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BIR – fulfilling our ever greater need to connect

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Rapid return to solid financial base

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Hard work rewarded

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BIR: fulfilling our ever greater need to connect

A BIR President’s term of office runs for four years and my own comes to a close at our late-May Convention in Amsterdam. During its 75-year history, each and every President of our world recycling organization will have had different experiences during their time at the helm, but I can say without fear of contradiction that my own period in office was the very definition of unique.

Only a matter of months into my role, the entire world was swept up in the COVID pandemic which has gone on to claim an almost unimaginable number of lives, as well as creating major challenges for the business community that remain with us to this day. And sadly, my four-year tenure was to be bookended by human tragedy as, on my return from the recent Material Recycling Association of India (MRAI) conference in Kochi, the shocking news emerged of the devastating earthquakes in Turkey and Syria. Added to the enormous human toll of the ongoing Ukraine conflict, these true crises put our own personal and business struggles into humbling perspective. On behalf of everyone within BIR, our thoughts and deepest sympathies go out to all of you around the world who have lost friends, colleagues and loved ones.

In this my final report as President of BIR, I am thankfully able to reflect on some positive recycling developments over the last four years. Global Recycling Day has further cemented its position on the calendar of international celebration and awareness days while, from the policy perspective, the proliferation of mandated recycled content initiatives in the plastics sector has served as a tangible acknowledgement of the need to create new demand paths for the recycling industry’s products if the Circular Economy is to be achieved.

Equally encouraging for the professional plastics recycling industry, BIR has been afforded a pivotal role in the Basel Convention Plastic Waste Partnership and has been involved at the ground floor of a United Nations initiative to draft a new Global Plastics Treaty. The latter kicked off with a meeting in Uruguay at which our industry’s interests were represented by BIR’s Trade & Environment Director Ross Bartley and our welcome new recruit, Alev Somer, Deputy Director for Trade & Environment.

While much of the Circular Economy impetus is behind creating material loops, so many of the recycling-related regulations to emerge over the last four years have been just plain loopy. Throughout 2022 and into 2023, for example, our industry has remained under the shadow of the EU Waste Shipment Regulation (WSR) revision. At the aforementioned MRAI conference attended by myself and BIR Director General Arnaud Brunet, I was honoured to be given the opportunity to explain during a round-table discussion how the WSR revision’s proposed impairment of free and fair trade in recycled raw materials would be disastrously counter-productive for the Circular Economy and for the protection of our planet.

Regulators often prove unwilling to listen to the recycling industry’s common-sense advice based on our experience gained over many generations. This is
“While much of the Circular Economy impetus is behind creating material loops, so many of the recycling-related regulations to emerge over the last four years have been just plain loopy.”

certainly true in South Africa where the government has implemented a six-month export ban on copper, brass, gunmetal and ferrous scrap in a bid to tackle metal theft – despite BIR issuing a direct warning that this would be an ineffective policy device and recommending several more reliable alternatives to thwart the thieves.

The negative implications of ill-considered regulation were a regular refrain at the various national association gatherings attended by me and Mr Brunet, including the ISRI Convention in the USA last April, the EuRIC Convention two months later and the ISRI leadership meeting in December which focused on a host of matters of mutual interest and concern.

And of course, these same issues were to dominate proceedings at BIR’s own highly-successful Conventions in 2022, with the events in Barcelona and Dubai both attracting around 1300 registrations from more than 60 countries – the perfect illustration of how recyclers have emerged from COVID restrictions with a renewed appetite to meet and to debate the issues confronting our industry.

The challenges of COVID and of conflicts around the world appear to have created an even greater need to connect as an industry. In addition to healthy Convention attendance figures, BIR has also witnessed steep and immensely satisfying growth in membership numbers, with 194 new members joining in 2022 alone to take the grand total up to 869 drawn from 67 countries.

It is important to recognize the outstanding efforts of the whole BIR team under the leadership of Director General Arnaud Brunet not only in keeping this world organization at the forefront of our industry during these challenging last few years but also in increasing BIR’s global footprint and membership numbers. Thanks to the efforts and direction of Elisabeth Christ, ably supported by Michèle Noukam, BIR has been extremely active on all media and social media outlets, ensuring that governments and all industries are aware of the importance of the recycling sector in combatting climate change and protecting the environment.

For all of your assistance and hard work over the last four years, a special thank-you to all of the staff in our Brussels office.

The membership and convention attendance numbers show that our world organization, born soon after the strife of the Second World War, has become even more relevant to the industry it serves. With all the conflict around the world and the unfortunate lurch away from globalization and back towards protectionism, members of our industry from all corners of the Earth continue to seek out – and find – common ground, to develop healthy and mutually beneficial working relationships within our broad recycling church.

Now that is something truly worthy of celebration in BIR’s 75th anniversary year.
As we leave 2022 behind us, who would have thought after the years of COVID restrictions that we would have been able to get back so swiftly on to a steady financial course?

At the beginning of last year, under the leadership of our President Tom Bird, Director General Arnaud Brunet, the BIR team and our Executive Committee, we had to make tough budgetary decisions as it was not clear what 2022 would bring. Under the originally-presented budget, funds were going to have to be taken from reserves; fortunately, Conventions and membership – our two financial pillars – allowed for a different picture to emerge.

Our two world recycling Conventions in Barcelona and Dubai each attracted around 1300 participants and generated a welcome surplus at the end of 2022. As for membership, we saw an equally impressive spike in new applications, certainly due in part to an increased interest in attending our biannual events after the lifting of most COVID restrictions. Combined with the record pace of membership renewals, this generated a solid financial base throughout the year.

My special thanks go to the Chairmen of the BIR Convention and Membership Committees, respectively Murat Bayram and Fadi Shahrour, and to their fellow Committee members, as well as to, of course, the team in Brussels which offers its invaluable support to all of our endeavours.

As a membership-driven organization, our main aim remains to offer value for money. We have kept investing in new Convention formats to further enhance networking opportunities and to diversify our commodity programmes. We have kept investing in our communications activities with additional campaigns on social media, frequent updates on trade and legislative issues, and publication of a swathe of reliable statistics that allow for benchmarking when it comes to the huge environmental contributions of our industry. We have kept investing in our regulatory monitoring and lobbying activities with the recruitment in the first half of last year of a Deputy Director for Trade & Environment. And we have kept investing in a closer co-operation with our national member associations via more in-person and online meetings to streamline our concerted efforts in support of the international recycling community.
We will continue to increase our efforts to invest in people and in the necessary tools to secure for you, our members, the very best service and to provide visible support in addressing all the issues and concerns arising within our global materials recycling industry. We have many challenges ahead of us across many areas but thanks to your ongoing financial support, through membership fees and attendance of our Conventions, we will be able to tackle them for the benefit of the recycling industry.

Once again, my thanks go out to all of you, our members, who carry the flag for fair and free trade and who maintain a burning passion for recycling. The future is ours and we will continue to work as hard as possible to ensure that our voice, our one common language, is heard loud and clear.

“We have many challenges ahead of us across many areas but thanks to your ongoing financial support... we will be able to tackle them for the benefit of the recycling industry.”
Hard work rewarded

Traditionally, it is the purpose of an Annual Report to look back on and take stock of the past year, not only the successes and achievements of which we can be proud but also the difficulties we faced and the measures we took in response. But personally, I prefer to turn my eyes to the future, to the next challenge, the next milestone.

However, I must say that BIR did well in 2022 – despite the trying times, despite the pandemic still with us after more than two years, despite a war in Europe, despite a complex economic situation, despite an energy crisis in some parts of the world and despite all the regulatory challenges and threats our industry is facing.

In his own report, our President Tom Bird has commented very precisely on the highlights of 2022 and, here, I will again underline just some of them. Let’s start with the good news...

Our membership numbers have already seen incredible growth and this strong momentum is continuing. We were proud to count 869 members from 67 countries as of December 31 2022 – a figure that includes an impressive 194 new members who joined our ranks in 2022 alone. We also enjoyed two very successful World Recycling Conventions in Barcelona and Dubai, each attracting around 1300 delegates from more than 60 countries to enjoy their first-class programmes, including two editions of “The Challenge”, as well as their amazing social events.

As a result, our finances have recovered from a difficult period brought about by two years of pandemic.

On the advocacy front, we have never been so active and have responded by reinforcing our Secretariat in Brussels with the hiring of a Deputy Trade & Environment Director, namely Alev Somer. To give just a few examples of our advocacy activities, BIR has, thanks to its globally-recognized expertise and to its central position in the recycling industry, taken a leading role in the Basel Convention Plastic Waste Partnership and is now also actively engaged in a United Nations initiative beginning with a meeting in Uruguay late last year, the ultimate aim of which is to frame a new Global Plastics Treaty.

Unfortunately, the general regulatory landscape remains uncertain and complex. Many new regulations, devised with the intention of paving the way for decarbonization and for a circular economy, will actually detract from these goals and have an opposite effect. The proposed revision of the EU Waste Shipment Regulation is just one of many examples of unbalanced legislation, adding to those emerging in South Africa (with its six-month scrap export ban), in Malaysia and in the Middle East. In an economy that remains truly global, the consequences of such misguided measures are not simply local or regional; they affect all international markets.
“All in all, we have strengthened our position at the apex of recycling, as the leading global association.”

This is why, together with our national federation members, we have been totally dedicated to advocating our positions, to defending our interests and to offering expert alternative solutions to those in decision-making positions, wherever they are needed. We have maintained regular online contact with them all while also meeting in person on various occasions, whether in Europe, the Middle East, Asia or North America.

Since advocacy cannot be fully effective without the support of solid figures and data, we have agreed to produce, in a collective effort with our federation members, strong and meaningful studies and analyses. The positive contribution of our industry to decarbonization goals will be at the centre of our efforts.

Lastly, we have looked to communicate our actions and endeavours to our membership and beyond. As an example of our online outreach, we now have a community of more than 8000 followers on LinkedIn.

All in all, we have strengthened our position at the apex of recycling, as the leading global association.

These pieces of good news do not come out of the blue. During difficult times, we worked hard for the benefit of our members. In a collective effort, the BIR’s leaders – its President, the Treasurer, the members of its Executive Committee and of its Advisory Council, and the Secretariat in Brussels – made those successes possible.

2023 will be – yet again – a year of many challenges. BIR will continue to reinforce its Secretariat, to strengthen even further its co-operation with its federation members and to increase its activities in support of membership. And of course, we will have the pleasure of celebrating the achievements of our industry during Global Recycling Day before meeting again at our renowned BIR Conventions.

We have had a successful year, and an exciting 2023 lies ahead with the milestone celebration of BIR’s 75th anniversary that we will share with you via a number of initiatives throughout the year. And to honour the founding fathers of BIR, we have decided to revisit Amsterdam – the birthplace of our world recycling federation – for our Convention in May. It is also in Amsterdam that we will elect our new President and Treasurer at what is an important time for our association.
Western Europe
Austria
Belgium
Cyprus
Denmark
Finland
France
Germany
Greece
Italy
Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
United Kingdom

Eastern Europe
Albania
Bulgaria
Czech Republic
Georgia
Hungary
Latvia
Lithuania
Poland
Romania
Serbia
Slovak Republic
Slovenia
Ukraine

Asia
Bangladesh
China
India
Japan
Malaysia
Pakistan
Philippines
Republic of Korea
Singapore
Sri Lanka
Taiwan (China)
Thailand
Vietnam

North America
Canada
Panama
USA

Australia & Pacific Rim
Australia
New Zealand

Africa
Egypt
Ghana
South Africa
Tunisia

Central & South America
Brazil
Chile
Cuba
Haiti
Honduras
Mexico
Trinidad and Tobago
Uruguay

Turkey & Middle-East
Bahrain
Israel
Jordan
Lebanon
Qatar
Saudi Arabia
Turkey
United Arab Emirates

Membership Highlights*

Around 870 BIR Members all over the World!

194 New Members in 2022

36 National Federations

67 Countries

More than 50% Members outside the European Continent

*situation on 31.12.2022
LIST OF BIR MEMBER FEDERATIONS

BRAZIL
• Brazilian Association of Iron and Steel Scrap Companies (INESFA)

BULGARIA
• Bulgarian Association of Circular Textiles (BACT)
• Association for Textile Recycling
• Bulgarian Association of Recycling (BAR)

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 Sustainable Plastics Association (CSPA)

CUBA
• Grupo Empresarial de Reciclaje

EUROPE
• European Recycling Industries’ Confederation (EuRIC)

FRANCE
• Fédération des Entreprises du Recyclage (FEDEREC)

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

HUNGARY
• Hungarian Waste Management Federation (HOSZ)

INDIA
• Inland Importers & Consumers Association (IICA)
• Material Recycling Association of India (MRAI)
ITALY
• ASSOFERMET

JAPAN
• Japan Iron & Steel Recycling Institute (JISRI)

MALAYSIA
• Malaysia Non-Ferrous Metals Association

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
• Recovered Paper Industrialists Association (AGED)
• Değerlendirilebilir Atık Malzemeler Sanayicileri Derneği (TÜDAM)

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.
Recyclers are delivering on decarbonization

In my report last year, I warned of “clouds on the horizon” as we entered 2022 in the form of proposed changes to the EU Waste Shipment Regulation (WSR) that had “the potential to heavily restrict exports to many parts of the world”. Well, here we are 12 months later and our industry remains under the same Sword of Damocles.

On January 17 2023, the plenary vote in the European Parliament brought approval of changes to the WSR that will place a heavy burden on EU exports to industrialized and also developing countries through the need for intergovernmental agreements and inspections, audits and checks on facilities in third countries. Such a stringent control regime will mean that flows are likely to be severely limited. No distinction is made between lower-value recyclables and the ferrous sector’s high-value products which help steelmakers around the world achieve their decarbonization goals.

In the 13th edition of our hugely respected publication “World Steel Recycling in Figures”, Statistics Advisor Rolf Willeke confirmed that this has now been given the subtitle “A raw material for green steelmaking” in order to highlight the environmental importance of steel scrap use. Most recent data indicate that, each and every year, steel scrap recycling prevents nearly 950 million tonnes of CO₂ emissions that would have resulted from producing steel using virgin raw materials. Such achievements should never be forgotten or undersold.

At the same time, we should waste no opportunity to stress that the scale of these achievements owes much to free access to global markets. As Mr Willeke has consistently stated, steel scrap is an ecologically unrivalled raw material used worldwide in steelworks and foundries, as well as an internationally-traded commodity subject to global market prices. As such, it should be subject to no more trading controls than any other raw material.

It seems entirely counter-intuitive that this threat to exports has arisen at a time when the global steel industry is under customer and consumer pressure to deliver “greener”, decarbonized steel, most obviously achieved through greater use of scrap. In effect, decarbonization and a healthy recycling industry go hand in hand.

Eric Niedziela, Vice President Climate Action at ArcelorMittal Europe, confirmed at our divisional meeting last May that European steelmakers would be requiring substantially increased quantities of scrap to boost their attempts to reduce the carbon footprint of their operations. But as pointed out in Barcelona by BIR President Tom Bird, this should not be achieved at the expense of free trade in scrap which, if seriously compromised, could lead to lower recycling rates and a drop-off in investment that would harm not only the interests of the steel sector but also of the environment. Cinzia Vezzosi, Immediate Past President of the European Recycling Industries’ Confederation, warned the same
“Each and every year, steel scrap recycling prevents nearly 950 million tonnes of CO₂ emissions. Such achievements should never be forgotten or undersold.”

meeting that stopping free trade out of Europe would leave almost 20 million tonnes of steel scrap with no obvious home. How can this make sense?

Europe does not have a monopoly on apparently counter-productive legislation: in late November last year, for example, South Africa issued a directive to regulate trade in ferrous scrap and semi-finished products in a bid to tackle metal theft. As BIR noted in a letter to the South African government, export restrictions have proved in the past to be ineffective in preventing metal theft from public infrastructure.

Our meeting in Dubai last October highlighted opportunities for scrap exporters to support the “greening” of steelmaking capacity, with Sanjoy Kumar Ghosh of BSRM Steels Ltd in Bangladesh pointing to his country’s growing need for scrap imports to support new infrastructure projects. His words provided further evidence that restrictions on EU scrap exports would not be a problem for Europe alone; it would have dramatic repercussions on markets globally.

Also in Dubai, Lee Allen of Fastmarkets lamented the loss of economic momentum during 2022, apparent in the reduced demand both for finished steel and our scrap. Energy availability/price pressures forced many in industry to cut production while rising interest rates in many parts of the world also dampened economic and industrial activity. The impact on our own businesses has been clearly visible at the weighbridge, with significantly diminished yard infeed.

Despite a slight improvement in general market sentiment in late 2022, the early part of 2023 has brought no major alleviation of these pressures. Certainly, there seems little possibility of a significant relaxation in energy costs. By the time you read this report, I sincerely hope that I have been proved wrong and that we can resume the post-COVID recovery cut so abruptly short in 2022.

KEY FACTS

January-September 2022 steel scrap consumption (million tonnes)

<table>
<thead>
<tr>
<th>Country</th>
<th>Scrap Consumption (million tonnes)</th>
<th>Change Year on Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>170.8</td>
<td>-6.7%</td>
</tr>
<tr>
<td>EU-27</td>
<td>61.1</td>
<td>-8%</td>
</tr>
<tr>
<td>Japan</td>
<td>24.9</td>
<td>-3.6%</td>
</tr>
<tr>
<td>Turkey</td>
<td>23.7</td>
<td>-8.4%</td>
</tr>
</tbody>
</table>

Source: February 2023 update of BIR Ferrous Division’s “World Steel Recycling in Figures” (US data not available at time).
A lot has already been said about how difficult 2023 is going to be. The International Monetary Fund anticipates a third of the world’s economies will be in recession, at the same time as intensifying rifts between major countries/blocs are inflicting widespread damage like never before. And perhaps most worryingly for the long term, record-breaking heatwaves across much of Europe last summer were followed by unprecedented cold temperatures recently in the USA, thereby highlighting the environmental chaos in which we are living.

As the Financial Times wrote recently, the world is undergoing a “polycrisis” – a collective term for a simultaneous and interlocking rise in economic, geopolitical and environmental disorder.

While there are reasons to be dour about the prospects for this current year, there have been plenty of examples throughout recent history where unexpectedly positive outcomes have emerged from all the difficult situations and the doomsday chatter. So in making optimism our best friend for now, let us hope that we quickly find the silver lining behind those grey clouds.

The world came together in November last year for the COP27 climate change summit in Egypt, where demands for greater sustainability featured prominently. As we have long appreciated within this industry, recycling is a direct and perhaps the most effective responder to this call for a more sustainable way of life. With metals mining contributing as much as 10% to global greenhouse gas emissions, our industry is a forerunner in decarbonization and in transitioning to “green” metals.

But there are many grey areas and inconsistencies. Countries’ differing perceptions and interpretations with regard to raw materials management have led to widely varying forms of policy interference, the end result of which is that we are distanced even further from our environmental goals.

The EU’s proposed new waste shipment regulation remains the most significant development and could gravely impact scrap exports, potentially changing the course of our industry and of its material flows. Other countries too have imposed – or are contemplating – restrictions on scrap trading in order to address a variety of issues, ranging from preventing theft and controlling inflation to giving domestic consumers preferential access to our secondary raw materials.

At the behest of primary metal producers, India is currently working on implementing standards on scrap which will act as non-tariff barriers to curtail imports.
“Regrettably with so much evidence from around the world, we would expect policy-related distortions and confrontations to remain central to our business.”

Considering that the EU alone satisfies around 30% of India’s appetite for metal scrap because insufficient supply is available domestically, this move is likely to cause major disruption within the industry and, above all, is in direct contradiction to India’s own circularity and sustainability goals.

Regrettably with so much evidence from around the world, we at the BIR’s Non-Ferrous Metals Division would expect policy-related distortions and confrontations to remain central to our business.

Heading into 2023, some promising green shoots are visible too. Perhaps best highlighting the positive long-term demand outlook, we are seeing investments – notably in the Middle East and North America – in the building of new capacities for production of recycled aluminium for extrusion, automotive and packaging applications. China’s reopening following its prolonged period of tight COVID-related restrictions could prove to be bumpy at first but will eventually bring a recovery and revamping of consumption and production levels. The world needs a China on its feet, even if it doesn’t come close to replicating the numbers seen in the heady days earlier in this Millennium.

For its part, India has been churning out 6.5% GDP growth, bringing its US$ 5 trillion economy dream within striking range. Good performances by core industries such as building/construction, automotive and white goods augur well for its secondary metal producers. There has also been strong forward momentum in the Middle East where new infrastructure investments are pushing metal consumption to unprecedented levels. With over US$ 200 billion spent on the football World Cup in Qatar and with the construction of a US$ 500 billion futuristic city under way in Saudi Arabia, there will be opportunities for our industry to push for yet more growth.

Finally, as President of the BIR Non-Ferrous Metals Division, I cannot offer enough thanks for the support of my 17 colleagues on our board, who are relentless in contributing their knowledge, ideas and effort. Guided by the saying that “team work is dream work”, we all remain 100% committed to serving this sector to the best of our abilities.

Another turbulent year on the markets

**LME copper in 2022 (per tonne):**
- Start of year: US$ 9720
- Peak in March: approaching US$ 10,700
- Low in July: below US$ 7000
- Year-end: below US$ 8400

**LME aluminium in 2022 (per tonne):**
- Start of year: around US$ 2800
- Peak in March: around US$ 4000
- Low in October: just above US$ 2000
- Year-end: just below US$ 2400
We are essential to the push for circularity

With food prices and energy bills soaring, the harsh reality is that many households have far less disposable income to spend on the latest clothes. Space in wardrobes and drawers is not being cleared to make way for new garments, with the result that collection volumes for most textiles recyclers were significantly below average in 2022. Sorting facility operators have been forced to introduce lower capacity utilization rates and have also been hampered by a shortage of workers to fill vacant positions.

Last year also reflected how our sector can be vulnerable to geopolitical developments, such as the conflict between Ukraine and Russia. Both countries have been major outlets over the years for second-hand clothing, including some of the best quality items our industry has to offer. Exporters’ sales prospects have been damaged and, in some cases, alternative markets have had to be sought.

Overall, however, we have been seeing good demand and higher prices for used textiles. Equally helpfully, we are witnessing greater awareness among textile producers, brands and retailers of the need for recycling, resulting in an explosion of related initiatives. At our most recent BIR Convention meeting in Barcelona, Maud Hardy of producer responsibility organization Refashion pointed by way of example to an environmental impact grading system in France to promote greener product design. And Erik Koep of Worn Again Technologies (a developer of polymer recycling processes for non-reusable textiles) told us that technologies had not been available in the past to capitalize on demand for sustainability but that these were now starting to come on line. The necessary investment and demand momentum would quickly follow once customers saw that fully-circular materials were available, he insisted.

In truth, much good work has been done but much remains to be achieved; crucially, only approximately 1-2% of used textiles currently follow a circular recycling route.

Therefore, the release in March last year of the EU’s “Strategy for Sustainable and Circular Textiles” shone a timely light on our sector. Its headline aim is to ensure that, by 2030, textile products placed on the EU market are long-lived, recyclable, made as far as possible of recycled fibres and free of hazardous substances, with specific measures including eco-design requirements, clearer information for consumers, a Digital Product Passport and a mandatory EU extended producer responsibility scheme. The Strategy also confirms that all local authorities within the EU should have separate collections of textiles in place by 2025.

These are ambitious steps. And crucially from the perspective of our own sector, this journey must be undertaken in collaboration with industry professionals in order to ensure, for example, that collections are carried out in such a way as to maintain reusable value. Encouragingly in this regard, the EU has agreed to consider a requirement for preparation of reuse as a priority for such collections. Our industry performs a vital task with an expertise developed over many generations and so our input is absolutely essential to the success of this push to achieve circularity.
“We are witnessing greater awareness among textile producers, brands and retailers of the need for recycling, resulting in an explosion of related initiatives.”

All the data underline why reuse and recycling are so important. Taking Europe as an example, its consumption of textiles still has the fourth highest impact on the environment and climate change after food, housing and mobility. A recent life-cycle assessment commissioned by the European textile reuse and recycling industry confirms the environmental impact of reusing textiles is 70 times lower than that of producing new clothing. Carbon dioxide emission savings are particularly eye-catching, amounting to 3 kg for each and every high- to medium-quality item of clothing that is reused. Water requirement for reuse is a meagre 0.01% of what it would be to produce a new garment.

The same life-cycle assessment also debunks the myth that exports of used clothing are damaging to the environment simply because of the associated transport emissions. The study found that the environmental impact of even long-haul transportation of used clothing is “trivial” compared to that entailed in producing a new garment.

For years, generations even, we have been urging policy-makers and regulators to recognize the importance of the used textiles management hierarchy. Given all the latest research and evidence, its rightful place is at the heart of all sustainability strategies.
Victims of irrational legislation

My first full calendar year as President of the BIR Paper Division included two major features that would have been familiar to most of my predecessors, namely volatile market conditions and legislative uncertainty.

Starting with the latter, 2022 began with new recovered fibre import regulations in Malaysia, including pre-inspection in the country of origin. On top of this, and pervading the whole of 2022, were fears over the future for European exports of recovered fibre, particularly to non-OECD countries, as a result of the proposed revision of the EU Waste Shipment Regulation.

For many years, Europe has shipped a significant proportion of its surplus tonnages to customers in developing economies, mainly in Asia. This has been a truly symbiotic relationship as the importing countries have received good-quality recovered fibre to help fuel their industrial development at a time when their own domestic collections are not yet sufficiently mature to meet their raw material needs.

As explained by our Division’s General Delegate, Manuel Dominguez, at our meeting in Barcelona last May, the proposed shipment regulation revision threatens to introduce stricter procedures and control measures on EU recovered fibre exports in a way that would create a captive market within Europe, leading inevitably to lower prices and putting the sector’s future in jeopardy.

Certainly not the planet which we are all supposedly trying to protect. The whole legislative approach appears unreasonable and irrational.

Let me underline here, some of the countries that would be affected by this regulatory tightening are Europe’s biggest customers for recovered fibre, such as India, Indonesia and Vietnam. Guest speaker Nishant Sahney of Gaurav Vipa Papers Pvt Ltd told our Dubai meeting last October that India alone imported 7 million tonnes from around the world in 2021 — roughly equivalent to Europe’s entire recovered fibre surplus.

Europe is not alone in making life more difficult for our eminently “green” industry. India’s review of limits on non-paper materials in recovered paper imports will bring further controls in countries of origin and an increase in bureaucracy. And as explained in Dubai by guest speaker Atul Kaul of Waraq in Saudi Arabia, his own government’s policy was restricting exports of recovered paper, with both exports and imports having to work through a licensing agency.

These bureaucratic strictures are being applied even though free and fair trade remains crucial to the well-being of our essential industry. Latest data confirm for the umpteenth time that we continue to perform a huge service to the global environment.

As mentioned above, this threat to exports was combined with volatile pricing, particularly for OCC, to make 2022 a turbulent time for our industry. Demand for recovered
“If viable exports are to be made significantly more difficult or even impossible, then who is the beneficiary? Certainly not the planet which we are all supposedly trying to protect.”

Paper was excellent in the early months of the year owing to healthy paper mill order books. However, the onset of far higher energy costs and an inflation-related slide in demand for finished products forced mills to significantly reduce their capacity utilization rates and, in some cases, take unprecedented levels of downtime. As I pointed out at our meeting last October, OCC prices had fallen by as much as 90% in preceding months.

To be fair, white grade and pulp substitute prices retreated only slightly from the high ground established many months earlier, thanks largely to elevated prices for virgin pulp. And a positive development for us as 2022 progressed was the improved availability and cost of both vessel space and containers.

Given these developments, it was perhaps prescient that a guest presentation at our Barcelona meeting focused on introducing some welcome predictability into the trading arena via cash-settled financial futures. Stein Ole Larsen of Norexco ASA argued that hedging would help protect us from understandable nervousness at our exposure to volatile pricing.

His words remind us once again that we cannot avoid certain threats and challenges to our day-to-day business but we can certainly help ourselves by remaining alert to new ideas and new ways of operating. We can also look to “control the controllables” by running a tight ship and by finding the right customer fit.
A watershed year for nickel pricing?

During my time as Chairman of the BIR Stainless Steel & Special Alloys Committee, I have typically incorporated a summary of LME nickel highs and lows in my reviews of the previous year. But never before have I had to report a complete, albeit temporary, absence of LME benchmark prices.

Last year began with LME nickel at just over US$ 20,000 per tonne, dipping below this level only in July before ending 2022 at around the US$ 30,000 mark. But these figures fail to reflect the unprecedented drama in March last year when, shortly after the outbreak of the Ukraine conflict, the LME was forced to suspend nickel trading after prices suddenly sky-rocketed to more than US$ 100,000 per tonne, with the finger of blame being pointed at short-covering by a leading producer.

For eight days, we found ourselves in the unfamiliar and destabilizing position of having no reference prices available from this metals industry institution of almost 150 years’ standing. And despite the relatively quick resumption of trading on the Exchange, the shock waves are still being felt today.

During the undoubtedly timely meeting of our Committee in Barcelona last May, we were able to gauge the immediate impact of this trading hiatus. Robin Martin, the LME’s head of market development, acknowledged that the Exchange’s nickel volumes were 15-20% lower than in the corresponding period of 2021 and that it had work to do to rebuild confidence and trust.

As we learned at the meeting, however, some companies had already incurred significant and irretrievable financial losses, such as through paying out huge amounts in margin calls. There were also suggestions of a significant trend towards direct negotiations rather than using an LME nickel price that, many believe, can no longer be relied upon to reflect the physical market.

In essence, 2022 could prove to be the watershed year in which the LME’s status as a global nickel price reference point began to unravel. Already, LME-deliverable nickel is occupying a significantly smaller share of the world supply and consumption universe.

Even before this controversy, we in Europe were experiencing lower order intakes as a consequence of pandemic-related effects on all parts of the stainless supply chain and therefore on demand. Rising costs relating to the production of stainless steel – such as for energy, electrodes, ferro-silicon and scrap – were pushing finished goods prices ever higher and duly impairing demand.

The start of the Ukraine conflict tipped the balance even more sharply towards the negative: soaring energy costs and interest rates fuelled talk of recession and convinced the public to be more cautious in their spending. Europe’s stainless steel producers have seen a worrying downturn in demand for their products, not least because of a record level of imports. With sales prices falling more rapidly than ever before and plenty of finished goods in stock, producers have been working to some of the lowest capacity utilization rates ever known.
“The start of the Ukraine conflict tipped the balance even more sharply towards the negative.”

Against this discouraging backdrop, demand and prices for stainless scrap have remained very low. Soft market conditions have dominated in the USA and Asia too, not helped by India’s 15% export duty on finished stainless products which has slowed demand for scrap imports. In China, by contrast, stainless scrap demand was healthy in the second half of last year owing to its price advantage over nickel pig iron.

By the time we met in Dubai last October, we were craving some good news. Guest speaker Robert Messmer of Steel & Metals Market Research did his best to oblige by reflecting the broad span of applications for which stainless steel was the material of choice. Rather more disconcertingly, however, he pointed out that some of the traditional uses of stainless steel within the automotive industry – such as in exhaust units for internal combustion engines – were diminishing as the industry stepped up its transition to electric vehicles.

Confidence levels in the LME and the effects of the Ukraine crisis are among the key issues to have carried over from 2022 into 2023. Indeed, nickel price forecasts for the current year have been made even more unstable as a result of risks surrounding Russian supply.

As we all know, lack of confidence and uncertainty are poisonous for business prospects. So in anticipation of another difficult year, we can do no better than fall back on our most trusted allies: resilience and an eye for opportunity.
The proverbial game of two halves…

It was all going so well – and then, quite suddenly, it wasn’t…

In early 2022, plastics recyclers were in largely uncharted territory, experiencing not only massive demand but also extremely high prices for their products. Never had their position seemed so secure: whereas recycled plastics had once been unfairly dismissed by many potential consumers as substandard compared to primary resources, they had now morphed into highly-desirable raw materials whose use would help propel a host of blue-chip consumers towards fulfilment of their increasingly ambitious environmental pledges.

Momentum had been built by the ongoing proliferation of recycled plastic content mandates worldwide. In Europe, indeed, there has even been the added encouragement of a proposal to extend recycled content targets from plastic bottles to all plastic packaging.

But of course, these generally healthy conditions in the opening months of 2022 were not without challenges, most notably the struggle to source sufficient feedstock to satisfy this welcome demand boom; in the Far East, for example, most factories were operating at less than 20% of capacity owing to this dearth of suitable input. And naturally, the available tonnages came with a lofty price tag.

Other business impediments included hugely elevated shipping costs, lack of labour, market tensions over the Ukraine conflict and ongoing trading uncertainties resulting from the Basel Convention amendments. Lurking too in the background were fears that interest rate rises would lead to cooling economies and thus reduced consumption, ultimately hitting demand and prices for raw materials.

Nevertheless, recyclers were generally able to incorporate cost increases into their sales prices and so preserve their margins.

But then it all started to go wrong. During a 2022 also featuring the FIFA World Cup in Qatar, recyclers played out the proverbial game of two halves. By the time we met in Dubai last October, high demand had turned into low demand almost at the flick of a switch – a suitable metaphor given the blow of soaring electricity prices which meant full production was no longer viable for many of our consumers. Similar considerations afflicted recyclers too: in Europe, for example, where energy had normally accounted for around 15-20% of their production costs, this figure suddenly careered to nearer 70%.

The above-mentioned recycled content mandates provide tangible recognition of plastics recycling as a key industrial and environmental sector – one which is so essential, surely, that it should merit compensation for these astronomical power costs. If this is not forthcoming, then mechanical recycling of some waste streams will become uneconomical and the far less environmentally-friendly incineration option will be preferred, thus undermining the hard work already invested in building a circular economy.
“High demand had turned into low demand almost at the flick of a switch – a suitable metaphor given the blow of soaring electricity prices.”

In difficult times, the resilient and forward-looking recycler will not stand still but, rather, will remain alert to new ideas. One of the many benefits of BIR Conventions is that they provide a platform for new concepts, and so it proved in Barcelona last May where Doug Woodring of Ocean Recovery Alliance outlined the Rebound Plastic Exchange initiative intended to enhance global flows of quality recycled plastics and to drive the innovation and investment required to boost circularity.

Our meetings also provide glimpses of the future. In Dubai, for example, Xavier Lhoir of Valipac in Belgium explained how his organization was currently the only one in the EU covering extended producer responsibility (EPR) for commercial and industrial packaging. However, this is an EPR path that other member states will have to follow by 2024.

At that same meeting, Bashar Ehsan Gadawala of Ala Group explained the UAE’s development of an action plan for plastics management and recycling based on the EU and OECD life-cycle approach, thus re-emphasizing the key role that legislators can play in nurturing the best environment for recycling.

But of course, the value of our Plastics Committee and of BIR membership as a whole is not confined to our twice-yearly meetings. Day after day, BIR is representing our interests at the ground floor of developments that will shape our industry’s future. A notable example came late last year when Alev Somer and Ross Bartley from the BIR Secretariat attended an initial United Nations meeting in Uruguay that will ultimately lead to a new Global Plastics Treaty addressing their entire lifecycle. There will obviously be profound ramifications for our industry and we should take great comfort from the knowledge that our views are being expertly conveyed.

**KEY FACTS**

**Investment required in plastics processing infrastructure over next five years:**

US$ 56 billion

Rising by year 2040 to:

US$ 400 billion

Market for recycled material to grow around 30% between 2020 and 2025 to

US$ 45.6 billion

*Source: Doug Woodring of Ocean Recovery Alliance, speaking at BIR Convention in Barcelona, May 2022.*
Never a better time to be in this dynamic sector

If you’ll pardon the pun, the **good times are continuing to roll for tyre recycling**. Indeed, for rubber recycling as a whole. As I said at our committee meeting in Barcelona last May, this has become **one of the most dynamic sectors of the recycling industry**, gaining unprecedented traction as a result of the ever-increasing possibilities for breathing new life into tyres and other rubber products.

A compound annual growth rate of more than 10% is projected for the global recycled rubber market in the years to 2028. In Europe alone, **demand for recycled rubber is expected to increase fivefold** over the next 25 years.

Of course, there are challenges encountered daily along the way. I am sure we would all wish for a trading and economic environment that was more supportive of our activities and of our profit margins. Like most other industries around the globe, we are suffering the effects of soaring energy costs and manpower shortages, as well as grappling with the **ongoing issue of sourcing reasonably-priced vessel space** for shipping our materials.

Specific to our sector, we are also facing **severe sanctions on what was once the jewel in the crown of used tyre outlets**. During 2022, the European Commission adopted a draft proposal to restrict the sale of tyre-derived infill materials smaller than 5 mm in size in a move that will effectively prevent its use in synthetic pitch surfacing once a six-year transition period has elapsed.

This blow to recycling is grounded in a European Chemicals Agency recommendation to ban all “microplastic” infills owing to possible release to the environment, even though recycling industry experts have contested the data and have championed the far more sensible option of **mandatory risk-management measures to limit the dispersion of infill materials**.

The harsh reality of such a ban could be that more than 50 million tyres go unrecycled or are exported outside the EU for incineration where environmental standards are less stringent, according to Emmanuel Katrakis of the European Recycling Industries’ Confederation.

Thankfully, at our Barcelona meeting last May, Mr Katrakis gave us reasons for greater optimism: policy-makers in Europe had finally understood, he said, that creation of a Circular Economy was not simply a matter of recycling targets but also of creating a demand and of **introducing sustainability at the design stage of a product**.

Indeed, and as I pointed out at our subsequent meeting in Dubai, this increasingly deep understanding of sustainability – particularly among customers – means **there has probably never been a better time to be a tyre/rubber recycler**. Not so many years ago, who could have dreamed that such tyre industry luminaries as Michelin,
“This increasingly deep understanding of sustainability – particularly among customers – means there has probably never been a better time to be a tyre/rubber recycler.”

Continental and Bridgestone would be striving for a massive scale-up of their use of our raw materials?

I am delighted to say that our committee meetings have earned an enviable reputation for showcasing latest research and technology developments. In Barcelona, Sonia Megert of Switzerland’s Tyre Recycling Solutions SA highlighted the massive growth potential for recycled content in tyres, suggesting that 10-15% was achievable in tyre treads compared to a current maximum of 5%.

At the same meeting, Robert Weibold of Robert Weibold GmbH in Germany also confirmed that many investors were now taking greater interest in this field, not least because the economics of recycling processes have been altered by the fact that customers are now prepared to pay significantly more for a sustainably-produced tyre.

In Dubai last October, another of the valuable services provided by our meetings was highlighted, namely the opportunity to focus on recycling developments in parts of the world that do not often come under the microscope. So it was that we heard from: Khaled Jamal Chaaroui of EPSCO Global General Trading in Kuwait who updated us on a local tyre recycling plant producing crumb, granules, powder, steel scrap and fibre waste; Abdullah Ahmed Alqurashi of Global Environmental Management Services who explained how Saudi Arabia was tackling the challenge of the 572,000 tonnes of end-of-life tyres generated domestically each year, with his own organization tasked with developing centralized collection hubs and sorting stations; and Zaid Bdour of The Gulf Rubber Company who emphasized the strong business case for mechanical recycling despite the volatility of used tyre prices owing to lucrative exports to Pakistan and India.

If the measure of a vibrant industry is its scope to promote global conversation and innovation, then tyre and rubber recycling has truly arrived.

KEY FACTS
Projected compound annual growth rate for global recycled rubber market (2020 to 2028): More than 10%
An ever more delicate commercial equation

The many and varied forecasts relating to the scale and expansion rate of the electronic scrap recycling market agree on one key point: this remains the fastest-growing sector across the entire recycling spectrum. With some analysts predicting compound annual growth rates well into double figures for the remainder of this decade, the consensus is that annual market worth will be somewhere north of US$8 billion by the year 2030, at which point e-scrap volumes worldwide are expected to have leapt to 75 million tonnes per annum.

This pace of change would be a challenge for any commodity sector but the projections are especially daunting when one considers that, over those next seven or eight years, e-scrap will continue to change massively in nature through a continuation of the mega trend towards ever-smaller products and greater multi-functionality. This means, firstly, that an ever higher number of items must be processed to maintain recovery volumes at commercially viable levels and, secondly, that recyclers will require yet more sophisticated, and expensive, processing technology.

So the financial risk-and-reward equation becomes ever more difficult to resolve at a time when our general costs – notably for energy and labour – are increasing constantly.

And the complications do not end there. Even taking the example of Europe, where e-scrap management developments have been more substantial than in most other parts of the world, only 55% of waste electrical and electronic equipment (WEEE) is reported as officially collected and responsibly recycled. Latest figures (for 2020) reveal that just over 10 kg was collected per inhabitant in the EU – still well short of the target of 16 kg. In my home country of the Netherlands, we see a lot of WEEE in mixed scrap which should be sorted before treatment and sent to WEEELABEX-certified recyclers implementing CENELEC standards.

For many years, our industry has been urging the design of electronic products for ease of recycling. Of equal importance perhaps, new products should be designed with easy-access batteries to aid disassembly and minimize fire risk. Every business in every industry is asked to comply with health and safety standards to protect employees and the general public, so it seems counter-intuitive that our calls for urgent action on lithium-ion batteries are going largely unheeded despite the increasing number of battery-related fires.

As demonstrated in a compelling video shown at our meeting in Dubai last October, the impact of such fires extends well beyond the immediate danger to personnel and property – for example, to higher insurance premiums and to skilled workers leaving for other jobs when fire-hit plants shut for rebuilds.

At our earlier meeting in Barcelona, Dr Alvaro Rodriguez de Sanabria of VOI Technology confirmed that thermal and hydrometallurgical recycling options were available for spent lithium-ion batteries but that the value of the
“The financial risk-and-reward equation becomes ever more difficult to resolve at a time when our general costs are increasing constantly.”

extracted elements fell short of covering processing costs. His own conclusion was that extended producer responsibility represented the only solution to this challenge.

The Barcelona gathering also highlighted other threats to the delicate commercial balance of the e-scrap business. The necessary investment in Europe’s WEEE plastics recycling capacity is unlikely to be forthcoming if thresholds for persistent organic pollutants (POPs) continue to change. Lowering the thresholds for POP brominated flame retardants would drive more material into undocumented streams and thus hinder progress towards a more circular economy. It should be remembered that the average plastics share of electronic goods has leapt from below 20% to around 30% in the last decade alone.

The financial well-being of our businesses also depends on open trading routes; nothing should be allowed to hamper exports of WEEE and of components once end-of-waste criteria and proper treatment have been guaranteed. From the start of 2025, however, country-to-country shipments of e-scrap will be subject to a notification and certification system similar to that introduced for plastic in 2021. Fred Fischer of the US Institute of Scrap Recycling Industries warned in Dubai that this cumbersome Prior Informed Consent regime under the Basel Convention would dampen trade and potentially convince many companies that the business was no longer commercially viable.

Given all the challenges outlined above, it would be easy to conclude that e-scrap recycling is an unpromising way of earning a living. However, it is also an environmentally essential line of business that is best placed in the hands of an industry with decades of experience and expertise in this highly-specialized field.

**KEY FACTS**

**E-scrap market projections for the period to 2030:**

- Growth of **40%** to US$ **8.2 billion**
- Volumes to jump from **53.6 million tonnes in 2019** to **75 million tonnes**
Recycling force fighting dark side of environmental regulation

As IEC Chairman, my responsibility is to closely follow progress and setbacks in relevant regulation, to monitor what is under preparation and to keep the recycling industry informed about key developments and potential threats.

In this regard, the proposed revision of the EU’s Waste Shipment Regulation is receiving our closest possible attention at BIR because of its potential to bring disastrous consequences at the world level. How is it possible for the EU to take such a selfish position? How is it possible for the EU to tell our companies “I forbid you to sell your product to this customer or to that one”? How is it possible for there to have been such a rapid transition from roaring free trade globalization to blinkered protectionism, specifically in a Western World so traditionally rooted in entrepreneurial freedom?

I am afraid to say not much can now be done to modify the EU’s political sinking of the Free Trade Titanic. On one issue, however, we are continuing to fight particularly hard: BIR, together with its European member association EuRIC, is doing its utmost to expand the end-of-waste status of our industry’s products.

The notion of raw materials from recycling (RMR) has been explained repeatedly to the authorities as a key component of the Circular Economy. The raw materials we extract from waste are no longer wastes; I stress the word “extract” because many people still think that our job is to “treat” wastes to produce raw materials, but this is not the case. Waste is a resource within which there are some materials of interest to industry to use in substitution of mineral ores mined from the earth.

This highlights the full distinction in the legal status of “waste”, which is an outcome of human activity and has a potentially critical environmental impact. Raw materials from recycling, by contrast, are of a completely different nature and, once concentrated into a single material such as paper or steel, should no longer have any association with “waste” status. By essence, waste is an entanglement of many different materials whereas raw materials from recycling are above all mono-material; this should be clear enough to simplify end-of-waste designation.

Be assured that we are investing all possible energy to reinforce this end-of-waste concept. While already obtained for metals and glass, this must be urgently expanded to paper and polymers – two families of resources which are as equally critical as metals.

Of all the problems that I see interfering with our day-to-day operations, the most urgent relates to the multiple initiatives taken by the authorities to create Producer Responsibility Organizations (PROs). These began to emerge out of the “polluter-pays” principle in the late 1990s and have been multiplying worldwide in the last 15 years. Until now, these “collective” organizations have played a relatively mild role in the recycling business, focusing more on collection issues for end-of-life items than on anything else. Some of them have even helped to bring financial support to local authorities for collection operations.
The notion of raw materials from recycling has been explained repeatedly to the authorities as a key component of the Circular Economy. The raw materials we extract from waste are no longer wastes.

Over the last three years, however, the cards have been reshuffled by the push for decarbonization and the stress on raw material availability at the world level. These two problems are of overwhelming importance for manufacturers and suddenly we have seen a huge change in the policy of the PROs. Manufacturers badly need recycled materials and will do anything to get their hands on such resources because they are a huge source of CO₂ emission reduction. In the case of steel, for example, the saving is 1.5 tonnes of CO₂ per tonne of steel; emissions are 2 tonnes per tonne of steel produced via mineral ore processed in a blast furnace but only 0.5 tonnes when recycled steel is melted in an electric arc furnace.

PROs are now completely changing their strategy; we are even seeing manufacturers leaving PROs to set up their own organizations in order to capture recycled material one way or another. Unfortunately, this is fully acknowledged by some authorities, ignoring our calls to maintain a balanced structure which avoids full power resting with manufacturers because we know perfectly well that our industry will suffer as a consequence, just as small retailers suffer at the hands of large-scale distribution.

The basis of our democracies is freedom of enterprise. The members of our recycling federations can be assured that we will fight legally with all our strength to defend this freedom.
As BIR enters its 75th year, it can proudly celebrate many achievements, not least its constant pursuit and championing of global free trade in our recyclable raw materials.

Especially in the last forty years, through its enormous efforts and advocacy, BIR secured the abandonment of the post-WW2 commercial enslavement of export controls on recycled metals from the EU (or E.E.C. as it then was known). This seminal achievement was the foundation of global free trade of our raw materials, which has contributed so much to the prosperity and success of worldwide economic growth via its role as part of the international raw materials supply chain and the attendant strength and economic stability of the recycling industry around the globe.

Yet, as we celebrate this landmark milestone, the existential threats in many regions, and particularly in the EU, with impending misguided and egregious regulatory and statutory controls including export restrictions endanger once again the stability and viability of our members and the recycling sector, whose vital and legitimate rights BIR, with its company and national association members, determinedly defends and advocates.

In the context of these formidable challenges, the BIR International Trade Council (ITC) is at the forefront of this cross-commodities mission.

The ITC meets these daunting threats to our industry primarily through two major approaches.

In respect of direct action to confront regulatory impairment of our industry’s interests, the BIR membership, through its own officers utilizing a vast array of knowledge, experience, expertise, and professionalism, is constantly monitoring and crafting strategies and initiatives required to defend our industry’s wellbeing.

In articulating, interacting and exchanging views with the array of governmental, intergovernmental and NGOs in these matters, BIR is supported by the consummate diligence and professionalism of the BIR Secretariat and especially the invaluable work of Ross Bartley, Director of Trade and Environment, now reenforced by the exciting recent addition to our team of Ms Alev Somer as his Deputy.

In a world focused on messaging, the second vital prong of ITC’s role is promoting BIR’s activities, value, and leadership as the global voice of the recycling industry and pursing this as the primary influencer of this message. The vehicle for this objective is the increasingly regarded and celebrated TV chat-show formatted BIR series “The Challenge” – the show is uniquely a live and recorded broadcast free to air to capture the interest of both our members and all tangential audiences interested in recycling.

Through its lively and engaging format, The Challenge offers a blend that addresses and reviews crucial and immediate issues confronting our members and the
“In a world focused on messaging, the second vital prong of ITC’s role is promoting BIR’s activities, value, and leadership as the global voice of the recycling industry and pursing this as the primary influencer of this message.”

global Industry in a thoroughly non didactic fashion, providing our audience with a greater in-depth appreciation of topical concerns in a relatable and identifiable manner. The show’s initial review discussions among The Challenge team’s Three Amigos as they’ve become recognized – comprising myself as host ITC Chairman, along with co-anchor resident contributors Mark Sellier and Murat Bayram – provide engagingly experienced and expert insights.

The main features of the show’s three editions in 2022 have been a vast array of significant guests.

In March, The Challenge’s virtual edition presciently – actually a good couple of months ahead of the field of financial and MSM focus – addressed the impending threat of rising inflation and its impact on our members in The Three Amigo’s discussion with our guest, the renowned commodity expert Professor Philippe Chalmin.

The Challenge was a key feature part of the opening sessions at both our World Recycling Conventions in Barcelona and Dubai. The May marquee edition welcomed as its key guest the author and Bloomberg journalist Jack Farchy with his recently released business bestseller “The World For Sale”, focusing on the history and antics of the great commodity players. Given the controversy of the LME nickel crisis, it was indeed once again an utterly apt and highly lively session.

In October in Dubai, The Challenge featured special guest Chris Sheppard, CEO of the recycling titan EMR, his discussion with The Three Amigos producing fascinating insights into the combined issues of commercial and ESG facing the global recycling industry.

A much-appreciated addition to The Challenge’s live Convention specials represent the One Minute Hot Seat “takes” that round off the show – with varied and insightful contributions from numerous selected guests. In Dubai, this included a unique sneak peek for a global audience of John Sacco’s series “Repurposed”, greeting Susie Burrage in her new role as BIR Ambassadors Committee Chair and innovatively recognizing the enormous messaging contributions (not least via The Challenge’s productions) of our Secretariat with, in Barcelona, the guest contribution of BIR’s Communications Director Elisabeth Christ, and in Dubai, Michèle Noukam Kwandjeu, Communications and Social Media Manager.

The Challenge continues to provide essential informative and influential messaging in these demanding times, and achieves this not just compellingly, relevantly and vitally, but in a world that is frequently overwhelmed by severe and faux sanctimonious deliveries, with humanity and entertainment.
The BIR Special Committees deal with organisational and administrative matters concerning the general structure of the organisation.
Impressive numbers in Barcelona and Dubai

Organizing great events is not an easy task. They have to be planned, the right location found and the participants, speakers, exhibitors and possibly sponsors satisfied. Event managers must always be keeping an eye on all the details and be able to react quickly to any problems that arise.

Last year presented some specific challenges for BIR’s Convention team. Although the greatest impact of the pandemic had been left behind us, associated problems were still being encountered for those planning conventions: some hotels and conference centres were heavily overbooked because many companies and other associations besides BIR had a lot of catching up to do given that they hadn’t been able to stage meetings for over two years. Let us not forget that, even in the middle of the pandemic in 2021, we were able to hold a very successful meeting in Brussels only because the whole of the Secretariat paid close attention to every little detail.

Our Conventions in 2022 started with a gathering in one of our most regular destinations, namely Barcelona, and attracted an impressive 1300 registrations and almost 630 companies from 61 different countries, including recycling industry colleagues from every continent. At a time when we are seeing more and more evidence across the world of protectionism and nationalism, we can proudly state that the sustainability industry – represented by us at BIR – has a proven track record of bringing people together for frank but friendly and informative debate on one simple but crucial theme: how to save raw materials and market them worldwide.

In the past, the second BIR Convention of the year had always tended to be the smaller in scale and to attract a lower proportion of our global recycling family. However, the “green” transformation of our society has become so relevant that, in a volatile business like ours, it has become more important than ever before to come together to discuss the most important matters of the moment, such as how best to overcome the crisis conditions currently facing us. Compared to the May gathering in Barcelona, our Convention in Dubai last October delivered similarly strong attendance figures – but on this latter occasion from an even more impressive 63 countries.

Catering for such a large number of participants is no easy feat. In addition to an interactive stage set-up with fantastic speakers, moderators and panellists, we also need to provide areas where people can do business, where they can meet and talk undisturbed. Moreover, our attendees have come to expect exceptional events to welcome them to the Convention and to the city in which it is being staged, in which regard I am happy to report that, particularly in Dubai, the White Night-themed Welcome Evening was so well organized by our Convention team that participants were rapturous in their praise of it.
“Compared to the May gathering in Barcelona, our Convention in Dubai last October delivered similarly strong attendance figures – but on this latter occasion from an even more impressive 63 countries.”

As for the challenges confronting our sector, the energy crisis currently afflicting many parts of the world does not make the work of the BIR Convention team any easier. **Hotels and cities often look to adjust their prices after pre-booking** in such a way that the costs are no longer acceptable for our members. Therefore, we have not been in a position to announce the destinations for our 2023 Conventions as early as we would have liked because financial framework conditions had drastically changed. Of course, this has been beyond our control, but rest assured that we will always negotiate as far as possible to achieve the best deal for all of our attendees.

As you come to read this report, you will hopefully be experiencing yet another highly successful BIR World Recycling Convention and a splendid celebration of our global federation’s 75th anniversary. As with every new year, I look forward to welcoming you all again in 2023.
In 2022, we returned to larger-scale, in-person Conventions while at the same time maintaining our industry-specific communications via our established online platforms and channels.

**Social media continues to be a major focus** as a means of building BIR’s brand and communicating with all existing and potential stakeholders. The Communications team has worked tirelessly in this area and has **successfully increased our LinkedIn following to over 8000**; in 2021, the number was a mere 2000 although this was celebrated at the time as a milestone.

**Building a social media following is all about content** and, unless you are able to produce something viral, it is a slow and steady process. We have discussed which platforms are most appropriate for BIR to focus on with experts in the field and their conclusion is that we should **concentrate our efforts on LinkedIn** while not ignoring other platforms such as Twitter.

The Communications Committee arranged **social media training for Divisional Presidents, Committee Chairs, Past Presidents and other senior leaders**. The training covered the basics such as completing and updating a personal profile and sharing posts with some commentary, as well as the importance of tagging and how that functions. Please do remember to tag us @BIRWorld on Twitter and @Bureau of International Recycling on LinkedIn, and use the hashtag #BIRWorld when commenting on or sharing content.

In our endeavour to provide regular content to our members, we continued to produce **our live show “The Challenge”**, hosted by Michael Lion and supported by Murat Bayram and myself. In addition to one fully online feature in February with economic history expert Professor Philippe Chalmin, “The Challenge” was an integral part of the opening sessions of both our Conventions last year and was broadcast live to those who could not make it in person to Barcelona or Dubai.

In Barcelona, our guest was **Jack Farchy, energy and commodities journalist at Bloomberg** as well as co-author of “The World for Sale”. It was a fascinating discussion about an essential industry of which BIR members are a vitally important sector. In Dubai, our guest **Chris Sheppard, Group CEO of EMR**, explained how he aspired to motivate people to work in an industry that can make a difference and how he saw some of the regulatory challenges as opportunities for innovation. All sessions are available for viewing on the BIR website.

Our twice-yearly Conventions remain key events around which the Communications Department weaves its fine mesh of **branding, press releases, speaker information, videos, proceedings, event announcements**, etc., in collaboration with the BIR Convention team. Onsite, we carry out the important task of welcoming the media, both specialist and general, for whom we provide interview opportunities, important background information on the different commodity sessions and any other assistance they may need to report effectively on the wealth of information and data shared during the sessions.
“Communications are becoming more and more important to BIR in today’s climate in which those with competing interests use large budgets to argue against free trade in recycled raw materials.”

Throughout 2022, we produced a number of publications: world steel statistics, global paper statistics, the Shredder Safety Survey Report, the Membership Directory and multiple World Mirrors on non-ferrous metals, ferrous, paper, stainless steel/special alloys, plastics and the Latin America region, as well as the 2021 Annual Report. We also prepared and issued eight eBriefs, 35 press releases and posted over 100 news items on the BIR website, from which stemmed hundreds of tweets and LinkedIn posts.

In 2023, BIR’s 75th anniversary year, the communications team will continue to focus on delivering our key industry messages while also celebrating the organization’s growth and achievements in support of the recycling industry globally.

Communications are becoming more and more important to BIR in today’s climate in which those with competing interests use large budgets to argue against free trade in recycled raw materials. Fortunately for our members, the leadership of BIR is committed to allocating more resources – both financial and human – to supporting our existing efforts and expanding them.

I am grateful to Elisabeth Christ and Michèle Noukam for their specialist support to me in my role as Chairman of the BIR Communications Committee, but I am also appreciative of the input of Director General Arnaud Brunet and the entire secretariat in meeting our communications objectives. Thanks also go to my two “amigos” – Michael Lion and Murat Bayram – as “The Challenge” would not be the same without them, and finally to Tom Bird our President, Andy Wahl our Treasurer, the Executive Committee and Special Committee Chairs for your contributions and commitment to BIR.

Mark Sellier
Global Metals Network Limited (CHN)
Chairman Communications Committee
Our recycling family grows ever larger

With the world continuing its recovery from the worst effects of COVID, 2022 began with many countries easing or ending pandemic-related rules and restrictions. One of the most striking improvements has been the increase in vaccination rates which, among other benefits, has facilitated a return to international travel for all of us. As you will read in the report from Murat Bayram, Chairman of the BIR Convention Committee, this had a very positive impact on attendance figures for our Conventions last year in Barcelona and Dubai. **These major twice-yearly events are one of the main reasons companies become aware of BIR and then, in many cases, go on to join our world organization.**

Despite the many challenges of the past few years, including COVID, **BIR has seen a remarkable increase in membership to a total of 869 by the end of 2022, equivalent to an increase of nearly 200 over the previous year.** Reflecting BIR’s well-earned reputation as a truly global organization, these **members are drawn from 67 different countries around the globe** and include 36 national federations. Attracted by the many benefits of membership, BIR’s recycling family continues to grow.

These benefits include **broadcasting worldwide the crucial role played by the recycling industry in protecting our planet**, including in our lobbying of policy-makers and regulators. Millions of tonnes of recyclable materials are collected, processed and moved around the world each year, with thousands of recycling facilities and hundreds of thousands of locations.
“Despite the many challenges of the past few years, including COVID, BIR has seen a remarkable increase in membership.”

of people working together to achieve a proper and professional recycling result. In so doing, our industry cuts the requirement for extracting primary resources and is thereby responsible for a huge reduction in damaging carbon emissions.

BIR’s Membership Committee is devoted to continuously attracting new members from across the globe while maintaining the high standards and ethical requirements to ensure membership obligations are met in compliance with our world organization’s rules and statutes, thus building trust and confidence among members that they can communicate and trade safely with each other. BIR’s Code of Conduct ensures applicants meet the specific criteria to be eligible for membership. This careful selection process is why BIR is proud of the quality of its membership; likewise, members can be proud of being part of what is recognized as the global recycling federation.

With your support, we at BIR will continue to strive for success in overcoming the many challenges facing our industry. Together, we will reap the benefits of yet more successful twice-yearly Conventions and of our ever-growing influence on legislative developments affecting recycling, all of which will solidify BIR’s status as the world’s leading recycling federation.

Finally and very importantly, don’t forget that you — our members — are BIR! We need you and your support more than ever before. Therefore, if you haven’t already renewed your membership, please don’t delay.
Recycling is everybody’s business

What a joy it was to return to full, face-to-face Conventions – not once but twice in 2022. And it seems my sentiments were widely shared as members turned out in force to network once again with their international colleagues. BIR’s Ambassadors also enjoyed their first post-COVID, in-person meeting at the excellent Barcelona Convention in May after keeping up the Committee’s momentum over the previous two and a half years via Zoom meetings.

As normality returned following the easing of lockdown restrictions, Global Recycling Day on March 18 last year saw BIR Ambassadors orchestrating various recycling awareness campaigns in their respective regions. The continents of Asia, Europe, Africa and North America engaged with stakeholders and media channels, earning much positive publicity for our recycling industry. Notably, BIR Ambassadors in the Middle East organized for recycling yards in the UAE to hold up Global Recycling Day flags while their counterparts in India also arranged several facility-based events.

Such global participation is clear evidence of the recycling sector’s growing popularity and of the mounting recognition of its essential contribution to circularity goals. It is our duty as recyclers and custodians of this planet to convince all people to get involved in recycling as it is everybody’s business; everyone needs to be aware of the benefits of recycling and play their part.

Being an Ambassador for the world’s leading recycling association is not an undertaking that is taken lightly by Committee members. Dedication and commitment to promote and represent BIR in our respective regions are non-negotiable requisites – and, in this regard, BIR’s Ambassadors did not disappoint us in 2022. They worked in collaboration with all the BIR Committees, with major priorities being promotion of planned Convention venues, communicating through social media and representing BIR in various conferences across the different regions of the world.

This promotional activity has enticed more companies to express an interest in joining BIR and contact details have been shared continuously by Ambassadors with the Membership Committee, thus contributing, I believe, to our world organization’s exponential membership growth. It has been our pleasure to assist the Membership Committee in the recruitment of new members.

Under the leadership of my esteemed predecessor Salam Al Sharif, the Ambassadors Committee kept the BIR flag flying high with its strong promotion of both the Barcelona and Dubai Conventions, events which ultimately produced record attendances. It was in Dubai last October that I was honoured to be invited to take the Committee helm by BIR President Tom Bird and I will endeavour to uphold the high standard of leadership set by Mr Sharif. I am humbled that the
It is our duty as recyclers and custodians of this planet to convince all people to get involved in recycling.

Susie Burrage OBE
Recycled Products Ltd (GBR)
Chairwoman Ambassadors Committee

current BIR Ambassadors have agreed to continue under my leadership and am delighted Ibrahim Aboura of the UAE and Leopoldo Clemente of Italy have agreed to join the Committee.

In 2023, we will be continuing to promote BIR at various conferences and seminars, to assist new and existing members in our respective regions, and to look constantly to raise awareness of recycling and its benefits to the circular economy globally. We will reiterate at every opportunity that international trade in commodity-grade raw materials from recycling is essential to coping with national imbalances between supply and demand. Trade barriers will always be detrimental to recycling and therefore to the environment as a whole, and so we continue to highlight how free, fair and sustainable global trade is instrumental in achieving a truly circular economy and in helping to care for our fragile environment.

Thank you all for your support of BIR. I am looking forward to seeing you all in May at our Amsterdam Convention. In the interim, “Keep Recycling!”
Barcelona, 23-25 May 2022

Opening Session
- Tom Bird, BIR President

The Challenge – Special Convention Edition
- Michael Lion, Everwell Resources Ltd (CHN)
- Mark Sellier, Global Metals Network Limited (CHN)
- Murat Bayram, EMR, European Metal Recycling Ltd (GBR)
- Jack Farchy, Bloomberg News (GBR)

International Environment Council
- Olivier François, Galloo (BEL/FRA)
- Ross Bartley, BIR
- Alicia García Franco, FER – Federacion Española de la Recuperacion (ESP)
- Antoine Stilo, EuRIC (EU)

Non-Ferrous Metals Division
- Dhawal Shah, Metco Ventures LLP (IND)
- Tom Eng, Tomra Sorting GmbH (DEU)
- Inka Guixà, Lafarga (ESP)
- Susie Burrage, Recycled Products Ltd (GBR)
- Rick Dobkin, Shapiro Metals (USA)
- Murat Bayram, EMR – European Metal Recycling Ltd (GBR)

Paper Division
- Francisco Donoso, Dolaf Servicios Verdes, S.L. (ESP)
- Manuel Domínguez, Dominguez, REPACAR (ESP)
- Stein Ole Larsen, Norexeco (NOR)

E-Scrap Committee
- Jan Visser, Mirec Benelux, TSR-Remondis Group (DEU)
- Alvaro Rodríguez de Sanabria, Voi Technology (ESP)
- Ross Bartley, BIR

Plastics Committee
- Henk Alssema, Vita Plastics (NLD)
- Doug Woodring, Ocean Recovery Alliance (CHN)
- Max Craipeau, Greencore Resources Limited (CHN)
- Steve Wong, Fukutomi Recycling Limited (CHN)
- Sally Houghton, Plastic Recycling Corporation of California – PRCC (USA)
- Natalia Cruz Cayuela, Ferromolins, SL (ESP)

Textiles Division
- Martin Böschen, Texaid TextilverwertungsAG (CHE)
- Alan Wheeler, Textile Recycling Association (GBR)
- Maud Hardy, Refashion (FRA)
- Erik Koep, Worn Again (GBR)

Shredder Committee
- Alton Scott Newell III, Newell Recycling Equipment (USA)
- Ross Bartley, BIR
- Frederick Thoma, Keller Lufttechnik Benelux (Lybover AIR) (BEL)
- Martin Dörner, Ventilatorenfabrik Oelde GmbH (DEU)

Stainless Steel & Special Alloys Committee
- Joost van Kleef, Oryx Stainless BV (NLD)
- Robin Martin, LME (GBR)

Tyres & Rubber Committee
- Max Craipeau, Greencore Resources Limited (CHN)
- Martin von Wolfersdorff, Wolfsdorf Consulting (DEU)
- Robert Weibold, Robert Weibold GmbH (DEU)
- Sonia Megert, TRS Tyre Recycling Solutions SA (CHE)
- Emmanuel Katrakis, EuRIC – European Recycling Industries’ Confederation (BEL)
- Christian Lemke, Synthos (DEU)

Ferrous Division
- Denis Reuter, TSR Recycling Gmbh & Co. kg, Zentrale (DEU)
- Eric Niedziela, ArcelorMittal Europe (FRA)
- Cinzia Vezzosi, EuRIC (EU)
- Rolf Willeke, BIR
Dubai, 17-18 October 2022

Opening Session
• Tom Bird, BIR President

The Challenge – Special Convention Edition
• Michael Lion, Everwell Resources Ltd (CHN)
• Mark Sellier, Global Metals Network Limited (CHN)
• Murat Bayram, EMR – European Metal Recycling Ltd (GBR)
• Chris Sheppard, EMR (GBR)

Stainless Steel & Special Alloys Committee
• Joost van Kleef, Oryx Stainless BV (NLD)
• Robert Messmer, SMR – Steel & Metals Market Research (AUT)

Ferrous Division
• Denis Reuter, TSR Recycling GMBH & CO. KG, ZENTRALE (DEU)
• Sanjoy Kumar Ghosh, BMRM Steels Limited (BGD)
• Lee Allen, Fastmarkets (SGP)
• Salam Al Sharif, Sharif Metals Group DMCC (ARE)
• Rolf Willeke, BIR

International Environment Council
• Olivier François, Galloo (BEL/FRA)
• Emmanuel Katrakis, EuRiC (EU)
• Ross Bartley, BIR
• Alev Somer, BIR

Tyres & Rubber Committee
• Max Craipeau, Greencore Resources Ltd (CHN)
• Robert Weibold, Robert Weibold GmbH (AUT)
• Zaid Bdour, Gulf Rubber Factory (ARE)
• Abdullah Ahmed S Alqurashi, Global Environmental Management Services (SAU)
• Khaled Jamal Chaaroui, EPSCO Global General Trading (KWT)

Plastics Committee
• Henk Alssema, Vita Plastics (NLD)
• Xavier Lhoir, VALIPAC (BEL)
• Bashar Ehsan Gadawala, ALA International FZE (ARE)
• Sally Houghton, Plastic Recycling Corporation of California – PRCC (USA)
• Max Craipeau, Greencore Resources Ltd (CHN)
• Steve Wong, Fukutomi Recycling Ltd (CHN)
• Andrei Mihai Sofian, Rematholding Co. SRL (ROU)
• Mahmoud Al Sharif, Sharif Metals Group DMCC (ARE)

Non-Ferrous Metals Division
• Dhawal Shah, Metco Ventures LLP (IND)
• Fadi Awadalla, EGA – Emirates Global Aluminium (ARE)
• Abdullah EL Doukhei, Ducab Metals Business (ARE)
• Jurgen van Gorp, AURUBIS AG (DEU)
• Ibrahim Aboura, Aboura Metals (ARE)
• Sebastien Perron, LABRADOR RECYCLING, INC. (USA)

E-Scrap Committee
• Jan Visser, Mirec Benelux, TSR-Remondis Group (DEU)
• Fred Fischer, ISRI (USA)
• Stavros Mylonas, SEFLMS Dubai (ARE)

Paper Division
• Francisco Donoso, Dolaf Servicios Verdes, S.L. (ESP)
• Atul Kaul, WARAQ (SAU)
• Nishant Sahney, Gaurav Vipa Papers Pvt Ltd (ARE)
• Ranjit Baxi, J&H Sales International Ltd (GBR)
• Dominique Maguin, La Compagnie des Matières Premières (FRA)