has been a remarkable journey, made successful only through the work of our members and trade associations.

This year is one in which, through working together, we need to sow new seeds to promote and strengthen your BIR global recycling body so that it can continue to deliver even greater results and share globally the Story of Recycling in the next decade of its growth.

Thank you.



Tom Bird
*Chiho Environmental
Group (CHN)
BIR Treasurer*

BIR'S FINANCIAL SITUATION

2017 was a year of many challenges. Given the enduring adverse global economic conditions, we had opted for a conservative budget. In the end, the year turned out more positively than we had expected, and we reached the conclusion of our financial year with a slight surplus.

The state of our finances allows us to continue to offer a valuable service to our members - not least through our biannual conventions. Last year, we organised a particularly successful Hong Kong event and an amazing first edition in India. The high numbers of registered delegates in 2017 confirmed that these conventions remain a unique meeting point for key decision-makers from the recycling industry worldwide.

Keeping sufficient reserves in order to meet all possible headwinds remains one of our top priorities in the uncertain economic climate we are all experiencing. The budget outlook for 2018 takes into account our investment in an ambitious image and awareness campaign - the Global Recycling Day - that will deliver its positive outcome during the course of 2018 and beyond.

DIRECTOR GENERAL'S REPORT



Arnaud Brunet
BIR Director General

This is my first annual report as Director General and I would like to start by thanking the BIR leadership for having entrusted me with the stewardship of your great organisation. It is with a feeling of excitement, mixed with some stress, that I am pleased and honoured to share with you the highlights of the BIR secretariat's activities in 2017.

Since I joined BIR in June 2017, I have been on a trajectory of progressive, yet intensive, discovery. I am proud to lead a very professional and dedicated team in Brussels and to be supported by passionate industry leaders and members. I would like to thank all of them, all of you, for the warm welcome I have received, with special thanks to our President Ranjit Baxi, our Treasurer Tom Bird and our Past Presidents Dominique Maguin and Björn Grufman who have been - and remain - my mentors in this new life.

Our world organisation and secretariat had faced the challenge of a full year without a Director General. I can only say that, thanks to the commitment and professionalism of the team in Brussels and the strong drive of our President and senior management team, BIR has not only remained afloat but has maintained a first-class service to its members and delivered highly-successful conventions.

Since day one, all my energies have been focused on the future of BIR. Since day one, my focus has been quite simple: motivate the team; share with them the vision, ambition and road map that I have for BIR; and ensure that, ultimately, we deliver the best service to you, our members.

After several weeks of initial evaluation involving discussions with our leadership, my team and some of our members (both corporate and associate), I identified the challenges, opportunities and priorities for BIR, some of which we started to implement and deliver, step by step. We clearly established our primary priorities and tasks, reorganised some key processes, streamlined the budget, consolidated our team, defined our communication priorities, revamped our IT and communication tools, and more. It is a work in progress as BIR continues to be agile and flexible in adapting to an ever-changing world for the good of its members.

"Since day one, my focus has been quite simple: motivate the team; share with them the vision, ambition and road map that I have for BIR; and ensure that, ultimately, we deliver the best service to you, our members."

Let me highlight just some of the milestones achieved in 2017. For the first time in its almost 70-year history, BIR organised two "overseas" Conventions in one year - in Hong Kong and Delhi. This challenge for both our secretariat and our members was ultimately crowned with success. It was also the first time that BIR had held an event in India, achieved only through the tireless efforts of our President Ranjit Baxi and our Ambassadors.

We actively defended the interests of the international recycling industry when changes to China's trade import policy started to emerge in mid-2017, and we have been both in the watchtower and on the front lines ever since. At the same time, BIR continued to interact with intergovernmental bodies and supranational organisations with a view to protecting its members' interests, finding practical solutions and maintaining a constructive dialogue for the benefit of the international recycling sector.

BIR's leadership also provided fresh momentum to the Global Recycling Day project by entrusting London-based communications and PR firm Flagship Consulting with its implementation. Based on constant input and guidance from our secretariat and leadership, a massive social media campaign was launched, catapulting the initiative to heights far beyond our boldest expectations. By the time you read this report, the success of the first-ever Global Recycling Day will have been well documented.

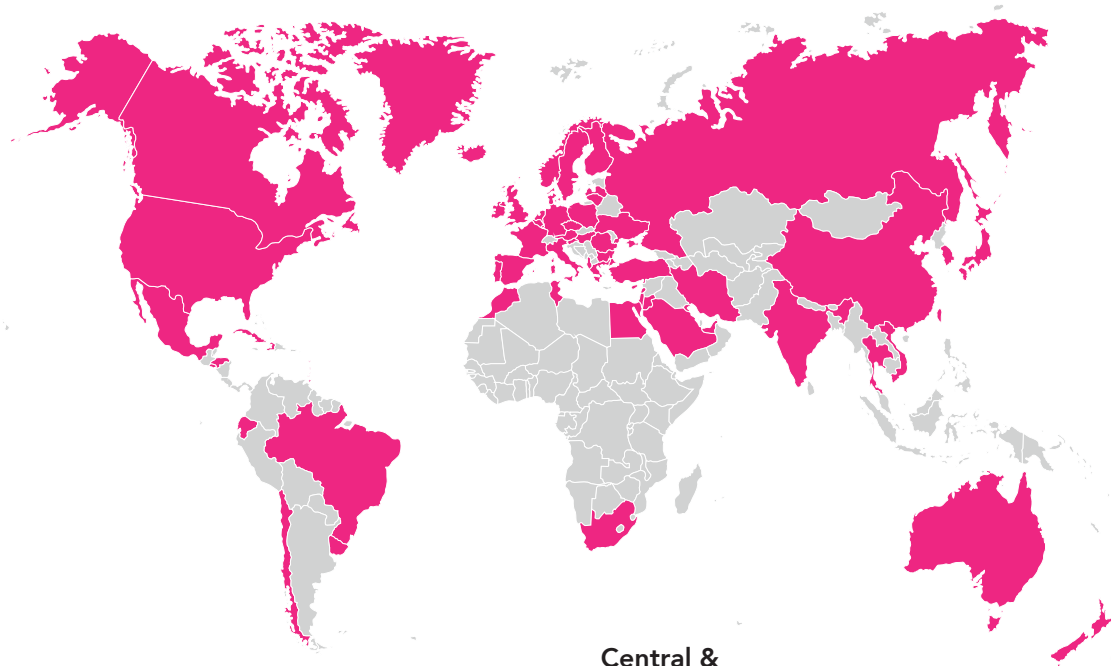
Bringing BIR's IT and online presence up to speed was another major task in 2017. We accelerated the upgrade of the secretariat's database to a true Customer Relationship Management (CRM) system and the go-live is imminent as I write this. In parallel, we modernised our flagship market reports, the BIR World Mirrors, by creating a completely new, responsive online version which

enables easy access via any mobile device to these important facts and figures. Renewing the BIR website as well as fundamentally rethinking our communications tools and presence will be the next step, and I will certainly be giving you positive feedback in our 2018 Annual Report.

Much was achieved in 2017, but if I were to summarise my ambitions for BIR, a single word would be enough: MORE! More service to our members. More visibility. More communication (internal and external). More influence. More reactivity. And, of course, more members.

Together with our leaders and the secretariat, I am determined to make our industry the key partner of the global circular economy and the sustainable society that everybody is calling for. 2018 is going to be a year of ambition and new beginnings.

MEMBERSHIP SPREAD 2017



Western Europe

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

Russia & Eastern Europe

- Albania
- Belarus
- Bulgaria
- Czech Republic
- Hungary
- Latvia
- Lithuania
- Poland
- Romania
- Russia
- Slovenia
- Ukraine

Asia

- China
- India
- Iran
- Japan
- Malaysia
- Pakistan
- Republic of Korea
- Singapore
- Taiwan (China)
- Thailand
- Vietnam

Central & South America

- Brazil
- Chile
- Cuba
- Ecuador
- El Salvador
- Haiti
- Honduras
- Mexico
- Trinidad and Tobago
- Uruguay

Turkey & Middle East

- Bahrain
- Israel
- Jordan
- Kuwait
- Lebanon
- Libya
- Saudi Arabia
- Turkey
- United Arab Emirates

North America

- Canada
- USA

Australia & Pacific Rim

- Australia
- New Zealand

Africa

- Egypt
- Morocco
- Reunion Island
- South Africa
- Tunisia

MEMBERSHIP HIGHLIGHTS



More than 750 BIR Members all over the World!



62 New Members in 2017...

34 National Federations



70 Countries

More than 40% Members
outside the European Continent



LIST OF BIR **MEMBER FEDERATIONS**

AUSTRIA

- Austria Recycling

BELGIUM

- COBEREC Textiles

CANADA

- Canadian Association of Recycling Industries (CARI)

CHILE

- Asociación Nacional de la Industria del Reciclaje AG (ANIR)

CHINA

- China Association of Metal Scrap Utilization (CAMU)
- China Nonferrous Metals Industry Association Recycling Metal Branch (CMRA)
- China Scrap Plastics Association (CSPA)

CUBA

- Union de Empresas de Recuperación de Materias Primas

CZECH REPUBLIC

- Aporeko Svaz Průmyslu Druhotných Surovin (SPDS)

EUROPE

- European Recycling Industries' Confederation (EuRIC)

FRANCE

- Fédération des Entreprises du Recyclage (FEDEREC)

GERMANY

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

HUNGARY

- Hungarian Waste Management Federation (HOSZ)



INDIA

- All India Non Ferrous Metal Exim Association (ANMA)
- Inland Importers & Consumers Association (IICA)
- Metal Recycling Association of India (MRAI)
- Electronic Recyclers Association

JAPAN

- Japan Iron & Steel Recycling Institute (JISRI)

THE NETHERLANDS

- Dutch Waste Management Association (DWMA)

POLAND

- Economic Chamber of Non-Ferrous Metals and Recycling (IGMNiR)
 - Scrap Economy Chamber of Industry and Commerce (IPHGZ)
- 
- 



ROMANIA

- Organizația Patronală Și Profesională „REMAT”

SOUTH AFRICA

- Metal Recyclers Association 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

- TÜDAM Değerlendirilebilir Atık Malzemeler Sanayicileri Derneği


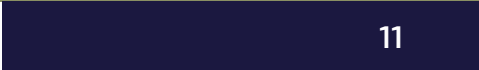
UNITED ARAB EMIRATES

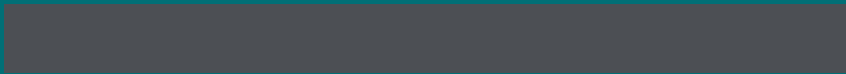
- Bureau of Middle East Recycling Inc. (BMR)

UNITED KINGDOM

- British Metals Recycling Association (BMRA)
- The Recycling Association
- Textile Recycling Association

UNITED STATES

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





Divisions and Committees

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



FERROUS DIVISION



Tom Bird

*Chiho Environmental
Group (CHN)*

Interim President Ferrous Division



Demand for ferrous scrap was sustained and healthy throughout 2017, despite the now-familiar ebb and flow of pricing from a low of around US\$ 240 per tonne for shredded scrap to more than US\$ 400 towards the latter end of the year. According to our latest figures covering the first nine months of 2017, most of the major steel producing countries of the world upped their consumption of ferrous scrap. China was the standout performer, raising its scrap usage from 64.7 million tonnes in January-September 2016 to 101.2 million tonnes in the corresponding period of last year; the country also became a significant exporter of steel scrap, with more than 2 million tonnes shipped across the whole of 2017.

World crude steel production climbed more than 5% to an all-time high of 1.691 billion tonnes in 2017. But perhaps more importantly for the health of the steel sector, and therefore of its scrap suppliers, global crude steel capacity utilisation exceeded 70% in every month of last year with the exception of holiday-affected December whereas around half of 2016 was spent below this threshold.

These figures reflect a general improvement in the world's economic well-being. China, for example, has exceeded expectations in recent times, with GDP growth returning close to the 7% mark for the final quarter of 2017. Buoyed by improved demand for their products, steelmakers were able to push their prices higher.

“Overall, we have more reasons than not to approach 2018 with measured confidence.”

Steel producers adopting the scrap-dependent electric arc furnace (EAF) route also benefitted from a sharp decline in Chinese steel exports resulting from: the removal of its induction furnace capacity; better-than-expected demand from the construction and real estate sectors; and trade barriers in key markets. The country's outbound shipments of finished steel plummeted more than 30% last year to 75 million tonnes from 108 million tonnes in 2016.

One of our guest speakers in Hong Kong, Dr Ye Chen of the Shanghai Futures Exchange, pointed out that steel consumption growth was lagging behind GDP and that the sector was still dogged by low profit margins, overcapacity and environmental constraints, among other issues. Overall, however, we have more reasons than not to approach 2018 with measured confidence. Backing up the strong growth in 2017, the World Steel

Association believes steel demand in the developed economies will rise a further 0.9% in 2018 while the upturn in the rest of the world (excluding China) is projected to be almost 5%.

On the scrap side, guest speakers at our Ferrous Division meetings in 2017 offered grounds for optimism. In Delhi, notably, the Joint Secretary of India's Ministry of Steel, Shri Sunil Barthwal, calculated that the scrap availability gap in his country would widen to 9.1 million tons by 2021/22 and that its greenhouse gas emission commitments would favour scrap-based technologies over those using DRI. In that same part of the world, Pakistan and Bangladesh are already emerging strongly as outlets for large quantities of imported ferrous scrap.

Key Facts

Ferrous scrap consumption
for crude steel production
(comparing first nine months of 2017
with same period in 2016)

China	+56.4% to 101.2 million tonnes
EU-28	+5.9% to 69.892 million tonnes
USA	+3.4% to 36.2 million tonnes
Russia	+8.2% to 31.4 million tonnes
Japan	+8% to 26.547 million tonnes
Republic of Korea	+10.8% to 22.681 million tonnes
Turkey	+17.7% to 23.214 million tonnes

World crude steel capacity utilisation averages:	
2016	69.4%
2017	72.3%

NON-FERROUS METALS DIVISION



David Chiao
Uni-All Group Ltd (USA)
President Non-Ferrous
Metals Division

In reviewing a year that was not short on negatives, let's start with some positives.

2017 brought a non-ferrous market rebound after three relatively frugal years for our businesses. Demand was not abundant but the year witnessed improved volumes and decent flows of material. At the same time, prices were significantly more supportive in many instances – with copper, for example, ending the year well above US\$ 7000 per tonne and aluminium encamped in US\$ 2000-plus territory. In effect, copper was worth over US\$ 2500 per tonne more than it had been two years earlier while the gain for aluminium was an equally impressive US\$ 800.

2017 was also a productive year for our Non-Ferrous Metals Division: we launched the publication "Global Non-Ferrous Scrap Flows 2000-2015" as part of our mission to formulate meaningful data in order to assist our members and the industry as a whole in their understanding of the mechanics and dynamics of our sector, to the betterment of their day-to-day business; and at the very end of 2017, improved information provision was again at the forefront of our minds as we launched a fresh, more attractive design for our long-running and much-admired Mirror reports tracking developments in global non-ferrous markets.

And 2017 also saw BIR stage its conventions in two of the world's biggest and most influential markets, namely China (Hong Kong) and India. These hugely

successful events provided an opportunity not only for networking with existing and prospective clients but also for building our understanding of these massively important destinations for our scrap. Our knowledge base was further enhanced by outstanding guest presentations.

In Delhi, our guest speakers treated delegates to a wonderfully detailed analysis of India, its economy and its secondary metals market, with particular emphasis on the huge potential offered by the country's already substantial automotive industry whose annual worth is expected to soar from less than US\$ 100 billion at present to more than US\$ 300 billion within a decade from now. Of course, such growth should prove to be good news for scrap suppliers worldwide: Century

“2017 is likely to be remembered as the year in which some of our worst fears about China’s scrap import policy were finally realised.”

Metal Recycling’s Akshay Agarwal indicated that imports already accounted for around 85% of the 1 million tonnes-plus of aluminium scrap consumed annually in India and that demand for secondary aluminium was poised to grow at 8-10% per annum, meaning that imports were likely to remain the primary source of scrap supply for the foreseeable future.

At our Convention in Hong Kong earlier in the year, we learned more about the secondary aluminium alloy market in South East Asia, the cyclical upturn in our markets and the reduced prospects for scrap flows into the major Chinese market. Indeed, despite all the positive developments outlined above, 2017 is likely to be remembered as the year in which some of our worst fears about China’s scrap import policy were finally realised. Having cracked down on illegal imports of scrap plastics and paper, the scope of the Chinese government’s actions was extended to a host of recyclables, including several forms of non-ferrous scrap.

While President Xi Jinping has taken a deeply personal interest in reducing environmental hazards within China, these latest, stringent

Key Facts

World refined copper production from scrap (January-October)

2016: **3.181 million tonnes**
2017: **3.481 million tonnes**
Year-on-year change: +9.4%

LME prices (US dollars per tonne)

	End of 2015	End of 2016	End of 2017
Copper	4600	5500	7150
Aluminium	1460	1710	2240

import controls could also be motivated by a desire within Chinese government circles for greater resource self-sufficiency.

If any positives are to be taken from developments in China, it is that flows into alternative South East Asian markets have expanded for many of those forms of scrap to which China has shut her doors. At the same time, however, there is reason to fear that some if not all of these countries could follow China’s lead in implementing harsher import regulations. And even if they do not mirror the Chinese model,

we have long understood that no market – not even a fully-flourishing India boosted by her enlightened financial and business policies – can ever replace the Chinese demand on which we had come to place perhaps too much reliance over the years.

TEXTILES DIVISION



Mehdi Zerroug
Framimex (FRA)
President Textiles
Division

The used clothing industry would not survive without international trade. Garments that become surplus to requirements in one part of the world can still enjoy a second, useful life in another. In recent decades, these flows have been relatively predictable – from the relatively affluent, developed countries of Western Europe and North America, to the developing regions of the world, in Eastern Europe, Africa and Asia. But in the last few years, changes have started to emerge.

Some of the countries that have been leading customers for these exported garments are now debating whether this trade should be allowed to continue. For example, the six countries making up the East African Community are still considering an outright ban on imports of used clothes, shoes and other leather products as a means, they argue, of assisting the development of their own textiles production industry.

And then there is China. For many years, we have heard other sectors of the recycling industry discuss the mega-impact of China on their markets – and now it could be the turn of the textiles recycling industry. In the early years of the current decade, Chinese exports of used clothing amounted to little more than a trickle; by 2015, the

Asian giant had become the world's fifth-largest exporter – and the growth remains exponential.

Already battling those familiar foes of late payments, rising costs, narrow margins and bogus operators, our sector could now be forced to adapt to an immense intensification of competition within our marketplace. And adapt we must, if we are to survive. This could mean more investment in R&D to find better and more lucrative outlets for the various forms of used textiles entering our facilities, particularly the 40% that remains after reuse. In addition, we could – and should – be exploring other export opportunities, perhaps straying beyond the “comfort zone” of markets we have known and cultivated for many years.

“For many years, we have heard other sectors of the recycling industry discuss the mega-impact of China on their markets – and now it could be the turn of the textiles recycling industry.”

Our meeting in Hong Kong last May offered us an insight not only into the Chinese market but also into pathways towards innovation. Guest speaker Luo Hong Jian of Sheng Dong Hua explained that sales of used clothing were not permitted in China and so it was necessary to reprocess collected material for use in new products. His own company, for example, produces disposable gloves as well as school bags and backpacks with a 30% recycled content.

Several months later in Delhi, it was the turn of the Indian textiles recycling sector – with its one million employees and 5 million tonnes of annual turnover – to be put under the spotlight. Nohar Nath of Kishco Group highlighted the problems blighting this sector, including rising labour and freight costs, ageing technology, high import duties and onerous licence requirements.

As for North America, shockingly huge quantities of used, unwanted clothing are still cascading into landfills. Recent research in the USA has indicated that over half of Americans throw away their used clothing rather than donating it, often because of a lack of awareness of their recyclability.

For this reason, North America's Secondary Materials and Recycled Textiles Association has been promoting the fact that “almost any textile can be reused and recycled”.

Collection rates are considerably higher in parts of Europe, with Germany and the UK being the biggest collectors. In the UK, an estimated 650,000 tonnes of clothing is collected annually for reuse and recycling but, even here, around 450,000 tonnes is dumped in bins.

A study commissioned by UK supermarket chain Sainsbury revealed the average person intended to get rid of around 19 garments during the spring of 2017, with seven going straight to landfill. So while most British people recycle some of their clothing, the study uncovered the reasons why they do not do this all the time, with 49% saying they didn't think they could recycle clothing that was worn out or dirty. A further 16% said they didn't have time to visit a charity shop or simply could not be bothered to sort items, while 6% didn't realise clothing could be recycled.

Key Facts

Global exports of used clothing and rags:
5 million tonnes per annum

Study by Edelman Intelligence:
More than half of Americans throw out their used clothing rather than donate it.

Study by Sainsbury:
49% of respondents said they didn't think they could recycle clothing that was worn out or dirty.

Clearly, the US and UK research demonstrates that public awareness of what our industry does and of its capabilities remains limited despite all of our positive messaging.

PAPER DIVISION



Reinhold Schmidt

*Recycling Karla Schmidt
(DEU)*

President Paper Division

Over recent years, our industry's leaders have warned on many occasions of the need for exporters to supply recovered fibre that meets their overseas customers' increasingly exacting requirements. The writing was most clearly on the wall in the leading market of China where a succession of government-led import clampdowns – such as Green Fence and National Sword – suggested that we were entering a new phase in the customer/supplier relationship and that a new standard was being set.

Many heeded this oft-repeated message by upping their sorting efficiencies, others were slower to react and perhaps some did not react at all. Henceforth, all of them must achieve impurity ceilings of 0.5% with their recovered paper shipments to China – or risk expensive rejections and loss of reputation.

And whereas in the past, we might dismiss this as a temporary measure and expect normal service to be resumed within a short period of time, there is every reason to believe that this latest thrust is a permanent move, backed by the highest echelons of the Chinese government under pressure from an increasingly influential environmental lobby.

An impurity threshold of 0.5% is going to be tough to meet – but it could have been even worse given that an upper limit of 0.3% was still under discussion when the

BIR Paper Division met in Delhi last October. One of our guest speakers, Uriel Papierrohstoffe's Andreas Uriel, argued that existing technologies would require several cycles of sorting "to even come close" to meeting this 0.3% ceiling, with an obviously severe inflationary effect on processing costs. Keeping impurities to within 0.5% will be almost as difficult, so we must hope that the extra skills and effort invested by the recovered paper industry will be adequately rewarded.

So if shipping to China has become tougher, what other options are open to exporters? Our meeting in Delhi heard several experts from the Indian recycling sector indicate that their country's imports of recovered fibre were likely to grow by many millions of tonnes per annum over the coming few years. Jogarao Bhamidipati, Director of Indian company Source Global Fiber Inc., forecast that India would

“In terms of recovered paper quality, the genie is effectively out of the bottle and cannot be put back in.”

need some 24 million tonnes of recovered fibre by that year for domestic production of newsprint, duplex board and kraft paper alone. But again, this good news for overseas fibre suppliers has been tempered by a clear message for all those willing to listen: India and other countries that may be in the market for increased volumes of imported recovered fibre will not be fobbed off with poor quality. As their production capacities increase and their recycling industries become yet more sophisticated, the requirements placed on overseas suppliers of raw material are certain to become more stringent.

Several of these countries have already tightened their legislation in relation to secondary raw material imports. So in terms of recovered paper quality, the genie is effectively out of the bottle and cannot be put back in; if we want to survive long term in this business, quality must be constantly front and centre of our operations.

From the recovered paper perspective, one of the few positives to be drawn from China's

new import measures was their taming effect on shipping freight rates. As noted at the BIR Paper Division meeting in Hong Kong last May, the cost of shipment between Europe and China had soared more than US\$ 1000 per container in the opening months of 2017; this equates to around US\$ 40 per tonne, making the freight component substantially more critical than normal. But with the reduction in volumes on the water, shipping lines dropped their rates to, typically, a quarter of what they had been at their early-year peak.

Another positive in 2017 was the strength of the paper and board industry in many parts of the world, most notably with regard to packaging production. Naturally, this helped to ensure a healthy demand for recovered fibre.

Overall, however, last year will be remembered – and not with much fondness – as the year in which all recovered paper industry conversations seemed to lead to China.

Key Facts

World paper and board production:

**+1.5% in 2017
to almost 420 million tonnes**

Utilisation of paper for recycling in CEPI countries (17 EU members plus Norway):

**+1.3% in 2017
to 48.4 million tonnes**

CASE STUDY: BIR TRAVELLING FAR AND WIDE

When BIR was formed in Europe seven decades ago, the world was a far smaller place. Trade, and the influences on that trade, were far more regional in nature. Meeting places for members were generally close to home for everybody because the membership was almost entirely European and concerned with Europe-specific issues.

Fast forward 70 years and the world has changed beyond recognition. Exporters are now just as likely to trade with someone on the other side of the globe as they are with their next door neighbour. Traders in Europe and America cannot afford to ignore developments in China and India, and vice versa. We have become a truly global family.

As the world federation for the recycling industries, BIR has adapted to these changes not only in terms of its vastly widened membership (now in more than 70 countries) but also through its global mobility. Never was this more apparent than in 2017 when BIR staged its two conventions far away from its Brussels home – the first being in Hong Kong and the second in Delhi.

The Hong Kong gathering could not have been more perfectly timed: the Chinese authorities were in the throes of developing new and far stricter import regulations, and so the Convention provided a superb opportunity to hear from local experts

and to discuss the issues in full. The high-profile event also enabled BIR to send clear messages to the Chinese authorities, particularly our undivided support for free and fair trade worldwide.

The Convention in Delhi was BIR's first-ever in India – a tangible recognition of the country's emergence and growing importance as a market for recyclables. This event provided not only an opportunity to learn more about this massive market but also a great launchpad for BIR's Global Recycling Day initiative. The personal message of support for the Convention from India's Prime Minister Narendra Modi underlined the importance of BIR's work and created a swell of publicity that can only encourage more companies to join our ranks.

To be a truly global federation, we need to be inclusive and to make participation in our events as convenient and as useful as possible for our members, irrespective of where they are based. By choosing to stage our conventions in the world's trading hubs and centres of greatest activity, we provide everyone with the best chance to meet the real movers and shakers in our industry, as well as top consumers, legislators and policy-makers.

By holding Conventions far from our birthplace in Europe, BIR is demonstrating that it is truly global in its outlook and that it represents the interests of the recycler no matter where he or she is based around the world.

Through guest presentations, networking opportunities and simply spending time in the country, our Conventions in 2017 provided an opportunity to explore key markets and learn first hand about China and India. Just as importantly, they allowed to see the wider Asian market in a clearer context, providing an insight into those countries in South East Asia, for example, that will become even more important to recyclers as China changes its import regulations.

For BIR too, particularly the Delhi event was a useful exercise in organising Conventions in new places with less familiar infrastructures.

The early evidence suggests that our travels in 2017 have helped inspire more people to attend our gatherings. The BIR 2018 Convention in Barcelona is set to attract record numbers of attendee registrations and exhibitors.

Message from India's Prime Minister Narendra Modi:



STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE



Joost van Kleef
ORYX Stainless BV (NLD)
Chairman Stainless Steel
& Special Alloys Committee

Once again, the world produced record volumes of stainless steel last year. Although the International Stainless Steel Forum's final figures for 2017 were still to be published at the time of writing, world output had already ventured far into uncharted territory during the first three quarters of the year, exceeding the January-September 2016 total by a clear 2.5 million tonnes.

Our best guess is that global stainless steel melt shop production will amount to more than 48 million tonnes for 2017 as a whole, thus outstripping the 45.8 million tonnes of 2016 and eclipsing the 41.5 million tonnes reported as recently as 2015. A constant throughout these three years has been China's production of more than half the world's total volume of stainless steel: according to the China Stainless Steel Council, the country's crude stainless steel output jumped 4.7% last year to an all-time high of 25.77 million tonnes, with the 300 series accounting for 52% of the total, the 200 series for 28% and the 400 series for 20%.

Another constant that followed us from 2016 into 2017 was price volatility across all the metals – nickel, chrome, molybdenum and iron – that go to make up stainless

steel. Taking nickel as an example, its LME value began 2017 at just above US\$ 10000 per tonne but drifted below US\$ 9000 for a period in the middle of the year before mounting a stout rally towards US\$ 13000 in November. In early 2018, it should be added, the nickel price has even spent some time above US\$ 14000 per tonne.

Amid all of these production hikes and price oscillations, there was at least some stability to report in the form of a generally steady supply of scrap. It was also a relatively stable year for our BIR Stainless Steel & Special Alloys Committee, with just one change – albeit a highly noteworthy one – to our board, as Vegas Yang of HSKU replaced Mark Sellier of OneSteel Recycling Hong Kong Ltd after the latter's many, many years of devoted and much-appreciated service.

“Amid all of these production hikes and price oscillations, there was at least some stability to report in the form of a generally steady supply of scrap.”

Just as Asia has become the world powerhouse in terms of stainless steel production, it also provided the focal point for our two meetings in 2017. Appropriately for BIR's first-ever Convention in India, guest speaker C. P. Gupta of Ambica Steels analysed the country's stainless steel production journey to date and its prospects, offering us the encouraging conclusion that India's scrap imports had been climbing at 10-15% per annum and would continue to grow.

Already the world's second-largest stainless steel producer after China, Mr Gupta noted not only that India's consumption had been expanding at some 13% per annum on the back of growth in the construction and automotive sectors, but also that the country was an exporter of significant volumes of finished product.

Adam Minter, an Asia-based freelance columnist and journalist who has become a familiar figure on the recycling circuit, explained at our meeting in Hong Kong last May how soaring wage costs in China were triggering change throughout

the region, driving production into other countries such as Vietnam, Cambodia and Malaysia. He also pointed to massive growth in China's domestic scrap volumes.

In a typically thorough analysis, industry expert Markus Moll of Steel & Metals Market Research made a number of interesting observations about trends in our sector, not least the fact that intercontinental stainless scrap trading had accounted for only 8% of the market in 2016, suggesting this was becoming an increasingly regional business.

Hopefully in 2018, it will also become an increasingly profitable business. While metals prices have undoubtedly improved and production rates have increased, the margins for many of our companies still have some catching up to do.

Key Facts

Global stainless steel melt shop production:

2015	41.5 million tonnes
2016	45.8 million tonnes
2017	48-plus million tonnes (estimated)

PLASTICS COMMITTEE



**Surendra Patawari
Borad**

*Gemini Corporation NV (BEL)
Chairman Plastics
Committee*

Perhaps we have been guilty in the past of overusing the term “game-changer”. However, when it comes to China’s new import restrictions, it can be said without fear of contradiction that the global plastics scrap market will never be the same again.

For many years, we have been putting out the message that only those offering good-quality scrap will survive in this business. For many years, we have also been warning that importing nations were likely to tighten rather than loosen their controls on materials arriving at their ports. And for many years too, we exporters have been aware of our almost complete dependence upon China as an outlet for our plastics scrap.

So while the blow to our markets has been struck perhaps earlier and more conclusively than many of us had feared, we have no right to express too much surprise at what transpired over the course of 2017. Efforts to persuade Chinese officials to step back from such a hard line on imports have been largely ineffectual and we are now faced with the unpalatable combination

of trading chaos, mounting stocks of scrap in exporting regions of the world, and falling prices.

Figures tell us that, overall in 2016, China imported more than 7 million tons of plastics scrap. Conservative estimates are suggesting that Chinese imports in 2018 could fall 30-40% short of their established levels, leaving the country’s overseas suppliers to find alternative outlets for perhaps 5 million tons of plastics scrap. This enormous volume is equivalent to one-third of the plastic scrap traded globally throughout 2016.

As an industry, we have regularly spoken of the importance of developing other markets for our materials. In light of developments in China, this has now become a priority and a necessity.

“Efforts to persuade Chinese officials to step back from such a hard line on imports have been largely ineffectual and we are now faced with the unpalatable combination of trading chaos, mounting stocks of scrap in exporting regions of the world, and falling prices.”

Already, this “China Syndrome” is boosting recycling investments elsewhere in the world. At our October meeting in Delhi, for example, Rajesh Gauba of Reliance Industries confirmed that China’s stringent import restrictions had already prompted some transfer of scrap processing capacities to South East Asian countries such as Taiwan, Indonesia, Malaysia and Vietnam. These countries already accommodate around 10-15% of Europe’s plastics scrap exports – but this proportion looks set to rise. In addition, the larger availability of plastics scrap in Europe and North America, for example, is presenting these regions’ recyclers with opportunities to increase their own production capacities while obtaining input material with a lower price tag.

The flow of plastics scrap to new destinations around the world could be smoothed by a change to the EU’s Note Verbale rules and the adoption of distinct administrative procedures for hazardous and non-hazardous wastes. The EU should allow exports to those recyclers who have obtained appropriate import licences and pollution certifications

from their respective officials. Where two green-listed items are mixed together, exports should be allowed; at present, however, if fridge-derived plastics contain more than 5% of green-listed metal, then exportation is not permitted.

Furthermore, we should be considering tax incentives to encourage investment in the recycling of plastics. And to help boost outlets for reprocessed materials, tax exemptions and public procurement could play a far more significant role than at present – for example, through preferential treatment within the public tender system for products with a recycled content.

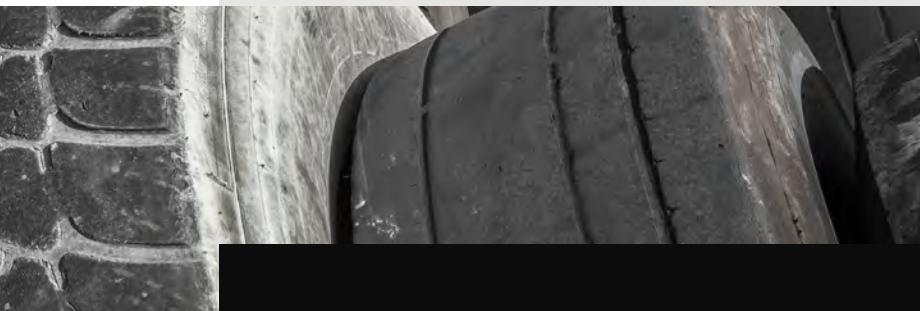
In effect, we need to show imagination. The world will continue to produce, consume and discard plastics and so, in the spirit of the circular economy about which we hear so much, we – not only as an industry but as a society – need to ensure that the political and legislative infrastructure is in place to ensure scrap plastics are returned efficiently to the processing loop.

Key Facts

Volume of plastics scrap needing to find new home owing to China’s import restrictions:
5 million tons per annum

Plastics scrap traded globally throughout 2016:
15 million tons

TYRES & RUBBER COMMITTEE



Barend Ten Bruggencate
Recybem BV (NLD)
Chairman Tyres & Rubber
Committee

While 2017 produced a familiar crop of challenges, it was also a year in which the industry grew significantly closer together in confronting issues of mutual interest. For example, our membership in north-west Europe has increased significantly and now extends to businesses with an annual turnover of 700,000 tons of granulate production.

Notably too, BIR has received steadfast support from the US Institute of Scrap Recycling Industries, among others, in countering the baseless media attacks launched on the crumb rubber industry. While newspaper and TV reports have continued to peddle sensationalised myths, the recycling industry has stood shoulder to shoulder in offering the simple, scientifically-grounded facts. In effect, around 100 separate pieces of research have reached the same conclusion: that no health risks are attached to the use of crumb rubber in synthetic turf.

The credentials of the research organisations are impeccable. We have received excellent support in this debate from, particularly, the Dutch public health and environment institute RIVM as well as the European chemicals agency ECHA, both of which concluded

that rubber granulate harbours no danger to humans. Good co-operation in these discussions has also come from the European Tyre & Rubber Manufacturers' Association.

We can only hope 2018 will see more media space given to the substantiated truth about crumb rubber. In the meantime, the recycling industry will continue to collaborate and share information in its mission to ensure the crumb rubber industry's good-news story is told as widely as possible, particularly among policy-makers.

Perhaps we have already begun to see some early signs of a shift in this debate. As 2017 was drawing to a close, the Council of State Governments in the USA unanimously approved a resolution calling for scientific evidence to take precedence over conjecture when assessing recycled rubber play

"Around 100 separate pieces of research have reached the same conclusion: that no health risks are attached to the use of crumb rubber in synthetic turf."

surfaces. The body also urged the earliest possible completion of an ongoing federal multi-agency study into crumb rubber.

In a statement that must have sounded like music to the ears of the crumb rubber industry, Minnesota State Senator Jeremy Miller said in presenting the resolution: "As a parent and a legislator, creating a safe environment for our children to play in is a top priority. Recycling tyres cleans up and preserves the environment for current and future generations. As we encourage children to take part in healthy activities and exercise more, the material from these recycled tyres is a source for safe, accessible turf. Credible science has demonstrated this time and time again. It is imperative that fellow state and local lawmakers carefully review the facts when making any key decisions regarding our children and jumping to conclusions not supported by science."

As well as the environmental contribution of the crumb rubber industry, it also generates US\$ 1.6 billion of annual economic activity

and supports 8000 jobs in the USA alone, we learned at our meeting in Hong Kong last May.

Delegates attending that gathering, as well as the one later in the year in Delhi, also heard high-standard guest presentations that expanded our knowledge of tyre recycling activities in the two massively influential markets of China and India. In Hong Kong, Yu Qiang of the China National Tyre Recycling Association told us that his own company, Tianjin Hi-tech Environmental Development Co. Ltd, has developed a tyre-derived crumb rubber modified bitumen used to pave more than 4000km of highway. Compared to traditional road surfaces, this is said to offer a clear noise reduction – a significant advantage given that, in many parts of the world, noise limits are likely to become ever stricter.

And in Delhi, our guest speaker Gaurav Sekhri of India's Tinna Rubber and Infrastructure Ltd explained how his company was "deconstructing" truck and bus radial tyres to derive maximum value from all their components. Picking up on the theme adopted

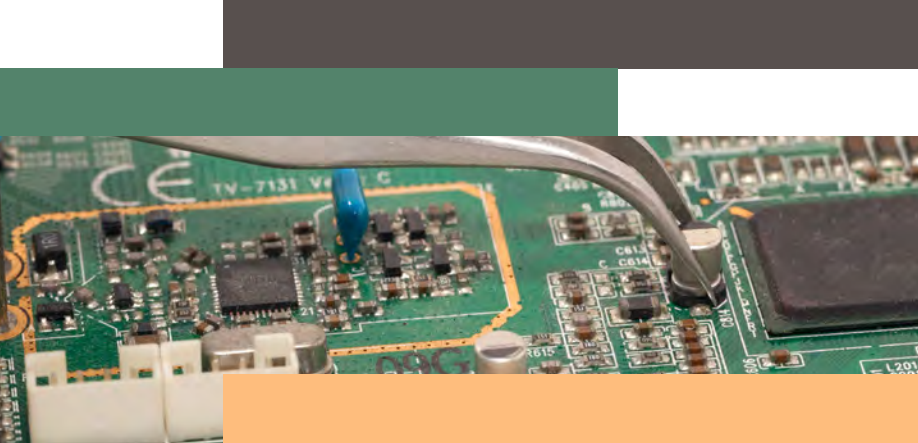
Key Facts

In the USA alone, the crumb rubber industry generates **US\$ 1.6 billion** of economic activity each year and supports **8000 jobs**.

by Mr Yu in Hong Kong, Mr Sekhri urged governments to explore the advantages of using crumb rubber modified bitumen/rubberised asphalt in road construction, and to mandate the use of recycled raw materials in making new tyres and other products such as conveyor belts.

Without doubt, scrap tyres can offer a multitude of environmental, economic and social benefits for those enlightened enough to see past media hype and other distractions. Let's hope that, in 2018, policy-makers heed the words of Senator Miller and view used tyre applications without prejudice.

E-SCRAP COMMITTEE



Thomas Papageorgiou

Anamet Recycling

Industry SA (GRC)

Chairman E-Scrap Committee

US author Mark Twain popularised the familiar saying: “There are lies, damned lies and statistics.” A more balanced view, perhaps, would be that statistics need to be tackled with care and consciousness if reliable conclusions are to be drawn from them.

As interest in e-scrap has intensified over recent years, the sector has become awash with statistics – some of which appear contradictory. So in 2016, our Committee decided to conduct a study reviewing key existing reports and data relating to the reuse and recycling of household appliances and various forms of electronics. The quality of the data was to be assessed to pave the way for the compilation of reliable generation and flow information by country and region.

Now carried through into draft form, the study incorporates a summary of per capita e-scrap production around the world and flows in different parts of the world. Relying on the combined weight of this accumulated data, generation and flow forecasts have been made for 2025. Unsurprisingly, it has been concluded that more than half of

the world’s e-scrap will be arising in the Asia-Pacific region by that year.

So 2018 will be a landmark year for our Committee as this study will be published in full. The importance of this work cannot be overstated. How can you tackle a challenge as large as global e-waste generation if you don’t know the scale and precise nature of that challenge? The study will help people understand and quantify the market far better, thus informing their strategies to address this issue.

Our meetings last year demonstrated how figures can vary. In Delhi, our guest speaker B. K. Soni of e-waste management specialist Ecoreco reckoned some 3.2 million tonnes of e-waste was generated annually in India, broadly in line with the assertion at our earlier meeting in Hong Kong that

“When we lobby on behalf of the e-scrap industry’s interests, policy-makers and legislators will expect us to know what we are talking about, to be the experts in our field and therefore the knowledgeable ones who should be consulted before all others.”

India’s e-waste generation would experience a compound annual growth of around 30% to reach 5.2 million tonnes by 2020. And yet for that same year, a recent United Nations report is forecasting a generation figure for India as high as 20 million tonnes.

There’s another important reason for conducting this research. When we lobby on behalf of the e-scrap industry’s interests, policy-makers and legislators will expect us to know what we are talking about, to be the experts in our field and therefore the knowledgeable ones who should be consulted before all others. Who better than BIR, the world recycling federation, to come up with a statistical analysis in which the world can place its trust?

Our meetings also illustrated the scale of the response that some countries are mounting to the high-profile issue of electronic waste. In Hong Kong, we learned that ALBA Integrated Waste Solutions had been awarded a 10-year contract by the Special Administrative Region’s government to develop and operate the first local integrated WEEE management plant. And

in Delhi, we heard about the Indian government’s scheme to train 300,000 e-scrap handlers nationwide over a 10-year period through a network of centres – an important development given that an estimated 98% of India’s e-waste is dismantled within the so-called “informal” sector.

The Delhi meeting also underlined how the high profile now assumed by electronic waste can produce severe – and, some would argue, heavy-handed – responses from certain governments. China’s stricter customs controls have pushed up the costs of bringing WEEE scrap into China to “as high as US\$ 10,000 per container”, we were reliably informed last October by Dr Steve Wong of the China Scrap Plastics Association. Factories in China using the latest sorting technologies had become “desperate” for material as a result, showing once again how private finance can be ploughed into an industrial venture designed to address the rising levels of e-waste – only for legislation to undermine the business strategy.

Key Facts

According to the United Nations, the world generated **44.7 million tonnes** of e-waste in 2016, of which an estimated **20%** was recycled through the formal sector.

As a result of the Chinese government’s import clampdown, WEEE scrap plastic recyclers have been faced with the choice of closing down their operations or moving to other South East Asian countries to continue their businesses. So never can there have been a more appropriate moment for our Committee to prioritise the charting of trade flows.

INTERNATIONAL ENVIRONMENT COUNCIL



Olivier François

Galloo Group (FRA/BEL)

Chairman International Environment Council

2017 was another year of shifting sands for those of us addressing environmental regulations affecting the recycling industry.

Our workload covered a vast range of topics – from inadvertent radioactive contamination in scrap to “wastes” collected from households and, of course, China’s new import restrictions.

But for me, the standout development occurred at the Stockholm Convention – an international environmental treaty which was brought into effect almost 14 years ago with the expressed aim of eliminating or restricting the production and use of permanent organic pollutants, or POPs. These compounds are resistant to degradation through chemical, biological and photolytic processes and therefore can accumulate in ways which are potentially harmful to human health and the environment.

You may be forgiven for asking why we should be so interested in the Stockholm Convention decision to classify decaBDE as a POP. In effect,

the move has potentially huge ramifications for our sector because of the use of this flame retardant in many of the plastic devices and textiles forming part of our everyday lives and therefore constantly coming forward for recycling.

Typically, decaBDE is used in plastics/polymers at loadings of 10-15% by weight while treated textiles contain up to 12% of the flame retardant. Thus, it can have a significant presence in certain waste streams, such as e-waste and end-of-life vehicles. By listing decaBDE as a POP, this could entail the setting of a level below which recycling of products containing the flame retardant may be allowed with restrictions, and above which they must go direct to final disposal by, for example, combustion at high temperature.

Of course, all of us should support the goal of a toxic-free environment. But in one fell swoop,

"In one fell swoop, we are facing the possibility of a ban on the recycling of a large quantity of materials, leading to loss of potential revenues and/or potentially substantial additional costs to remove toxic substances prior to recycling."

we are facing the possibility of a ban on the recycling of a large quantity of materials, leading to loss of potential revenues and/or potentially substantial additional costs to remove toxic substances prior to recycling. This decision also makes it impossible to achieve EU recycling quotas.

While governments and experts are still debating timetables and other details, BIR has already gone on record as stating that, at some point in the future, the recycling market will disappear for materials containing decaBDE. At the same time, BIR is ensuring that its voice is heard so as to secure the best outcome possible for the recycling industry.

But that is not the full extent of this issue. With research being undertaken on a constant basis, the list of candidates for classification as POPs is likely to lengthen rapidly such that hundreds of substances

in common use today could be prohibited tomorrow. This will throw up a daunting challenge – particularly for those involved in plastics, textiles and paper because their low-temperature recycling processes do not destroy POPs.

This important and far-reaching subject occupied much of the debate at our meeting in Hong Kong last May, at which I suggested the priority should be to ban the use of toxic substances in manufacturing, as well as their importation and exportation. Furthermore, the polluter – in other words, the producer – should pay to eliminate the contaminated material sorted by recyclers.

This issue underlines the often-subtle interplay between our industry and the legislative process. Sometimes, the impact of regulatory change on the recycling sector – be it at international or even simply national level – is not

immediately apparent. For this reason, it is essential that BIR and its member associations remain both vigilant in monitoring legislative proposals and in a state of constant preparedness to lobby for the best interests of the recycling industry.

Also subtle are many of China's motivations for tightening its import restrictions. While Beijing's headline goal is to keep out "foreign garbage", contributors to our meeting in Delhi last October also identified other targets, such as increased self-sufficiency in resources by halting scrap imports that could be replaced by materials collected domestically.

It was also suggested in Delhi that further restrictions might yet emanate from Beijing and that other countries in the region might well look to follow similar courses of action – another reason why our continued vigilance will be crucial in 2018.



INTERNATIONAL TRADE COUNCIL



Michael Lion

*Everwell Resources Ltd (CHN)
Chairman International Trade
Council*

There is no other reasonable place to start a report about trade in 2017 than in China. The country's tightening of its import restrictions was the elephant in the room at almost every recycling conference and meeting, either dominating the debate or serving as a constant undercurrent in trade-related discussions.

With apprehension mounting throughout much of 2017 as to the exact course the Chinese authorities would take with its regulations, the final weeks of the year brought greater clarity. This is what we now know: trading companies will not be allowed to apply for import licences; only factories and end users will be permitted to apply to be a consignee; the AQSIQ licence validity period has been extended from three years to five years; CCIC no longer has exclusivity regarding pre-shipment inspections; and importers will be required to disinfect and fumigate shipments upon request by Chinese officials at ports of arrival, depending on the degree of pollution.

At the same time, China's MEP and AQSIQ have published environmental protection control standards confirming impurity limits for a range of recyclables.

To universal agreement and consternation, these contamination ceilings will be difficult to achieve for those exporters wishing to continue to ship to China.

At the BIR Convention in Delhi last October, we explored some of the subtleties underlying China's decision to pursue tighter import regulations. By taking a personal interest in environmental protection and improvement, President Xi Jinping has effectively raised the issue of stricter import controls to the level of political necessity. Furthermore, it was noted, the Chinese authorities need to be seen to be mounting a strong response to green lobbyists calling for an end to imports of "foreign garbage" – an incendiary phrase that, unfortunately, has also been used to cover high-quality, fully-sorted secondary raw materials that Chinese industry requires to feed its production processes.

"With governments around the world taking their environmental responsibilities ever more seriously, partly in response to public pressure, the recycling industry cannot expect to sway opinion simply on the strength of a pro-free trade argument."



Basing my comments on many years' personal experience of living in Hong Kong, I suggested in Delhi that the challenge for us is to adopt a diplomatic and respectful approach in explaining to the highest political echelons within China how the recycling industry is an important part of the solution to the country's environmental issues rather than part of the problem.

We should not attempt to tell the Chinese authorities what they should do; however, we should strive to gain access to influential officials at the highest political level in order to convince them that we can offer not only a solution but also one that is commercially and socially advantageous to them.

At the BIR's superb workshop on India last October, there was actually some good news for those trading in recyclables as Dr Aruna Sharma, Secretary of India's Ministry of Steel, announced that the country's import duty on scrap

was in the process of being cut from 2.5% to zero. With India's steel industry currently in a steep growth phase and dependent upon imported scrap for a sizeable proportion of its raw material needs, this duty cut is surely a win/win for all involved and an example of enlightened self-interest producing good regulation.

At our International Trade Council meeting in Hong Kong earlier in the year, the US Institute of Scrap Recycling Industries' Senior Director of Government Relations & International Affairs, Adina Renee Adler, argued that harmonisation of terminology and standards were important to achieving clarity on trade issues such as China's import controls. Fellow guest speaker Hon-Meng Wong, Assistant Director (Waste Reduction & Recycling) within the Hong Kong Special Administrative Region of China's Environment Protection Department, underlined just how

much money and effort were being invested in achieving lofty "green" goals. For example, Hong Kong's blueprint for the sustainable use of resources sets a target of reducing waste disposal by 40% within nine years via a levy on plastic bags, a quantity-based charging system for municipal solid waste and producer responsibility schemes.

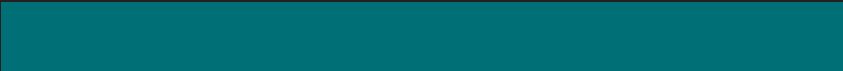
With governments around the world taking their environmental responsibilities ever more seriously, partly in response to public pressure, the recycling industry cannot expect to sway opinion simply on the strength of a pro-free trade argument. The challenge is for us to persuade authorities that, as the experts in our field, the recycling industry can help them fulfil not only their industrial needs but also their environmental goals.



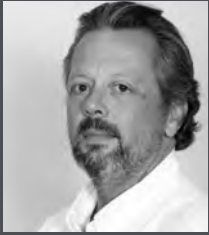


Special Committees

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



CONVENTION COMMITTEE



Mark Sellier

*OneSteel Recycling Hong Kong Ltd
(CHN)*

Chairman Convention Committee

What a year 2017 was! It was more turbulent and challenging than 2016 and reinforced the global importance of BIR and its twice-yearly Conventions. BIR Conventions continue to be the premier events on the recycling calendar where all the stakeholders in our industry come together to network and be informed.

For the first time in its 70-year history, BIR hosted two Conventions outside of Europe in the same year which coincided with the departure of the BIR Convention Director. In spite of these personnel changes, the remainder of the Secretariat – supported by the Exco – rose to meet the challenge and delivered two outstanding events. As delegates, we often are unaware of all the work involved in preparing a major event from a distance, so to pull off two highly successful long-distance events within five months was a great achievement.

More than 900 participants attended the Convention and Exhibition at the Hong Kong Convention Centre. Being my current home town, it was great to be able to walk to a BIR Convention for once and not travel thousands of miles. The last time we had visited Hong Kong as an organisation was more than 20 years earlier at the same venue.

It was during this event that most people were first informed of the Chinese government's intention to ban "Category 7" scrap metal – as

well as various grades of recovered paper and plastics – from entering China. Considering that, for more than 20 years, China had been the principal market for those grades and that investments elsewhere in recycling those items was virtually non-existent, this produced quite a shock wave. This is an excellent example of why companies join BIR and send delegates to these events.

During the sessions in Hong Kong, we heard from 23 speakers. These included Michael Lion's "Random Recollections of a Rebellious Recycler" in the keynote session followed by his band's performance at the exhibitors' party, giving many of us a whole new perspective on this BIR stalwart and demonstrating the unrivalled experience and diversity among BIR's membership.

In October, BIR met in Delhi and extended the Convention programme by a day. We were warmly welcomed in a letter from India's Prime Minister Narendra Modi. The post-event report showed that there had been 600 registrations and 28 speakers, thus endorsing the choice of destination.

"As delegates, we often are unaware of all the work involved in preparing a major event from a distance, so to pull off two highly successful long-distance events within five months was a great achievement."



It is understandable that many companies chose not to attend two long-distance events. However, considering market developments in China, meeting in India was strategically appropriate for some sections of our industry as they were able to find a limited but developing market for products previously destined for China.

As we enter the organisation's 70th anniversary year and with the inaugural Global Recycling Day also taking place in 2018, this year's two Conventions are being staged in Europe. We will celebrate BIR's 70th anniversary in Barcelona – a city that we have visited three times in the past 20 years. A special committee has been commissioned by the President to differentiate this event, so don't miss it!

In October, we will meet in London just prior to LME Week, thus hopefully allowing many delegates to participate in both events.

The BIR Convention will be held the weekend prior to LME Week, principally due to venue availability. Apologies in advance if this causes difficulties in attending for some potential delegates.

Both these events in the 70th anniversary year provide an excellent branding opportunity for businesses through our extensive range of sponsorship options. Please contact the Secretariat for the catalogue or ask them to tailor something for you.

The success of our Convention offering is due to the efforts of many, many people: the Convention Committee, whose members bring so much diversity to the debate about location, content and programme, is where it starts; the support of the President and Exco progresses the project; and the BIR Secretariat is responsible for its organisation, logistics and execution to produce the final product.

Ultimately, it's the BIR delegates that make our events so successful and I look forward to seeing many of you in Barcelona and London.

Delhi was my final Convention as Chairman of the Convention Committee as I will move on to chair the Communication Committee from March 1. Murat Bayram will assume the Convention Chairman's role; both he and the organisation can be assured of my support for this important portfolio.

Finally, I would like to thank all of you who have supported me in my role as the Convention Chairman over the past 12 years or so. It's been a privilege to work with such a diverse group of individuals. Although there are simply too many of you to mention individually, I have learnt a great deal from you all. Thank you.

COMMUNICATIONS COMMITTEE



Elisabeth Christ

BIR Communications Director

2017 was an eventful year in terms of communications activities. New projects were launched while the solid base of established communication tools was not only maintained but further strengthened.

The Global Recycling Day (GRD) as well as the preparation of our two World Conventions very much dominated our roadmap for the year.

Stepping up our efforts and targets for GRD meant that a host of messages, texts, graphic material (including branding guidelines and a logo with excellent recognition value), website, social media channels etc. needed to be prepared and turned into a powerful international campaign. With its experience and first-class expertise, the outstanding communications and PR firm Flagship Consulting cemented the foundations on which this massive project was built. It was inspirational to work with their dedicated team and to follow their lead in developing a complex international strategy with the ultimate aim of celebrating, on 18 March 2018, a day entirely dedicated to recycling, and this in all parts of the world.

The same principle applied to our 2017 World Recycling Conventions, with the emphasis very much on "the world". For the first time

in BIR's long history, we offered our members two non-European Conventions in the one year, in Hong Kong and New Delhi. While the BIR Convention team was pulling this off with amazing efficiency, the Communications Department defined the graphical "look and feel" of these two amazing events as well as providing speaker and event promotion. In Delhi, we added a full day to the normal two-day programme in October; this was devoted entirely to the theme of "Business in India", with an array of high-profile contributions that included a written message from India's Prime Minister Modi and presentations from top-ranking government officials and industry experts.

In between these two gargantuan projects, we maintained our ongoing information service to our members with regular eBriefs, news, World Mirrors, Convention proceedings and a string of publications such as the 2016 Annual Report, the eighth edition of the renowned ferrous statistics "World Steel Recycling in Figures" and the second edition of "Global Non-Ferrous Scrap Flows".

"The Global Recycling Day (GRD) as well as the preparation of our two World Conventions very much dominated our roadmap for the year."



Following a request by the Non-Ferrous Metals Division, we developed a new design for the BIR World Mirrors with the purpose of moving from the traditional pdf report towards an interactive and responsive web page to allow easy access from all mobile devices, on which a pdf was difficult to read. This new concept was well received across all commodity divisions and committees, and was adopted for the entire range of BIR World Mirrors.

Media work was also very high on our agenda, with huge interest from both general and trade journalists in BIR statements following the import restrictions that started to unfold in China in the middle of the year. Equally, both Conventions attracted an impressive tally of journalists, resulting in a number of on-site interviews with the BIR leadership.

With the arrival of Arnaud Brunet as Director General, BIR's external and internal communications are set to undergo a fundamental change because one of his priorities is to modernise and increase the user-friendliness of how BIR communicates with its members and the outside world.

I would like to conclude my report with my heartfelt thanks to Kamiel van Wijk, former Communications Committee Chairman, for his dedication and excellent co-operation over the last seven years, and also to Andy Wahl for having stepped in to chair Communications Committee meetings on several occasions.



MEMBERSHIP COMMITTEE



Fadi Shahrouh

*Sharmetal Trading CO. SARL (LBN)
Chairman Membership Committee*

Membership of BIR continues to provide added value for all recycling companies through the world federation's many services and campaigns on behalf of the international recycling industry. The BIR's Code of Conduct ensures that members are carefully selected and need to meet certain criteria to be eligible for membership. The BIR is not simply a pay-and-join club.

This careful selection policy creates a safe zone for the recycling industry and for BIR members where they can meet, network and trade with a good level of trust and safety. The Membership Committee will always keep an eye on the quality assurance of new members joining the organisation so as to maintain the standards and uniqueness of the BIR.

Our members receive a comprehensive information service, with regular updates from the various industry divisions covering ferrous, non-ferrous, stainless, paper, plastics, textiles, tyres/ rubber and E-scrap. There is also our arbitration service for the fair settlement of disputes among members in a quick process managed by field-experienced arbitrators. And we organise our

twice-yearly conventions to keep members updated with the latest key market developments and data.

BIR is now gearing up for its 70th anniversary celebration in 2018. In 1948, a group of scrap merchants from Belgium, the Netherlands and Luxembourg met in a hotel in Amsterdam and decided to create what has become the world's oldest international recycling federation. Seventy years later, the BIR has expanded in every direction to cover all continents, counting more than 800 members from 70 countries around the globe. The BIR success story has attracted the membership of more than 30 national federations that look upon the world body as the protective parent for all recycling industries worldwide.

"BIR is proud of the quality of its membership and, likewise, members can be proud of their world organisation, which is recognised as the global recycling federation."

These national federations found in BIR a safe harbour to safeguard their interests at the international level and to provide them with a louder voice that can be heard in all corners of the world. In this respect, BIR launched its first-ever Global Recycling Day, celebrated across the globe on March 18 this year.

At world, regional and national level, our organisation has exerted tremendous effort on the legislative front. Many new regulations emerge every year and BIR makes sure of its involvement when and where necessary to protect the industry's interests and to promote the free flow of recyclables worldwide. In many cases, the people who frame regulations lack experience of the recycling industry and often include barriers to trade. BIR works tirelessly to surmount these barriers and ensure the continued flow of recyclables.

BIR is proud of the quality of its membership and, likewise, members can be proud of their world organisation, which is recognised as the global recycling federation. It has the loudest voice to promote recycling while offering umbrella protection and support for all the regional and national federations worldwide.



AMBASSADORS COMMITTEE



Salam Sharif

Sharif Metals (UAE)

Chairman Ambassadors Committee

As the world has been changing at an unprecedented pace, facing up to the new challenges would have been much more difficult without the BIR's services and guidance. Representing the world recycling industry, and as a professional and responsible organisation, the BIR has been proactive in tackling trade issues on behalf of its members and national associations, helping them tackle such new challenges.

The BIR's formation of the Ambassadors Committee was a great step in the right direction, reaching out to the world in a multifunctional way and making itself available in several places at the same time.

The Ambassadors Committee was formed to be "the extended arm" of the BIR's headquarters in Brussels through its team of industry experts who were nominated as Ambassadors for the different regions of the world, representing the BIR in local and international arenas such as at conferences and symposia, working closely with local media and with governmental authorities and decision-makers.

In 2017, I had the opportunity to represent and promote the BIR at many conferences, including in the United Arab Emirates, India, Malaysia and China. Several interested companies were proposed to the BIR for membership, and the BIR-led Global Recycling Day was given maximum promotion.

Our Committee fully supports raising awareness of the BIR and of its vital role in supporting our industry's various sectors such as ferrous, non-ferrous, stainless steel, electronics, paper, plastics, tyres/rubber, textiles and e-scrap. It also supports the push to have recyclables considered as the world's Seventh Resource after air, water, oil, natural gas, coal and minerals.

"The BIR's formation of the Ambassadors Committee was a great step in the right direction, reaching out to the world in a multifunctional way and making itself available in several places at the same time."



The Ambassadors Committee has worked closely with other BIR committees and divisions to ensure additional support and to complement their activities and objectives. Together with the Convention Committee, we helped raise sponsorships, introduced the BIR to key government decision-makers and invited key officials to attend BIR Conventions. We also worked closely with the Communications Committee and assisted the Membership Committee in renewing memberships and introducing new members. We also organised local seminars for sharing common problems and trade practices, and for proposing new ideas to help us all move forward.

With the world depending heavily upon the trade in recyclables on economic, environmental and social grounds, our Ambassadors' role remains vital to serving the

BIR and its members to achieve a sustainable industry for us all and for future generations to come.

The Ambassadors Committee continues to be "the extended arm" and the mirror of the BIR. Our Ambassadors work closely with the BIR's World President and the secretariat in Brussels to help in achieving common goals, and we are all looking forward to a successful year ahead.

I would like to take this opportunity to thank the BIR President and the Executive Committee for empowering our Ambassadors Committee, and to offer special thanks to the Chairmen of the other BIR committees, to the Director General, to the hard-working secretariat and, last but not least, to our Ambassadors for the great job done in 2017.



SPEAKERS AT BIR EVENTS IN 2017

Hong Kong, 22-24 May 2017

Non-Ferrous Metals Division

- MASAO MONTANI, Director, Daiki Aluminium Industry Co., Ltd. (Japan)
- HONG YANG, Deputy General Manager, Minmetals Germany GmbH (Germany)
- JOHN BROWNING, Managing Director, BANDS Financial Limited (China)

Stainless Steel & Special Alloys Committee

- MARKUS MOLL, Managing Director, SMR – Steel & Metals Market Research GmbH (Austria)
- ADAM MINTER, Freelance Columnist & Journalist

International Trade Council

- ADINA RENEE ADLER, Senior Director of Government Relations & International Affairs, Institute of Scrap Recycling Industries – ISRI (USA)
- HON-MENG WONG, Assistant Director (Waste Reduction & Recycling), HKSAR Government (China)

Textiles Division

- LUO HONG JIAN, General manager, Sheng Dong Hua (China)
- ALAIN CLAUDOT, Director General, Eco TLC (France)

Tyres & Rubber Committee

- YU QIANG, Executive Chairman, China National Tyre Recycling Association (China)

Ferrous Division

- DR YE CHEN, Commodity Department I, Shanghai Futures Exchange (China)
- NATHAN FRUCHTER, Founder, Idoru Trading Corp. (USA)

Shredder Committee

- TIM SHUTTLEWORTH, President & CEO, Eriez Manufacturing Co. (USA)
- JASON LOOMAN, President, Steinert US, Inc (USA)
- DIDIER HAEGELSTEEN, Managing Director, SGM Gantry S.p.A. (Italy)

Keynote Session

- MICHAEL LION, President, Everwell Resources Ltd (China)

Paper Division

- NOBUYUKI SHIOSE, CEO, Daiwa-Shiryo Co., Ltd. (Japan)

E-Scrap Committee

- SHIRLEY KWOK, Honorary Advisor, Hong Kong Recycling Chamber of Commerce (China)
- GOH KIAN GUAN, Chief Investment Officer, Chiho-Tiande Group Limited (China)

Plastics Committee

- NIGEL MATTHEW, Director & General Manager, ALBA Integrated Waste Solutions (Hong Kong) Limited (China)
- DEEPAK SAXENA, Executive Director – Global Ocean IIF, Kerry Logistics (China)
- ANTHONY IP, Global Ocean Operations and Products, Kerry Logistics (China)

International Environment Council

- GARY TAM, Senior Environmental Protection Officer, HKSAR Government (China)

Workshop on India

- Dr CH. BIRENDER SINGH, Minister of Steel (India)
- Dr HARSH VARDHAN, Minister of Environment, Forest and Climate Change (India)
- Dr ARUNA SHARMA, Secretary, Ministry of Steel (India)
- Dr JAIJIT BHATTACHARYA, KPMG (India)
- AMARJEET SINGH, KPMG (India)
- RITA ROY CHOUDHURY, Assistant Secretary General, FICCI (India)
- PRANSHU SINGHAL, Founder, Karo Sambhav Private Limited (E-waste PRO) (India)
- B. B. SINGH, Managing Director, MSTC Ltd (India)
- SANJAY SINGH, Senior representative, IL&FS (India)
- EMMANUEL KATRAKIS, Secretary General, EuRIC
- VIKRAMJIT SINGH SAHNEY, Founder and Chairman, Sun Group (India)
- DARSHAN SINGH, Additional Director General, DGFT (India)

Stainless Steel & Special Alloys Committee

- C.P. GUPTA, Chairman & Managing Director, Ambica Steels Ltd (India)

Ferrous Division

- BECKY E. HITES, President & Founder, Steel Insights, LLC (USA)
- SHRI SUNIL BARTHWAL, Joint Secretary, Ministry of Steel, Government of India
- R. GANESH, Director of Sourcing, Jindal Stainless Limited (India)

Textiles Division

- NOHAR NATH, CEO, Kishco Group (India)

Tyres & Rubber Committee

- ROBIN WIENER, President, Institute of Scrap Recycling Industries (ISRI) (USA)
- GAURAV SEKHRI, Director, Tinna Rubber & Infrastructure Limited (TRIL) (India)

Plastics Committee

- RAJESH GAUBA, Vice President, Recycling and Sustainability, Reliance Industries (India)
- MANI VAJIPEY, Co-Founder and CEO, Banyan Nation (India)

Non-Ferrous Metals Division

- DEEPAK MAHENDRA, Former Managing Director, Chassis Brakes International (India)
- NAVIN SHARMA, CEO, Gravita India Limited (India)
- AKSHAY AGARWAL, Executive Director, Century Metal Recycling (India)

Paper Division

- ANDREAS URIEL, Managing Director, Uriel Papierrohstoffe GmbH (Germany)
- JOGARAO BHAMIDIPATI, Director, Source Global Fiber Inc. (India)
- PRADEEP DHOBAL, Director & Operating Partner, Springforth Investment Managers Pvt Ltd and Former Executive Director, ITC Paper Division (India)
- SVR KRISHNAN, Executive Director, TNPL (India)

E-Scrap Committee

- B.K. SONI, Chairman & Managing Director, Eco Recycling Ltd (Ecoreco) (India)

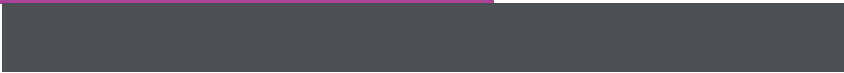
CALENDAR OF FUTURE BIR CONVENTIONS



2018

(27) 28-30 May
Barcelona, Spain
Hotel Sofia

(5) 6-7 October
London, United Kingdom
Hotel Intercontinental-The O2







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