ANNUAL REPORT 2020

BIR

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WORDS FROM THE **PRESIDENT**

Tom Bird
BIR President

When I wrote my words for last year's Annual Report, I was fairly confident that the year ahead would see some positive signs, and I was very much looking forward to the Convention in Istanbul and my first full year as BIR President. Well, I think it is fair to say things didn't quite go to plan.

What can we say about 2020? From a global perspective, it has probably been **the biggest challenge many of us have faced in our lives**. A global pandemic that still continues to cause havoc; a global economy that has suffered as a result; racial tensions throughout the world sparked by an incident in the USA; an American election with division the like of which we have never seen before; political turmoil from east to west; and of course, Brexit thrown in for good measure. Eventful certainly, but not necessarily in a good way.

As for our industry, the year was something of **a roller-coaster ride**. When lockdowns began to be implemented throughout the world, there was an immediate impact. Volumes dropped sharply as the supply chain dried up; many consumers of our materials shut their gates as production was suspended; and prices plummeted as demand for our materials fell dramatically.

It was an uncertain and challenging time for all of us, with a number of companies closing yards. But as we have said many times, **our industry is resilient**. There has been no better example of this than in 2020: we adapted and cut our cloth accordingly; we introduced COVID-safe working practices and opened up yards once again. Demand started to pick up and prices began to improve, obviously helped by the pressure in the supply chain. **We finished 2020 with a strong market** and with many companies reporting they had made up the ground that had been lost during the first few months of lockdown.

The ferrous market was also helped by the announcement that China would allow certain scrap to be imported. While only a token amount of business was actually done, it did help sentiment. In addition, the announcement by China that it aims to be carbon neutral by 2060 bodes well for scrap as a vital raw material.

From the moment lockdowns were implemented and it was clear the BIR Convention in Istanbul would have to be cancelled, **our world organization stepped up to the plate**. Regular calls with national associations were set up so we could communicate detailed, up-to-the-minute information to our members. BIR was also instrumental in promoting **recycling as an "essential business"**, enabling it to operate during lockdowns. BIR worked tirelessly with our colleagues from the Material Recycling Association of India and the country's Inland Importers and Consumers Association, writing to Indian government ministers (including Prime Minister Modi), the Indian port authorities and shipping lines to **help resolve the container congestion crisis** directly affecting our members. Behind the scenes, BIR continued with its **vital advocacy work**, protecting the interests of recyclers on a whole range of issues, not least ensuring the free trade of our materials throughout the world. With Conventions being an important source of revenue for BIR but, more importantly, a vital part of BIR's service to members, the Secretariat quickly organized **a hugely successful, free-of-charge Global eForum** taking place from June 2 to 23. An emerging second wave of the pandemic dashed our hopes of resuming face-to-face events in October and so, once again, the BIR team organized **a series of excellent webinars over a five-day period**. Regular online meetings continued to be held with national associations and advocacy work remained top of the agenda.

At the time of writing this report, many of us are in the grip of a much more virulent wave of the pandemic. Lockdowns have been introduced once again throughout the world. Many events that we thought would be going ahead this year now look a lot less likely. Some of us by now will also have had first-hand experience of the COVID virus and of losing family members and friends as a result. To all of those people, **I offer my heartfelt condolences**.

Despite the ongoing challenges, we should remain optimistic. A number of vaccines are being rolled out that should relieve the pressure in the months ahead. Demand will improve as economies start to move once again. We see **China forecasting 8.5% growth for 2021** – this from the only major economy to register a higher GDP in 2020 (preliminary estimates suggest +2.3%).

" Our industry is resilient. There has been no better example of this than in 2020."

While it is good news that demand in China is set to increase and that its economy is near to normal again, all of us should also look to support our domestic economies as best we can during the years ahead while maintaining our ability to trade freely at a global level.

BIR, as the global representative of the recycling industry, will continue to show leadership and deliver value for its members. We will look to continue to **increase communication** with our members through a number of **online initiatives**, including the excellent new series called **"The Challenge"** which had its first session on January 14 2021. BIR will be organizing a very full online Convention for May 2021 and is confident of putting together a face-to-face event for October.

It has been a challenging time to be BIR President. As soon as the virus allows, however, I hope to become more than a "virtual President" who is only seen online. I would like to **thank each and every one of our members for their continued support** and to confirm that, as your President, I remain committed to leading BIR through this challenging period, ensuring we deliver the best service to all of you.

Stay safe everyone!

BIR'S FINANCIAL SITUATION

Andy Wahl
TAV Holdings Inc. (USA)
BIR Treasurer

The year 2020 is behind us now and, with the help of vaccines, we all look forward to getting back to a new normal in 2021.

Little did we know when we started our first budget projections in 2020 that a freight train would hit us. Last year posed more challenges than we could have ever imagined. From a fiscal side, we had to learn to adjust and be **flexible with our projections and budgets**. I am very happy to report, though, that even in these tough times, you – our members – and our team in Brussels never wavered from offering their dedication to the message that "Recycling is Essential" or from supporting the BIR world recycling association.

Standing our ground as one has allowed us to move forward and, with **control of our expenditure** and your **membership loyalty**, we have manoeuvred the ship through rough waters. 2021 promises to be a better year in more ways than one as we look forward to meeting safely again in person at some point during the year.

Due to the untiring work of our Secretariat and Executive Committee, under the leadership of our President Tom Bird and strongly supported by our Director General Arnaud Brunet, we were able to control our expenditure and to come in lower than our final budget for the year 2020. That is what I call **a strong team effort** despite all the circumstances, such as the COVID-related postponement of our Conventions and working from home for the most part.

Indeed, BIR was able to offer successful virtual programmes for its members, while also supporting the national member associations with monthly video calls, to provide membership services and offer any possible help that the BIR could deliver to you in these unprecedented times.

We will continue to work hard for you, our BIR members, to deliver interesting programmes and services, in person or virtually, but most importantly to **support you in spreading the message that we are essential**. We will count on you in 2021 and I assure you that you can count on us too. We will be prudent again with our expenditure but will not shy away from necessary investments to continue to improve our services for a better future.

May 2021 be a prosperous and healthy year for all of you and thank you all for your commitment in continuing to be part of this great organization.

Arnaud Brunet
BIR Director General

DIRECTOR GENERAL'S REPORT

Drafting a report for the past year is generally a straightforward process. But I must say that this one is particularly difficult for me. 2020 was such an extra-ordinary year that I simply do not know where to start and what to say that has not already been said many times over.

When looking back at 2020, it is hard to believe that we had started it with a solid sense of optimism, anticipating a year of opportunities, growth and stabilization after years of uncertainty. BIR's plans were clear: grow our membership; expand geographically; provide top-class global Conventions offering unique networking and business opportunities for our members; increase communications and services to members; enhance our advocacy on behalf of the industry, etc.

When the pandemic started to spread across Asian borders in early 2020, we still believed this "bad flu" would be easily contained, cured, controlled. Despite the stress caused by the risk of being quarantined, our President Tom Bird and I decided to fly to India to meet with our colleagues in the MRAI and IICA, initiating what we believed at that time would be a number of important international meetings throughout the year: Russia, the USA, Turkey, the UK, the UAE, China, etc. None of this was to happen, and finally we had to face up to **a global crisis** that experts described as unprecedented since the Second World War. As I write these lines, many of us are still under the constraint of measures restricting our ability to travel, do business and simply enjoy a normal social life.

When it became obvious that we would have to live through a prolonged crisis, our main concern at BIR became to ensure that, whatever the constraints, we would absolutely continue to **provide our members with the services they need**, if not more. Very quickly, despite the legal obligation to work from home, the BIR Secretariat adopted working systems that have made it seamless for our members. My message to my team has been simple and clear: we are not going to operate only "as usual", but **we shall deliver even more**. They have all worked hard to achieve that goal, and I thank them sincerely.

BIR has been standing firmly by its members in this difficult period, supporting them more than ever before, reinventing its way of operating when necessary. **Crises are accelerators of change** and we have continued to modernize our communication tools, have increased our presence on social media, and have adapted the ways in which we interact with our members and other stakeholders. Many of these changes have happened behind the curtain, but they were vital in facing up to the situation. **Our organization is now fitter than ever**, and even if we missed meeting you in person at our World Recycling Conventions, we were able to meet virtually and share an incredible amount of information during our Global eForums in May and our World Recycling Convention Week in October. We have also

"With a strong determination, it is now time to look ahead and decide what our future will be."

continued to publish **highly-relevant reports and data**, thus providing useful tools for our members and reference works for the industry as a whole.

Of course, 2020 was hard from a financial point of view and we sorely missed our Convention revenue. But thanks to the incredible loyalty of our members and very tight cost controls, we have been able to **limit the financial impact** and maintain our investment capacity. In summary, our finances remain solid.

Also, we have not paused our advocacy mission; on the contrary, BIR has been very vocal in various international fora and with many organizations in order to protect the interests of our members. When it was necessary to have our activities recognized as "essential" or when it was vital to unlock port-related problems in India, we have acted strongly, swiftly and with success. Many of those **actions were co-ordinated with our National Association members**, and because of – or thanks to – the pandemic, we have further tightened our relations and co-operation with them.

2020 was a year we all want to forget, but most certainly we will keep in our hearts and thoughts those who suffered as a result of COVID. **I want to express my deepest sympathy** – on behalf of everyone at BIR – for those who have lost loved ones, dear friends and valued colleagues during the pandemic. And to all those among you who are still enduring the worst ravages of this terrible virus or who are now trying to piece together your lives and businesses, I send you my sincerest best wishes for a brighter future.

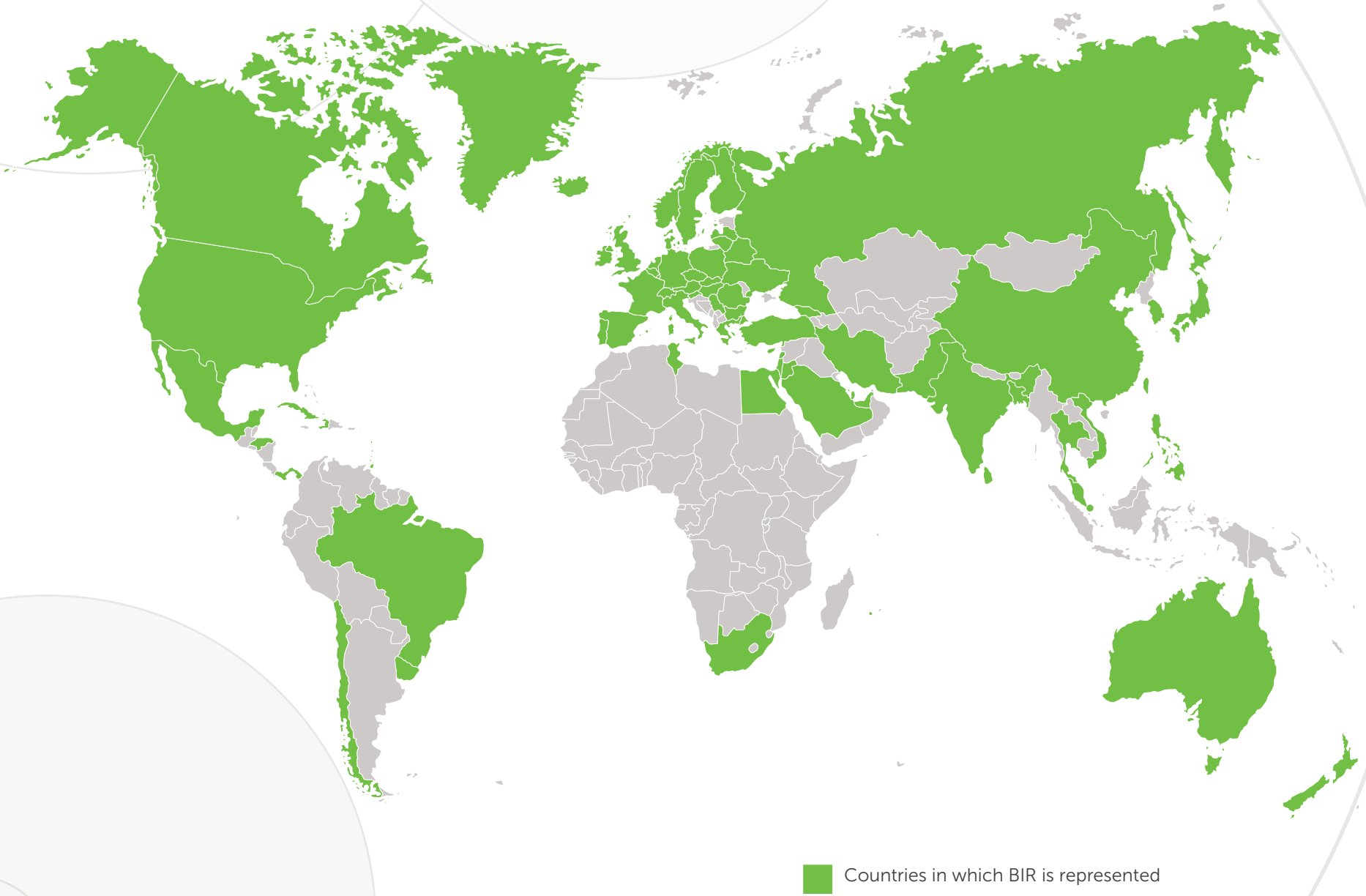
In these difficult times, rest assured that your Secretariat is working hard – harder than ever – to deliver the services you need. We are grateful for the strong support we receive from our leadership – your President, your Treasurer, your Executive Committee, your Ambassadors and all the Presidents and Chairmen of our Divisions and Committees – and we are confident that, together, we form **the best team to face up to the various difficulties** and to prepare for a successful year.

With a strong determination, it is now time to look ahead and decide what our future will be. We noted **some positive signs from the markets** at the end of 2020, with still-low volumes but better prices. We all anticipate that the first half of 2021 will not be very different from the latter months of 2020, but once the various vaccines have been delivered, we can hope that our life will progressively resume (a new) normality. It is with that **new optimism** that we now look ahead.

The geography of recyclables is changing, becoming probably more regionalized, except for products of higher quality. The **call for quality** that we have been supporting for some years now will become more vital than ever. BIR will continue to make sure that the voice of the global recycling industry is heard when regulators draft the rules that impact our businesses. We will offer new content and communication tools to our members so that they remain connected and informed with regard to the latest news and trends. And last but not least, **we will meet again**. I am confident that we will be able to have an in-person Convention this year, and we at BIR are already preparing for that.

We are looking forward to meeting you again in 2021.

MEMBERSHIP SPREAD 2020



Western Europe

Austria
Belgium
Cyprus
Denmark
Finland
France
Germany
Greece
Italy
Luxembourg
Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
United Kingdom

Russia & Eastern Europe

Belarus
Bulgaria
Czech Republic
Georgia
Hungary
Latvia
Lithuania
Poland
Romania
Russia
Serbia
Slovak Republic
Slovenia
Ukraine

Asia

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

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

North America

Canada
Panama
USA

Australia & Pacific Rim

Australia
New Zealand

Africa

Egypt
Reunion Island
South Africa
Tunisia

MEMBERSHIP HIGHLIGHTS

More than 700 BIR Members all over the World!

31 New Members in 2020

37 National Federations

70 Countries

More than 40% Members outside the European Continent

LIST OF **BIR MEMBER FEDERATIONS**

AUSTRIA
- Austria Recycling

BELGIUM
- DENUO – Belgian federation of the waste and recycling sector

BRAZIL
- INESFA – Brazilian Association of Iron and Steel Scrap Companies

BULGARIA
- Association of Recyclers and Traders of Second Hand Clothes (ARTSHC)
- 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)
- China National Resources Recycling Association (CRRA)

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 Sekundärrohstoffe 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)

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

- Organizaţia Patronală Şi Profesională „REMAT"

RUSSIA

- National recycling association „RUSLOM.COM"

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.

Greg Schnitzer
Sims Metal Management Global Trade Corporation (USA)
President Ferrous Division

FERROUS DIVISION

For many years, the recycling industry has presented a vast array of reasoned, well-substantiated arguments to illustrate its massive economic, environmental and social worth. The message has not always struck home with policy-makers and legislators, so it is particularly instructive to note that we continued to function throughout the pandemic because we are fundamental to sustaining a manufacturing sector deemed essential by those same policy-makers.

The recycling industry has stuck to its task during the pandemic, although not always at 100% capacity and also not without encountering many bumps in the road. There were restrictions on the way we were allowed to operate; there was the painful process of laying off valuable members of our workforce; and there were inevitable transportation problems as **global movements came under stricter control** in a bid to stem the spread of the virus. Adoption of unfamiliar ways of working included a temporary halt to those personal, face-to-face meetings which have always characterized our industry.

And yet, **the recycling industry quickly adapted to these new circumstances** and simply did what it has always done: got on with the job. It should make us all proud to reflect on the fact that our industry has played its part in maintaining the world economy's impetus at this difficult time.

2020 was a remarkable year in so many ways, not least **the speed of recovery in China**. Preliminary data from its National Bureau of Statistics indicate that, despite COVID and all the related tribulations, the country still managed to record 2.3% GDP growth last year. And one of the most visible signs of this growth was that, following the onset of the pandemic, its **steel industry regained momentum faster** than any other in the world. China's crude steel production not only exceeded 1 billion tonnes, but smashed through this barrier on its way to a prodigious 1.053 billion tonnes and an increase of 5.2% over 2019. Crude steel output in the rest of the world fell around 8% to 811 million tonnes.

For our sector, of course, the scale of the crude steel production increase in China has not been reflected in the country's overseas purchases of ferrous scrap because of **import restrictions**. But are we about to see a significant change in this regard? In December 2020, the government of the world's largest consumer of steel scrap announced **new standards for "recycled iron and steel raw materials"** which would permit imports meeting certain standards.

The potential ramifications for our markets are obvious. According to figures collated by our esteemed Statistics Advisor Rolf Willeke, **China's steel scrap consumption soared 15% in 2019** to almost 216 million tonnes and was on course to grow again in 2020: the cumulative total for January-September last year of 155.2 million tonnes was only 1% short of the corresponding figure for 2019 despite a relatively slow first quarter in which **China consumed 41.53 million tonnes**.

A Chinese government statement about this import-related change recognizes the **role of scrap in the eco-friendly development** of its domestic steel industry. At our BIR Ferrous Division webinar last October, guest speaker Ian Roper of Shanghai Metals Market pointed to massive increases in the

" The recycling industry quickly adapted to these new circumstances and simply did what it has always done: got on with the job."

country's domestic steel scrap generation and to its electric arc furnace capacity. Renate Featherstone of Wood Mackenzie told our June eForum that the integrated route would remain China's main source of steel in the next two decades but that her company's base-case scenario suggested **scrap could still account for 33-35% of the global steel industry's metallics requirement by the year 2040, rising potentially as high as 47%**.

With steelmakers under mounting pressure to adopt environmentally cleaner production methods, Renate added that the first logical step to reducing harmful emissions was to **recycle and reuse all available scrap**. This view dovetails perfectly with a study conducted on behalf of German steel scrap association BDSV which concluded that use of steel scrap in Europe rather than the ore-based steelmaking route **reduces climate change costs** by up to Euro 20 billion per year. If we are serious about inducing **a greener industry** approach, the argument goes, then such savings should be reflected in the raw material pricing mechanism.

Recycling is integral to the renewed **"greening"** of our planet. It was a word much used in 2020 but one which certainly applies to our industry: essential.

Key Facts

China's share of global crude steel production:

2018	50.9%
2019	53.3%
2020	56.5%

Turkey remains world's leading steel scrap importer:

16.134 million tonnes imported in January-September 2020 (+14.9% year on year)

scan for more information

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

NON-FERROUS METALS DIVISION

Three or so years ago, China was established as the go-to outlet for many non-ferrous scrap exporters. Traders had become accustomed to the country's distinctive systems and had been successful in nurturing strong and mutually-beneficial links with the country's customer base.

All was to change, however, with its government's announcement that **imports of "solid waste"** – a sweeping category that unfortunately captured our own raw materials – would be banned with effect from December 31 2020.

Last year, China approved **import quotas** for 882,697 tons of copper scrap and 821,519 tons of aluminium scrap. In 2017, by comparison, China's copper scrap imports had amounted to 3.56 million tons or 64% of its supply, while its overseas purchases of aluminium scrap were close to 2.2 million tons.

The step-by-step, quota-based reduction in imports over two to three years provided our industry with **valuable time to explore alternatives**. Also, it gave an opportunity to organizations like BIR and particularly our member association in China, the CMRA, to **maintain a dialogue with government officials** and seek outcomes that would enable scrap metals to reach China's still-hungry consumers.

Last year, thankfully, brought good news. The Chinese authorities announced a **reclassification** permitting the importation of materials for recycling if they met certain **specified standards**. Copper, brass and cast aluminium alloys have provided the template for this new system.

The reclassification process confirms China's ongoing requirement for secondary raw material imports to supplement domestically-generated metal units. In addition, it shows China's eagerness to promote its own recycling industry, for which the country's latest Five-Year Plan for 2021 to 2025 specifically targets steady growth and increased efficiency. And on a positive note for traders around the world, the Plan also makes clear **China's desire to continue to strengthen co-operation with foreign countries**, enterprises and international industry associations.

Overlaying developments in China and all other key events for our sector last year was, of course, the COVID pandemic. Even though **recycling was rightly designated an essential**, strategic industry in many parts of the world, our day-to-day activities were still turned upside down by the rapid spread of the virus and the response measures put in place. Lockdowns of varying levels of severity downshifted world economies into first gear and made business life even more challenging than before.

As we heard at the BIR Non-Ferrous Metals Division's eForum in June, more than 40 million US citizens had lost their jobs in just 10 weeks. Unemployment rates in some countries soared as high as 25% and, unfortunately, many of our own companies were forced to take the painful decision to lay off valued members of their workforce. Another impact of the lockdowns was to stem the flow of material into yards; for example, **estimates of metal scrap availability in May were just 50% of the norm for Italy and Spain**. And in India, the suspension of normal life meant that, for the first time ever, zero automotive sales were recorded in April.

"The reclassification process confirms China's ongoing requirement for secondary raw material imports to supplement domestically-generated metal units."

But even at that June eForum, the **resilience of human activity** was already beginning to show through. Our guest speaker Eugen Weinberg of Commerzbank pointed to the recent spike in China's business activity index while demand for scrap in Asia was showing distinct signs of recovery. By the time of our webinar in October, we learned that Asia's recyclers were operating at quite **high production levels** because of particularly strong demand from China. Astonishingly, given the effects of COVID, it was suggested that the Chinese economy would still record growth in 2020. In India too, the secondary non-ferrous metals sector had rebounded despite ongoing concerns over COVID infection rates.

To date, the **business resurgence** in Asia – especially South East Asia, India and Pakistan – has provided the main spark for a rally in the non-ferrous metals markets, led by copper whose LME cash price had fallen close to US$ 4600 per tonne by late March but ended 2020 at upwards of US$ 8000. With a number of highly-effective vaccines now emerging and with vaccination programmes receiving priority status in many countries, we have some justification for hoping that the recovery will spread far wider in 2021 and that this year will be far brighter than its predecessor.

Key Facts

China's scrap import quotas in 2020:

882,697 tons of **copper scrap**

821,519 tons of **aluminium scrap**

China's scrap imports in 2017:

3.56 million tons of **copper scrap**

2.17 million tons of **aluminium scrap**

Chinese estimates: Domestic recycled non-ferrous metals output in 2025:

Copper 4 million tons
Aluminium 11.5 million tons
Lead 3 million tons
Zinc 1.5 million tons

scan for more information

Martin Böschen
TEXAID-Textilverwertungs AG (CHE)
President Textiles Division

TEXTILES DIVISION

There has probably never been a time in the past when we have entered a new year with such reduced – but nevertheless realistic – expectations. Owing to the unremittingly brutal nature of 2020 and the world's continuing struggle against COVID, 2021 was always likely to bring only incremental improvements in business conditions without ever permitting a return to pre-pandemic levels.

During last year's divisional eForum and webinar, I warned that **the textiles recycling industry could not expect to return to 2019 activity levels for at least 18 months to two years**. This view chimes with those expressed by experts addressing BIR's Keynote Session in October: neither Stefan Schilbe of HSBC Germany nor Prof. Philippe Chalmin of commodity research specialist CyclOpe anticipated such a recovery until 2022, and potentially even 2023.

The early months of the pandemic brought **a steep decline in our business worldwide** as many retail outlets were forced to close and processing operations became more restricted, leading initially to a **huge increase in inventories** of both raw materials and sorted goods, and thus a **substantial decrease in prices**. Around the world, the traditional mechanics of collection, sorting and sales became impaired and, at times, collapsed completely.

Although demand and payment levels for sorted goods had showed some improvement by the time of our October webinar, prices were still 15-25% lower than at the start of 2020, while **demand for recycled goods had witnessed no improvement**. Even late last year, many sorters were still working at reduced capacities while their stocks of originals were typically 50% to 100% higher than the seasonal norm. We have also been forced to contend with regular staff shortages owing to illness, self-isolation and parenting requirements in light of school/kindergarten closures.

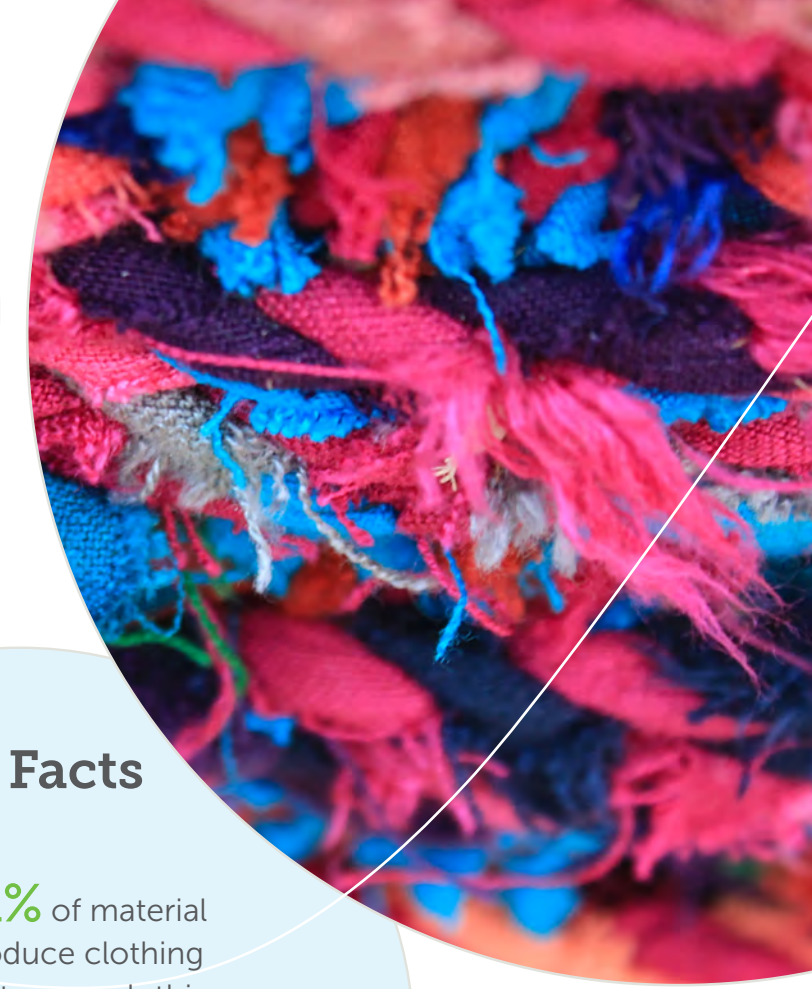
Goods continued to flow into the export channel but, again, not at pre-COVID rates and values, and a lack of shipping containers did not help our business cause. In March, we were also hit by Kenya's virus-related import ban on used clothing and textiles although, thankfully, this was lifted five months later.

The pandemic stretched our resilience and our resources at a time when we were already facing damaging trends, such as the negative impact of fast fashion on quality and therefore on the proportion of marketable second-hand textiles. In truth, **we need to be smarter** about fashion to ensure: clothes are worn for longer; **recyclability is considered at the design stage**; and less waste is generated. In line with the waste hierarchy forever supported by BIR, recycling is part of the solution – and a very important part – but **waste reduction** is critical too.

It is against this backdrop that the European Commission has ordered the publication in 2021 of a comprehensive strategy aimed at **boosting the circularity of textiles**. BIR representatives are actively involved in key discussions towards this goal, such as the first Policy Hub workshop which focused on extended producer responsibility (EPR).

This debate was continued at our eForum and webinar last year. In June, Mauro Scalia of European apparel and textile confederation EURATEX argued that EPR schemes should value different textiles that may need different

“ The pandemic stretched our resilience and our resources at a time when we were already facing damaging trends.”



recycling routes, and should avoid detrimental unintended consequences. And Maud Hardy of France-based Eco TLC suggested EPR made sense only if integrators of recycled materials could be connected with the manufacturers of those materials.

At our October webinar, EuRIC’s Emmanuel Katrakis contended that **the textiles strategy should champion EPR** so as to support a proper infrastructure and modulate fees based on textiles’ reusability, recyclability and recycled content, while also incentivizing reuse and incorporation of recycled fibres into new products. In line with waste hierarchy thinking, Hilde van Duijn of Netherlands-based Circle Economy stressed that the priority should not be recycling but rather ensuring products were used more and for longer. As she argued, it is essential that the end-of-life value chain – and not just brands and producers – are at the table when these issues are under discussion.

So while the impacts of 2020 will be with us for some time to come, we have no time to dwell on what has happened and on what we cannot affect. We at BIR, and we as an industry, **need to look to the future** so as to ensure that recycling and **recyclers play the most active part possible** in the new future for textiles that is currently under discussion.

Key Facts

Less than 1% of material used to produce clothing is recycled into new clothing

EU separate collections of textiles in 2020:

Between 1.6 and 2.5 million tonnes

scan for more information

Jean-Luc Petithuguenin
Paprec Recyclage (FRA)
President Paper Division

PAPER DIVISION

For some time, we had known that 2020 was going to be a watershed year for the recovered paper industry across the globe. China had served notice several years earlier that, on the final day of last year, it would halt imports of all materials falling into the category of "solid waste".

In its heyday as an importer of recovered fibre, China had bought in upwards of 30 million tonnes per year from a host of countries dotted throughout the world. In 2020, recovered paper import quotas approved by the Chinese authorities had dwindled to just 6.7 million tonnes. Although supplier nations had received several years' warning of the import changes to be made by China, last year was to provide the exclamation mark to **this market-altering shift in policy**.

As 2020 finally dawned, however, few if any of us could have imagined that we were about to take our seats on one of the **wildest roller-coaster rides in the industry's history**. Mainly as a result of the combination of China's approaching import ban and the COVID-19 pandemic, the markets entered a state of almost constant churn: demand and prices headed sharply higher and then steeply lower throughout most of the year. The level of unpredictability was so exaggerated in 2020 that even the most experienced of industry professionals have been left struggling to predict what 2021 might hold.

Last year began with a **continuation of the recovered paper market trends** seen in late 2019: difficulties in finding adequate markets for all the material available to sell, resulting in **heavy pressure on prices**. But then COVID muscled its way into the spotlight: as severe lockdowns were imposed around the world, offices and industries shut their doors and economies stalled. Collection rates went into decline for a number of grades, notably deinking for which recovery rates remained low until the second half of 2020. For the lower grades, conversely, **the year brought a surge in supply** as pandemic-related restrictions forced the closure of many non-essential retail outlets and prompted a sharp swing to shopping online – the so-called "Amazon Effect".

On the demand side, it was **a case of either feast or famine**. From relatively low demand in the first quarter of 2020, mill orders for recovered paper surged to record highs in the tumultuous early weeks of the pandemic's global spread; by the end of the second quarter, however, demand plumbed the depths once again as our mill customers had built up substantial stocks. The year ended with one more twist as demand once again gathered a strong momentum, reducing mills' stocks to almost zero as 2020 drew to a close.

As mentioned above, Europe, North America and several other parts of the world had been able to rely for many years on China as an outlet for much of their recovered paper surpluses. With the knowledge that this option was to be removed, exporting nations have spent the last two or three years **seeking alternative outlets for this excess material** which, in the case of Europe, amounts to more than 8 million tonnes a year.

During the BIR Paper Division webinar in October 2020, a panel of experts considered not only the great strides already made towards offsetting the loss of recovered paper orders from China, but also

"The level of unpredictability was so exaggerated in 2020 that even the most experienced of industry professionals have been left struggling to predict what 2021 might hold."

the need for further developments to account for the remaining surplus. Indeed, it is encouraging that, in Europe's mill sector alone, an additional 2 million tonnes of new capacity is scheduled to come on stream in 2021.

Also welcome is the **widespread research activity** aimed at **developing new markets** for paper. In this context, Gilles Lénon and Fabienne Vercelli from the Centre Technique du Papier in France gave details at our October 2020 webinar of two emerging barrier technologies – chromatogeny and MFC wet lamination – which have the potential to extend paper and board usage within the gigantic and ever-growing packaging sector.

In 2021, **demand for recovered fibre appears certain to remain high** as new applications and capacities continue to be developed. It is equally certain, however, that 2021 will see us all taking another turn on the roller-coaster.

Key Facts

Chinese imports of recovered fibre totalled **24.2** million tonnes in 2017

China's recovered fibre import quota was **6.7** million tonnes in 2020

scan for more information

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YOU ARE BIR

Thank you for your support in 2020!

Joost van Kleef
Oryx Stainless BV (NLD)

Chairman Stainless Steel & Special Alloys Committee

STAINLESS STEEL & SPECIAL ALLOYS COMMITTEE

The stainless steel industry had entered 2020 in reasonably confident mood following the previous year's record production of 53.2 million tonnes and a relatively healthy demand outlook. That was the recollection of guest speaker Natalie Scott-Gray of INTL FCStone Ltd at our BIR Stainless Steel & Special Alloys Committee eForum in June last year.

By then, of course, she and the rest of the world knew that 2020 was going to be unlike any other year we had ever experienced, with **the COVID pandemic creating many difficulties and challenges for the stainless sector.** As fellow guest speaker Jason Schenker of Prestige Economics pointed out, many key consumers of stainless steel – such as aerospace – were unlikely to see a rapid rebound in sales while even the meteoric rise of electric vehicles would not be helped by a low oil price.

Challenges for the scrap sector were not in short supply in pandemic-hit 2020. Just some of these were listed by my fellow board member Doug Kramer at our webinar in October last year: difficulties with transportation and inventory management; finding sufficient qualified workers; volatile commodity pricing; worsening credit insurance availability; squeezed cash flows; and reduced capital spending.

Other factors making 2020 a difficult time for our sector included **India's general push towards reducing its reliance on imports**, including stainless scrap of which it has long been a major international market player. Leading producer Jindal Stainless announced, for example, that it had already cut the imported share of its raw material needs from 65% in 2017 to around 45% and was expecting to trim this figure to 35% during the course of 2021.

Further to the detriment of scrap, there was evidence last year – notably in parts of Asia – of **cheap stainless slab being imported from Indonesia rather than being produced domestically**. In other words, product made from stainless scrap was being replaced by one entailing perhaps five times more carbon dioxide emissions. This would seem to be a clear contradiction in these times when politicians are striving for "greener" industrial growth.

Stainless steel has one of the smallest environmental footprints of all engineering materials, not least because it can be recycled endlessly and without any loss of quality. A study conducted by the Fraunhofer Center for Economics of Materials on behalf of German steel scrap association BDSV concluded that climate and environmental costs avoided by adopting the scrap route to stainless steel production could be as high as Euro 502 per tonne. What excellent reasons for promoting the greatest possible use of scrap.

According to the International Stainless Steel Forum, **stainless and heat-resisting steel melt shop production was hit hard by the pandemic in 2020**. Output worldwide tumbled to little more than 11.5 million tonnes in last year's second quarter – and yet China's production was already recovering by that stage.

“ Stainless steel has one of the smallest environmental footprints of all engineering materials, not least because it can be recycled endlessly and without any loss of quality.”

Indeed, it was predicted at our webinar in October that **the combined share of global stainless steel production held by China and Indonesia was already around 68% and would climb to more than 70% in 2021**. In what was a welcome dose of normality in an otherwise abnormal year, this forecast came from a regular contributor to our Conventions, namely Markus Moll of SMR GmbH – Steel and Metals Market Research. He also anticipated that this China/Indonesia share would begin to plateau in the years to come.

Perhaps more encouragingly, Mr Moll told us that **the global decline in stainless steel consumption was on course to be limited to just 4% in 2020** – thanks in large part to growth of around 3% in China – and that this would be more than offset by **an 11% surge in 2021**. We know that 2021 will be another difficult year for the many reasons outlined above, but at least there are also more positives from which we should draw encouragement.

Key Facts

Using **one tonne** of stainless steel scrap saves 4.3 tonnes of **CO_2 emissions** in stainless steel production (Fraunhofer study)

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Henk Alssema
VITA Plastics (NDL)
Chairman Plastics Committee

PLASTICS COMMITTEE

During our BIR Plastics Committee webinar in October last year, my fellow board member Sally Houghton used the entirely appropriate phrase "perfect storm" to describe the combination of factors that had blown the recycling sector way off course in 2020. On top of ever-increasing regulation (and the promise of more to come at the start of 2021), our markets were suddenly confronted not only with a pandemic but also with far cheaper competition from virgin plastics as a result of nosediving oil prices.

The slump in oil, triggered by the demand impact of the pandemic and by a **production/price dispute between Russia and Saudi Arabia**, was unlike anything most of us had witnessed during our working lives: famously, the benchmark WTI crude oil price had traded as low as minus US$ 40.32 per barrel at one point in late April 2020.

Demand for recycled plastics had already been weakened hugely by the pandemic and so the slide in virgin plastic prices left our sector to contend with a steep fall in the value of our products, far fewer orders, massive stocks and inevitable liquidity problems. As pandemic-related restrictions began to bite around the world, there was also an **inevitable decline in collection volumes**.

Demand and prices for recycled material mounted a recovery as 2020 progressed, boosted by an improvement in oil values. However, our prices never regained all of the ground they had lost since the start of the pandemic. Conditions for our sector were not helped by **tighter enforcement of China's existing regulations** on importing recycled pellets and the prospect of steeper financial penalties for any transgressions.

But despite this tide of negatives in 2020, our **resilient plastics recycling sector** has always retained its ability to see the wider picture and to **identify opportunities**. During the October webinar, for example, there was discussion of a growing and encouraging disconnect between recycled plastics prices and those of oil and virgin plastic: Sims Lifecycle Services' Global Plastics Manager Jan-Hein Stiens pointed out that, to an ever-increasing extent, brand-owners' **corporate and social responsibility programmes** are committed to using recycled material, irrespective of cost considerations; and our board member Max Craipeau confirmed that **government moves towards mandating recycled contents** were also helping to decouple recycled prices from that of oil.

To this I can add that demand for recycled material is certainly on the increase as more and more **companies are seeking co-operation along the value chain** to ensure maximum recycled contents as well as packaging designs that take **best account of recyclability**.

The need to find **new outlets for recycled materials** in the mammoth packaging sector was underlined by Dr Dirk Textor of German recycling association BVSE in his guest presentation to our eForum in June last year. One of his key points was that legislation should be used to assist rather than burden the recycling sector, such as through the use of carbon emission taxes or financial benefits for users of recycled materials.

"To an ever-increasing extent, brand-owners' corporate and social responsibility programmes are committed to using recycled material, irrespective of cost considerations."

The introduction last year of the **European Commission's Circular Economy Action Plan** would appear to provide a clear signal that forthcoming legislation should include not only recycling targets but also recycled content targets in order to **stimulate demand**. At the same time, there is a growing appreciation among governmental authorities of the **CO_2 emission savings achieved through the use of recycled materials**.

Unfortunately, actual regulation appears slow to capture this positive mood. Indeed, the very first day of 2021 brought **new UN Basel Convention listings** for transboundary movements which, experts agree, could hamper necessary flows of plastics. Patricia Whiting, Senior International Policy Analyst at Sims Lifecycle Services, had told our webinar in October that the new criteria would affect all but a few types of scrap plastic shipments, leading to **"negative implications" for the Circular Economy** through limits on plastic waste available as inputs for recycling facilities and limits on the availability of recycled plastics.

To ensure that plastics recycling plays its fullest possible role in the **green revolution** desired by politicians, there needs to be some **rebalancing between incentive and disincentive**.

Key Facts

Recycling uses up to
76% **less energy**
compared to sending the same materials to landfills or incinerators and making new products from scratch

Recycling one tonne of plastics saves around 1.4 tonnes of **carbon dioxide emissions**

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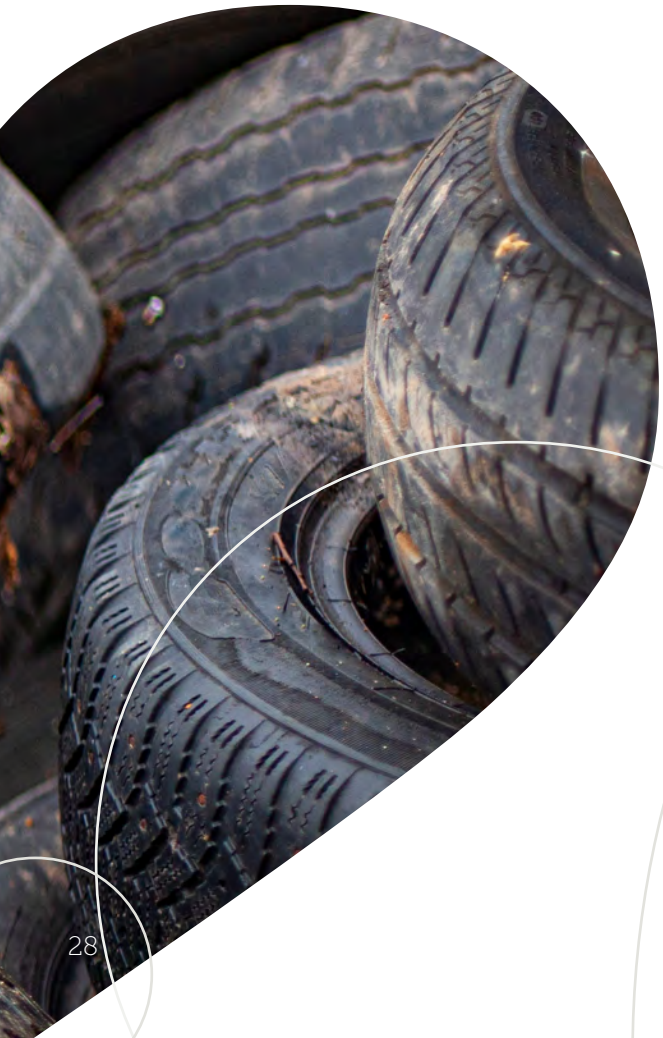
Max Craipeau
Greencore Resources Ltd (CHN)
Chairman Tyres & Rubber Committee

TYRES & RUBBER COMMITTEE

After many twists and turns over the last few years, and following the latest round of consultations and discussions, the European Chemicals Agency (ECHA) has decided to recommend a ban on the use of crumb rubber infill in artificial sports surfaces. This is a massive market for the recycling sector: in Europe, for example, 62% of end-of-life tyres (ELTs) are destined for material recovery, with 527,000 tons processed to make infill for use in sports pitches.



Countless scientific studies over many years have concluded that **crumb rubber infill presents no risks to health**. However, ECHA's Committee for Risk Assessment argued that information on the effectiveness of risk management measures was incomplete and that a ban would be more effective in preventing releases to the environment in the long term. During the BIR Tyres & Rubber Committee webinar in June last year, guest speaker Fazilet Cinaralp of the European Tyre and Rubber Manufacturers' Association (ETRMA) warned that the repercussions of such a ban could well prove "catastrophic" for the crumb rubber sector and for tyre recycling in general.

The ban would be scheduled to take effect after a transition period of six years, leaving very **little time for producers to find new outlets for their crumb rubber**. At present, there are no material recycling alternatives for the potentially huge surplus of ELT-derived rubber infill materials, with energy recovery the only possible outlet that could attempt to absorb such large volumes. Indeed, the recommendation from ECHA is likely to provide a boost to tyre-derived fuel and pyrolysis operations, with the major oversupply of material almost certainly leading to a **substantial increase in gate fees**.

Against this backdrop, and with seemingly perfect timing, our Committee's webinar in October 2020 brought first-hand confirmation that the world's largest tyre manufacturer – Michelin – was spearheading the breakthrough **BlackCycle project** aimed at **recycling almost 50% of Europe's ELTs** into new tyres within five or six years. Research Programme Manager Michaël Cogne explained that the initiative was pooling the talents of seven industrial partners, five research and technological organizations, and an innovation cluster, with their specialisms spanning tyre collection, granulation, pyrolysis, transformation of pyrolytic oil into more valuable materials, carbon black manufacture, life-cycle analysis, environmental assessment along the value chain, data management and communications.

The magnitude of the BlackCycle initiative and its potential as a game-changer for the used tyre market cannot be overstated. Among all industrial sectors, it is the only project of this scale designed to complete the virtuous circle when **recycling end-of-life products**. If BlackCycle is successful in meeting its objectives, crumb rubber manufacturers will have a substantial and reliable alternative outlet for their product; in all likelihood, they would become suppliers of feedstock either to Michelin or to similar projects which other tyre manufacturers may have in the pipeline.

"The magnitude of the BlackCycle initiative and its potential as a game-changer for the used tyre market cannot be overstated."

Industry-led innovation is not the only route to creating a more **sustainable tyre sector**; policy-makers and politicians can also play a major role, such as through the introduction of mandatory **recycled content quotas** in new rubber compounds so long as these do not entail a significant impact on product properties.

A review of developments in 2020 would be incomplete without mention of the profound impact of the COVID pandemic. With fewer cars and trucks on the road throughout the crisis, this naturally led to **a decline in the number of ELTs generated and to a decrease in the volumes recycled last year**. Other key effects included an undersupply of some grades, such as rubber powder, while exportation of low-value-added ELT-derived materials became less attractive owing to unprecedented freight increases.

And of course, many COVID-related challenges have carried over into 2021.

Key Facts

COVID impact in Europe:

Car tyre sales down
14.4%
year on year

Truck tyre sales down
8%
year on year

**Source: ETRMA statistics for January-September 2020*

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Thomas Papageorgiou
ANAMET SA (GRC)

Chairman E-Scrap Committee

E-SCRAP COMMITTEE

In truth, I could not have chosen a more tumultuous final year as Chairman of the BIR E-Scrap Committee. As 2020 dawned, our sector's thoughts were occupied mainly by ever-tightening regulatory controls and the impact of trade disputes on the all-important Chinese market. But then COVID arrived to dominate the concerns of every business in the world.

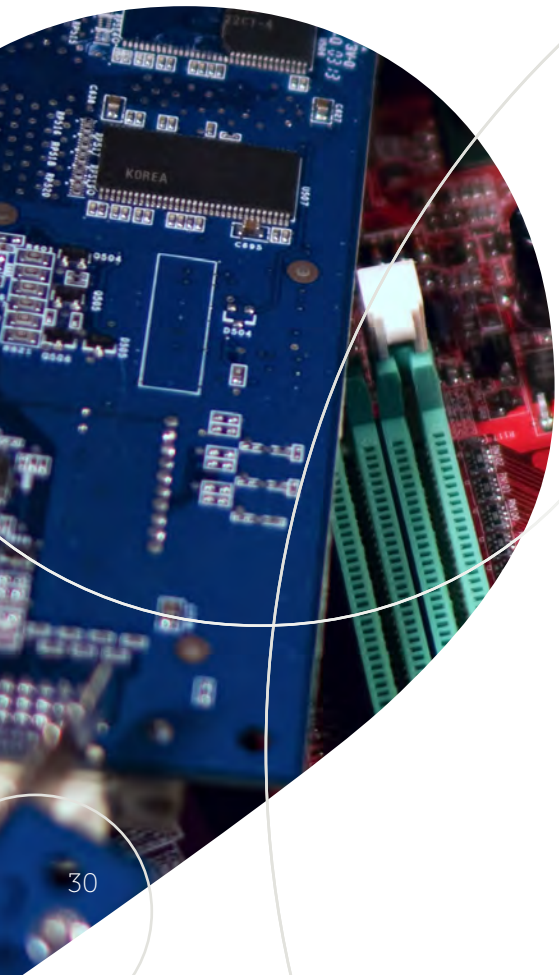
Like so many others, **the e-scrap sector was badly affected by the pandemic** – most notably, perhaps, the widespread supply issues resulting from retail sector closures and the suspension of many scrap dealer operations. On top of this, the oil slump in the early months of 2020 forced down the prices of prime plastics and thereby **undermined the economics of recycling** the plastic component of e-waste, with selling prices for some pellets falling below the costs of processing and creating liquidity – and even survival – issues for some processors.

At our eForum in June last year, we acknowledged that the pandemic had served to make **technology even more central** to our daily lives, such as by helping us to keep in touch with friends and family during lockdown and by enabling businesses to continue to function through facilitating a huge increase in home-working. However, there was little evidence in 2020 of any deepening appreciation of the pivotal role played by the recycling sector in the technology management chain.

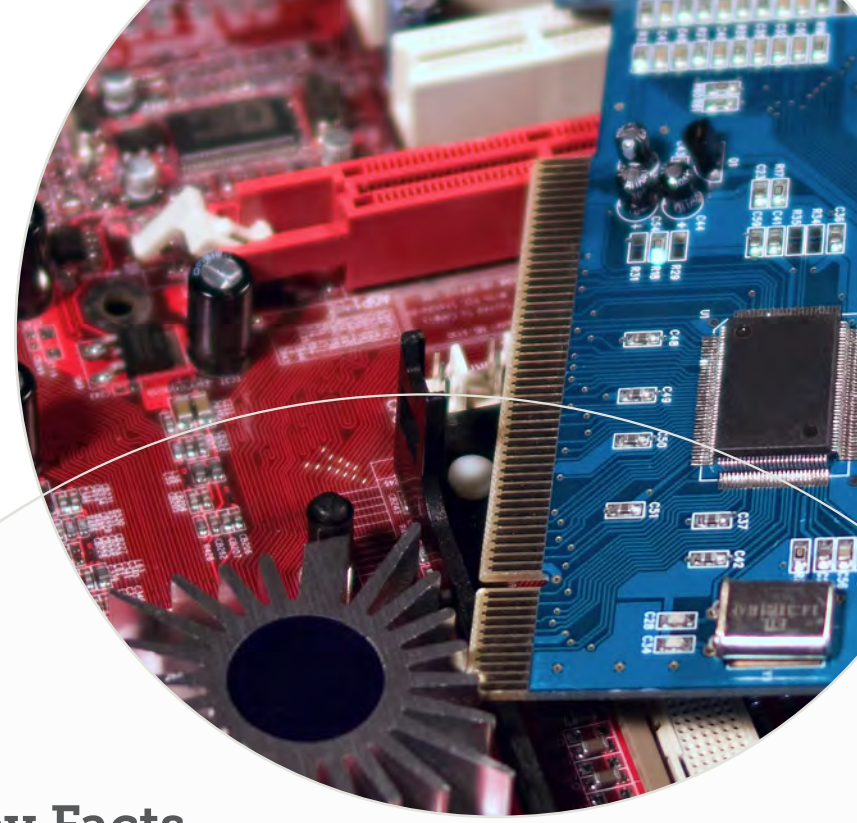
Indeed, recent **changes to the Basel Convention** have only added to our problems. Entering force from January 1 2021, the new rules affecting transboundary shipments of **plastics recovered from electronics** have been implemented in different ways around the world, leading to a level of confusion in the marketplace that has meant yet more time and money lost for many companies already under severe **financial and operational pressure** because of the pandemic.

Is this how to promote a circular economy or to spark a **"green" industrial rebound** from the negative impacts of COVID? As was stated by a couple of my esteemed BIR E-Scrap Committee board members during our webinar in October last year**, legislative over-reach** can affect legitimate trade in materials and therefore hinder circularity rather than promoting it.

At that same webinar, the BIR International Environment Council's Chairman Olivier François of Galloo made a presentation highlighting the **sophistication of industrial-scale processes** required to recover high-quality plastics from waste electrical and electronic equipment and other sources. He also enlightened us about technology developed to segregate plastics containing hazardous brominated flame retardants from all other plastic streams. His video and supporting comments re-emphasized the problems faced by recycling practitioners when they are not consulted at a product's design stage. Equally, and more positively, the presentation underscored the **amazing adaptability and innovation that exist within the recycling industry's ranks** when faced with practical challenges. When recyclers apply their immense experience and expertise, solutions to technical problems are nearly always found – even if this often implies considerable cost.



“ Legislative over-reach can affect legitimate trade in materials and therefore hinder circularity rather than promoting it.”



That October webinar also provided me with an opportunity to look back on some of the key interactions and achievements of the BIR E-Scrap Committee since I became its first Chairman back in 2013, including the **fostering of closer contacts with producers** in order to encourage a **greener, more recycling-friendly approach to product design**.

Other key facets of our work on the Committee have included examining potential new business opportunities such as data destruction, as well as building the sector’s statistical database, notably through the launch in 2018 of its in-depth study entitled “Statistics on the national arisings of e-scrap and the movement of e-scrap between countries”. The research team behind the report confirmed that **global arisings of e-scrap** were likely to continue to record strong growth over the years to 2025. This serves to underline, once again, the **importance that needs to be accorded to recycling and to the recycling industry**.

In closing, I would like to convey my best wishes to my successor as Chairman of the BIR E-Scrap Committee. Hopefully in a year from now, he will be able to report that 2021 was more settled and positive for our sector than was 2020.

Key Facts

UN’s latest Global E-waste Monitor:

53.6 million tonnes of **electronic waste** generated worldwide in 2019 (**+21%** in just 5 years)

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Olivier François
Galloo Group (FRA/BEL)
Chairman International Environment Council

INTERNATIONAL ENVIRONMENT COUNCIL

Last year brought a clear acceleration of climate change concerns at the highest political level. Whether this was an effect of the Greta Thunberg-led protests all over the world in 2019, it is difficult to know. However, it is obvious that the younger generation wants its future to be taken into account.

Whatever the various reasons, a **dramatic change in EU policy** was observed as early as March 11 last year with the release of the **Circular Economy Action Plan**. Suddenly, the European Commission's main, and very nearly only, concern appears to be the circular economy, for which expectations are that it will provide jobs for millions of unemployed people in the EU and help decarbonize the EU's new green industry at every level. Money is popping up as fast as EU meetings will allow, and hundreds of billions of Euros are being borrowed to **aid circular economy investments**.

There has been a slight delay but, very probably, a massive programme will be launched in early 2021 – the year of "the great leap forward" for our recycling industry. So be ready for it, and also for that refurbishment project, plant extension, new plant or recycling process you have in mind. There is a very high probability that **permission and support will be granted as part of this huge circular economy push**.

There is also an interesting parallel to be drawn between the **policies of China and the EU**: just as China decided abruptly in 2018 to put a **halt to imports of solid waste**, the EU is now refining its Waste Shipment Regulation to include **a clear export ban on waste**. This is a complete about-turn in EU policy: fully based for the last three decades on **"open borders"** and **"free" trade**, the evident weakness of our deindustrialized countries as a result of the Coronavirus pandemic means that, suddenly, all of the focus must be on: re-localizing industries; control at the borders with regard to hidden CO_2 "imports"; and of particular **relevance to the recycling industry**, keeping our raw material resources inside the EU. Thus, a recycled material export ban is clearly at stake at the highest political level.

EU recycling companies have **three ways of fighting this major threat**:

- *End-of-Waste (EOW)*
  There is already a regulation in the EU on steel EOW (333/2011) which can be summarized thus: to achieve EOW status, recycled steel must contain no more than 2% impurities; very simply, once recycled steel meets this criterion, it is no longer waste and can be exported without problem.

- *Mandatory recycled content*
  We have to be absolutely uncompromising about the use of recycled material in all production

"The unrestrained globalization we have known for the last 30 years is coming to an end."

processes in the EU, including vehicles, appliances and buildings. If we are no longer allowed to export, for example, our recycled steel, copper and aluminium, then EU industry and manufacturers should be required to adhere to a mandatory incorporation rate for recycled content. It is just a matter of common sense.

- *Carbon adjustment*
  If an export ban on recycled material is introduced in a few months, we must question the EU about imports of other raw materials. It would be unfair to continue to import mineral ores, for example, in a situation where recycled material is not being fully absorbed by EU industry. Typically, this is where a "carbon adjustment" at the EU border would be welcome – again, a matter of common sense.

What is happening in the EU and in China clearly demonstrates that the **unrestrained globalization** we have known for the last 30 years is coming to an end. For a variety of reasons, borders are coming back into the equation: not completely closed borders but, more precisely, tariffs are being restored. **Our businesses will need to be more agile** to keep in the race.

Michael Lion
Everwell Resources Ltd (CHN)
Chairman International Trade Council

INTERNATIONAL TRADE COUNCIL

Virtual solutions to numerous and conspicuous challenges were the imperative of 2020. Networking was identifying a strong wireless signal for laptop, tablets or smart phones, not regrettably a cold beer or cola with clubbable convention colleagues.

Necessity is the mother of invention (sans Frank Zappa), and so it was, specifically in addressing the unprecedented issues facing our recycling industry and global membership at the launching of BIR's first virtual convention in May 2020 where the International Trade Council (ITC) provided the opening and spotlight session of the event.

The **novel approach** of the session required to address the plethora of unique issues facing our members, many feeling isolated, bewildered and vastly challenged by all the ramifications of the global pandemic, was to assemble an array of contributors from the entire range of BIR's recyclables where the commonality of cross-commodity issues was the ITC's primary remit and by means of **examining all aspects of international transactions** 'from soup to nuts' to identify and focus on problems, experiences and solutions of the webinar's participants.

The session, moderated by myself, Michael Lion, as the ITC Chair, encompassed numerous **real-time transactional matters** including additional strains on financial liquidity, making payroll, bank support, logistics, interruptions to movement of goods, counter-party risks, and at the operations level stringent health precautions and even the impact of mental health issues on the industry's employees. The questions raised and the responding comments of the panelists provided a panoply of **informative and enlightening insights** to support our members with day-to-day practicalities and supportive encouragement in addressing their activities in a COVID-challenged world.

October 2020 saw BIR's second virtual convention in global conditions that still negated the feasibility of physical meetings. These circumstances provided the opportunity for ITC's convention opening session entitled "**Spotlight on Global Trade: Leadership in an economic and pandemic challenged world**".

Approaching a different but crucial aspect of the support of and services to our membership, the session – by means of two consecutive webinar interviews – highlighted respectively the **leadership role and contributions of BIR President Tom Bird and subsequently that of national association BMRA President Susie Burrage**. The interviews were conducted by myself, Michael Lion, ITC Chairman.

"The spectre of fresh emerging challenges to our primary commitment to free trade will be an ongoing priority of the ITC"

The interview with our President, Tom Bird, thoroughly revealed how through his extensive range of recycling industry roles, in his own family's business, as an SME executive, an international corporate leader, an international trader, and as an operations officer in entities around the globe, he brings a crucially vast degree of experience to BIR's leadership at a time when such an array of skills provides **vital insights of essential expertise** so much beyond encouraging epithets.

The second interview with Susie Burrage, in the vanguard of a significant group of the upcoming generation of BIR and the **global recycling industry's future leadership**, provided a profile of her passionate and energetic commitment to recycling's enormous contribution to sustainability and the world's economies. Her enthusiasm and achievements underscored our celebration of diversity through true talent not tokenism, and a much-needed inspiring optimism for recycling's future advances.

At the regulatory level, the ITC saw landmark success through BIR's spearheading with its National Association members of the **longstanding advocacy** of defining its products as recyclable raw materials not waste with that terminology's adoption in China's new regulations, albeit with our **vigilant monitoring** of its effective implementation an ongoing necessity.

The spectre of fresh emerging challenges to our primary commitment to free trade will be an ongoing priority of the ITC supported by the **consummate diligence and professionalism** of our Brussels Secretariat, particularly with the invaluable role of Ross Bartley as our Director of Trade and Environment and his unrivalled expertise through detail, data and dialogue.

As the Annus Horribilis 2020 closed, the ITC presaged yet another innovation to keep our members engaged and informed with **its forthcoming webinar series** and its first edition slated for January 2021 – aptly entitled (what else?): **"The Challenge"**, of course!

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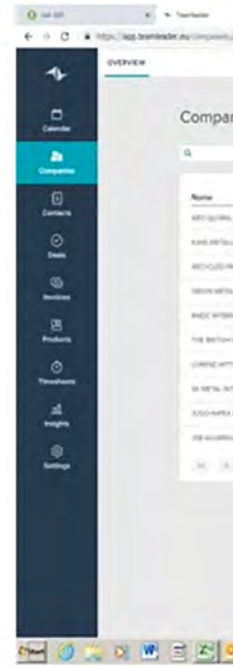
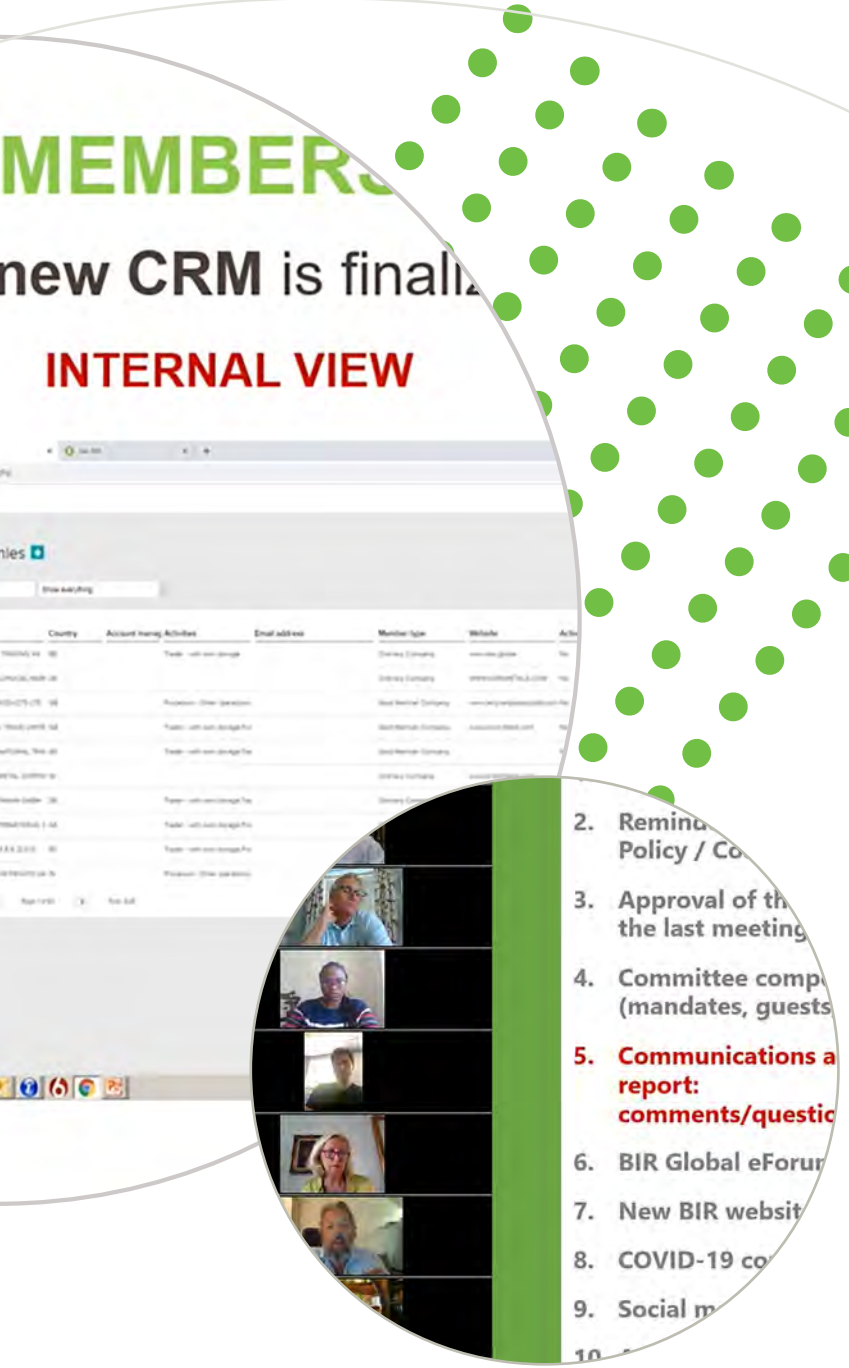
schedule





Special Committees

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

Murat Bayram
European Metal Recycling Ltd (GBR)
Chairman Convention Committee

CONVENTION COMMITTEE

"Welcome to Istanbul! The largest city in Turkey and a cultural and historic centre. A city with a foot in two continents, like a bridge between the people of Europe and Asia. A city which connects souls and is full of inspiration."

These were the words floating around my mind in 2019 when we were planning the BIR events schedule for 2020. Between then and now, unfortunately, I have spent more on alcohol hand wipes than I will probably be able to drink during the rest of my life. On top of that, I have started hearing the words **"We can't hear you – you are on mute"** in my dreams; with all the online calls in which I have been involved, I feel like I have heard that phrase at least a thousand times over the course of the last year or so.

My work as the Chairman of the BIR Convention Committee has felt a little bit like being a pilot without a plane, a sailor without a boat or a singer without a voice. But during this period in which normal life was on "mute", we took the initiative of planning and organizing – together with the communications team at BIR – the range of **very professional online meetings** which were held in June and October last year. While **such events can never match the pleasure of meeting face to face**, at least they ensured that we **remained connected and fully informed** of latest developments affecting our industry.

We learned day by day, week by week and month by month how to use the various online resources – Zoom, Microsoft Teams, Skype, GoToMeeting, TeamViewer and many others – in the best possible way. As our desktop became filled with dozens of **video-conferencing apps**, we also learned that, sometimes, it is better to switch off the camera while a meeting is taking place or to choose a good desktop picture while sharing the screen; there were some moments during last year's video conferences which will certainly stay in the memory for a long time and bring a smile to our faces.

Last year gave us many reasons to cry but the **BIR and its convention team showed that there are a thousand reasons to be optimistic**. A big thank-you goes to each and every member of that team for their tireless work in organizing the online meetings and their availability around the clock to ensure that the events proceeded seamlessly and without any major hitches. Within the space of just a few months, they became consummate IT professionals, jumping in to help our members if a problem arose or if the connection didn't function.

“ During this period in which normal life was on ‘mute’, we took the initiative of planning and organizing the range of very professional online meetings which were held in June and October last year.”

In 2021, it is to be hoped that **we will see the return of meetings where the recycling industry can come together** – an industry which stands for the future, for sustainability and for green raw materials. Last year was a source of knowledge for us all whereas 2021 will be a **source for hope**. As we say in Turkey: “We will meet again – inshallah!”

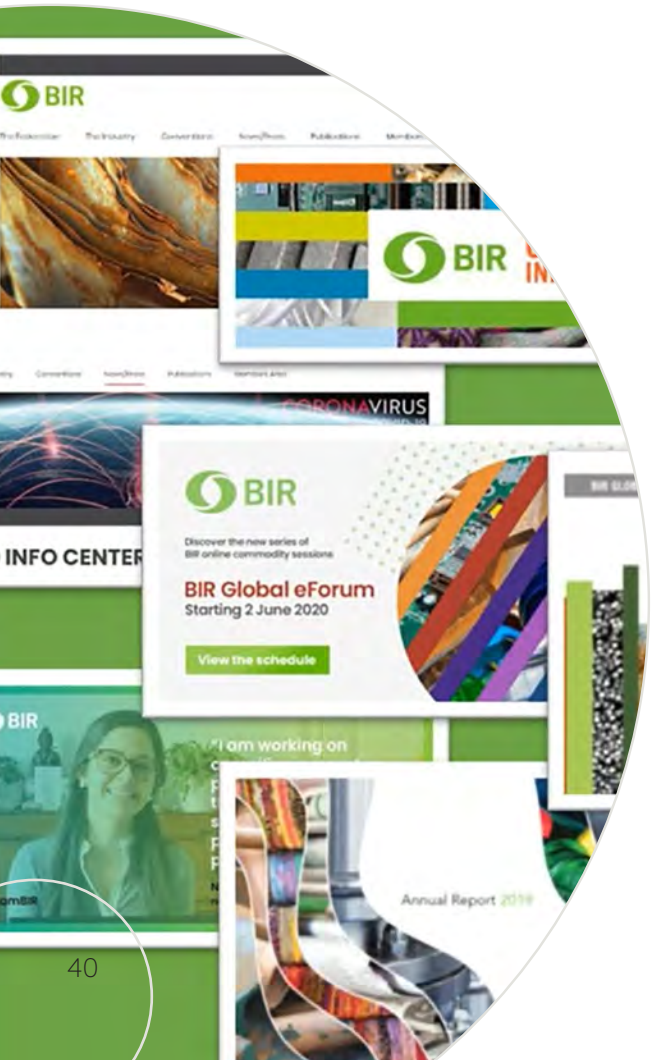
I will finish with another phrase which we have heard a lot over the last year, but which I repeat here with the greatest sincerity: “Stay healthy.”

Mark Sellier
Global Metals Network Ltd (CHN)

Chairman Communications Committee

COMMUNICATIONS COMMITTEE

"Communicating in times of a pandemic!" This might have been the title of a masterclass offered by communications specialists and agencies that abound in numerous countries across the globe, but nobody was prepared for what unfolded at the beginning of 2020.



The BIR communications team adapted very quickly to this **new reality**: if we couldn't meet our members in person, we had to **use all technological means available** to show our constant presence and unyielding support.

At the beginning of the year, BIR launched a **brand-new website** designed to help in communicating more effectively and seamlessly when **everything turned digital**. The mission was to reassure our members and to provide them with relevant and more up-to-date information to keep them abreast of the global situation relating to our industry. Almost daily, we issued **news, statements, updates and overviews** to ensure that, at all times, our members were aware of what was going on in BIR, in the commodity markets across the globe, and regarding the spread and impact of the pandemic. A dedicated and specific information hub called **COVID-19 Info Centre** was created, which collated all information relevant to our members during this challenging period.

When it became clear that physical meetings would not be possible, BIR stepped up its efforts with **content-laden webinars** that would give our members the much-needed **interactive discussions** that they normally find at our Conventions. Before, during and after our two online events – the BIR Global eForum in June and the BIR World Recycling Convention week in October – **daily updates** were issued on programmes, speakers, highlights, recordings, proceedings, etc. These illustrated the wealth of information disseminated during these webinars, providing our members with **much-needed clarity and transparency**.

As physical interaction graduated more to digital interaction, **BIR increased its emphasis on social media**, with its main focus on **LinkedIn** and **Twitter** since the targeted audience includes mainly peers and other stakeholders from industry, politics and the media. As a result of its efforts, BIR doubled the number of its followers on LinkedIn and increased its Twitter community by 30%. While these are commendable achievements, the BIR communications team is forging ahead with **strategies to continue this growth**.

" If we couldn't meet our members in person, we had to use all technological means available to show our constant presence and unyielding support."

In parallel to all this, of course, **the flow of all our regular publications continued**: the BIR World Mirrors (22 in total), which members and the press rely upon; and monthly eBriefs summarizing the highlights of BIR's activities and serving as a constant reflection of the value that is provided to members. The 2019 Annual Report in three languages, the 11th edition of World Steel Recycling in Figures with the latest statistics on ferrous scrap, as well as a new set of statistics on paper and board recycling were all published last year.

Given the increased attention and media focus on plastics, **BIR produced a bespoke report on "Recycling Plastics: facts – data – policy recommendations"** which summarizes what plastics are, the problems associated with them, and how recycling can be a major factor in helping solve these challenges. BIR dedicated a substantial amount of time to an important **study on "The Economic and Social Benefits of Recycling"** which will likely be published in 2021. Last but not least, BIR completed the annual edition of the BIR Membership Directory with the contact details for our worldwide membership base.

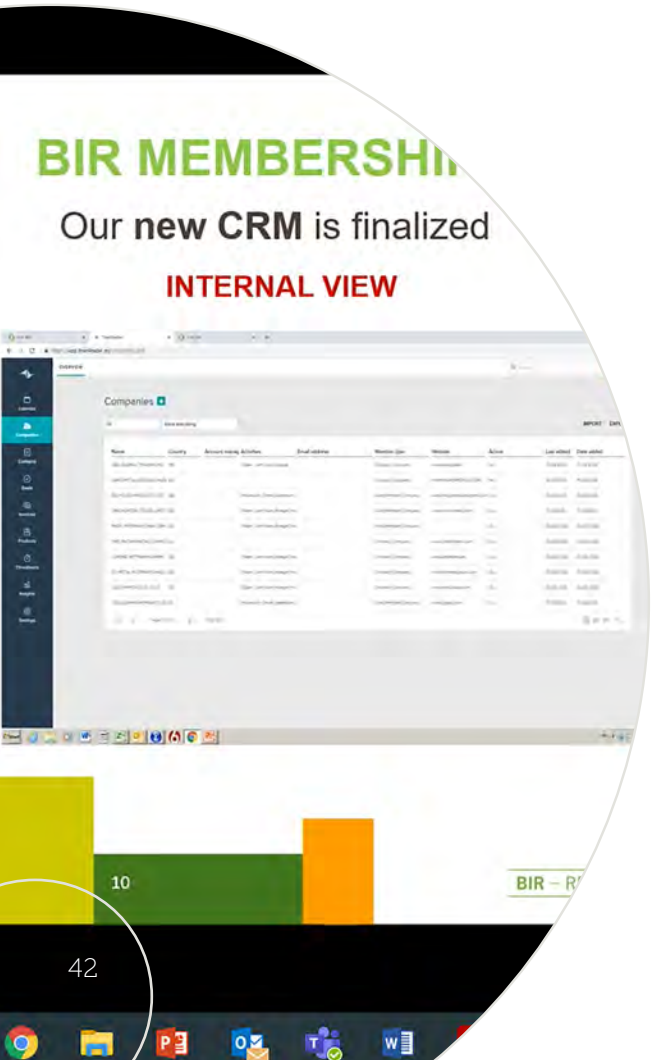
In 2020, there was **constant communication with our members**, the trade press and the general media worldwide. The communications team received a lot of support from the BIR leadership as well as from the Divisional Presidents and Committee Chairmen who made themselves available for **many interviews and press inquiries**. I would like to thank the journalists and the interviewees who have been instrumental in communicating BIR's messages to the world.

Of course, this significant increase in communications activity during the course of 2020 could not have been achieved without the unstinting efforts of the communications team and the wider BIR Secretariat, all of whom continued to **perform to the highest standards of professionalism** despite the many practical challenges presented by the pandemic.

Fadi Shahrour
Sharmetal Trading CO. SARL (LBN)
Chairman Membership Committee

MEMBERSHIP COMMITTEE

2020 will be remembered as the year in which the outbreak of a pandemic brought unprecedented consequences for the whole world. COVID-19 has radically altered our way of living, forcing many of us to change our habits and routines. These circumstances have had direct effects on BIR too as many recycling businesses around the world have suffered big losses owing to lockdowns and have had to cut costs in order to survive.



These unusual times have also put **huge pressure on BIR membership renewals**. However, the membership team at the BIR Secretariat in Brussels has done a wonderful job in managing to **keep membership numbers close to the average level** for the past five years.

Indeed, throughout last year, we at BIR did our utmost to **step up services to our members**, to quicken the pace of our market and legislative updates, and to maintain our advocacy of members' interests in all of the key international fora, such as the United Nations and the OECD. Taking account of the new conditions in which we had to operate, we also **adapted our Convention services** to provide virtual gatherings in the form of online eForum and webinar events. At the same time, we continued with our **regular information services** to members through the publication of eBriefs, news items, World Mirrors, Convention proceedings and various other resources made available on the BIR website. We also developed a special COVID-19 Info Centre for the where members can find the latest information about the pandemic, its impact on recycling-related affairs and BIR's actions in this respect.

More than ever, your world organization has focused on **services to members**, on delivering high-quality, content-relevant conventions and on representing – albeit virtually rather than in person – the worldwide recycling industry wherever necessary, with the assistance of our **network of national associations**.

Of course, for us to be able to do all of this in these trying times, your support is of the utmost importance.

BIR is happy to report that we ended 2020 with 712 member companies and 37 national associations – all from a total of 71 countries. Furthermore, **31 new members** joined our ranks, compensating for a number of losses owing to mergers and company closures. These new members come from across the globe, with equal numbers from Europe and Asia, closely followed by the USA. Although BIR membership had its roots in Europe, these latest statistics are a further clear illustration of the **continuing evolution and global essence** of our organization.

“ For us to be able to do all of this in these trying times, your support is of the utmost importance.”

The BIR Membership Committee is devoted to continuously **attracting new members** from across the globe while maintaining the **high standards** and **ethical requirements** to ensure that membership obligations are met and that there is compliance with BIR rules and statutes. This **builds trust** among our members to communicate and trade safely with each other. The BIR’s Code of Conduct ensures that members are carefully selected and that they are able to meet specific criteria to be eligible for membership. This is why **BIR is proud of the quality of its membership** and, likewise, members can be proud of their world organization, which is recognized as **the global recycling federation**.

I am optimistic that we will all get through these difficult times in 2021 and that, hopefully, we will be able once again to meet each other in person at one of BIR’s bi-annual Conventions.

Last but not least, don’t forget that **You are BIR**! We need you and your support, more than ever. Therefore, please renew your membership now if you have not already done so. In the meantime, I wish all members a healthy and prosperous 2021.

Salam Sharif
Sharif Metals Int'l LLC (ARE)
Chairman Ambassadors Committee

AMBASSADORS COMMITTEE

We began last year full of resolve and hope for our industry, but finding good stuff to celebrate in 2020 would prove to be a tough challenge. It was a difficult year for our entire industry and also for many beyond. We had already seen the significant global effect of the US/China trade war, and this was to be followed by the onset of a pandemic which applied the brakes to most of the world's economies.

The COVID-19 pandemic swept across the globe, restricting the movements of billions of people, impacting lives and jobs, disrupting international supply chains, and bringing economies to a halt. The current situation has also revealed our limited ability to contain and adapt to the systemic risks posed by such a pandemic.

"Circular economy" has become the buzz phrase as the current crisis has highlighted the **shortcomings of our linear system**. With around US$ 10 trillion in economic stimulus being unveiled by governments all around the world, there is an unprecedented opportunity to move away from unequivocal growth at all costs and the old fossil fuel economy, towards a lasting balance between people, prosperity and geographical boundaries.

An analysis by the European Central Bank, the World Bank and the OECD shows that **"greener" economies with less carbon-intensive activities** are better placed to ensure faster recoveries. The circular economy approach clearly advocates **the need for recycling** in order to reduce environmental degradation, climate change, biodiversity loss and pollution.

2020 synced the recycling industry into one great community. We saw the continuous efforts of BIR to connect with its members worldwide through its various webinars, reaching out to reinforce **the solidarity of our recycling community** during the pandemic. We saw the constant striving of President Tom Bird and the rest of the BIR team to co-ordinate support for its members during these trying times.

At the same time, all of our BIR Ambassadors were committed to providing members with **updates from their various regions** regarding changes to government policy, economic stimulus packages, vaccination programmes and industry conditions.

"The circular economy approach clearly advocates the need for recycling in order to reduce environmental degradation, climate change, biodiversity loss and pollution."

I have been attending BIR Conventions for 34 years, but 2020 gave us the greatest insight into how **digitalization can enable us to continue networking** amid a pandemic through "virtual" means. BIR engaged with the recycling community and reached all corners of the world through its informative and educative webinars. BIR's various committees were constantly active on social media, updating members on a wide range of relevant industry issues.

Despite the pandemic, **BIR Ambassadors were able to accomplish most of their tasks remotely**, renewing their commitment to serve the world recycling association and its membership by providing the very latest key information from their regions across the range of commodities covered by BIR. When possible, we sought face-to-face interaction with prospective new members of our world body and also kept in regular touch with existing members to remind them of the very many reasons for remaining part of BIR.

2020 showed us how resilient we are in the face of the most dire situations and also how, for every challenge to the human mind, a solution can always be found, such as the development of COVID vaccines that open the door to the hope that human life can return to something nearer normality in 2021.

SPEAKERS AT BIR EVENTS IN 2020

BIR GLOBAL eFORUM, 02-30 JUNE 2020

Spotlight on Global Trade

- **Tom Bird**, BIR President
- **Michael Lion**, Everwell Resources Ltd (CHN)
- **Greg Schnitzer**, Schnitzer Steel Industries Inc. (USA)
- **David Chiao**, Uni-All Group Ltd (USA)
- **Martin Böschen**, Texaid. Textilverwertungs AG (CHE)
- **Thomas Papageorgiou**, Anamet SA (GRC)
- **Henk Alssema**, Vita Plastics (NDL)
- **Max Craipeau**, Greencore Resources Limited (CHN)
- **Joost van Kleef**, Oryx Stainless BV (NLD)
- **Mark Sellier**, Global Metals Network Limited (CHN)
- **Georges Adams**, SA Recycling (USA)
- **Sébastien Ricard**, Paprec Recyclage (FRA)

Non-Ferrous Metals Division

- **David Chiao**, Uni-All Group Ltd (USA)
- **Susie Burrage**, Recycled Products Ltd (GBR)
- **Eugen Weinberg**, Commerzbank AG (DEU)
- **Dhawal Shah**, Metco Marketing PVT LTD (IND)
- **Rick Dobkin**, Shapiro Metals (USA)
- **Murat Bayram**, EMR – European Metal Recycling Ltd (GBR)
- **Shen Dong**, Omnisource Corporation (USA)

E-Scrap Committee

- **Thomas Papageorgiou**, Anamet SA (GRC)
- **Ross Bartley**, BIR

International Environment Council

- **Olivier François**, Galloo (FRA/BEL)
- **Emmanuel Katrakis**, EuRIC asbl
- **Joe Pickard**, ISRI (USA)
- **Ross Bartley**, BIR

Ferrous Division

- **Greg Schnitzer**, Schnitzer Steel Industries Inc. (USA)
- **Renate Featherstone**, Wood Mackenzie (GBR)
- **Rolf Willeke**, BIR

Shredder Committee

- **Alton Scott Newell III**, Newell Recycling Equipment (USA)
- **Chris Bedell**, The David J. Joseph Company (USA)
- **Thomas Papageorgiou**, Anamet SA (GRC)
- **Karl Hoffman**, Steinert GMBH (DEU)
- **Brian Gist**, Tomra Sorting GMBH (DEU)
- **Mike Shattuck**, Eriez Magnetics Europe Ltd (GBR)

Plastics Committee

- **Henk Alssema**, Vita Plastics (NDL)
- **Dirk Textor**, BVSE (DEU)
- **Steve Wong**, China Scrap Plastics Association (CHN)
- **Sally Houghton**, The Plastic Recycling Corporation Of California (USA)
- **Natalia Cruz Cayuela**, Ferromolins SL (ESP)
- **Mahmoud Al Sharif**, Sharif Metals Int'l LLC (ARE)
- **Andrei Mihai Sofian**, Rematholding Co. SRL. (ROU)
- **Clément Levebfre**, Veolia Proprete France Recycling (FRA)

Stainless Steel & Special Alloys Committee

- **Joost van Kleef**, Oryx Stainless BV (NLD)
- **Jason Shenker**, Prestige Economics (USA)
- **Nathalie Scott-Gray**, INTL FCStone Ltd (GBR)
- **Pablo Abasolo**, Acciai Speciali Terni (ITA)
- **Doug Kramer**, Spectrum Alloys LLC (USA)

Tyres & Rubber Committee

- **Max Craipeau**, Greencore Resources Limited (CHN)
- **Fazilet Cinaralp**, ETRMA-European Tyre & Rubber Manufacturers' Association
- **JM Bermejo**, ETRMA-European Tyre & Rubber Manufacturers' Association
- **Giovanni Corbetta**, Ecopneus (ITA)
- **Des Collins**, Continental AG (BEL)
- **Flavio Piovesan**, Bridgestone (IRL)
- **Wolfgang Lauer**, Goodyear Dunlop Tires Operations S.A. (LUX)
- **Gabriel Leal**, Signus (ESP)

Paper Division

- **Jean Luc Petithuguenin**, Paprec Recyclage (FRA)
- **Sébastien Ricard**, Paprec Recyclage (FRA)
- **Ranjit Baxi**, J&H Sales International Ltd (GBR)
- **Dominique Maguin**, La Compagnie des Matieres Premieres (FRA)
- **Francisco Donoso**, Alba Servicios Verdes, SL (ESP)
- **Keith Trower**, Viridor Resource Management (GBR)

Textiles Division

- **Martin Böschen**, Texaid. Textilverwertungs AG (CHE)
- **Mauro Scalia**, Euratex-The European Apparel And Textile Confederation
- **Mehdi Zerroug**, Ecotextile (FRA)
- **Maud Hardy**, Eco TLC (FRA)

BIR CONVENTION WEEK, 12-16 OCTOBER 2020

Opening Session followed by "Spotlight on Global Trade"

- **Tom Bird**, BIR President
- **Michael Lion**, Everwell Resources Ltd (CHN)
- **Susie Burrage**, Recycled Products Ltd (GBR)

Keynote Session

- **Professor Philippe Chalmin**, Cyclope Commodities Report (FRA)
- **Stefan Schilbe**, HSBC Germany (DEU)

Paper Division

- **Jean Luc Petithuguenin**, Paprec Recyclage (FRA)
- **Sébastien Ricard**, Paprec Recyclage (FRA)
- **Fabienne Vercelli**, Centre Technique Du Papier (FRA)
- **Gilles Lénon**, Centre Technique Du Papier (FRA)

Ferrous Division

- **Greg Schnitzer**, Sims Metal Management Global Trade Corporation (USA)
- **Ian Roper**, SMM-Shanghai Metals Market (SGP)
- **Rolf Willeke**, BIR
- **Daniela Entzian**, BIR
- **Denis Reuter**, TSR Recycling GmbH & Co. KG (DEU)
- **Georges Adams**, SA Recycling (USA)
- **Quintin Starkey**, MRA – Metal Recyclers Association of South Africa (ZAF)
- **Zain Nathani**, Nathani Group of Companies (IND)

Plastics Committee

- **Henk Alssema**, Vita Plastics (NDL)
- **Steve Wong**, China Scrap Plastics Association (CHN)
- **Sally Houghton**, The Plastic Recycling Corporation Of California (USA)
- **Patricia Whiting**, Sims Recycling Solutions (USA)
- **Max Craipeau**, Greencore Resources Limited (CHN)
- **Andrei Mihai Sofian**, Rematholding Co. SRL. (ROU)

Textiles Division

- **Martin Böschen**, Texaid. Textilverwertungs AG (CHE)
- **Alan Wheeler**, Textile Recycling Association (GBR)
- **Emmanuel Katrakis**, EuRIC asbl
- **Hilde van Duijn**, Circle Economy (NLD)
- **Peter Sass**, Pisatex Gulf (ARE)
- **Yavor Pandov**, Eurotex (BGR)
- **Lisa Jepsen**, Garson & Shaw LLC (USA)

Non-Ferrous Metals Division

- **David Chiao**, Uni-All Group Ltd (USA)
- **Natallia Zholud**, TRM Group (BLR)
- **Dhawal Shah**, Metco Marketing (IND) PVT Ltd (IND)
- **Leopoldo Clemente**, LCD Trading S.R.L. (ITA)
- **Nick Hinohara**, Metal Solution Provider (JPN)
- **Sidney Lazarus**, Non-Ferrous Metal Works (ZAF)
- **Shen Dong**, Omnisource Corporation (USA)
- **Mogens Bach Christensen**, H. J. Hansen Genvindingsindustri A/S (DNK)
- **Rick Dobkin**, Shapiro Metals (USA)

International Environment Council

- **Olivier François**, Galloo (BEL/FRA)
- **Julia Blees**, EuRIC asbl
- **Jordi Costa Rodriguez**, Gremi de Recuperació de Catalunya (ESP)

Tyres & Rubber Committee

- **Max Craipeau**, Greencore Resources Limited (CHN)
- **Michaël Cogne**, MICHELIN (FRA)
- **Martin von Wolfersdorff**, Wolfersdorff Consulting (DEU)
- **Robert Weibold**, Robert Weibold GmbH (AUT)

Stainless Steel & Special Alloys Committee

- **Joost van Kleef**, Oryx Stainless BV (NLD)
- **Markus Moll**, SMR GmbH (AUT)

CALENDAR OF FUTURE BIR EVENTS

2021

31 May-2 June 2021
Online – TV-like format

(24) 25-26 October 2021
Venue to be confirmed

2022

(29) 30 May-1 June 2022
Venue to be confirmed

(16) 17-18 October 2022
Venue to be confirmed

2023

(21) 22-24 May 2023
Venue to be confirmed

(22) 23-24 October 202
Venue to be confirmed

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