Annual Report 2023

BIR 75 1948 2023 Anniversary

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WORDS FROM THE PRESIDENT

2023: a year of celebrating our past and building for our future

I feel very privileged to be contributing for the first time to the BIR Annual Report in my capacity as your President. **Looking back at 2023 fills me with pride because, collectively, we have made significant progress and have put actions in motion** that will come to fruition in 2024 and beyond, thereby planting the seeds for future growth and diversification.

As BIR commenced its 75th anniversary celebrations during our **record-breaking Convention in Amsterdam last May – an event attracting an unprecedented 1600-plus participants** from all around the world – **I was extremely honoured to be elected your 23rd President**. Throughout the year, we marked this significant anniversary in various ways – one of which was to **produce a beautiful booklet that chronicles the rich history of BIR**, highlighting the numerous milestones achieved over the years.

We continued our 75th anniversary celebrations in Abu Dhabi, the first time a BIR Convention had been held in this Emirate. **The event was graced by around 1200 participants** who enjoyed a beautiful Welcome Evening set in the truly memorable location of the Emirates Palace.

In 2024, our May Convention will be held in Copenhagen and in October we will return once again to Singapore, a venue of which BIR delegates have always been very fond. In light of the **ever-growing Convention attendance figures over recent years**, it has become necessary to move from our traditional hotel-based events to convention centres, thereby **giving members more space to network and also to accommodate more exhibitors** to showcase their state-of-the-art equipment.

Our advocacy efforts were amplified during 2023, with the recruitment of an additional policy officer completed in the middle of the year; this was followed by candidate research which led to two more staff members coming on board at the beginning of 2024. We have continued **our unwavering commitment to defending free and fair trade for our industry** and to monitoring the increasing number of global policies impacting all the recycling industry's material streams. Our new recruits also offer **commodity expertise and support to our Divisions and Committees**, thereby helping with new programmes and projects.

BIR continues to represent the recycling industry wherever important environmental and regulatory debates are taking place at international and supranational levels,

> “Our intention is to reshape the perception of recycling, emphasising the vital role our industry plays in a sustainable world.”

Susie Burrage OBE
Recycled Products Ltd (GBR)
BIR President

including at the United Nations and the OECD. Once again, this demonstrates our **unshakeable commitment to advancing sustainable practices on a global scale**.
I am also very proud to report that, recently, BIR was afforded a pivotal role in the Basel Convention’s Plastic Waste Partnership and has been involved from the very outset in the United Nations initiative to draft a new Global Plastics Treaty.

In collaboration with our national association members, we have identified **the necessity for BIR to produce position papers on a variety of topics**, completing one on extended producer responsibility in 2023 and starting work on others covering trade barriers, chemical recycling and critical raw materials, all to be finalised in 2024. Substantial effort has also been put into conducting a **new study on the environmental benefits of recycling**.

All our initiatives would go unnoticed if we didn’t tell the world about them. I have always been a strong believer in the **pivotal role of communications in furthering our mission**. With this in mind, we have made **significant strides to enhance our public image and also our outreach**, both within the industry and beyond. We have embarked on a partnership with a new communications agency, and will be placing a particular emphasis on leveraging social media as a platform to amplify our message in 2024.

As part of my special focus on communications, I also pursued an idea for an **additional service to members that would offer insight into BIR’s work** and the breadth of our activities. I am therefore particularly proud to report the completion of **BIR’s first magazine, The Recyclist**, at the beginning of this year. This beautifully laid-out, glossy publication will also be made available to the media, policy-makers and the general public as part of our drive to enhance the image of our industry.

Our intention is to reshape the perception of recycling, emphasising the vital role our industry plays in a sustainable world, modifying our language to reframe our products as raw materials from recycling and highlighting their **critical role in the circular economy**.

None of these achievements would have been possible without our dedicated BIR Secretariat. To further strengthen our team, the BIR Executive Committee was delighted to approve, during their last meeting in 2023, the **recruitment of another member of staff for membership and convention activities**, in addition to the aforementioned recruitments for advocacy.

The governance of our organization was bolstered during 2023 with the nomination of **three new special committee chairs**: **Alicia García-Franco**, Chair of Articles of Association and Internal Rules; **Ibrahim Aboura**, Chair of Communications; and **Sudhir Aggarwal**, Chair of Ambassadors. In addition, **Paul Coyte** and **Shane Mellor** were elected Presidents of, respectively, BIR’s Non-Ferrous Metals and Ferrous Divisions. Also importantly, **plastics will soon become the fifth Division of BIR** under the presidency of **Henk Alssema**.

It is my honour to have led BIR during this momentous year. Together, let’s continue to **pave the way for a sustainable and impactful future for the recycling industry**.

Keep recycling!

FINANCIAL SITUATION

Better and stronger, together!

As Treasurer of our world organization, the months since my appointment have entailed several meetings at the BIR offices in Brussels, resulting in a **wealth of collective learning and in the exploration of new ideas** as we strive to make BIR progressively better. Our President Susie Burrage is doing a stupendous job and it gives me immense pleasure to be supporting her through maintaining the **good financial health of our federation**. Our Director General Arnaud Brunet and the Secretariat team in Brussels are equally relentless in their efforts on behalf of BIR, which makes co-working a very exciting experience.

Looking back at 2023, both of our Conventions – in Amsterdam last May and in Abu Dhabi five months later – were very well attended and gave us a **strong financial lift**, while **growth of around 20% in new member numbers** provided us with additional reinforcement. Overall, **the finances of BIR remain healthy**, allowing us now to work effectively and fearlessly on new projects in 2024 aimed not only at **enhancing the benefits of BIR membership** but also at further accelerating the growth of our industry.

On receiving approval from BIR's Executive Committee, we are in the process of **creating adequate financial provision** to work towards, notably, global reports on key issues such as: the annual carbon emission savings achieved through our industry's activities; and trade flows for materials handled by the recycling sector. Other points of focus for our programme of projects will include: **enhanced, effective and futuristic communication tools**; engagement of BIR in new high-growth markets not yet represented within the world organization; and further strengthening of the Secretariat through new recruitment.

These projects will certainly increase our expenditure but we are well prepared for this and have budgeted accordingly. Overall, we remain **committed to seeing BIR on a healthy growth trajectory** while ensuring that we maintain financial discipline.

May I take this opportunity to **thank once again my predecessor as BIR Treasurer, Andy Wahl**, who performed the role admirably and has set the bar really high for those following in his footsteps.

“The finances of BIR remain healthy, allowing us now to work effectively and fearlessly on new projects in 2024.”

Dhawal Shah
Metco Ventures LLP (IND)
BIR Treasurer

DIRECTOR GENERAL'S REPORT

75 years old – but more relevant than ever

Looking back at 2023, I am amazed at how much happened in the course of a mere 12 months: a **new leadership team**, **two amazing anniversary Conventions**, a host of **new projects** and an **additional member of staff**. But don't let me get ahead of myself; 2023 is worth looking at in detail.

Despite meticulous planning, birthday celebrations can sometimes fall short of expectations. Not so with our world organization's 75th anniversary event **in Amsterdam last May which attracted a remarkable 1672 people, representing a total of 775 companies from 65 countries**; notably, 28% of them were attending a BIR Convention for the very first time. This success was then replicated five months later at our ground-breaking Convention in Abu Dhabi, with the **delegate total of 1100 from 56 countries again exceeding all forecasts**.

BIR membership numbers also tell a positive story, maintaining the momentum from an incredible year of growth in 2022. **A total of 195 new members** were welcomed into the BIR fold in 2023 to push the total to 991, drawn from 69 countries.

These impressive data all point to a single, inescapable conclusion: **the services and representation offered by BIR are as relevant as ever** – if not more so. It is not because times are good and profits are sky-high that business people choose to spend time and money on membership fees and Convention registrations. Quite the reverse. Conflicts with global implications, a complex economic landscape and a growing array of regulatory hurdles have impelled **our industry to unite even more closely under the BIR banner**.

Recycling professionals are clearly gravitating towards the collective strength and influence offered by BIR at a time when multiple threats are assailing our industry, acknowledging us as both a safe haven and a fighting force. Be assured, we strive every day to repay this trust placed in us.

Convention and membership successes have put BIR in a strong position to invest in its services. **Our advocacy efforts have never been more vigorous** and we have moved quickly to bolster the team following the retirement last year of Trade & Environment Director Ross Bartley after many years of outstanding service. Alev Somer has established herself as a worthy successor

> “Recycling professionals are clearly gravitating towards the collective strength and influence offered by BIR at a time when multiple threats are assailing our industry.”

and can now count on the assistance of Dasa Paulikova, Federico Zanotti and Daniel Pietikainen, who have brought their substantial experience of regulatory affairs at the national, EU and UN level to BIR's advocacy team.

BIR continues to exert influence in the many policy and regulatory areas which have massive practical implications for our members. To identify just a few examples, we have been representing the interests of the recycling industry in negotiations aimed at developing a UN Global Plastics Treaty where the many issues under discussion include recycled content, design for recycling and extended producer responsibility (EPR).

BIR organized a workshop on EPR in September last year, leading to the development of **our world organization's first-ever position paper** in which we outline basic principles for such schemes **to guarantee free and fair competition** as well as to ensure the transition to a functional and **competitive circular economy**.

Also in September, BIR participated in OECD Steel Committee discussions on the role of recycled material in the low-carbon steel transition. There is a trend towards **considering recycled steel as a strategic raw material**, and BIR is monitoring trade implications.

Another key goal for our world federation is to activate more research into the environmental, social and economic contribution made by the recycling industry. Central to this will be updating our 2008 and 2015 studies on the **“Environmental Benefits of Recycling”**, which focused on the carbon emission savings delivered by our activities. Carbon footprint has become an ever more important yardstick for measuring environmental performance and so the **data generated by this research will be of inestimable value** when defending our interests with regulators and policy-makers.

The journey towards decarbonization and a circular economy have prompted protectionist reactions and de-globalization measures. Whenever and wherever necessary, **BIR will stand united with its member associations**, speaking out loudly and directly in support of free and fair trade.

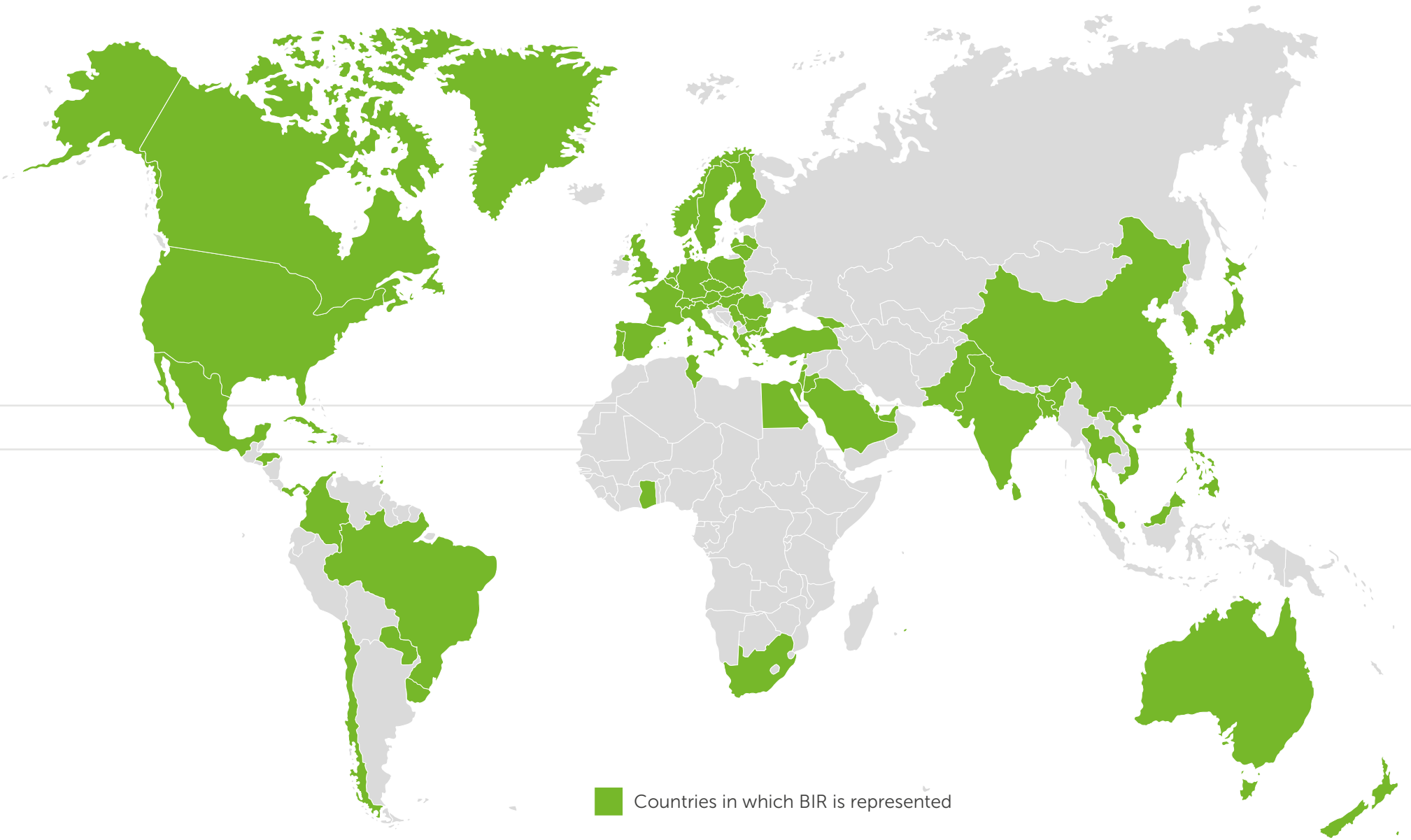
To make our voice heard, we need more than advocacy; we also need effective communication through all available media and information channels. To this end, BIR is working with a new PR agency, Unity, to fortify its public relations initiatives. It has also continued to put **more emphasis on its social media strategy**, leading to significant increases in follower numbers on LinkedIn and X (formerly Twitter).

Arnaud Brunet
BIR Director General

2024 will mark a year of substantial investments, new projects and fresh approaches aimed at **enhancing and fine-tuning services to our members**.

In closing, I wish to express my heartfelt gratitude for the support of **BIR's dynamic new leadership team**, our first-ever female President Susie Burrage OBE and Treasurer Dhawal Shah, as well as members of the Executive Committee and Advisory Council. My appreciation also extends to the dedicated Secretariat team in Brussels and to the unwavering support of national association members. **This is a global team, a family that continues to grow in numbers and in strength**.

MEMBERSHIP SPREAD 2023*



as of 31.12.2023

Continental Europe (EU)
Austria
Belgium
Bulgaria
Cyprus
Czech Republic
Denmark
Finland
France
Germany
Greece
Hungary
Italy
Latvia
Lithuania
Luxembourg
Netherlands
Poland
Portugal
Romania
Slovak Republic
Slovenia
Spain
Sweden

Continental Europe (other)
Albania
Georgia
Norway
Serbia
Switzerland
Turkey
United Kingdom

North America
Canada
USA
Mexico

Central & Latin America
Brazil
Chile
Colombia
Cuba
Haiti
Honduras
Panama
Paraguay
Uruguay

East Asia and the Pacific
Australia
China
Hong Kong SAR China
Japan
Malaysia
New Zealand
Philippines
Republic of Korea
Singapore
Taiwan (China)
Thailand
Vietnam

South Asia
Bangladesh
India
Pakistan
Sri Lanka

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

Africa (North & Sub-Saharan)
Egypt
Ghana
Mauritius
South Africa
Tunisia

MEMBERSHIP HIGHLIGHTS*

Around 990+
BIR Members
all over the World!

195 New Members in **2023**

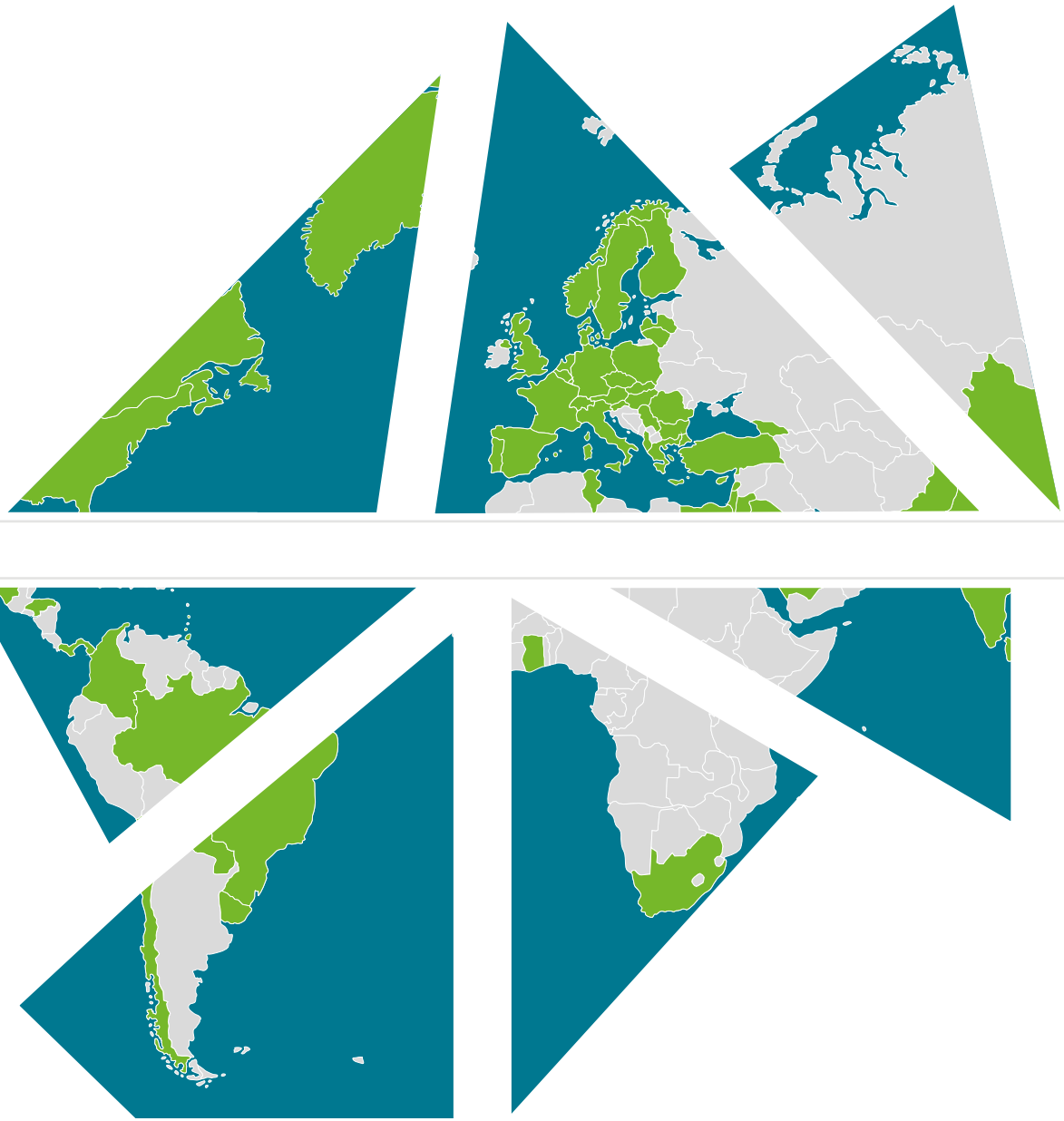
National Federations 36

69 Countries

More than 45% Members outside the European Continent

as of 31.12.2023

LIST OF BIR MEMBER FEDERATIONS



BRAZIL

- INESFA – Brazilian Association of Iron and Steel Scrap Companies

BULGARIA

- Association for Textile Recycling
- BACT – Bulgarian Association of Circular Textiles
- BAR – Bulgarian Association of Recycling

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 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)

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

- Organizaţia Patronală Şi 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

- Aged Recovered Paper Industrialists Association
- 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

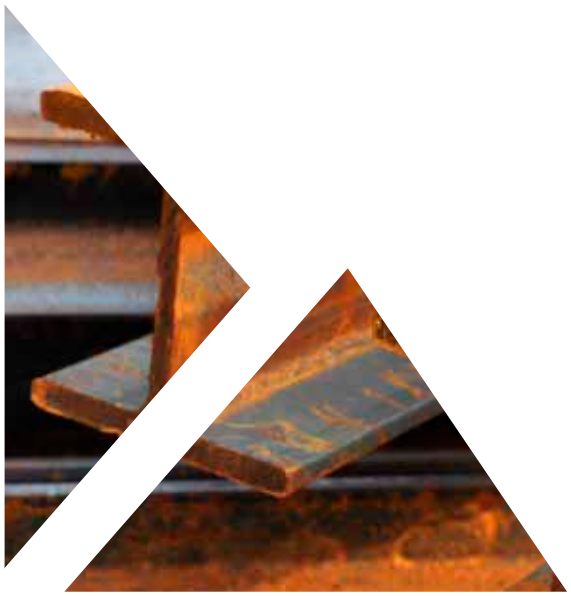
UNITED STATES

- 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.

"The revolution is here and we are all part of it"



Last October, I handed on the BIR Ferrous Division presidency at a tumultuous moment for our industry. Mind you, it would have been difficult to identify a moment over recent years that was not accompanied by **profound challenges and uncertainties**. I wish my successor Shane Mellor every success in navigating our Division's course through the coming years when, no doubt, **change will remain the norm and our industry's resilience will be constantly tested**.

Many of 2023's challenges have been carried forward into 2024 – not least for Turkey, a standard bearer for recycled steel usage. Its steel industry has been struggling with **high input costs and limited demand**, exacerbated by **inflationary pressures and protectionist measures** adopted by the EU and the USA. The country's recycled steel imports tumbled almost 23% in the first half of last year and remained under stress for the balance of 2023.

As for China, the world's largest user of recycled steel, the difficulties facing the country's real estate sector have been impairing steel demand and could result in mills altering production mixes in favour of flat steel, thereby creating **increased export pressure**.

In the West, an **encouraging recovery in steel demand** has been predicted for the EU in 2024 as a counterbalance to the steep falls of 2022 and 2023. But so much of what goes into making longer-term forecasts of this nature is mired in uncertainty these days. As steel association Eurofer points out, this level of recovery remains conditional on a host of factors, including energy prices, inflation and the future course of the Russia-Ukraine conflict. In the USA, meanwhile, **steel demand growth is expected to outweigh the slight decline posted in 2023**.

Anticipated crude steel production growth in India is likely to exert growing pressure on recycled steel buyers in other countries, notably Turkey. Kedar Joshi, Markets Manager (Asia) for Davis Index in Canada, told our divisional meeting in Abu Dhabi last October that **India's recycled steel imports were likely to triple** from around 8.4 million tonnes in 2022 to 25 million tonnes by 2030.

Amid all this market upheaval, Mr Joshi's presentation reminded us that **long-term trends still suggest a bright future for recycling**. Steelmakers are set on an unalterable course towards decarbonization that will require vastly increased metals recycling. "The revolution is here and we are all part of it," was his uplifting message.

> “Steelmakers are set on an unalterable course towards decarbonization that will require vastly increased metals recycling.”

According to fellow guest speaker Davide Braga of Danieli Centro Recycling in Italy, an additional 300 million tonnes-plus of recycled steel will be needed every year to feed the wave of **new electric arc furnace (EAF) capacity supporting the transition to green steel**. There is already clear evidence of this transition in the USA where, of the nearly 22 million short tons per year of EAF capacity expansions announced since 2020, around 60% are expected to be completed by 2024 or are currently in the ramp-up phase. As a result, **competition for primary recycled steel remains fierce**.

This green revolution was also addressed at last year’s Amsterdam meeting by Ole Rolser of McKinsey & Company in the Netherlands who suggested **energy demand was likely to slow** at some future point owing to efficiencies and electrification.

Over the decades, Ferrous Division meetings at BIR Conventions have become synonymous not only with reports on our day-to-day operations but also with placing these activities in their global, longer-term context. **This mixing of micro and macro perspectives also applies to the BIR Shredder Committee**, chaired expertly for several years now by Alton Scott Newell III: its meeting in Amsterdam last May, for example, paired **findings and recommendations from BIR’s latest global Shredder Safety Survey** with a presentation from leading shredder operator George Adams of SA Recycling in the USA on the every-day practicalities of preventing and managing fires caused by lithium batteries.

Another important similarity between these BIR mainstays concerns their **provision of key industry statistics**: the Shredder Committee not only supplies useful safety-related data but also monitors shredder installation numbers around the world and provides a regular running total, both by region and country; and for many years, the Ferrous Division publication **“World Steel Recycling in Figures”**, a statistical tour de force compiled by Rolf Willeke, has served to demonstrate the **absolutely vital contribution** made by our sector not only to industrial production but also to carbon emission reduction.

scan for more information

Denis Reuter
TSR Recycling GmbH & Co. KG (DEU)

President Ferrous Division
(until October 2023)

KEY FACTS

Share of recycled steel used in crude steel production (January-September 2023)

China	21.1%
Japan	36.3%
South Korea	39.7%
EU-27	59.3%
Turkey	86.7%
USA	68.6%

** BIR Ferrous Division’s “World Steel Recycling in Figures”, February 2024 update.*

Global shredder numbers

Worldwide	1181
USA	334
EU/EFTA region	257
Rest of world (mainly China and South East Asia)	590

** BIR World Shredder List.*

NON-FERROUS METALS

A legacy of which to be proud

Our sector endured a rough ride in 2023, impacted by everything from **elevated energy prices to inflationary pressures** and from large-scale fraud at Aurubis to the US banking crisis. Some of last year's all-too-familiar headwinds included hurdles to the free movement of our crucial raw materials, with many governments introducing measures designed to impair or completely prevent established flows between nations.

The increase in trading obstacles during 2023 coincided with BIR's celebration of its 75th anniversary, providing a **timely reminder of why our world organization first came into existence** and of how the lessons of history so often go unheeded. Immediately after the Second World War, many countries decided to continue with bans on exports of ferrous and non-ferrous scrap, enabling local mills to dictate purchase prices and **hampering the wider development of recycling potential through international trade**. Recycling industry leaders of the day examined the options for repairing this trading void and BIR duly took shape.

The longevity of our organization is a reflection of how it has **developed to meet the changing needs of the industry and of its continuing – even growing – relevance**. Nothing makes that enduring relevance plainer than the 23% growth in membership numbers during 2022, drawn from almost 70 countries.

BIR has compiled a huge body of work over its seven and a half decades but its mission remains just as vital today as it was back in the late 1940s. Our world organization marked its noteworthy anniversary with the special publication "The Story of BIR: 1948-2023" in which it was noted that **"the globalization of previous decades has turned full circle into widespread protectionism"**. Despite wider understanding of the need for a healthy recycling industry, its ability to realise its full environmentally-positive potential was still being "compromised by trading restrictions", it added.

It is essential that governments reach a broader, collective view to facilitate not only the energy transition but also the continued supply of the basic manufactured products we all need in our daily lives. Given the critical importance of our raw materials to manufacturing sectors globally, **BIR will continue to play a vital role in educating and in advocating for trade barriers to be removed**.

> “We are the traders, processors, consumers and innovators whose expertise, effort and resilience have been making the world a better place for generations.”

Paul Coyte
Hayes Metals (NZL)
President Non-Ferrous Metals Division

In my first contribution to BIR’s Annual Report as President of the Non-Ferrous Metals Division, I want to put on record my **immense pride in what we do as an industry and as a world organization**. As I said at our Convention in Abu Dhabi last October, we are the traders, processors, consumers and, I should add, innovators whose expertise, effort and resilience have been making the world a better place for generations through **conservation of resources and huge reductions in carbon emissions**.

Over the years, guest presentations at BIR Conventions have also underlined **the crucial role played by recycling** while also providing **valuable information to help us understand trends** and plan more effectively. In Amsterdam, for example, Jianbin Meng of the International Lead and Zinc Study Group/ International Nickel Study Group underlined the huge impact of recycling on meeting global lead and zinc demand while Jean-Marc Moulin of Hydro Extrusions explained how **recycling was at the core of many of the EU’s sustainability initiatives**. And in Abu Dhabi, Deepesh Goyal of Fujairah Gold in the UAE confirmed how primary producers’ attitudes to secondary metals have shifted over recent years – from avoidance in many instances to being seen as the “low-hanging fruit” towards achieving carbon footprint reduction targets. ISRI’s chief economist Joe Pickard then gave us all an injection of optimism by stating that, despite some short-term challenges, medium- to **longer-term prospects for our industry were “incredibly bright”**.

I would like to thank our divisional board for its sterling work in putting together attractive Convention programmes and delivering informative reports for our regular Mirror publication. And **a special mention should go, of course, to my predecessor Dhawal Shah** for his inspirational tenure as President of our Division.

Looking to the future as any organization should, the board will be assessing ways of enhancing the BIR World Mirror and of **underlining our sector’s vital work through the provision of information and key data**, to which end we have already commenced an update of our study on non-ferrous material flows.

KEY FACTS

Another turbulent year on the markets

Refined lead usage 1960-2022:

422.1 million tonnes

of which

47%

attributable to the recycling industry

** International Lead and Zinc Study Group, presented at BIR Convention in Amsterdam, May 2023.*

scan for more information

Time to turn words into actions

Given the tide of economic and geopolitical shocks over recent years, **we have become accustomed to operating in a fog of uncertainty**. Even before the attacks on commercial tankers passing through the Red Sea, earth-shaking events like the COVID pandemic and the conflicts in Ukraine and Gaza had come along to undermine confidence in forward business planning.

At the time of writing this report, it is not clear how the Red Sea situation will develop but, already, the threat of further attacks has prompted several of the world's largest shipping lines to divert vessels onto the much longer route around the Cape of Good Hope. **A significant commercial impact on our sector is unavoidable** given that large volumes of our goods are shipped from Europe to East Africa, Dubai and the Indian Subcontinent via the affected route. Sailing times have been extended by, typically, 12 days and freight costs have soared. Worse still, a knock-on effect will be out-of-place containers leading to much longer delays such as we saw during the COVID lockdowns.

Our environmental credentials count for nothing in moments such as these; like other industries, we are a mere straw in the wind when such events occur. **Our markets were even more disturbed last year than in 2022**, partly because of the Ukraine and Gaza conflicts and partly the generally high levels of inflation which served to restrict purchasing power in many of our key markets. Our industry's volumes were actually higher in 2023 than in 2022 but were still below pre-COVID levels. Meanwhile, our businesses have had to cope with escalating costs, notably for fuel and wages.

Especially in light of the shipping issues mentioned above, **it is impossible to foresee anything other than a difficult 2024** in which the insecurities surrounding our operations will not only remain but intensify. If there is to be any relief for our industry in terms of commercial conditions, it is likely to be delayed until the second half of the year.

Hopefully, **progress on other fronts in 2024 will be more visible**. As we saw in 2023, many initiatives – including significant investment in recycling infrastructure – were announced but have yet to brought to fruition, while policy measures have been defined but have yet to

> It is impossible to foresee anything other than a difficult 2024 in which the insecurities surrounding our operations will not only remain but intensify.

come into force. Certainly in Europe, the year holds the promise of **significant developments on a number of policy and regulatory fronts**.

2023 set the scene in many ways with, for example, **MEPs' overwhelming adoption of the EU Textiles Strategy** which will require products to be more durable but also to be more easily reused, repaired or recycled. They also voiced their approval of specific targets for textile waste prevention, collection, reuse and recycling, as well as for the European Commission's proposal to establish harmonized EU rules on extended producer responsibility along with eco-modulation of fees. And towards the end of last year, EU negotiators reached a **provisional agreement on the Ecodesign for Sustainable Products Regulation**, aimed again at making products more durable, reusable, upgradable, repairable, recyclable and easier to maintain.

So 2023 was the latest in a series of transition years in which debate and policy development took centre stage. What we now need in 2024 is concrete change at ground level and in how systems work; in other words, **we need to see the concept of a circular textiles economy becoming a reality**.

Design for recycling, **upcycling**, **greater product durability** and **repair strategies** were all identified as **key building blocks for circularity** during the excellent group discussion at our Convention meeting in Amsterdam last May. The guest presentation from Prof. Dr.-Ing. Stefan Schlichter of Germany's Institut für Textiltechnik – Recycling Atelier certainly made the transition from concept to harsh reality, not least with his contention that the proportion of used textiles recycled in a closed loop remains at a paltry 1% and that circularity in Europe would require the construction of between 150 and 250 additional recycling facilities in the years to 2030.

In effect, the time for talking is over.

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

KEY FACTS

Proportion of used textiles destined for **energy recovery** or **landfilling**:

73%

Proportion of used textiles **recycled in a closed loop**:

1%

* ***Prof. Dr.-Ing. Stefan Schlichter*** *of Germany's* ***Institut für Textiltechnik – Recycling Atelier, speaking at BIR Convention in Amsterdam, May 2023.***

scan for more information

The ebb and flow of a life in recycling

2023 provided yet another lesson on our steep learning curve about coping with adversity.

The previous year had brought an **abrupt change of momentum** after positive early demand for recovered fibre was suddenly replaced by lower orders as mills were hit with the double-whammy of high energy costs and reduced demand for their finished products owing to spiralling interest rates. The difference in 2023 was that the year was challenging from the outset and remained that way for the entire 12 months, thereby **testing our industry's renowned adaptability and resilience**.

On the commercial front, collection volumes were under pressure and demand from our mill customers was short of what many of us would have wished. Even in the USA, where OCC and mixed paper prices were on a rising trend for most of 2023, the upturn was largely driven not by increased demand from the mills but by buyers' nervousness over fibre availability.

So what of exports to Asia? China has been fighting its own battle with **low consumption and a lack of orders for finished products**. But long gone are the days when large parts of the world relied so heavily on China to absorb recovered fibre surpluses. **India and Indonesia, among others, have become key Asian outlets for Europe's exports** – but even this steady business was to suffer a jolt in late 2023 following the launching of attacks on commercial vessels in the Red Sea region. Import procurement plans for many buyers in Asia had to be thrown out of the window while suppliers in Europe and the USA were faced with diverted vessels, significantly longer transit times and huge increases in freight costs, not to mention risks of cancelled orders and revoked vessel space bookings.

There were suggestions from some quarters that the freight rate increases and surcharges imposed in response to the attacks were at best opaque and at worst excessive. What can be said with certainty is that **our industry always remains vulnerable to geopolitical and commercial forces beyond our control** – even though our industry is regularly lauded as the spearhead of the circular economy.

> “It cannot be repeated too often that free and fair trade in recovered fibre is the lifeblood of our environmentally-essential industry.”

It cannot be repeated too often that **free and fair trade in recovered fibre is the lifeblood of our environmentally-essential industry**. Our two meetings at BIR Conventions in 2023 served not only to underline this point but also to stress how international flows have been changing in recent times, not least because of China’s altered import rules.

In Amsterdam last May, CellMark’s John Atehortua focused on the adaptability of US OCC exporters. Having shipped more than 50% of their volumes to China as recently as 2018, **the biggest overseas buyers in 2022 were India, Thailand and Indonesia**. And Simone Scaramuzzi of LCI Lavorazione Carta Riciclata Italiana Srl noted that China had been replaced as the leading buyer of European recovered fibre by Indonesia, India and Turkey, with total volumes shipped from Europe to Asia actually increasing 12% in 2022.

At our gathering in Abu Dhabi last October, our esteemed former President Ranjit Singh Baxi **highlighted the massive growth potential in India** where a surge in domestic mill production capacity from 14 million tonnes at present to more than 20 million tonnes by the end of the decade will be fuelled largely by recovered fibre, on which three-quarters of India’s producers currently rely. The country’s imports already amount to some 12 million tonnes per year, once again underscoring the **importance of free and fair international trade to a successful circular economy transition**.

In terms of flows, South East Asia is still a powerful magnet for recovered fibre surpluses generated elsewhere in the world. According to last October’s presentation by Atul Kaul of Waraq in Saudi Arabia, the Middle East’s annual recycled containerboard production of 4 million tonnes creates an **ongoing requirement for quality fibre**, and yet volumes are still being pulled from the region towards South East Asia.

Understanding material flows and their many shifts is crucial for any business reliant on exports, thus emphasizing yet again the **value of our twice-yearly gatherings and the expert presentations they attract**. Their “not-to-be-missed” tag is well-earned.

Francisco J. Donoso
DOLAF Servicios Verdes S.L. (ESP)
President Paper Division

KEY FACTS

Focus on India:

Domestic paper and board production capacity projected to grow from

14 million tonnes
to **20** million tonnes by 2030

75% of country’s paper mills dependent on recovered fibre

** Ranjit Singh Baxi of J&H Sales Ltd speaking at BIR Convention in Abu Dhabi, October 2023.*

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New world order for the "wonder alloy"

For stainless steel output, the shift in the global balance of power has never been more pronounced than it was in 2023.

Figures released by worldstainless in early 2024 have revealed that stainless steel melt shop production totalled 42.6 million tonnes in the first three quarters of last year for an increase of 2.5% over January-September 2022. At the time of writing this report, **leading analysts are expecting production growth** of approximately 4% for 2023 as a whole, thus largely counterbalancing the 5.2% drop recorded in 2022.

But to say the least, **last year's recovery in stainless steel production was far from evenly spread**; in fact, it was driven exclusively by China. While production was falling 8% in Europe, 12.9% in the USA and 12.4% in Asia (excluding China and South Korea), Chinese output in the first nine months of 2023 was a remarkable 13.4% higher than in the corresponding period of 2022 at 26.6 million tonnes.

China's production increased by approximately 3.1 million tonnes in the opening three quarters of last year whereas the global total was barely 1 million tonnes higher than in January-September 2022. Again at the time of writing, **experts are suggesting that Chinese stainless steel production could have topped 36 million tonnes last year**. If this is combined with Indonesia's output, we arrive at a total of around 40 million tonnes for the two countries – or close to 69% of global production.

The scale of the shift in market dominance is made plain by the fact that Europe and the USA produced a combined 5.8 million tonnes of stainless steel in the first nine months of 2023, or approximately 22% of China's volumes over the same period.

For stainless steel producers in Europe and beyond, **the harsh, day-to-day reality has been commercial pressure resulting from lower-cost imports from Asia**. This pressure ebbs and flows, but is forever present. During 2023, some mills were forced to make difficult business decisions in a bid to keep their costs low and their production viable, such as temporary lay-off schemes.

Looking ahead, however, sustainability and ESG considerations will make it increasingly difficult to import NPI-based stainless into the EU. But the big plus for everyone involved in this story is **stainless steel demand, with excellent long-term prospects** almost everywhere you look.

> “There is no ‘green steel’ and no ‘green stainless steel’ without scrap.”

Emerging and fast-growing nations are racking up some **particularly impressive growth numbers**. At our meeting in Abu Dhabi last October, Hitesh Agrawal of Jindal Stainless pointed to projections from the Indian Stainless Steel Development Association and CRISIL Research that annual stainless steel demand in India would surge an astonishing 3 million tonnes over the remainder of the current decade to almost 7 million tonnes. Importantly, stainless steel produced in India is based largely on recycled feedstock.

A major challenge, said Mr Agrawal, would be to **secure sufficient quantities of recycled steel in the current climate of raw material protectionism**. So while market prospects for scrap are healthy, its full circular economy potential can be realised only through the free and fair trade for which BIR has passionately argued over many decades.

Mr Agrawal rightly described stainless steel as a **“wonder alloy”** given its range of positive properties, including strength and heat/corrosion resistance. And in a world where carbon footprint has become an ever more important yardstick, **stainless steel boasts some of the most impressive credentials available**. As noted in Abu Dhabi by Dr Gerhard Pariser of Oryx Stainless, a recent lifecycle assessment conducted by Germany’s Fraunhofer Institute found that making a tonne of 304 stainless steel with 100% primary material generates 7.82 tonnes of carbon dioxide equivalent whereas this figure drops to 3.62 tonnes with 70% recycled stainless steel and to 0.8 tonnes at 100% recycled steel.

Dr Pariser reminded us that **“there is no ‘green steel’ and no ‘green stainless steel’ without scrap”**. This is a statement well worth remembering whenever our industry’s vast social, economic and environmental contribution is called into question.

At our meeting last year in Amsterdam, Prof. Dr Frank Pothen of the Ernst-Abbe-Hochschule Jena University of Applies Sciences and the Fraunhofer Center for International Management and Knowledge Economy IMW in Germany favoured **incentives to use scrap over mandatory utilization quotas**, while fellow guest Markus Moll of Steel & Metals Market Research confirmed **massive scope for increasing scrap’s contribution to this green revolution** given that its 41% share of the global raw materials mix in 2022 was one of the lowest numbers for many years.

What goes down hopefully comes back up even more strongly.

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

KEY FACTS

Carbon emission savings
when making 304 stainless steel from 100% recycled rather than 100% primary input:

Around 90%

** Fraunhofer Institute, Germany.*

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PLASTICS

Industry needs assists, not own goals

In my previous contribution to BIR's Annual Report, I adopted a well-known footballing phrase – **"a game of two halves"** – to describe the sudden shift during 2022 from positive to negative fundamentals. Looking back now at market conditions in 2023, another saying familiar to football fans comes instantly to mind: **one-way traffic**.

Our industry was under **immense pressure throughout the entire year** as it faced the onslaught of low demand and poor prices for our final products, leading to uncomfortably high stocks. A cynic might say that the market found its direction in 2023: unfortunately, that direction was generally downwards.

Market uncertainty has undermined confidence among recyclers to invest in their operations and therefore to drive forward this industry's growth for the long term. Still-high interest rates and energy costs have added to our woes, combining with persistent inflationary pressure which has led to increased labour costs and thus a further squeeze on profit margins. Rather than boosting capacities, **many recyclers have opted to limit or even curtail production** in the face of such unrelenting market challenges.

Memories are now fast-fading of those all-too-brief glory days when brands were fulsome in their commitments to the use of recycled plastic as part of their bold environmental agendas. But as we heard first hand at our May 2023 meeting in Amsterdam from Caroline van der Perre of Belgian recycler RAFF Plastics, customers were now switching back from recycled to cheap, often-imported primary raw materials. Rather than **reaping the benefits of investment in recycling capacity**, she lamented that her business was now struggling to keep all its lines running.

Last year's BIR Conventions in Amsterdam and Abu Dhabi were a great success on many levels, not least in illustrating how **the recycling sector is alive with ideas and innovation**. At the October meeting of our Plastics Committee, for example, Jerome Viricel of Recapp in the UAE spoke of his company's success in **encouraging recycling through an app and website** serving Dubai which were creating a phenomenally useful database of consumption and behaviour.

At the same time, our Plastics Committee meetings drill to the very core of latest industry issues. At last year's gatherings, there were reasoned arguments in favour of a standardized legal framework within

> “A cynic might say that the market found its direction in 2023: unfortunately, that direction was generally downwards.”

Europe and **an extension of obligations to use recycled materials as routes to boosting our industry's ailing prospects**. And yet we also heard how the legislative climate facing recyclers is becoming ever more obstructive, such as through unhelpful changes to the EU Waste Shipment Regulation. To further the footballing analogy, **our industry needs assists in order to flourish, not own goals**.

Our meetings also brought pleas for **encouragement of mechanical over chemical recycling**. In Abu Dhabi, Carlos Monreal of Plastic Energy in Spain delivered a robust defence of chemical recycling while insisting that such technologies need to focus on hard-to-recycle, end-of-life plastics that cannot be processed mechanically.

The concerns and ideas voiced at these meetings come from **experts positioned in recycling's front line on a day-to-day basis**; it is to these people, surely, that legislators should be listening and responding with help rather than hindrance. As BIR's Trade & Environment Director Alev Somer told us in her Abu Dhabi presentation on developments towards a UN Global Plastics Treaty, **it is essential that recycling industry representatives have a seat at the table** and are not regarded merely as service providers.

Our views should count. And yet despite the proliferation of recycled plastic content mandates worldwide, the earlier momentum enjoyed by our industry has been largely lost. As a first course of action, **legislation underpinning the use of recycled content in final products needs to be implemented** in order to create a more balanced market and to reduce destructive fluctuations in demand and prices, thus enabling recyclers to grow their businesses with confidence.

The paramount need for positive action to restore momentum to viable environmental solutions such as recycling is underscored by the OECD study “Global Plastics Outlook: Policy Scenarios to 2060”, which concludes that global plastics waste generation is set on a course to outpace envisaged improvements in waste management. **Recycling can achieve so much more if given the proper legislative tools**.

Henk Alssema
Vita Plastics (NDL)
Chairman Plastics Committee

KEY FACTS

OECD projections for the period from 2019 to 2060:

Global annual plastics use to soar from
460 million tonnes
to **1.231 billion tonnes**

Share of successfully-recycled plastic waste to rise from
9% to 17%

but annual plastic leakage to the environment to double to
44 million tonnes

** OECD document “Global Plastics Outlook: Policy Scenarios to 2060”.*

scan for more information

On the threshold of a transformation

2023 proved to be a **watershed year for tyre recycling in Europe**. After many years in which the crumb rubber infill market underpinned growth in the recycling of end-of-life tyres (ELTs), the European Commission confirmed in late September that this infill was to be banned from use in synthetic turf surfaces at the end of an eight-year transition period because of the risks to human health thought to be posed by its content of polycyclic aromatic hydrocarbons, or PAHs. **The recycling industry has repeatedly questioned the data used to support the ban**, but to no avail.

To the general public and even to legislators, eight years may sound like a long time to prepare for this ban but, as every industry expert will tell you, **the impact of this ruling will become visible immediately in investment decisions**. Crumb rubber infill's card has been well marked and demand will reflect this. Already, there has been an observable trend towards ELTs being lost to co-incineration, even though burning tyres is far more harmful to the environment than material recycling. As a result, **tyre recycling companies are now struggling to obtain ELTs – the lifeblood of their operations**.

The ban has been debated for several years but **the regulators have ultimately waved away the commonsense arguments put forward by recycling industry representatives**, including calls to implement risk management measures to prevent microplastic releases from synthetic turf and to introduce initiatives to create alternative markets to help those businesses that have invested heavily in equipment to produce infill.

Without doubt, the ban is set to transform the tyre recycling industry in Europe. **Over 80% of the infill market relies on recycled rubber derived from tyres**. At the height of its use in Europe's sports pitches, more than 500,000 tonnes of ELTs were processed each year to make the required quantities of infill.

In effect, the door is being slammed on a market that we, rather than the tyre producers, have spent valuable time and money on cultivating. We have been forced into a position of demonstrating once again our **renowned resilience** and of **diverting our efforts into other outlets for ELTs**.

> “We have been forced into a position of demonstrating once again our renowned resilience and of diverting our efforts into other outlets for ELTs.”

Thankfully, and as our recent meetings at BIR Conventions have confirmed, **the ELT recycling arena is awash with inspiration and initiative**. The rise of recovered carbon black (rCB) is a particularly rich source of optimism, presenting new opportunities for utilizing crumb rubber as a feedstock for pyrolysis plants. These facilities require large quantities of quality crumb rubber to produce high-quality rCB, which constitutes a sustainable alternative to virgin carbon black.

With its potential to be incorporated in significant proportions, **rCB promises genuine circularity and a brighter future for the industry** at a time when the crumb rubber infill market has been dealt a severe blow by Europe's ban-in-waiting. Even with a conservative estimate of a 20% substitution rate for virgin carbon black, the outlook for rCB production is highly optimistic, underscoring its viability, profitability and **potential for driving innovation and environmental benefits**.

360 Market Updates estimated recently that the rCB market's worth US$ 317 million in 2022 would increase to US$ 485.5 million by 2031 and at a compound annual growth rate of 6.7% for the period from 2024 to 2031.

As rubber recycling and rCB expert Martin von Wolfersdorff of Wolfersdorff Consulting explained to one of our more recent BIR Convention meetings, companies had struggled in the past to **push recycled products into a competitive marketplace** whereas demand now favoured them because end customers wanted to boost their sustainability credentials. In effect, he said, **the focus had shifted from economy to ecology**.

As the infill ban illustrates, **legislators continue to erect hurdles to greater material recycling from ELTs**. And during our panel discussion on tyre pyrolysis at last May's BIR Convention in Amsterdam, speakers also alluded to the difficulties of building a sustainable venture in Europe given existing funding rules. But as the rise of rCB underlines, **our industry fixes its eyes firmly on the future** and always bounces back with further innovation.

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

KEY FACTS

Expected CAGR of recovered carbon black market for 2024 to 2031:

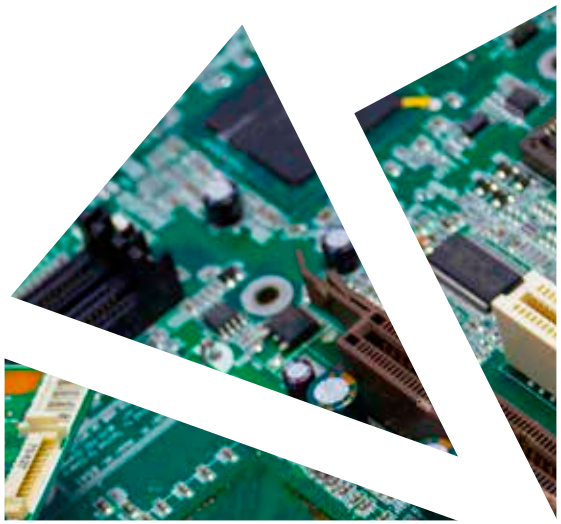
6.7%

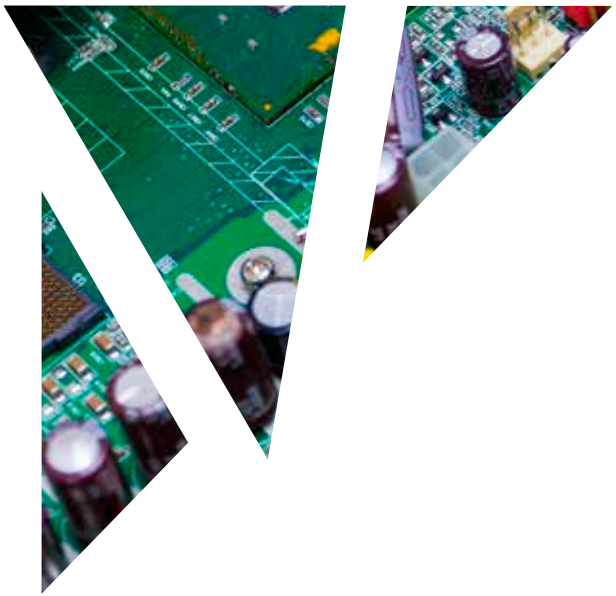
** 360 Market Updates.*

scan for more information

ELECTRICS, ELECTRONICS & EV BATTERIES

Let's dispel the misconceptions – Can we be a part of the solution?





I am deeply honoured for the trust invested in me as the new Chairwoman of what is now known as the **BIR Electrics, Electronics and EV Batteries Committee (EEEVB)**. This is the fastest-growing and undoubtedly the fastest-changing material stream handled by recyclers and so I am mindful of the responsibility ahead and will strive to do everything in my capacity to meaningfully contribute to and lead this Committee.

In recent years, **the words "scrap" and "waste" have created misconceptions** about what we actually do. Looking at **recycling from the perspective of a resource material** rather than as a waste or scrap material would help policy-makers formulate guidelines that would help us achieve higher levels of recycling. The initial step, therefore, was to change the name of our Committee. Our new name is **a more positive reflection of the essential environmental work we do** and highlights the changing nature of what we handle, for example, through the addition of "EV Batteries".

Changing perceptions of our industry for the better will be one of my key goals as Committee Chairwoman. My own fascination with recycling began with a school project I undertook at the age of 13 and has stayed with me ever since. I'd like today's younger generation to experience the same thrill of discovering that **there is an industry out there in which they can pursue their commitment to recycling** and, by doing so, **make a real difference to the way we treat our planet and its precious resources**.

The electronics recycling industry has made a **massive contribution to resource conservation** and to **reduction of harmful emissions**. However, the industry continues to face challenges with changing regulations and the complexities of new technology-driven products.

As electrical and electronic devices become ever more complex, **recycling outcomes could be significantly enhanced if manufacturers and recyclers collaborated during the design stage**. By working together early on with a focus on recycling, recovery of secondary raw materials and minimizing the fire risks related to lithium-ion batteries (LiBs), incredible progress could be made towards safely recycling and closing the loop for a circular economy. If LiBs were positioned in products with ease of removal in mind, this would undoubtedly lead to a reduction in fires at recycling facilities. Apart from the obvious danger to personnel and to property, these increasingly frequent LiB fires have led to escalating insurance premiums for recyclers in Europe and the USA.

> “The electronics recycling industry has made a massive contribution to resource conservation and to reduction of harmful emissions. However, the industry continues to face challenges with changing regulations and the complexities of new technology-driven products.”

From the start of 2025, amendments to the United Nations Basel Convention will be implemented for all materials designated as e-waste. These materials are to be subjected to prior informed consent (PIC) procedures for all transboundary movements that fall under hazardous and other wastes. Delays with paperwork could definitely be foreseen owing to the change of regulations and allied procedures. As pointed out at our session in Abu Dhabi last October by BIR’s Trade & Environment Director Alev Somer, **we as recyclers must prepare well in advance for this change** that would impact the transition to the new procedures as well as existing trade flows.

Another concern relating to regulation, as pointed out by Julie-Ann Adams of the European Electronics Recyclers Association in her presentation to our session in Amsterdam last May, is that **different governments will interpret legislation in different ways**; her example was the EU’s WEEE Directive which, she said, had given rise to the implementation of 27 different versions by Member States.

In his presentation to the BIR Convention in Amsterdam last May, Yousef Al Sharif of Sharif Metals Group identified construction/infrastructure projects and substantial tech-related consumption among expatriate populations as key sources of end-of-life electronics in the Middle East region where an estimated 1.74 million tonnes was generated in 2022, mostly in the UAE, Saudi Arabia and Egypt. A 25% increase in this figure was anticipated by the year 2030.

While industry challenges in the region included lack of awareness/education, informal recycling practices and insufficient infrastructure, growing interest in electronics recycling as well as **enhanced corporate social responsibility commitments suggested huge potential lay ahead**, according to Mr Al Sharif.

Only around 5% of LiBs are being recycled at present, we were told at the BIR meeting in Abu Dhabi by Leah Chen of S&P Global Commodity Insights. This is one example, among many, of the huge amount of work still to be done if **recycling is to maximize its potential to deliver environmental benefits**.

We are all consumers of electrical and electronic devices and we can lead by example in creating awareness within our families, communities and workplaces of **the significance of electronics recycling** and, more importantly, how we can be **advocates for safe handling of end-of-life electronic devices** as consumers and recyclers.

Josephita Harry
Pan American Zinc LLC (USA)
Chairwoman Electrics, Electronics & EV Batteries

KEY FACTS

Estimated cost of recycling

the 75 million tonnes of end-of-life electrical and electronic devices generated annually:

US$ 75 billion

Estimated worth of recovered content:

US$ 150 billion

** B K Soni of Ecoreco Recycling Ltd speaking at BIR Convention in Abu Dhabi, October 2023.*

scan for more information

INTERNATIONAL ENVIRONMENT COUNCIL

Taking a stand against EPR abuses

TO begin this review of 2023 by concentrating on BIR's main achievement, this was without contest **the publication of its first-ever position paper**. Through this document dedicated to the structure and governance of extended producer responsibility (EPR) schemes, our world organization has sought to **tackle a highly sensitive political issue**: for the last 30 years around the world, this has been an arena in which **producers have engaged in a fierce fight with the recycling industry** in a bid to obtain the value from collected raw materials for their own profit.

Everybody forgot the original purpose of the EPR process, namely to implement the **"polluter pays" principle**. In other words, the polluters are the producers and therefore they should pay for the consequences of their production when products reach their end-of-life phase. But what has been happening instead? The authorities have followed the advice of the producers and given them all the power to organize their "responsibility", by which we mean their way of "paying".

So what did the producers do? They organized themselves into "central purchasing units" – the infamous producer responsibility organizations – and transferred their costs to all other possible stakeholders, including recyclers, municipalities and consumers. Why would they do otherwise? **They have been granted full powers by the authorities who have failed to understand the mistake of their original decisions**.

Privatizing profits and nationalizing losses: it's a basic business instinct we all know very well – except, that is, the authorities who believe we live in an ideal world in which people do what they are told. This trend must be stopped, and the stakeholders affected by this process should be voicing it loudly.

Through the development of its pertinent position paper, **BIR has looked to re-establish basic guiding principles for EPR schemes to succeed**. I am proud that our world organization has taken this stance.

In another important development last year, the recast of the EU End-of-Life Vehicles Regulation published in July will have consequences all around the world because, clearly, **no manufacturer produces cars solely for the European market**. Importantly, the reach of this regulation extends beyond end-of-life vehicles to the design of new cars, including the revolutionary obligation to

> “This trend must be stopped, and the stakeholders affected by this process should be voicing it loudly.”

Olivier François
Galloo (FRA/BEL)

Chairman International Environment Council

incorporate a certain level of recycled plastics. Back in 2019, the European Commission introduced the requirement that, by 2025, PET drinks bottles must contain at least 25% recycled plastic, thereby acknowledging **the importance of creating demand for recycled raw materials (RRMs)**; the vehicle regulation drives this demand imperative to a whole new level.

With the EU now pressing manufacturers to incorporate RRMs into their production, 2023 saw huge volumes of these materials – particularly plastics – arriving from all over the world in a bid to profit from this new market situation in the EU. As a consequence, **the EU recycling industry has been unable to compete against countries where energy and labour costs are lower than in Europe**.

Also on the issue of transboundary movements, UN Basel Convention amendments will require all e-waste crossing international borders to follow prior informed consent (PIC) procedures from January 1 2025, with national governments deciding whether they want these imports. To repeat the sound advice offered at last October’s Abu Dhabi Convention by BIR’s Trade & Environment Director Alev Somer, **recyclers affected by these amendments should be preparing well in advance for a PIC system which is neither electronic everywhere nor harmonized worldwide**. In the meantime, BIR is urging both Basel and the OECD to simplify transborder arrangements.

Another on-going United Nations initiative concerns the development of a **Global Plastics Treaty targeting a legally-binding instrument to control plastic pollution**. BIR has been actively involved in this process from the outset because we believe recycling plays an important role in preventing such pollution. To date, governments have submitted over 500 proposals covering such topics as recycled plastic content, transboundary movements of plastic waste, EPR and design for recycling – all of which are central to **the essential work carried out by our industry**.

Further negotiations are planned for 2024, ahead of a potential Treaty signing in 2025. As ever, BIR will engage at every opportunity **to ensure the best interests of the recycling industry are safeguarded**.

INTERNATIONAL TRADE COUNCIL

Engaging members and influencing policy

The challenges facing the recycling industry are legion and varied, reflecting the current turbulent and demanding times. Consequently, the role of BIR in terms of **advocating and safeguarding the commercial interests of its members has never been more vital**.

BIR's International Trade Council (ITC) plays a pivotal role in these endeavors. As the voice of recycling worldwide, BIR collaborates with its national association members to provide an **umbrella platform for articulating and representing the industry's position** to numerous supranational organizations and NGOs, including, but not limited to, major international institutions like the UN, OECD and EU. This collaboration **ensures that BIR's voice is heard whenever and wherever regulatory and other reviews that impact the global recycling industry arise**, as they increasingly do.

At the Amsterdam Convention in May 2023, BIR's former Director of Trade and Environment, Ross Bartley, bid farewell to our members after **many years of exceptional service**. His contributions, characterized by his hallmark wit, verve, and wisdom, will be deeply missed.

The arrival of our new skilled and talented Director of Trade and Environment, Alev Somer, has been a **tremendous boost**. Together with her team, she has made a seamless and invaluable impact in pursuit of our aims and strategies, which are **crucial to advancing the interests of our members**.

The ITC's second crucial role is to convey key messages about BIR's activities, value, and leadership as **the global voice of the recycling industry**. The vehicle for this objective has been, for some considerable time, the **highly regarded and celebrated TV-chat-show-format series The Challenge**. While numerous excellent contributions advocating the value and importance of recycling are produced by BIR and other industry elements, The Challenge's unique role is in directly **addressing the crucial and real-time issues facing our members** through both live and recorded broadcast free-to-air editions at our conventions and on other occasions.

The Challenge, with its lively and engaging format, has been providing our audience with a **deeper appreciation of topical concerns in a relatable and identifiable manner**. The multi-generational composition of The Challenge Team known as the Three Amigos, comprising

> “In a rapidly changing world that constantly demands new strategies and approaches, our ever-resourceful organization is always adapting and enhancing to meet these needs.”

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

myself as host and Chairman of the ITC along with co-anchor resident contributors Mark Sellier and Murat Bayram, has provided **engagingly experienced and expert insights**.

The main feature of The Challenge shows has been the vast array of significant guests who have appeared on the show's editions. However, the guests have been carefully selected to address issues that are specifically topical and where **BIR's input as an influencer can be most effective**. For instance – and among many other issues the show has covered – the CEO of the LME was interviewed during their discussion paper phase; or the author and journalist of the bestseller "The World for Sale" was interviewed as commodity activities and hiatus became a top concern for our members; additionally, a leading industry CEO was interviewed on ESG as it impacts recycling.

The last edition of The Challenge at our Amsterdam Convention, where we celebrated our 75th Anniversary, included **Hot Seat contributions from a wide range of special guests who have often made significant contributions to BIR** in previously less recognized roles over the years.

Uniquely, due to unavoidable absences of two of its Three Amigos (namely Mark Sellier and Murat Bayram), the Amsterdam Convention edition saw a change in its lineup. I invited "Mr Repurposed" John Sacco, to join me as guest co-anchor, with Repurposed having previously made its first initial sneak peek debut on a prior edition of The Challenge in Dubai. This very well-received and lively edition was further enhanced by a **splendid contribution from our special guest**, Uwe Schmidt, CCO and Board member of the major copper consumer Montanwerke Brixlegg.

In a rapidly changing world that constantly demands new strategies and approaches, our ever-resourceful organization is always adapting and enhancing to meet these needs. The ITC will certainly continue to play its full part as a standard bearer in this respect, as always going forward.

BIR
75
1948
2023
Anniversary
WORLD RECYCLING
CONVENTION
ROUND-TABLE
SESSIONS
ABU DHABI 2023
TO OUR SPONSORS
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SPECIAL COMMITTEES

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

CONVENTIONS

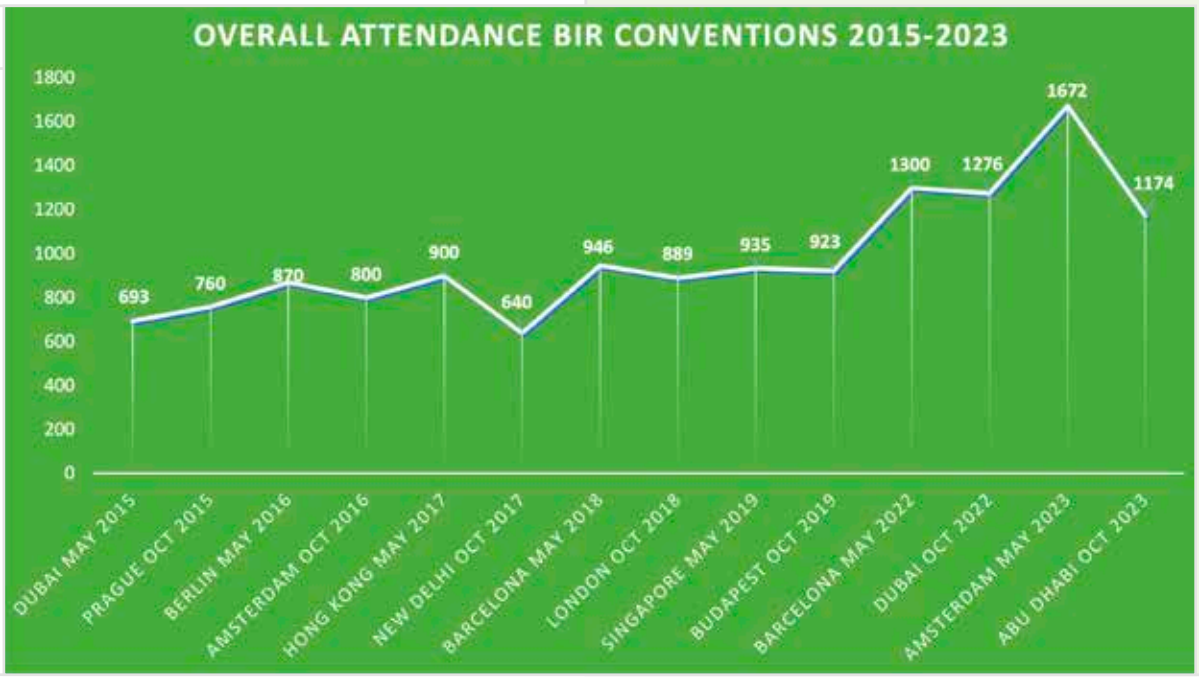
Strong demand growth requires a new strategy

The biannual BIR Conventions not only represent **the most international platform for trading and networking** but also are an essential source of **the most up-to-date information about global trade, markets and regulatory developments**. The importance of these events is reflected in the **growth in Convention registrations** and by the numbers choosing to join BIR from all around the world.

This growth in interest in BIR events brings significant **challenges in terms of continuing to provide the quality venues**, meeting content and level of service demanded by attendees. In recent times, we have seen a **step-change in attendance numbers** – from typically between 600 and 800 participants to more than 1200 in both May and October. The two events are now of an almost similar size and attendance profile.

The BIR Convention timeframe is usually about two years from location concept to the event itself, although it should be noted that this was less than four months for Amsterdam in 2023. During this two-year time period, the Convention team must visit the location to view the geography of the space to gauge whether it is suitable and how it might be utilized. Contracts with convention centres, hotels and service providers, among others, need to be negotiated while logistics, tax and legal advice must also be sorted out. **The programme needs to be agreed by our President and Executive Committee** before each of the content slots are determined and speakers are sought.

The pandemic severely disrupted the BIR Convention Committee's forward planning and location selection. We are almost back on track and I expect that, by the time of our May 2024 Convention, we will have our locations for 2025 and 2026 agreed internally and planning will have commenced for those events.



> “The challenge of increased delegate numbers means options are more limited if we remain rooted in using only hotels as Convention venues.”

Mark Sellier
Global Metals Network Limited (CHN)
Interim Chairman Convention Committee

Such was registration demand for our 2023 Convention in Amsterdam that, for the first time ever, **a BIR event was oversubscribed**. This provided massive challenges for the Convention team: as anyone who has planned a large event will know, **it is not easy to pivot and change**. The upside of oversubscription was the amazing networking opportunities for all participants. As you would expect, we have already moved to identify key lessons from our Amsterdam experience.

While many were initially sceptical about Abu Dhabi as the venue for our second Convention of 2023, the final product was well received by all participants. We had **record registrations for an October Convention** and **the programme was extended from the normal two days to two and a half days** in order to accommodate the step-change mentioned above. The Welcome Evening was superb, with more than enough space and catering.

When looking at our future Conventions, **the challenge of increased delegate numbers means options are more limited** if we remain rooted in using only hotels as Convention venues. For this reason, we have identified some convention centres which, we feel, are appropriate for hosting our events. This will be put to the test in May 2024 when we meet in Copenhagen for the first time in more than 30 years and for the fourth time in our organization’s history. The city does not have a hotel of a suitable size and so our **strategic shift in thinking to consider convention centres** means we will now have the pleasure of visiting Denmark once again.

With regards to Singapore as our second Convention destination in 2024, BIR has hosted Conventions in the past at the Shangri-La Hotel but, when again considering participation growth, the location’s facilities are no longer suitable. However, the Raffles Convention Centre linked to several excellent hotels will provide us with **plenty of options for our October 2024 Convention**. So we look forward to seeing you all in Singapore – **an important hub for international trade**.

The Convention Committee and members of the BIR Secretariat team, notably Cristina Munteanu and Antoine Breysens, are **working on new ideas to ensure these events continue to evolve** and remain as current as possible.

I would like to thank Murat Bayram for all the effort and energy he put into the Convention portfolio, and also Director General Arnaud Brunet and the BIR Secretariat for their dedication and hard work in producing these **world-beating events**. And recognition is also due to the Divisional Presidents, Special Committee Chairmen and other BIR leaders for their commitment and input.

KEY FACTS

Amsterdam Convention, May 2023:

1672 participants
representing 775 companies
from 65 countries

Abu Dhabi Convention, October 2023:

Delegate total of **1100**
drawn from 56 countries

COMMUNICATIONS

BIR turning up the volume as the global voice of recycling

Last year, we celebrated a **key milestone as BIR completed the 75th year of its rich history**. And in June, it was a great honour for me to mark a personal milestone as I assumed the role of Chairman of our world organization's Communications Committee.

I would like to begin by expressing my **gratitude for the groundwork laid by my predecessor as Committee Chairman, Mark Sellier**, and for the diligence of the communications team based at the Brussels Secretariat. The Committee continues to make **bold strides in enhancing our communications output**, thereby delivering tangible benefits to our members and stakeholders.

Among our key initiatives, we have embarked on a **new collaboration with a prominent UK-based PR agency, Unity**, with the aim of extending our communications outreach, increasing our engagement with the media, and elevating our social media and messaging strategies. To this end, we held a workshop in Brussels last July with BIR's leadership in order to **identify the main pillars of our world organization's narrative**, with Unity helping us to refine BIR's branding as the global voice of recycling.

Our social media presence has grown significantly, with a particular focus on LinkedIn where we have **doubled our number of followers from the previous year**. We also continue to be highly active on X (formerly Twitter), with increased engagement and outreach leading again to substantial growth in follower numbers.

In 2023, BIR's biannual Conventions were held in Amsterdam and Abu Dhabi, providing us with opportunities to celebrate our 75th anniversary in style. Both Conventions were stand-out events, providing **focal points for our branding** and generating the usual rich array of press releases, videos, proceedings and special announcements which led to **positive media features** and social posts for BIR. Recordings of the various Convention sessions are available online, complementing the post-event press releases and proceedings.

Also at our Amsterdam Convention, we published a special brochure offering a **comprehensive and visually-impactful history of BIR** – a written testimony of our successes and resilience, and of the great leaders who have helped to create and shape our global organization over the last seven and a half decades.

> “We are thrilled to be launching The Recyclist: this exclusive, members-only biannual magazine represents a truly special undertaking.”

Ibrahim Aboura
Aboura Metals (ARE)
Chairman Communications Committee

Through our partnership with Unity, we have identified an **opportunity to connect more consistently with our members** and to introduce more in-depth analysis into our industry. We are thrilled to be launching **The Recyclist: this exclusive, members-only biannual magazine** represents a truly special undertaking for the communications team, the PR agency and BIR's leadership, with all parties working tirelessly to deliver the first edition to our members in the first quarter of 2024.

Amid all these new initiatives and milestones, let us not forget that we continue to offer our members an **established, regular flow of information and publications**. Our online services continue to include our justifiably renowned **BIR World Mirrors** covering non-ferrous metals, ferrous, stainless steel & special alloys, paper, plastics and Latin America, all of which deliver direct reports from the recycling "coalface" thanks to the regular input of our divisional and committee board members. Our **monthly eBrief**, meanwhile, summarizes the important work of BIR's Brussels Secretariat, with a **particular focus on legislation and advocacy** but also on any other subject of relevance to our membership's interests. Although much of our output has made the transition from hard copy to online, we continue to produce **printed versions of our Annual Report**, our **global recycled steel statistics** and, the cornerstone of our organization, the **BIR Membership Directory**.

I would like to express my gratitude to the Secretariat office in Brussels, and particularly for the unwavering support of Elisabeth Christ and Michèle Noukam, as I set out on this new journey as Chairman of the Communications Committee. A heartfelt thank-you goes out also to BIR President Susie Burrage OBE for her trust and assistance as we navigate our way through the many challenges faced by this industry while also **advancing our communications strategy**.

As we embark on yet another year in the illustrious history of BIR, our commitment remains stronger than ever to **enhancing our communications efforts** and to delivering **the best possible value to our members** and stakeholders.

MEMBERSHIP

Four-figure milestone clearly in sight

Although 2023 could be described at best as **a year of mixed fortunes for the recycling industry globally**, it was certainly **another good year in terms of numbers joining BIR's ranks**. Membership had reached almost 1000 by the end of last year: growth towards this significant milestone reflects our **Membership Committee's strategic target to increase its presence** and remain a vital part of the global recycling landscape. The Membership Committee will strive to build on this positive momentum over the coming years.

Membership numbers are increasing sharply but BIR continues to adopt **a rigorous screening process for new members to ensure they meet the required standards**. Upholding the high quality of its membership helps to maintain **a secure and reliable network**. Reinforcing trust among members is also one of the key benefits of our Conventions, along with **networking and knowledge exchange**; our world organization hosted two highly successful Conventions in 2023, with record-breaking attendances in both Amsterdam and Abu Dhabi.

BIR is happy to report that **we ended 2023 with 955 companies and 36 national associations** in membership, all drawn from **a total of 69 countries**. A total of **195 new members joined last year**, more than compensating for a number of losses owing to mergers and company closures. These new members come from across the globe: India supplied the most but was closely followed by Italy and United Arab Emirates.

Although BIR membership had its roots in Europe, these **latest statistics clearly illustrate the continuing evolution and increasingly global essence** of our organization. The Membership Committee will continue the hard work to encourage greater representation in areas like Latin America, Africa and South East Asia.

The Membership Committee is working closely with the Ambassadors Committee to **establish a clear strategy for increasing membership numbers**, the regions where we are represented and also services to members. We aim not only at promoting BIR to a wider audience but also to **enhancing the overall membership experience**, making it an ever more attractive proposition for potential members.

Finally, and very importantly, please don't forget that **you – our members – are BIR! You are our best ambassadors**. We need you and your support more than ever before. Therefore, if you haven't already renewed your membership, please don't delay. And if you would like to introduce new members to our network, please refer them to our Secretariat team who will be delighted to speak to them.

> “Latest statistics clearly illustrate the continuing evolution and increasingly global essence of our organization.”

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

KEY FACTS

BIR membership as of December 31 2023:

991 members
drawn from **69 countries**

Retention rate
92.06%

Growth rate
14.04%

** Total includes 36 national associations and 195 new members (including 15 returning to membership on 31.12.2023)*

AMBASSADORS

BIR's vision and core messages worldwide

As Chairman of the BIR Ambassadors Committee, it is with great pleasure and pride that I reflect upon the significant milestones and challenges we encountered in 2023.

The year was marked by our two momentous global Conventions: the first held in May in the vibrant city of Amsterdam, with the second staged five months later in the dynamic metropolis of Abu Dhabi. **Our Ambassadors worked alongside the BIR Secretariat to help ensure that these Conventions fostered stronger collaboration** and trading partnerships between our diverse membership.

2023 was also BIR's 75th anniversary, marking **three quarters of a century of industry service and leadership** in concert with members and national associations around the world. The anniversary celebrations brought together our global community, providing an opportunity to reinforce **our industry's commitment to sustainability and environmental stewardship** as well as to underline its role as a catalyst in helping to deliver a future where **recycling plays a central role in shaping a sustainable world**.

A cornerstone of BIR's success has been the invaluable contribution of its Ambassadors, who are **the heartbeat of its global outreach programme**. Their tireless efforts and unwavering commitment were evident during both Conventions last year, standing as pillars of support for all their fellow members, striving to meet their individual needs and helping to **amplify BIR's core messages across the different regions of the world**.

I would like to thank all our Ambassadors for playing such a pivotal role in **expanding our reach into new regions and markets**. Your dedication has not only strengthened our existing network but also brought in new members who share our vision of a sustainable circular economy. The continued growth of our membership is a testament to the impact of your **determined efforts to share BIR's vision as widely as possible**.

Also in 2023, BIR Ambassadors played a **leading role in celebrating Global Recycling Day on March 18** – a date on the calendar which has quickly established itself as a focal point for propagating the aims and achievements of the global recycling industry.

Last year also posed its share of challenges as we continued to recover from the global pandemic. **Our collective resilience and dedication have prevailed** and, on behalf of the BIR Ambassadors Committee, I would like to extend my sincere gratitude to all our members for your unwavering support during these challenging times.

Finally, I wish to thank BIR President Susie Burrage OBE for appointing me Chairman of the Ambassadors Committee. I am convinced that, in 2024, **our Committee members will succeed in extending BIR's influence and key messages** to even more corners of the globe, thereby helping to pave the way for a future where recycling and sustainability are at the forefront of humanity's consciousness. Hopefully too, we will be able to build on our global network of Ambassadors.

In closing, I would like to call on all of us to embrace the opportunities that lie ahead and to continue to show leadership on the journey towards a world where **recycling is not just practised by many but has become a way of life for all**. Until we meet again at the BIR Convention in Copenhagen, I wish you all a happy and successful 2024.

“A cornerstone of BIR’s success has been the invaluable contribution of its Ambassadors, who are the heartbeat of its global outreach programme.”

Sudhir Aggarwal
Inland Importers & Consumers Association (IND)
Chairman Ambassadors Committee

SPEAKERS AT BIR EVENTS IN 2023

Amsterdam, 22-24 May 2023

Opening Session
- **Tom Bird**, BIR President

The Challenge – Special Convention Edition
- **Michael Lion**, Everwell Resources Ltd (CHN)
- **John Sacco**, Sierra International Machineray (USA)
- **Uwe Schmidt**, Montanwerke Brixlegg AG (AUT)

Stainless Steel & Special Alloys Committee
- **Joost van Kleef**, Oryx Stainless BV (NLD)
- **Markus Moll**, SMR GmbH (AUT)
- **Frank Pothen**, Ernst-Abbe-University Jena of Applied Sciences and Senior Research Associate of Fraunhofer Center for International Management and Knowledge Economy IMW (DEU)

Non-Ferrous Metals Division
- **Dhawal Shah**, Metco Ventures LLP (IND)
- **Jean-Marc Moulin**, Norsk Hydro ASA (NOR)
- **Jianbin Meng**, International Lead and Zinc Study Group (ILZSG) / International Nickel Study Group (INSG) (PRT)
- **Natallia Zholud**, TRM Group (POL)
- **Elinor Feuer**, Chilanga AB (SWE)
- **Alejandro Jaramillo**, Glorem SC (MEX)

Paper Division
- **Francisco Donoso**, Dolaf Servicios Verdes, S.L. (ESP)
- **Simone Scaramuzzi**, LCI Lavorazione Carta Riciclata Italiana S.r.l. (ITA)
- **John Atehortua**, Cellmark (NLD)

E-Scrap Committee
- **Jan Visser**, Mirec Benelux, TSR-Remondis Group (DEU)
- **Antonia Biggs**, ANIR-National Association of the Recycling Industry (CHL)
- **Julie-Ann Adams**, EERA – European Electronics Recyclers Association (BEL)
- **Yousef Al Sharif**, Sharif Metals Group DMCC (ARE)

Ferrous Division
- **Denis Reuter**, TSR Recycling GmbH & CO. KG, Zentrale (DEU)
- **Ole Rolser**, McKinsey & Company (NLD)
- **Rolf Willeke**, BIR

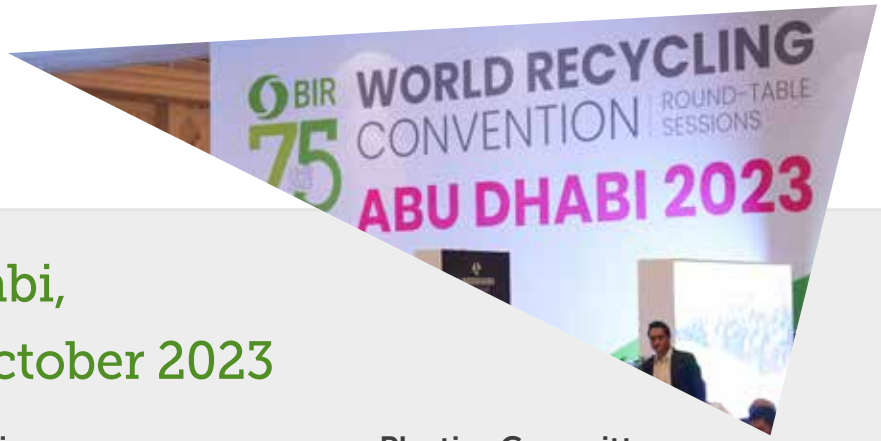
Shredder Committee
- **Alton Scott Newell III**, Newell Recycling Equipment (USA)
- **George Adams**, SA Recycling (USA)
- **Howard Bluck**, BMRA – British Metals Recycling Association (GBR)
- **Sebastian Raubinger**, SEDA-Umwelttechnik GmbH (AUT)

International Environment Council
- **Olivier François**, Galloo (BEL/FRA)
- **Robin Wiener**, ISRI (USA)
- **Emmanuel Katrakis**, EuRIC (BEL)

Textiles Division
- **Martin Böschen**, Texaid TextilverwertungsAG (CHE)
- **Alan Wheeler**, Textile Recycling Association (GBR)
- **Stefan Schlichter**, Institut für Textiltechnik – Recycling Atelier (DEU)
- **Jean-Francois Gryspeert**, Valvan (BEL)
- **Josse Kunst**, CuRe technology B.V. (NLD)

Tyres & Rubber Committee
- **Max Craipeau**, Greencore Resources Limited (CHN)
- **Martin von Wolfersdorff**, Wolfersdorff Consulting (DEU)
- **Frank Cremer**, Bolder Industries (USA)
- **Pieter ter Haar**, Circtec (GBR)
- **Ad van Oorschot**, Black Bear Carbon (NDL)

Plastics Committee
- **Henk Alssema**, Vita Plastics (NLD)
- **Caroline van der Perre**, RAFF Plastics (BEL)
- **Alev Somer**, BIR
- **Surendra Borad Patawari**, Gemini Corporation NV (BEL)
- **Sally Houghton**, Plastic Recycling Corporation of California -PRCC (USA)
- **Max Craipeau**, Greencore Resources Ltd (CHN)



Abu Dhabi, 23-24 October 2023

Opening Session
- **Susie Burrage OBE**, Recycled Products LTD (GBR)
- **Matthew Griffin**, 311 Institute (GBR)

Stainless Steel & Special Alloys Committee
- **Joost van Kleef**, Oryx Stainless BV (NLD)
- **Hitesh Agrawal**, Prime Stainless DMCC (ARE)
- **Gerhard Pariser**, Oryx Stainless BV (NLD)
- **Omar Al Sharif**, Sharif Metals Group DMCC (ARE)

Ferrous Division
- **Denis Reuter**, TSR Recycling GmbH & CO. KG, Zentrale (DEU)
- **Kedar Joshi**, Davis Index (CAN)
- **Davide Braga**, Danieli Centro Recycling (ITA)
- **Rolf Willeke**, BIR

International Environment Council
- **Olivier François**, Galloo (BEL/FRA)
- **Alev Somer**, BIR
- **Adam Shaffer**, ISRI (USA)
- **Emmanuel Katrakis**, EuRIC (BEL)

Paper Division
- **Francisco Donoso**, Dolaf Servicios Verdes, S.L. (ESP)
- **Ranjit S Baxi**, J & H Sales Internation LTD (GBR)
- **Simone Scaramuzzi**, LCI SRL (ITA)
- **Fátima Aparicio**, Repacar (ESP)
- **Atul Kaul**, Waraq (SAU)

Plastics Committee
- **Max Craipeau**, Greencore Resources LTD (CHN)
- **Jerome Viricel**, Veolia Middle East (ARE)
- **Alev Somer**, BIR
- **Steve Wong**, CSPA – China Sustainable Plastics Association (CHN)
- **Mahmoud Al Sharif**, Sharif Metals Group DMCC (ARE)
- **Carlos Monreal**, Plastic Energy LTD (GBR)

Non-Ferrous Metals Division
- **Paul Coyte**, Hayes Metals (NZL)
- **Sebastien Perron**, Wieland-Werke AG (DEU)
- **José-Martin Neumann**, TSR Recycling GmbH & CO. KG (DEU)
- **Deepesh Goyal**, Fujairah Gold FZC (ARE)
- **Jawed Ahmed**, Al-Qaryan Group (SAU)
- **Joseph Pickard**, ISRI (USA)
- **Hashem Al Sharif**, Metals Bank FZCO (JOR)

Electrics, Electronics & EV Batteries Committee
- **Josephita Harry**, Pan American Zinc LLC (USA)
- **Leah Chen**, Platts (SGP)
- **BK Soni**, Ecoreco (IND)
- **Alev Somer**, BIR

CALENDAR OF FUTURE BIR CONVENTIONS

2024

(26) 27 – 29 May
Copenhagen – Denmark
(Bella Center Copenhagen)

(27) 28 – 29 October
Singapore
(Raffles Convention Centre)

2025

(25) 26 – 28 May
City to be confirmed

(26) 27 – 28 October
City to be confirmed

2026

(31 May) 1 – 3 June
City to be confirmed

(25) 26 – 27 October
City to be confirmed

Bureau of International Recycling

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