



Recycling

International

November 2009, No.9

BIR meets in Amsterdam
**Deep concern gives way
to cautious optimism**

**Matec - a paragon of
organisation and technology**

**Entsorga in Cologne - 'Finally,
the market is picking up'**

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Member of



And then the fight started...

As a general although not universal rule, a group of men and a group of women will have entirely different takes on what constitutes an entertaining evening. Take this example from a few weeks ago....



My wife Helga had invited seven friends - all women - for a cosmetics party at our house. Basically, these events are an excuse to chat, gossip, eat and drink. For me, there was no attraction in being under the same roof as eight women discussing how to prevent skin from ageing, latest divorces and family illnesses, the best way to cook perfect pasta, and up-to-the-second fashion trends. And so I decided to call a few friends to see if they fancied a boys night on the town. To my surprise, three of them immediately and enthusiastically agreed to join me - perhaps because their wives were coming to Helga's party.

I suggested: "How about the kitchen?" And then the fight started...'

Casey, the other friend present that evening, then acknowledged: 'Something similar happened to me at the end of my previous marriage. I took my wife out to a restaurant despite having just had one of our most bitter arguments. For some reason, the waiter took my order first. "I'll have a steak - medium rare, please," I said. The waiter looked at me and joked: "So you're not worried about the mad cow?" To which I replied: "Nah, she can order for herself..." And then the fight started...'

By now, other customers at the bar were coming

forward with their own fight-starter stories. One man told us: 'My wife and I were sitting at a table at her high school reunion, and she kept staring at a drunk-en man swigging his drink as he

sat alone at a nearby table. I asked her: "Do you know him?" "Yes," she sighed, "he's my old high school boyfriend. They say he took to drinking right after we split up and hasn't been sober since." "Goodness me!" I said. "Who would have thought a person could carry on celebrating that long." And then the fight started...'

Another customer chipped in: 'How about this. Last year, my wife was dropping hints about what she wanted for our wedding anniversary. "I want something shiny that goes from 0 to 200 in about three seconds." So I bought her a pair of bathroom scales. And then the fight started...'

The final story of the evening was told by our barman Gary who has been married four times. 'Years ago, when I was not getting on with either my wife or her mother, I decided to buy my mother-in-law a burial plot as a Christmas gift. She didn't say anything at the time. But the following year, when I didn't get her a present, she asked me why I hadn't bought her anything. And I replied: "Because you still haven't used the gift I bought you last year!"...'

'...And then the fight started!' the bar echoed to the chorus.

'I guess we've all been there.'

As usual, we met at our favourite pub: the Paranoid Parrot. We drank some beers, shot some pool and then played cards for an hour or so. At around midnight, we sat ourselves down at the bar for what is euphemistically called a 'night cap' or 'one more for the road'.

When the drinks came, we toasted our wives, saying that we hoped they had had as much fun as us. 'Well, to be honest, I don't care whether my wife had a pleasant evening or not,' said my friend Gerard. 'Earlier today we had quite a fight.' As we knew his wife to be quite easy-going, we expressed some surprise. 'Okay, I must admit that it was my own fault,' Gerard continued. 'I came home late from work; I was tired and had had a bad day. I took a beer from the fridge and sat down to watch some television. My wife stopped making the dinner, sat next to me as I was flipping through the channels, and asked: "So what's on the TV?" So I said: "Dust." And then the fight started...'

After the laughter had subsided, my friend Jake said: 'I guess we've all been there. I remember some years ago I asked my wife where she would like to go for our wedding anniversary. Smiling, she said: "Somewhere I haven't been in a long time." So

Manfred Beck
Editor



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Recycling International

18 / BIR meets in Amsterdam Deep concern gives way to cautious optimism

The latest BIR Convention, staged in the Dutch capital of Amsterdam, enjoyed a somewhat lighter atmosphere than its two predecessors in Düsseldorf last autumn and Dubai this spring thanks to a general improvement in market conditions. But as reflected in the following series of articles covering all of the Convention's open sessions, the recycling industry's new-found optimism remains guarded.



38 / Matec - a paragon of organisation and technology

One of the most advanced recycling facilities in Japan is the Ishikari yard operated by Matec in Hokkaido prefecture. Recently, Recycling International took up a rare but welcome invitation to tour premises which represent a high water mark in the recycling of end-of-life vehicles, household appliances and e-scrap.



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44 / Entsorga Enteco exhibition in Cologne 'Finally, the market is picking up'



Will the Entsorga exhibition, held in Cologne in late October, prove to be a turning point for the recycling machinery market? Only time will tell. What can be said with certainty, however, is that equipment manufacturers

showcased their latest products at the event and, importantly, received plenty of interest from potential buyers.

51 / Upstate Shredding aims high with plant upgrade

Upstate Shredding LLC - New York State's largest scrap metal processor and one of the biggest privately-held operators of its type on the US East Coast - is in the final stages of a US\$ 25 million upgrade of its Owego plant that now ranks it among the most state-of-the-art facilities in the recycling industry.



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2010

20-22 January Salzburg (Austria)
9th International Electronics
Recycling Congress
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Fax: +41 62 785 1005
E-mail: info@icm.ch
www.icm.ch

3-5 March Basel (Switzerland)
10th International Automobile
Recycling Congress
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14-17 April Montichiari (Italy)
Metef-Foundeq
International aluminium exhibition
Edimet
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Fax: +39 030 9981 055
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www.metef.com

5-7 May San Diego (USA)
ISRI Convention and Expo 2010
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industry exposition
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www.isri.org

5-7 May Shanghai (China)
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sewage, refuse and recycling
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30 May-2 June Istanbul (Turkey)
BIR Spring Convention
Bureau of International Recycling
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Fax: +32 2 627 5773
E-mail: bir@bir.org
www.bir.org

15-17 June London (UK)
Futuresource
Europe's sustainability event
IWM Business Services
Phone: +44 1604 620 426
Fax: +44 1604 604 467
E-mail: emma.stott@ciwm.co.uk
www.ciwm.co.uk

13-17 September Munich (Germany)
IFAT 2010
16th international trade fair for
water, sewage, refuse and recycling
Messe München - Munich
Phone: +49 89 9491 1358
Fax: +49 89 9491 1359
E-mail: info@ifat.de
www.ifat.de

14-16 September Birmingham (UK)
RWM 2009
Recycling and waste management
exhibition
EMAP
Phone: +44 20 8277 5540
www.rwmexhibition.com

25-26 October Brussels (Belgium)
BIR Autumn Convention
Bureau of International Recycling
Phone: +32 2 627 5770
Fax: +32 2 627 5773
E-mail: bir@bir.org
www.bir.org

16-17 March Brussels (Belgium)
Enviroplas
1st Conference on environmental
compliance in the plastics supply
chain - iSmithers Rapra
Phone: +44 1939 250383
Fax: +44 1939 252416
E-mail: conferences@ismithers.net
www.ismithers.net

3-5 May Atlanta (US)
WasteExpo
Solid waste and recycling trade show
Penton Business Media
Phone: +1 203 358 9900
Fax: +1 203 358 5816
E-mail: marion.howard@penton.com
www.wasteexpo.com

3-6 November Rimini (Italy)
Ecomondo
14th International fair of material &
energy recovery and sustainable
development - Rimini-Fiera
Phone: +39 0541 744 492
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E-mail: a.astolfi@riminifiera.it
www.ecomondo.com

20-22 January 2011 Salzburg (Austria)
International Electronics Recycling Congress



The IERC congress will be held in the historic city of Salzburg.

Swiss event organiser ICM is opening its congress season with the ninth International Electronics Recycling Congress (IERC), with industry leaders and experts expected to gather in the Austrian city of Salzburg early next year to discuss latest global developments in electronics recycling.

German Member of the European Parliament Karl-Heinz Florenz and Professor Dr Thomas Stocker, Co-Chair of the Inter-Governmental Panel on Climate Change, will kick off the conference as keynote speakers. Subsequent presentations at the IERC will cover, among other topics: the revision of the EU's WEEE Directive; recycling of LCD panels;

best available recycling techniques; and harmonisation of recycling standards.

The two-day event at the Salzburg Congress Centre can be extended into a third day by taking up the offer of visits to electronics recycling plants in the vicinity of Salzburg. The organisers are also arranging a networking dinner and a cocktail reception in 'the City of Mozart'.

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Alex Antikides †



1947-2009

On Wednesday October 21, we received a phone call with the sad news that Alex Antikides had died at the age of 62. Between June 2008 and October 2009, Alex had played a central role in the writing of the ferrous scrap market analysis that appears in every issue of Recycling International. Feedback suggests that many readers believed this to be the best ferrous analysis published anywhere in the world.

A week earlier, I had talked to Alex for a long time on the phone. Sounding very tired, he told me that he had suffered bleeding in his stomach and had been in hospital for some time. Unlike during our frequent talks in the past, he hardly talked about the ferrous scrap and steel markets; instead, he deliberated at length about his health, his wife Christel, and his children Tino and Alexia. He philosophised about life in general but also joked that he wanted to come to the late-October BIR Convention in Amsterdam - even if they had to bring him in a wheelchair. Little did I know that this would be our last conversation.

Alex was born in Lebanon to a Polish Jewish mother and a Greek-Cypriot father. In the early 1950s, the family came to the Netherlands. Alex graduated in Economics at Rotterdam University and later started his career in the scrap business with Hollandia, before moving to the UK to join Harlow and Jones. In later years, he became a trader, mainly in steel and ferrous scrap. Conducting business on a global scale, the fact that he spoke ten languages made it easy for him to communicate with his clients all over the world.

In the 1990s, Alex was particularly involved in trade with Eastern Europe. I had the pleasure of accompanying him on trips to Poland and the Ukraine; and with him around, it was easy to get approval for company visits and interviews. We toured both countries, saw plenty of scrap yards and spoke to many interesting people - but, above all, we had a lot of fun.

Referring to Alex's stature, one person said of him during the BIR Convention in Amsterdam: 'We have lost a small man, but a huge friend.'

Manfred Beck, Recycling International

Euro 5 billion thrown away annually, says FoE

Europe wastes resources worth over Euro 5 billion every year by landfilling and incinerating materials that could be recycled, according to a new report from Brussels-based environmental lobby group Friends of the Earth (FoE). If these same materials were recycled, an estimated 148 million tonnes of carbon dioxide emissions would be prevented - equivalent to taking approximately 47 million cars off the road each year.

The research reveals that around half of all key recyclable materials generated in the EU - including paper, cardboard, glass, plastics, aluminium and steel - are being

directed into disposal rather than recycling. If recycled instead, their minimum potential monetary value would amount to Euro 5.25 billion, FoE has calculated. Dr Michael Warhurst of FoE Europe says: 'It's shocking that all these valuable resources are being literally thrown away across Europe, whilst at the same time Europe continues to buy in ever-increasing quantities of materials from the rest of the world. Europe needs to stop landfilling and incinerating recyclable materials, and we need new policies to create a resource-efficient EU.'

www.foe.co.uk

Move to boost shipbreaking at Alang



The regional government of Gujarat in India is banking on a special purpose vehicle (SPV) to restore the world-renowned Alang yard to its former glory as the world's leading ship-breaking facility by making its operations cleaner and by improving its competitive position in relation to neighbouring Bangladesh.

Currently, shipbreaking at Alang is monitored by the Gujarat Maritime Board (GMB), the state regulator that is also tasked with developing infrastructure through private investment. The SPV seeks to separate the GMB's regulatory functions from its commercial activities. 'We want to make the yard more productive, independent and professional,' says Atul Sharma, Environment Engineer with the GMB. 'We want to convert this into a separate entity through an SPV, which will oversee the operations of the yard instead of the GMB.'

The Gujarat government and a private firm - to be selected through a tendering process - will hold stakes in the SPV, according to Mr Sharma. Decisions about equity will be based on a report from IL&FS Ecosmart, an environmental

consultancy hired by the regulator to prepare a master plan for the Alang shipyard which is to be submitted in six months from now.

Last year, India's Supreme Court asked the state government to modernise and improve the infrastructure at Alang to make it more environmentally friendly and safe for workers. A seven-member inter-ministerial committee, set up to implement the court's order, asked the Gujarat government to discontinue small plots of 30 metres, according to a member who spoke to India's LiveMint magazine. Of the 173 plots at Alang, around 100 measure 30 by 45 metres. According to an official at the Iron, Steel, Scrap and Ship-breakers Association of India, it is impossible for plots of this size to incorporate all of the infrastructure and facilities required for environmentally-friendly and worker-safe shipbreaking activities as decreed by the Supreme Court. The association is a member of the inter-ministerial committee, which includes representatives from the union ministries of steel, shipping and labour, the GMB and the Gujarat Pollution Control Board.

www.gmbports.org

Quote ~ Unquote

'Age is mind over matter - if you don't mind, it doesn't matter.'

Intec lays groundwork for expansion in China

Australian metals recycling specialist Intec has teamed its technology with Hong Kong-based investors with the aim of boosting metalliferrous recycling projects in China.

Intec has signed a subscription agreement with Hong Kong-based Green Resources - a special purpose vehicle designed to implement primary and secondary resources projects using the Intec Process, combined with other advanced sustainable international technologies as appropriate, to exploit metalliferrous recycling opportunities in China. Several possibilities have already been identified and advanced through Intec's representative office in the country.

Scheduled to commence operations in 2011, a project to treat blast furnace dust

from Liugang Steel in Guangxi Province will be the largest commercial-scale application of the Intec Process to date. Initially, the venture will treat 50 000 tonnes per annum of furnace dusts containing 25% iron, 30% carbon, 7% zinc, 1.5% lead and 250 ppm indium. The treatment plant will produce high-purity zinc oxide, lead sulphide and indium metal for sale to external parties, along with high-purity hematite and carbon for sale to Liugang for reuse in its furnaces.

Once the plant is fully established, expansion of its throughput to 1 million tonnes per annum will be considered, in concert with the furnace dust production rates from Liugang.

Intec's CEO Philip Wood comments: 'China is a vast, highly-integrated and rapidly-growing economy with a well-established culture of recycling. New environmental standards are high, but there are many existing operations where environmental and economic performance can be substantially enhanced by recovery of metals and by-products through the recycling of solid and liquid waste streams using the proprietary Intec Process, which is extensively patented in China.'

www.intec.co.au



WEEE schemes approved in the UK

The UK Environment Agency has approved 33 waste from electrical and electronic equipment (WEEE) schemes to operate during the 2010 compliance period.

During the past three months, all compliance schemes in the UK have had to apply for approval - a process involving the submission of detailed documentation to demonstrate the viability of their plans; not all of this year's 38 schemes applied for approval for 2010.

The UK's WEEE system is renowned for its large number of schemes but also for its low collection rate compared to other

European countries; on an annual basis, some 6.9 kg of e-waste is currently collected per UK inhabitant compared to a Western European average of 8.4 kg. The Waste Electrical and Electronic Equipment Regulations, which came into force in January 2007, impose a responsibility on producers of electrical or electronic equipment to ensure that the products they place on the market are treated and recycled in an environmental manner when reaching the end of their life. Producers must either form themselves into a compliance scheme or join a scheme.

www.environment-agency.gov.uk

Joke of the Month



Home truths

A boy returns home from school and says to his father: 'Dad, I have a special report to write. Can you answer me a question?' 'Sure son,' his father responds. So the son asks: 'What is politics?'

His father thinks for a moment and then says: 'Well son, let's take our home as an example. I am the wage earner, so let's call me the management. Your mother looks after the money, so let's call her the government. We take care of you and your needs, so let's call you the people. We'll call the maid the working class and your baby brother the future. Do you understand?'

His son replies: 'I'm not really sure. I'll have to think about it.'

That night, the boy is awakened by his baby brother's crying, so he goes to see what's wrong. Discovering that the baby has a soiled nappy, he goes to his parents' room where he finds his mother fast asleep. He then peeks through the keyhole of the maid's room and can see that she is in bed with his father. His knocks on the door go totally unheard so he goes back to his room and falls asleep.

The next morning, he tells his father: 'Dad, I think I understand politics now.' And his father replies: 'That's great son, so explain it to me in your own words.' To which the son says: 'Well, while the management is taking advantage of the working class, the government is fast asleep, the people are being completely ignored and the future is full of crap.'

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Harsco to recycle slag from Austrian mills

According to industrial services company Harsco Corporation, its minerals division and two of Austria's leading stainless and specialty steel producers - Böhler Edelstahl and Breitenfeld Edelstahl - have agreed to recycle metal-making slags at a new facility which is expected to be operational towards the end of 2010.

The 10-year accords have a combined revenue potential of up to US\$ 100 million over their duration and both automatically renew for successive five-year periods. 'These substantial new relationships demonstrate Harsco's broad international scalability in the integrated metals and minerals sector,' comments Harsco's Chairman and CEO Salvatore D. Fazzolari.

Working in collaboration with Germany-based conglomerate Scholz Recycling AG, Harsco will process the Austrian producers' existing stockpiles and future slag outputs. The US company will assume full

responsibility for recovering the slag's high-value metallic content for re-sale into commercial markets while also generating aggregate materials for use in a broad range of external applications, from road construction to civil works.

In related news, the company also signed contracts with Italy's second largest steel producer, the Lucchini Piombino works. Harsco Corp.'s Metals division has been awarded a new 10-year contract valued at more than US\$100 million over its duration to provide a range of on-site services at a major steelworks in Italy. In 2010, Harsco will start steel slag recycling activities at a former steel manufacturing plant in Gadsden, Alabama, USA. The company has signed a contract with the US government valued at more than US\$50 million to handle the metal recovery and on-site removal of decades-old slag stockpiles left behind.

www.harsco.com



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Resin prices threaten market recovery, says EuPC

The Brussels-based European plastics converters organisation EuPC has attacked the hikes in plastics raw material prices announced by suppliers in recent weeks. 'Markets are currently too fragile to cope with this kind of increase,' according to EuPC's Managing Director Alexandre Dangis.

'Converters are unable to pass these down the value chain onto their customers,' he warns. 'Raw material producers are endangering the economic recovery of the plastics markets and are displaying a poor knowledge of business conditions at the sharp end experienced by their processor customers.'

Introducing EuPC's latest economic report, Mr Dangis claims that investments in new plastics converting machinery have come to a virtual standstill, highlighting the difficulties faced by plastics processors all over Europe. Moreover, credit insurance schemes are not providing sufficient financial backing for companies to take on new risks and create growth. 'All of this,' he says, 'is dampening the prospects for the expected re-launch of the economy.'

With variations from one country to another, the first half of 2009 saw a drop of 20% in European plastics converters' production

volumes when compared to the same period in 2008. Mr Dangis observes that the economic crisis has affected plastics converters less badly (down by 25% on the industry production index) than raw material and machinery producers which have experienced declines of, respectively, 32% and 69%. He adds that, surprisingly, production of plastics in primary forms has increased by 10% since early 2009 - a move which could herald a recovery for plastics converters.

Spain and Italy have been the most severely hit by the economic downturn, with production drops of around 26% and 27%, respectively. Conversely, Germany has shown the greatest resilience among EU-27 member states with an overall growth rate of 1.2%.

According to Mr Dangis, different parts of the plastics industry have been affected in different ways by the recession: on the one hand, the consumer packaging sector has been the least affected, with a manufacturing decrease of 15% since 2008; on the other hand, other plastics sectors have reported a decrease of up to 26% in the production of plastics goods when compared to last year.

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Drive company scores UK first

US-based electrical system integrator Quad Plus has installed its first-ever DC Shredder Drive in the UK and only its second in Europe, adding to the 60-plus already supplied to customers in the USA, Canada, Mexico, Spain and Australia. The new 4000 HP, 24-pulse DC Shredder Drive is powering an 80 104 American Pulverizer vehicle shredder at Hawkeswood Metal Recycling in Birmingham. Quad Plus of Joliet, Illinois, states: 'The DC Shredder Drives are preferable to the power company because they can limit voltage fluctuations that cause flicker.' The DC Shredder Drive's controls enable

running at any speed, and jogging forward and reversing to clear jams, according to Quad Plus. 'DC motors also have 100% of their torque down to zero RPM, making jams less likely,' it adds.

www.quadplusinc.com



Supplied by Quad Plus, two 2000 HP DC motors at Hawkeswood Metal Recycling.

Japanese giants to recycle lithium-ion car batteries

Car maker Nissan and fellow Japanese corporation Sumitomo are planning a joint business venture to 'Reuse, Resell, Refabricate and Recycle' lithium-ion batteries used in electric cars. According to Nissan, it will also study a similar framework to reuse batteries in Europe with its alliance partner Renault SA of France.

The lithium-ion batteries - which will power the Leaf electric car - are produced by a separate joint venture firm set up by Nissan, NEC Corp. and its sub-

sidary NEC Tokin Corp. The new tie-up with Sumitomo will allow Nissan to reuse the batteries and resell them after repackaging into other applications such as storage of renewable energy. Raw materials will be recycled after the second-life batteries expire.

The lithium-ion batteries, which are more compact, lightweight and powerful than existing batteries, are likely to maintain 70-80% of their residual capacity even after the end of a normal vehicle cycle, according to the two companies.

Nissan hopes to bring down the market price of its electric vehicles (EVs) through the new recycling business since battery costs are believed to be the main barrier to lowering the price of zero-emission cars to levels comparable to conventional alternatives. The recycling business 'will contribute to the promotion of EVs and stemming their initial costs', comments Nissan's Chief Operating Officer Toshiyuki Shiga.

According to Sumitomo's Executive Vice President Kazuo Omori, there are no plans to expand the joint venture into a capital tie-up with Nissan, adding that the new venture will handle only Nissan's lithium-ion batteries.

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*Based on recyclers using analytical equipment to sort alloys and publicly reported annual sales data as of July 2009



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Business

* Alcufer

Family-owned Hungarian waste management company Alcufer has inaugurated a HUF 2.2 billion (US\$ 12 million) shredder plant at Fehérvárcsurgó. To be staffed by 44 people, the facility has the capacity to shred 100 000 tonnes of metal a year, according to Managing Director Ferenc Horváth.

Employing a total of around 600 people, Alcufer manages 430 000 tonnes of waste a year from 14 collection sites and sells its products to partners in Hungary, Austria, Slovakia and Italy.

www.alcufer.hu

* Shapiro Brothers

US recycler Shapiro Brothers has relocated its scrap metal facility in Moberly, Missouri, to allow for an expansion of operations. The new premises cover approximately 10 acres and will create 10 new jobs, according to Shapiro. The company operates multiple plants across the USA.

www.shapirobro.com

* Destrudatos Confidencial

Spanish paper recycling company Destrudatos Confidencial has opened the doors to its new paper and paperboard recycling plant in Mungia. According to the company, the Euro 4 million, 2000-square-metre yard includes all the modern equipment and resources necessary for confidential destruction and recycling of paper materials.

www.destrudatos.com

* MeWa Recycling Anlagen

German recycling equipment specialist MeWa has opened an office in Hungary to serve the south east Europe market. The premises at Győr will include a MeWa pilot plant and a comprehensive stock of spare parts. The office in Győr will be managed by Gabor Vidak and Eva Takács.

www.mewa-recycling.com

China urges metals firms to build plants abroad

Chinese producers of steel and non-ferrous metals should look to construct plants overseas, according to a senior official at China's top planning body, the National Development and Reform Commission (NDRC).

China has long promoted a 'go abroad' policy which has translated for the large part into asset acquisitions by its cash-rich, state-owned firms. But domestic industrial growth has been far greater, turning China into the world's biggest producer of steel by far as well as into a leading or top producer of many other metals. China is now trying to trim production capacity in many industries - including steel and base metals - in an effort to tackle waste, pollution and excess supply.

'As for excessive steel capacity at home,

we encourage firms in these sectors to set up steel plants overseas to relieve pressure on resources and the environment at home; in fact, some companies have been trying in this regard,' said Xiong Bilin, Deputy Director of NDRC's Department of Industry to Reuters news agency. 'Some of our non-ferrous firms are also trying to go abroad. In an overall view, this is a path of sustainable development, and it is time for Chinese companies to go abroad.'

China's apparent steel consumption is expected to rise around 120 million tonnes or 26% this year, according to the China Iron & Steel Association. Currently, the country's steel inventory is around 40 to 50 million tonnes, the organisation has stated recently.

Interpol to fight illegal e-waste exports

International police force Interpol is set to form a division to tackle the burgeoning illegal trade in electronic waste. The new Interpol Global Crime Group will be headed by the UK's Environment Agency and supported by the US Environmental Protection Agency as well as the Dutch environment agency VROM.

The group says it will adopt an 'intelligence-led approach' to tackling the exportation of hazardous e-waste in breach of international laws and will endeavour to uncover the links between organised crime and illegal waste exporters. In particular, it will seek to tackle the growing phenomenon of 'waste tourists' - people who visit countries as tourists and use their short stay to purchase electronic waste and arrange its shipment to developing nations.

The new group aims to encourage improved co-operation between different countries' environment agencies to help track down suspects, and also to work with governments in the developing world to tackle the transfer of waste across borders.

A spokeswoman for the Environment Agency told The Daily Telegraph newspaper in the UK that there is evidence of an upturn in illegal waste shipments. 'We know there has been an increase in the



scale of commodity waste being shipped and while much of that is legitimate, it also means there is increased scope for illegal activity,' she said. 'Our intelligence has revealed that there is more organised criminal activity in this area and has uncovered some of the techniques they are using to export waste illegally, such as waste tourists, mislabelling containers, or mixing in e-waste with other types of recyclable material.'

This year, the Environment Agency has arrested 12 people in connection with the illegal export of waste compared to just one last year. There has also been an increase in the number of checks on waste operators and ports: the most high profile saw three men arrested in connection with the shipment of thousands of tonnes of toxic waste - including nappies, dirty toys and hospital waste - to Brazil.

www.interpol.int

E-scrap for excellence at 2010 Olympics

Medallists at the 2010 Olympic and Paralympic Winter Games in Vancouver, Canada, will celebrate with e-scrap hanging round their necks.

The 1000-plus gold, silver and bronze medals to be awarded at these upcoming sporting events will contain metals recovered from televisions, computer parts and circuit boards that might otherwise have ended up as e-waste. Local recycling giant Teck Resources is producing and supplying the medals in conjunction with the Royal Canadian Mint.

Also setting the medals apart is their use of contemporary Aboriginal artwork by Corrine Hunt, a Canadian designer of Komoyue and Tlingit heritage. In addition,



the medals are wavy rather than flat - a design inspired by the ocean waves, drifting snow and mountainous landscapes found in the Games region and throughout Canada.

www.teck.com



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People

* Rob van der Palm

After approximately 10 years spent at Van Dalen Metals & Recycling in the Netherlands and the UK, Rob van der Palm will return to the metals/minerals/marine inspection and consultancy business from the start of 2010 when he becomes a partner in MIL International (Rotterdam) BV. Mr Van der Palm worked in this sector for around 18 years before joining Van Dalen.

www.marineinspection.com

* William J. Tolpa

William (Bill) J. Tolpa of Tolpa's Auto Parts in Remsen, New York, USA, has taken on the role of President of the US Automotive Recyclers Association (ARA). Since becoming a member of ARA's Executive Committee in 2006, Mr Tolpa has been a steady force within the association, helping to guide ARA through its busiest year in recent history - including negotiating it through the legislative process of the Car Allowance Rebate System (CARS), generally known as 'Cash for Clunkers'.

www.a-r-a.org

* Roland Scharf-Bergmann

Aluminium producer and remelter Norsk Hydro has appointed Roland Scharf-Bergmann as Director of its recycling activities. Mr Scharf-Bergmann was Managing Director of VAW-IMCO Guss und Recycling from 2000 to 2008; from 2002, he was also head of IMCO Recycling (UK) and became President in 2006 of the recycling business unit within Aleris Europe.

www.hydro.com

* Edd Berkoben

Edd Berkoben, President of leading US recycling equipment manufacturer Harris Waste Management Group, has elected to retire at the end of the year after a decade in the post. According to the Georgia-based company, he oversaw Harris' entry into new markets such as shredder equipment.

www.harrisequip.com

* Albert F. Strikkers

The day after visiting the BIR 2009 Autumn Convention in Amsterdam, former Vice President of the world recycling organisation Albert Strikkers passed away at the age of 82. He concluded his long career in the scrap industry by heading Curef Metal Processing of Rotterdam and Havana, Cuba. A member of the BIR Non-Ferrous Metals Division, Mr Strikkers served as a Vice President from 1987 to 1991.

www.bir.org

America's newest warship, the USS New York, carries in her bow system 7.5 tons of scrap steel recovered from the rubble of the World Trade Center. The ship was commissioned by US Secretary of State Hillary Clinton at a ceremony on November 7. From New York, the ship and her crew of 360 will set sail for home, namely the Norfolk Naval Station in Virginia.



Itronics' huge expansion of silver recycling capacity

Precious metals mining and recycling specialist Itronics Metallurgical, Inc. has obtained the necessary funding to commence the expansion of its silver refining capacity, initially by a factor of ten. According to the US company, the development will lead to numerous benefits, including an increase in its sales of silver extracted from spent photoliquids.

Taking place in two stages, the expansion will boost capacity from 24 000 ounces to, ultimately, 2.4 million ounces per year. Under stage one of the project, nominal silver refining capacity will be raised to 240 000 ounces per annum by increasing the per-melt capacity of the refining operation by 10 times with no increase in the cost, thereby producing a 90% drop in the per-melt cost of each ounce of silver produced.

Production at this new capacity - with a price of US\$ 15 per troy ounce of silver - would increase refined silver sales from

US\$ 360 000 to US\$ 3.6 million per year, according to the company. The increase in per-melt capacity will be more than sufficient to accommodate intermediate term growth, and will also provide the capacity for acquisition of new silver-bearing sources to expand growth even further, it adds.

The Itromet FeLix and SuLix Processes separate nutrient metals and minerals (iron, zinc and sulphur) from silver- and gold-bearing solids. The solids are produced by the spent photoliquid demetalisation process that Itronics Metallurgical uses to remove the silver from spent photographic liquids. The nutrient metals are put into liquid solution for use in GOLD'n GRO liquid fertilizers, and the silver- and gold-bearing solids are sent to the refinery for recovery of the precious metals from the residual non-nutrient impurities.

www.itronics.com



Ministers want separate scopes for WEEE and RoHS

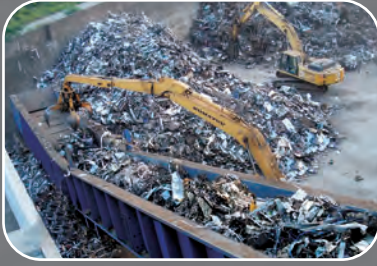
The EU Directives dealing with the disposal of electrical and electronic equipment and the toxic substances they contain - namely WEEE (waste from electrical and electronic equipment) and RoHS (restriction of hazardous substances) - should have separate scopes, the great majority of the EU's environment ministers agreed in Luxembourg late last month.

The European Commission wants to set the scope for both laws in the RoHS Directive as part of a revision. Under existing legislation, the WEEE Directive lists the type of products that must comply with the two laws but the Commission is proposing to transfer this to the RoHS Directive.

According to the member states' environment ministers, the WEEE and RoHS

Directives should have distinct scopes because they have different legal bases and objectives. But EU Environment Commissioner Stavros Dimas has insisted a single scope would improve implementation.

Most member states argue that the RoHS Directive should have an open scope with a list of exemptions - although the UK has raised concerns about this proposal, calling for an impact assessment. Mr Dimas said an open scope 'might create more questions than answers'. Regarding the WEEE Directive, several ministers backed a Swedish presidency proposal to maintain the existing list of product categories covered by the rules. Some delegations suggested cutting the number of categories to five.



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/ More productive alloy analyser from Thermo



X-ray detection specialist Thermo Fisher has launched its Niton XL2 Series hand-held alloy analyser in succession to its Niton XLt devices.

The new models incorporate 'customisable' menus for ease of use, multi-language options and a standard analytical range of more than 25 elements. They are also equipped with Thermo Scientific Niton Data Transfer (NDT) software - a suite of data management utilities that allows users to set operator permissions, print certificates of analysis to document results or operate the analyser remotely from a PC. According to Thermo, the NDT file format preserves and protects the data from each sample analysis, ensuring that the infor-

mation is not compromised either intentionally or unintentionally.

'With the launch of the Niton XL2, we can now offer scrap recyclers a range of products that are engineered from the ground up to deliver a new level of productivity and profitability,' comments Bob Wopperer, Director of Marketing and Business Development for Thermo Scientific Niton Analysers.

According to the US-based company, hand-held Niton XL2 and Niton XL3 Series XRF analysers are purpose-built for taking measurements in any location and for supplying accurate results in seconds, thereby providing the user with savings when compared to traditional laboratory testing. The non-destructive devices provide integral storage of all test results.

Multiple communication options include Bluetooth wireless, USB and RS-232 serial communication ports.

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/ Magnetic grates remove contaminants



PM Rare Earth Grate-in-Housings from magnets specialist Eriez remove fine ferrous contamination from plastic pellets, flake and regrind prior to entry into an injection moulding machine, extruder or compounding equipment.

Supplied in stainless steel housings in three standard sizes, these products feature two banks of rare earth permanent magnets with a 250 degF temperature capability.

According to the company, the PM Rare Earth Grate-in-Housings are particularly suited to applications where product purity is crucial. The magnets remove fine ferrous material that can plug tiny valve gates and screens or damage calendar rolls; and they can even capture and hold pellets with encapsulated ferrous particles, thereby helping to prevent equipment damage and downtime.

*Eriez Magnetics,
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Fax: 814 838 4960,
E-mail: eriez@eriez.com
www.eriez.com*

/ New automatic baler from HSM

German company HSM has introduced the completely automatic HSM VK 12018 R channel baling press for professional waste disposal businesses and large industrial applications. With an extremely high pressing force of 1200 kN and a large opening of approximately 1000 x 1800 mm, it is designed to handle a variety of materials including



not only cartons, paper and foils but also bulky items, sorted waste and substitute combustible materials.

According to the Frickingen-based manufacturer, bale size depends on the material to be processed and can measure around 1100 x 1100 x 600-2000 mm. The bales can weigh up to 1100 kg for a length of 1200 mm and are bound together by a fully-automatic wire banding system.

The company has also updated its range with energy-saving solutions. For example, it has introduced a frequency-regulated drive concept which leads to lower drive power consumption for identical throughput performance or for identical cycle time of the press stroke.

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www.hsm.eu*

/ Harris baler for paper and plastics

The new HSO 4529 horizontal baler from Harris has been designed for processing shredded OCC, ONP and even PET, according to the leading US-based recycling equipment manufacturer.

The HSO 4529 measures less than 15 feet in length and will therefore suit many places where a traditional horizontal baler will not fit, the company explains. Said by the manufacturer to be powerful for its size, the baler is also described as energy-friendly: the 50 HP model features an 'economy mode' which involves shutting down one of the unit's twin 25 HP motors to save on energy costs.

For this same twin 25 HP model, the cycle time is 6.5 seconds while throughput can reach 14 tonnes per hour for shredded

OCC and 16 tonnes per hour for shredded news. Maximum operating pressure is 3000 psi, while ram face pressure is 89 and 120 psi to enable the baler to handle the toughest materials, says Harris.

Other features include: high-strength design and construction; rear access doors which enable excellent accessibility to cylinders; an enclosed power unit which serves to reduce noise levels; and hinged wire tie inserters and twister units for easy access.

*Harris,
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BIR meets in Amsterdam

Deep concern gives way to



cautious optimism

The latest BIR Convention, staged in the Dutch capital of Amsterdam, enjoyed a somewhat lighter atmosphere than its two predecessors in Düsseldorf last autumn and Dubai this spring thanks to a general improvement in market conditions. But as reflected in the following series of articles covering all of the Convention's open sessions, the recycling industry's new-found optimism remains guarded.

The mood among traders at the Okura Hotel in Amsterdam was mixed, although there seemed to be a consensus that the worst is over and that the recycling industries are on the way back up - although it was widely acknowledged that the recovery is likely to be long and hard. 'We just have to forget about 2009 and look forward to next year,' mused one trader.

Among the major current issues, the weakness of the US dollar in relation to the Euro is currently working to the detriment of Europe's scrap traders and machinery/equipment manufacturers, with all of them struggling to compete against their North American counterparts. Secondary raw materials are flowing more freely but prices remain highly volatile. 'I don't have the feeling that our end users are seriously re-stocking,' commented one trader. 'Many are just using the spot markets to purchase material for their short-term production needs. And let's face it, as long as the economy is not picking up, lower volumes of raw material are needed for production and so we will keep on suffering.'

Dutch home game

As it was a 'home game' for them, it should come as no surprise that the Dutch contingent in Amsterdam was the second largest at just over 100 - a figure bettered only by the 111 delegates from Germany.

As at the BIR 2009 Spring Convention in May, the large proportion of traders from India was particularly noticeable. Although some 30 had registered for the event, a far larger number was to be found in the lobby of the Okura

Hotel, ready to do business with anyone stepping out of the Convention rooms. Surveying this scene, a European delegate joked: 'It looks like the Indian Ocean down here.'

In contrast to the BIR Convention in Dubai, there were many more participants from China; approaching 30 had registered and a few more unregistered traders could also be seen in the Okura's lobby.

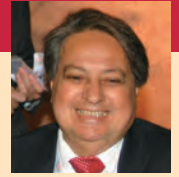
International Environment Council

The European recycling industry must remain united as it nears the long-held goal of extricating its end-products - namely materials ready for melting or re-pulping - from waste legislation, delegates to the BIR's International Environment Council (IEC) meeting in Amsterdam were urged by its Chairman, Olivier François of Galloometal in Belgium. It is crucial, he said, for the industry as a whole to back the development of criteria for establishing the 'end of waste' because these will bring harmonisation, legal certainty and a reduced administrative burden for the entire EU recycling industry, Mr François insisted. 'We really must keep this target in mind,' he declared. 'We need to be strong and we need to be strong together.'

Also at the IEC meeting, BIR's Environmental & Technical Director Ross Bartley highlighted the Basel Convention's Partnership for Action on Computing Equipment (PACE) which brings together personal computer manufacturers, refurbishers, recyclers, international organisations, academia, environmental groups and governments with a view to improving the management of used and end-of-life comput-

Ikbal Nathani's BIR joke

Indian Hell



A man dies and goes to Hell. On arrival, he finds that there is a different Hell for each country. He goes to the German Hell and asks: 'What do they do here?' He is told: 'First, they put you in an electric chair for an hour. Then they lay you on a bed of nails for another hour. Then the German devil comes in and beats you for the rest of the day.'

The man doesn't like the sound of this, so he moves on and checks out the American Hell, the Russian Hell and those for some other countries - only to find that they are all more or less the same as the German Hell.

Then he comes to the Indian Hell and finds that there is a long queue of people waiting to get in. Amazed, he asks: 'What do they do here?' And he is told: 'First, they put you in an electric chair for an hour. Then they lay you on a bed of nails for another hour. Then the Indian devil comes in and beats you for the rest of the day.' 'But that's exactly the same as in all the other Hells, so why are so many people waiting to get in here?' the man wonders.

He is told: 'Because the maintenance here is so bad that the electric chair does not work, someone has stolen all the nails from the bed and the Indian devil is a former government servant, so he just comes in, signs the attendance register and then goes to the canteen.'



Michael (left) and his father Julian Schwartz (middle) from I.R. Metals for Industry Ltd. in Israel are engaged in a conversation with BIR's International Trade Council Chairman Robert Voss.



Dr Guido De Santis (left) and Frank Gevelle in the booth of SGM Magnetics.

NEW



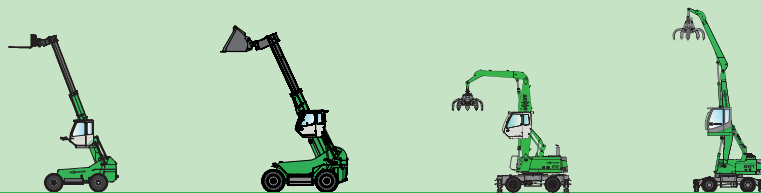
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Three ISRI figureheads. From left: Commodities Director Bob Garino, Chair George Adams and SCRAP magazine Publisher/Editor Kent Kiser.



The cocktail bar in the hospitality area was sponsored by Dutch company Jewemetaal Stainless Processing.



During BIR's Welcome Reception, Rembrandt's famous painting 'Nightwatch' was recreated 'live' on stage.



BIR's Communication Director Elisabeth 'Marilyn Monroe' Christ.



BIR President Dominique Maguin was one of the characters who performed in the Nightwatch-recreation.



Rolf and Hannelore Willeke are copying the Rembrandt painting shown on the screen during the Welcome Reception.

ing equipment. Since recycling industry participation in PACE has been limited to date, he suggested more companies operating in this field should consider becoming involved in this important initiative.

International Trade Council

Reporting on an 'extremely busy' period for BIR's International Trade Council, its Chairman Robert Voss of UK-based Voss International confirmed a change in the rules affecting exporters of recyclables to China. With regard to its registration system for overseas suppliers, the country's General Administration of Quality Supervision, Inspection and Quarantine (AQSIQ) wants all new applicants to be certified to ISO 9001 or equivalent. However, it was emphasised in Amsterdam that this requirement is unlikely to apply to those companies looking simply to renew their registrations. A 'channel of communication' has been opened up with the credit insurance sector which could eventually lead to the development of an insurance policy tailored to the needs of the entire scrap industry, Mr Voss noted. And he also warned delegates about an Internet scam whereby fraudulent companies have been using the names of reputable firms to secure deposits for scrap which is never received. 'I know of three companies in China which have been caught out,' he told delegates.

Situation 'on ice'

Mr Voss also confirmed that some progress has been made in recent months with regard to India's onerous scrap import proposals. However, the situation remains unresolved and 'on ice', he told delegates. During the BIR Convention in Amsterdam, Ikbal Nathani - who is both President of the Nathani Group of Companies and Chairman of the recently-founded Metal Recycling Association of India (MRAI) - took time out to outline to Recycling International his organisation's stance on India's classification of all ferrous and non-ferrous scrap as 'hazardous'. 'In India, the Ministry of Environment & Forest is responsible for environmental affairs,' he explained. 'In September 2008, they issued a governmental notification whereby all grades of both ferrous and non-ferrous scrap were classified as "hazardous waste". In addition, only actual scrap users were allowed to import these scraps, not the traders. Users could get



permission to import only once they had filled out a transboundary form which calls for test reports, analysis, examinations and so on. Subsequently, India's scrap traders met with the Indian Minister of the Environment, Jairam Ramesh, and, as a result of these discussions, he gave instructions that it should also be allowed for traders to import metals.'

Businesses under threat

Annually, India imports nearly 3 million tonnes of ferrous scrap and 1.5 million tonnes of non-ferrous scrap; around 90% of this business is carried out through traders. Most of the imported scrap is sold to small smelters making parts such as door hinges. 'Because these smelters cannot import themselves,

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In Amsterdam, there was a large number of traders from India. One European delegate joked: 'In the lobby, it looks like the Indian Ocean.'



A delegation from Japan. From left: Masahiro Nagata of Metal One, Jun Nakatsuji of Nakatsuji Ltd., Haruhiro Okada of the Japanese Iron & Steel Recycling Organisation JISRI, and Genkichi Ando of Seinan Corporation.



Outside the Okura hotel in Amsterdam, it was Smoker's Paradise.

their businesses would have to close if their supply stopped,' noted Mr Nathani.

India is a signatory to the Basel Convention whose Annex 9 classifies metals as non-hazardous. Mr Nathani pointed out: 'India has become the first country in the world to classify metals scrap as hazardous and, as a result, all other signatories will no longer be able to export metal scrap to India once our government reports this change of policy to the Basel Convention - something which, by the way, it still has not done.'

Although Mr Nathani is convinced that Indian officials have acted in good faith, he believes this notification was drafted by people 'who do not understand the importance of recycling for our economy and the environment'. And he added: 'The government should encourage recycling and imports of secondary raw materials rather than calling metals scrap hazardous.'

Unnecessary red tape

MRAI's Chairman underlined that recycling scrap compares favourably to using iron ore, coking coal and limestone which entails heavy carbon dioxide emissions. According to a BIR study, 67% of the energy is saved when using scrap compared to following the primary route - a finding MRAI has brought to the attention of the Indian authorities, he noted. The re-classification of scrap as hazardous cre-

ates unnecessary red tape and benefits other countries competing with India for raw materials, according to Mr Nathani. 'If India does not change this, US, European and Japanese exporters will sell their material to other countries and our recycling industry will be severely hit,' he warned.

Mr Nathani believes the Indian government should immediately conduct a study into whether scrap is hazardous or not - even though such analyses have already been carried out and are readily available. He insisted: 'They will come to the conclusion that this material is not hazardous and that it is wrong to impede imports of metals scrap.'

And he concluded: 'In November, we will meet again with the ministry and we hope we can convince them of our views.' □



BIR International Environment Council (IEC) Chairman, Olivier François of Galloometal in Belgium.



Ikbal Nathani, Chairman of the recently-founded Metal Recycling Association of India (MRAI): 'India's re-classification of scrap as hazardous benefits other countries.'

Ferrous



'Too much too soon' from steel producers?

Conditions for the global steel industry have improved since this year's BIR Spring Convention in Dubai, but there was no great mood of celebration at the BIR Ferrous Round-Table in Amsterdam. Instead, there were warnings that many steel producers around the world have implemented output increases before an improvement in real demand has become entrenched.

'Optimism is returning' but the scale of the improvement within the steel industry should not be overstated, the latest BIR Ferrous Round-Table was warned by divisional President Christian Rubach of Germany-based Interseroh Hansa Recycling GmbH. 'Although we are seeing the first signs of economic recovery, so far this seems to be based on restocking of inventories and/or the result of stimulus packages and other governmental programmes,' he pointed out to delegates in Amsterdam.

Mr Rubach underlined that leading market analysts are still anticipating difficult times ahead for the steel industry: Steel Business Briefing, for example, has declared recently that 'steel demand expectations could col-

lapse to late-2008 levels again'; the European Confederation of Iron and Steel Industries (Eurofer) has warned that there is unlikely to be any rapid recovery in the EU steel market (see box headed 'Slow motion market predicted by Eurofer'); and Deutsche Bank Research has ventured to suggest that steel production levels in Europe will not recover to 2007/08 levels for 10 years - a prediction which prompted Mr Rubach to add 'Let's hope they are wrong'.

The BIR Ferrous Division President emphasised that the economic outlook is distinctly regional in nature, with all available forecasts suggesting that there will be a pronounced 'split' in the world's economic growth patterns

over the coming years: Western economies appear likely to suffer a significantly slower rate of improvement than, for example, large parts of Asia and Brazil.

'Huge' impact of crisis

A report from Markus Barg of TSR Recycling in Germany highlighted the difficult circumstances in the EU. Europe's construction, shipbuilding and engineering industries have suffered a 'huge' negative impact from the financial and economic crises, resulting in a 41% slump in EU crude steel production to 84.2 million tonnes when comparing the first eight months of 2008 and 2009. 'Some countries - like Germany, for instance - even fell back to their crude steel production level of the 1960s,' delegates were informed.

'One year of crisis with production cuts of more than 40% has certainly left its marks on the financial situation of our customers; their margins seem to be healthy, but the volumes are missing,' Mr Barg continued. In addition, the EU steel industry is 'running out of sales options' given that leading consumers of the past - including Italy and Spain - are no longer

so important for the continent's producers. Having underlined the close relationship between the steel and scrap markets, Mr Barg insisted that 'circumstances are far from being good' and that 'a fundamental recovery is not in sight'.

40% scrap consumption drop

In his statistical analysis, Mr Barg observed that, when compared to the same period last year, EU steel scrap consumption fell around 40% in January-August 2009 to approximately 45 million tonnes. EU steel scrap exports declined just over 20% in the first half of 2009 to 6.5 million tonnes while the region's imports tumbled approximately 40% to 1.4 million tonnes.

Turkey maintained its position as the leading buyer of EU steel scrap in the first half of the year, although purchases plummeted almost 39% to just short of 3 million tonnes. Over the same comparative periods, Egypt reduced its orders by 57.6% to 232 000 tonnes while Switzerland cut its requirements from the EU by 40.6% to 174 000 tonnes. By complete contrast, EU exports to India, China and Pakistan soared 139%, 144.2% and 176.2%, respectively, to yield totals of, in turn, 1.133 million tonnes, 613 000 tonnes and 406 000 tonnes. The EU's leading supplier of steel scrap also remained unchanged although Russian deliveries of approximately 350 000 tonnes in the first six months of 2009 represented a decrease of around 55% from January-June 2008. In second place came the USA on 284 000 tonnes (+35.5%).

Sales still difficult

In his presentation, Mr Barg made reference to an analyst's prediction that, between now and the year 2020, Europe's share of world crude steel output will decrease from 16% to 8% while the proportion produced in Asia will jump from 56% to 80%. In this context, Blake Kelley of Sims Metal Management pointed out that China is already responsible for almost 49% of the crude steel produced worldwide, having upped year-on-year output by more than 12% at a time when the rest of the world as a whole has cut volumes by more than 26%. But despite some very recent and yet indecisive price increases in China, conditions for the steel industry in Asia 'are generally difficult and deteriorating as we speak', he said.

In recent months, many countries have increased their steel production. Mr Kelley suggested 'many people believe producers have increased output by too much too soon', adding that 'demand does not seem to be developing much beyond the amount required to restock'. In his US market focus, Mr Kelley reported 'concern' at the possibility that domestic steel output will increase from just over 61% of capacity in late October to 70% in the foreseeable future. 'Steel sales are increasingly difficult to make, suggesting that restocking has been completed and true demand may not have developed,' he said. 'As a result, buyers expect the next steel price will be lower.'

In his market summary, he described idled excess capacity as an 'overriding issue' in the steel industry. Despite consolidation, therefore, the sector's product prices 'are unlikely to increase to sustainable levels any time soon', Mr Kelley argued. 'But in the meantime, lower volume makes it very difficult for scrap processors and steel producers to effectively amortise their costs.'

He predicted that scrap prices are likely to continue easing downwards until demand and supply return to balance - possibly by late December buying but more probably not until January next year.

According to Andrey Moiseenko of MAIR in Russia, domestic scrap collection volumes amounted to some 2 million tonnes in September this year - a decline of around 30% compared to 2008 - although October was expected to witness the highest monthly collection total of the year to date. Since the start of this year, steel producers in Russia have reduced their scrap stocks from upwards of four months to the 'normal' level of around one month, he added. Russia's scrap exports were described as 'stable at a low level'.

China the 'wildcard'

In his guest presentation, Dr Thomas Ludwig - CEO of German steel distributor Klöckner & Co SE - dismissed widespread fears that China would become a major exporter of steel. Having emphasised that the Asian giant is not a low-cost producer, he suggested that it makes no sense for the country to import raw materials so as to export steel rather than steel-containing finished products.

Describing its government as the world's biggest steel producer, Dr Ludwig said that China



BIR Ferrous Division President Christian Rubach: 'Optimism is returning.'



Markus Barg of TSR Recycling in Germany: 'Steelmakers' margins seem to be healthy, but the volumes are missing.'



Guest speaker Dr Thomas Ludwig, CEO of German steel distributor Klöckner & Co.



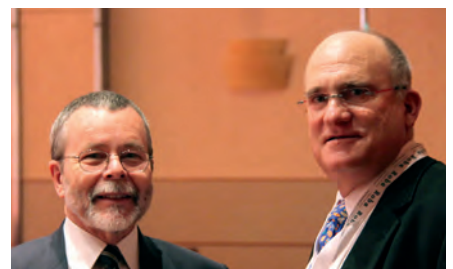
Blake Kelley of New York-based Sims Metal Management.



Anthony P. Bird of the UK-based Bird Group of companies (left) and Ruggiero Alocci of Alocci Rappresentanza Ind. in Italy.



Hisatoshi Kojo of Metz Corp, Japan (left) and Andrey Moiseenko of MAIR, Russia.



Joaquim De Souza-Gomes of Brazil's Gerdau Group (left) and Robert Salsitz of Protrade Steel of the US.

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Retirement gift for industry 'friend'

On the occasion of his retirement from the European Commission after 27 years of service, a special presentation was made to Alberto Canevali at the BIR Ferrous Round-Table in Amsterdam.

Formerly in charge of steel and scrap industry affairs within the Commission's DG Enterprise, Mr Canevali has been 'an important and great friend of our industry for many years', delegates were told by BIR Ferrous Division Honorary President Anthony Bird of The Bird Group of Companies in the UK. In 1984, the latter recalled, Mr Canevali's 'patience and common sense' had proved crucial in helping the industry to win its argument with steel producers over the right to export scrap from the EU. 'He made our success possible,' stated Mr Bird. Over the years, Mr Canevali has developed 'a great understanding' of the steel industry and of recycling, he added.



Alberto Canevali (left) and BIR Director General Francis Veys.

'Slow motion' market predicted by Eurofer

The EU steel market 'will remain stuck in slow motion for the time being' despite signs of a turning point in the global economy during the third quarter of 2009, insists Gordon Moffat, Director General of the European Confederation of Iron and Steel Industries (Eurofer). Furthermore, he warns: 'Global crude steel production increasing in anticipation of a recovery in steel demand which yet has to materialise remains a major risk for the EU supply-demand balance.'

The organisation's recently-released steel market outlook for the period to 2011 contends that prospects remain 'subdued' for some of the EU's key steel-using sectors, including automotive and construction. Despite greater stability emerging within the financial markets, financing is still a 'bottleneck' for many companies and industrial orders remain weak in spite of some inventory replenishment. 'While year-on-year output growth should turn positive again in the second quarter of 2010, it could take to 2011 before a more pronounced rebound in output begins,' Eurofer suggests.

Weak activity in the steel-using industries and sharp destocking in the steel supply chain resulted in apparent steel consumption plummeting 45% year on year in the first half of 2009 and by almost 32% in the third quarter. However, stocks are now 'better aligned with the current weak level of steel demand', Eurofer explains. 'Drastic production cuts at EU mills and substantially reduced third country imports supported the process of balancing supply with demand. Significantly reduced steel inventories resulted in some customers cautiously returning to the market in recent months to fill gaps in their stocks.'

'Technical' demand recovery

In 2010, some inventory build-up following heavy destocking in 2009 will lead to a 'technical' recovery in steel consumption, which is forecast to increase by approaching 12%. And improving end-user activity should provide 'a broader basis for steel demand growth' during 2011. Eurofer comments: 'This will also trigger the need to align stocks with higher downstream output. Apparent steel consumption could grow by 7.5%.'



Compared with the same period last year, output in the EU steel-using sectors tumbled almost 23% in the first half of 2009 as companies were forced to cope with an 'unprecedented' drop in demand for industrial goods, both in the EU and in global export markets. Latest data indicate that the production decline in these sectors will be nearer 18% for the year as a whole while forecasts for 2010 suggest gradual further improvement; from the second quarter onwards, says Eurofer, 'year-on-year growth could become slightly positive again'. A more pronounced recovery is anticipated in the following year, with initial steel-weighted industrial production data venturing an increase of 4%.

is in a position to manage its steel output far more effectively than the democratic world. If Chinese ministers fail to manage this growth, there is potential for huge over-capacity, he warned.

While maintaining that the worst of the global crisis 'is behind us' and that the long destocking phase in the steel sector is at an end, Dr Ludwig also warned that real demand for steel has shown no signs of a major recovery and could remain at low levels for some time. 'Maybe we won't see again such high steel consumption as we have seen in 2007 and 2008,' the speaker said.

Without a rapid improvement in real demand, steel prices are likely to remain highly volatile in the coming years, according to Dr Ludwig. It is therefore important, he added, for steel distribution companies such as his own to maintain high levels of discipline with regard to stock management. 'We will not speculate with our stocks,' he went on to insist.



Threat to trade with India

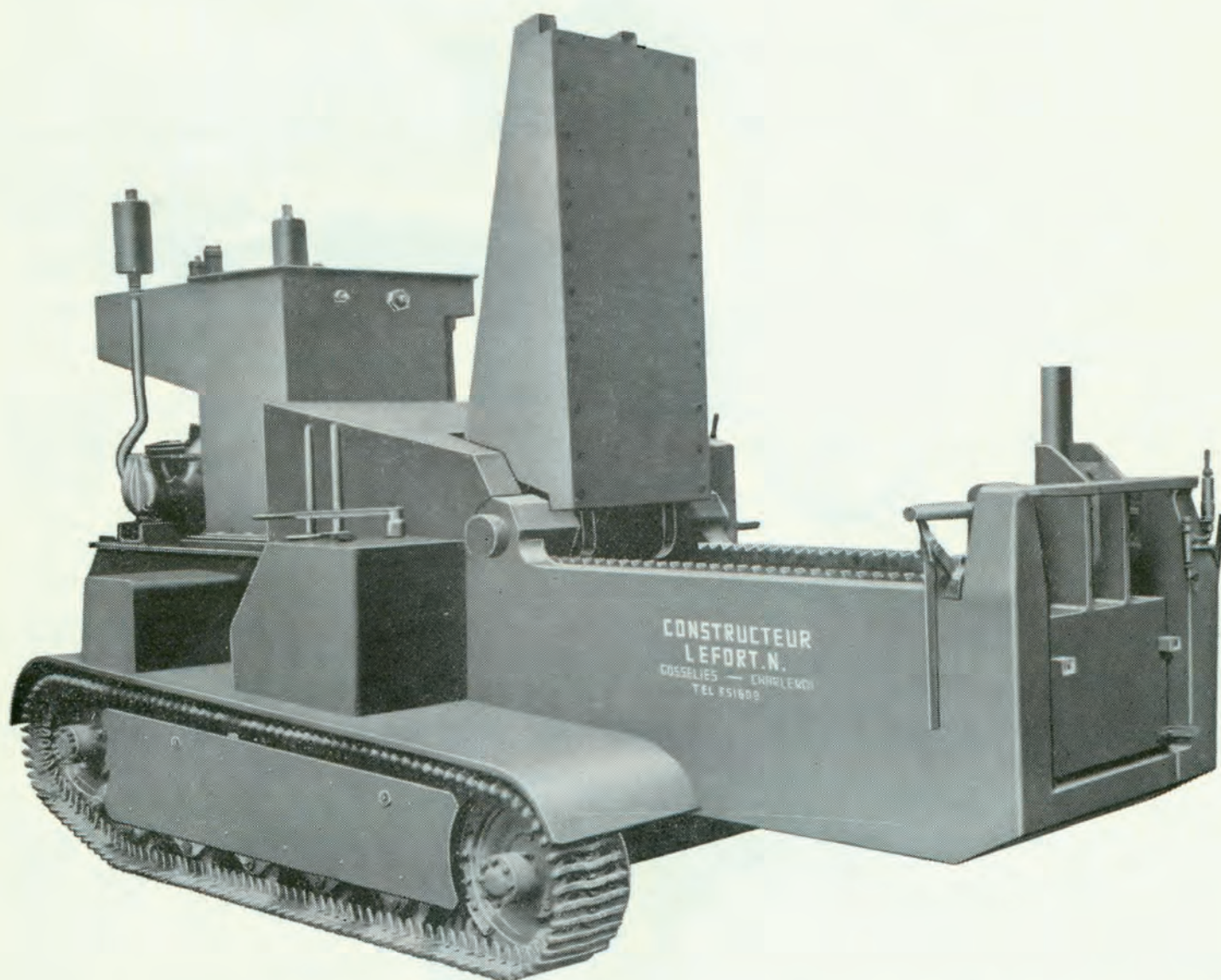
Although helpful changes have been made in relation to registration and pre-shipment inspection proposals, scrap exports to India are still under threat because government officials have yet to be convinced to remove ferrous and non-ferrous scrap from the 'hazardous waste' classification - despite the concerted efforts of the BIR, the US Institute of Scrap Recycling Industries and the newly-formed Metal Recycling Association of India. During the Ferrous Round-Table in Amsterdam, BIR Ambassador Ikbal Nathani of India's Nathani Group of Companies confirmed that, at the time of speaking, the Indian government had not complied with the requirement imposed on all Basel Convention signatories to inform the secretariat officially of these regulatory changes. □

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Non-ferrous

Caution remains the watchword



Given the severity of market conditions at the same stage last year, companies in the non-ferrous metals sector can be excused for celebrating something as fundamental as their very survival. But while conditions have improved markedly since those dark days of falling prices and contract disputes, contributors to the Non-Ferrous Metals Round-Table in Amsterdam were agreed that challenges still lie ahead.

'As restocking of finished non-ferrous products takes place, as the automotive industries around the world improve, as delayed construction projects are rejuvenated and people go back to their jobs, I think that we can look forward to sustainable improvement in our businesses.' This was the upbeat message from divisional President Robert Stein of US-based Alter Trading to the BIR Non-Ferrous Metals Round-Table in Amsterdam. He offered his congratulations to those companies that have survived 'what was arguably the most challenging and stressful time for our industry in modern times'. Although some companies have 'van-

ished' and many have 'lost a lot of money', the industry for the most part 'is on a far better course than we were last autumn', he said. 'There is realisation that, hopefully, we've seen the worst of what the world has to give us.' In 2009, the prices of many of the leading non-ferrous metals have been driven higher by a combination of governments' financial stimuli, strong demand from developing nations, supply disruptions, production cutbacks and a lower value for the US dollar, he suggested. He noted by way of example that, between January of this year and the Round-Table in late October, LME cash price averages for copper and lead had soared around

95%, while the gains for zinc and nickel had exceeded 60%. Over the same period, aluminium and tin prices had climbed, respectively, 34% and 31%.

Optimism still guarded

But the renewed optimism within the non-ferrous metals sector remains 'very guarded', Mr Stein stressed. There is more caution and more recognition among buyers that sellers need financial performance guarantees, and hopefully increased scrutiny and due diligence on the part of suppliers as a new wave of market participants surfaces, he said. And referring to the surge in contract defaults following the onset of the global financial and economic crisis, he added: 'There are some who stole from us and have reincarnated under new names (and) some who still regard their purchase obligations as commercial conveniences and not binding agreements.' He went on to report that, at the request of its Non-Ferrous Metals board, BIR has initiated a study relating to the organisation's Code of Conduct and members' compliance with its by-laws. 'A good start has been made,' he said, 'and it will no doubt serve as a springboard to initiate in-depth and meaningful changes to our rules.'

Rather sombre

Delegates to the Round-Table were also provided with a country-by-country summary of market conditions based on

the most recent BIR Non-Ferrous World Mirror. Delivered by Dhawal Shah of Metco Marketing in India, this highlighted 'doubts' over the strength of domestic demand in China, describing as 'rather sombre' the non-ferrous metals market in the south of the country. Meanwhile, non-ferrous trading volumes in the USA have shrunk to around 50% of last year's highs while those in the UK have dropped some 30% from their peak, he added. Guest speaker Günther Kirchner, Secretary General of the Organisation of European Aluminium Refiners and Remelters (OEA), also added to this cautious tone by contending: 'I'm not so sure the bad times are really over.' On the subject of China, he pointed out that its imports of aluminium scrap from the EU were higher in the first half of 2009 than for the whole of 2008: the respective totals were 257 426 tonnes and 252 119 tonnes. From the wider perspective, he added, international aluminium scrap flows have sky-rocketed from 427 200 tonnes in 1995 to an estimated 2.8 million tonnes in 2007.

Stable relation 'missing'

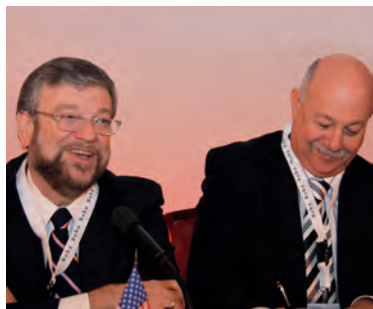
Mr Kirchner's presentation also called for the wrought alloys pricing system to be adopted for casting alloys. 'A stable relation between aluminium alloys and aluminium scrap is missing,' he argued. His organisation is looking to hold talks with the scrap industry to gauge whether such an exercise could prove worthwhile. Fellow guest speaker Michael Widmer, Metals Strategist with Banc of America Securities-Merrill Lynch in the UK, envisaged potential for a 'relatively healthy rebound in GDP growth' and an improvement in metals demand next year, partly because many government stimulus packages will roll over into 2010. He ventured an average copper price for next year of US\$ 7000 per tonne. □



Dhawal Shah of Metco Marketing in India.



Guest speakers Michael Widmer of UK-based Merrill Lynch Financial Centre (left) and Günther Kirchner, Secretary of the Organisation of European Aluminium Refiners and Remelters (OEA).



BIR Non-Ferrous Division President Robert Stein of US-based Alter Trading (left) and Michael Oppenheimer of Brookside Metal Company in the UK.

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Stainless

A fragile and uncertain market



During the latest BIR Stainless Steel & Special Alloys Round-Table, delegates were shown a film which dubbed stainless steel a recycling 'champion'. For the moment, however, the producer sector is being forced to confront the challenge of significantly reduced demand for its products. An upturn is expected - but not even the experts are sure when this will arrive.

On more than one occasion during the course of last month's BIR Stainless Steel & Special Alloys Round-Table in Amsterdam, its Chairman Michael Wright of UK-based ELG Haniel Metals suggested that the stainless market is currently 'fragile' and 'sensitive', and that the timing of an upturn in its fortunes remains difficult to predict. However, he still believes that world stainless steel output could climb almost 4 million tonnes next year.

In his introductory comments, Mr Wright cast doubt on whether the latest estimate of 24 million tonnes of global stainless steel production in 2009 is truly achievable, suggesting that a total of nearer

23.5 million tonnes is perhaps more realistic. At the same time, he is 'still optimistic' that the forecast of 27.2 million tonnes for 2010 will be realised.

Global scrap availability is on course to fall from 7.5 million tonnes in 2008 to around 6.8 million tonnes this year - but an increase is likely in 2010 and the total is expected to exceed 8 million tonnes by 2013 at the latest, he added.

Fears of deterioration

Switching his focus to the European market, Mr Wright used figures provided by Heinz Pariser of Alloy Metals & Steel Market Research of Austria to highlight a decline of 36.4% in the continent's

stainless steel production from 5.69 million tonnes in January-August 2008 to just 3.616 million tonnes in the corresponding period of the current year. Despite some positive signs of increased demand for stainless steel in recent months due mainly to 'restocking of the supply pipeline', he added: 'In general, the European mills are concerned about a further deterioration in demand after it appears that stock replenishment was completed in the second and third quarters and demand for end-user goods remains depressed.'

Precarious market

The precarious condition of the world market was also highlighted by Mark Sellier of OneSteel Recycling in his report on Asia when he questioned whether fundamental demand for stainless steel is sufficient to consume stock or whether a further period of decline should be anticipated.

Scrap is scarce in Asia and is attracting high prices, he noted. Scrap ratios in China are running at around 20% owing to the large availability of nickel and nickel pig iron. A number of the continent's mills have announced planned maintenance shutdowns for the coming months while scheduled investment in some projects has been delayed. 'Acerinox has yet to break ground in Malaysia after making an announcement more than 18 months ago,' Mr Sellier noted by way of example.

Barry Hunter of Hunter Alloys LLC in the USA offered more positive news about China, pointing to a prediction from industry 'guru' Markus Moll of Austria-based Steel & Metals Market Research that the country's stainless steel output will increase around 10% next year. Other encouraging factors identified by the speaker included more positive economic indicators in the USA and the prospect of huge energy/environmental projects boosting demand for stainless and nickel-bearing materials.

Extreme pressure

Other contributions emphasised the shortage of stainless steel scrap, including the Middle East report from Ahmad Sharif of Sharif Metals Est. in Jordan which also pointed to widespread predictions in the region of an upturn in the market during the first quarter of 2010.

According to the submission from Anand Gupta of India-based Ambica Steels, latest figures show that his country's imports of stainless steel scrap are running some 27% below those of last year due to weak demand from domestic stainless steel producers. Operating capacities have improved to around 80-85% but prices for finished goods remain 'under extreme pressure'.

Russia's stainless steel scrap exports are likely to be higher than official estimates of around 100 000 tonnes for 2009, according to Ildar Neverov of Scrap Market Ltd. Russia is considering a five-fold increase in the export duty - a move which would 'kill the export business', he added.

The high temperature alloy and titanium report from Phil Rosenberg of Keywell in the USA confirmed that both markets remain quiet, not least due to low activity levels in the aerospace sector. Of long-term concern for the scrap titanium industry is growing sponge capacity, he added. □



Steel & Special Alloys Round-Table Chairman Michael Wright of UK-based ELG Haniel Metals.



Sheraz Nefatti of the International Chromium Development Association.



Michael Sutter of Cronimet Ferrolegierungen in Germany (left) and Claes Merborn of Hans Andersson Metal in Sweden.

Paper

China confounds the sceptics

The 'green shoots' of recovery have become more apparent in the recovered paper sector since this year's BIR Spring Convention in Dubai, with market support notably coming in the form of strong demand from China. However, a number of serious challenges continue to face the paper recycling sector - including low collection volumes and rising costs.

At the beginning of this year, a number of leading industry commentators and media giants - including the BBC - suggested that the global economic crisis could potentially destroy the very fabric of international trade in recyclables.

In the case of recovered paper, export and import activity certainly took a severe knock in late 2008 and early 2009. However, figures presented to the latest BIR Paper Round-Table in Amsterdam reveal that the world's leading buyer - China - is now well on course to shatter its previous import record.

The Asian giant bought in some 18.6 million tonnes of recovered paper in the first eight months of 2009, according to BIR Paper Division President Ranjit Baxi of J & H Sales International in the UK. Of this total, the USA supplied 7.654 million tonnes and Europe around 6.5 million tonnes. If this pace of imports is maintained throughout the remaining third of the year, China will buy in some 27.9 million tonnes in 2009 as a whole - an increase of some 15% over the 24.15 million tonnes imported last year. Indeed, China's recovered paper import growth has accelerated in 2009, having risen 'only' 7% between 2007 and 2008.

Guest speakers at the meeting were equally bullish about China's buying frenzy. Data provided by Bill Moore of the well-known USA-based consultancy Moore & Associates revealed that China's recovered paper imports slumped from around 2 million tonnes in December 2008 to nearer 1.5 million tonnes in January this year - the lowest monthly total since October 2006. However, China's overseas purchases quickly re-gathered momentum to exceed 2 million tonnes in February; and by April this year, an all-time monthly import record of more than 2.7 million tonnes was set.

Indian imports to leap?

From less than 25 million tonnes in 2008, China is expected to become a net importer of around 35 million tonnes of recovered paper by the year 2014, according to Mr Moore. On the other side of the scale, North America and



Western Europe are expected to be even more substantial net exporters five years from now: the figures are put at around 22-23 million tonnes for the former and 12-13 million tonnes in the case of the latter.

For his part, fellow guest speaker Trilochan Singh of RKS International Sales GmbH & Co. KG in Germany predicted that import demand from China would rise to 37 million tonnes by the year 2012 while requirements in India would jump to 20 million tonnes by the year 2020 in response to paper manufacturers upscaling their technologies. However, some industry insiders believe the latter figure will be hard to achieve within this timescale.

Having noted the encouraging news that China and India are expected to register GDP growth rates of, respectively, 9% and 6.5% in



From left: Ain Lindre of Estonia-based Tallinna Sekto, Merja Helander, President of the European Recovered Paper Association (ERPA), and Lars-Gunnar Almyrd of IL Recycling AB, Sweden.



BIR Paper Division President Ranjit Baxi of J & H Sales International in the UK (left) and guest speaker Bill Moore of USA-based consultancy Moore & Associates.



2010, Mr Baxi returned the focus of the meeting to the harsher realities of the nearer term. While the recession appears to have 'bottomed out', the recovery is set to be slow, he said, with rising unemployment impacting negatively on spending and therefore on paper consumption. Low recovered paper collection volumes represent 'a problem we are all currently facing', along with cash-flow issues, an increase in bank charges and a strongly rising trend over recent months in sea freight rates.

Exchange rates important

Market reports from around the world emphasised the drop-off in recovered paper collection volumes. According to Merja Helander of Finland-based Paperinkeräys Oy, incoming tonnages have declined between 10% and 15% in northern Europe; and generation in the USA has slid by similar proportions, noted Michael Moulton of Koch Pulp and Paper Trading.

Jean-Luc Petithuguenin of Paprec pointed to weak collection tonnages in his home country of France and in nearby nations. The future scale of exports beyond Europe will depend to a significant degree on the US dollar/Euro exchange rate, he added.

Low generation and a high level of exports were noted in the report for southern Europe, delivered by Francisco Donoso of Reciclajes Dolaf SL of Spain. Statistics for the first half of this year showed that Spanish exports of recovered paper exceeded 600 000 tonnes while its imports were below 400 000 tonnes, thus confirming the country as a net exporter of secondary fibre after a long history as a predominantly importer nation.

In Italy, collection volumes have declined but demand from the paper and board industry has also been lower as a result of production cuts. This situation led Giuseppe Masotina of Masotina Spa to re-work a familiar proverb in the following way: 'The horse may not be thirsty, but we may have no water to offer it.' Reporting on developments in the Turkish market, Tümay Erdil of TUDAM informed delegates that the country's Ministry of Environment and Forest has issued new pre-shipment inspection certificate criteria similar to those introduced in India. Mills are discussing the new rules with the ministry given that these are seen to have



Reinhold Schmidt of RKS GmbH in Germany and Michael Moulton, Vice President of US based Koch Pulp & Paper Trading.

resulted in additional costs and bureaucracy. On a more positive regulatory note, Mr Baxi explained that the Indonesian government has extended the list of approved pre-shipment inspection surveyors from two to upwards of 20. The government may look to implement its new import controls with effect from January 1 next year - although Mr Baxi emphasised in Amsterdam that no firm date has yet been issued.

Rates 'unsustainably low'

Rising sea freight rates was one of the challenges to the recovered paper sector highlighted by Mr Baxi. And guest speaker Peter Hall, Managing Director for the UK & Ireland of container transportation specialist APL, warned that a continuation of 'unsustainably low' freight rates will lead potentially to shipping line failures, to a degradation of service levels and, in the longer term, to a lack of re-investment within the container shipping industry.

During 2009, Mr Hall explained to delegates in Amsterdam, global container trade volumes have plummeted 20% while container shipments have declined for the first time in more than 20 years. Faced with these conditions, carriers have incurred losses running into billions of US dollars and the shipping industry as a whole finds itself 'in serious negative territory'. More than 500 container



Thomas Braun of the German waste management and recycling association Bvse (left) and Trilochen Singh of RKS International Sales in Germany.

SAICA scoops Papyrus prize

For its increasing use of recovered fibre as well as its 'healthy partnership' with companies in the supply chain, the SAICA Group of Spain has become the latest recipient of the BIR Paper Division's Papyrus prize. The award was presented by BIR World President Dominique Maguin to the company's Materials Director Guillermo Vallés Albar during the Round-Table in Amsterdam.

Formed in 1946, the family-owned SAICA Group has relied solely on secondary fibre for its raw material needs since 1997 and recovered almost 2.3 million tonnes of paper last year at a total of 43 centres, delegates were informed. The company is currently installing a waste-to-energy plant at its mill in El Burgo de Ebro - the first of its kind in Spain - to consume the recycling waste from the host mill and from its facility in nearby Zaragoza.

www.saica.com



Paper Division President Ranjit Baxi (left) and BIR President Dominique Maguin (right) present the Papyrus prize to Guillermo Vallés Albar of the SAICA Group of Spain.

ships are idled at present - 'and that's a big problem', the speaker underlined. 'I don't think the recovery in our industry will happen that quickly.'

The report on European Recovered Paper Association (ERPA) activities, delivered by Ms Helander, confirmed that the European paper recycling rate has reached 66.6%; the total amount recycled in paper mills last year amounted to 60.3 million tonnes - an increase of 8.2 million tonnes since 2004. The key question now, she said, is how high the recycling rate can feasibly go. 'It can't go up forever,' she concluded. □



BIR Honorary Life Member Heinz de Fries of Germany.

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Textiles

French eco-levy stirs strong emotions



At present, the used clothing market appears to offer one of the few - if not the only - route to profitable operation for the vast majority of textiles recyclers. However, there is concern within Europe that France's eco-levy system may undermine even this area of activity. Last month's BIR Textiles Round-Table in Amsterdam focused on this topic, as well as on issues and market conditions in the USA.

The emerging eco-levy system in France has energised debate within the international textiles recycling community. And its ability to stimulate discussion was once more in evidence at the latest BIR Textiles Round-Table in Amsterdam.

Under the system, distributors and other companies responsible for putting new clothing and shoes on the market are required to pay a levy designed to more

than double sorted volumes. Delegates learned from Mehdi Zerroug of France-based Framimex that the first of the levy funds were transferred in July of this year, and that the first agreements between EcoTlc and sorting companies were signed early in October.

Reading out a statement on behalf of Boer Group Holding, Rainer Binger of FWS in Germany said this 'subsidy programme to stimulate the collection of textiles' could potentially deprive 'healthy sorting companies with strong traditional grading' of their established markets, leading to 'serious' job losses among people who will be left with 'little or no chance of finding other employment'.

Mr Binger added: 'The French need to reconsider this subsidy scheme. Government money and our knowledge should be used for real recycling purposes; we should not waste it on collecting original material and merely sending nearly unsorted merchandise around the world, thus disturbing the only profitable parts of textile recycling - the used clothing markets.'

A similarly strong opinion was voiced by Pol T'Jollyn of Recutex NV in Belgium who warned that the eco-levy system in France could divert the focus from quality and encourage 'rough' grading. 'Our business is still an art and we want to keep it like that,' he insisted.

Fears not realised

To date, 2009 has not hit the textiles recycling sector 'as hard as we feared it would' despite high energy costs and payment problems for a number of African customers, delegates were told by BIR Textiles Division President Olaf Rintsch of Germany-based Textil Recycling K&A Wenkhaus GmbH. However, market reports delivered in Amsterdam highlighted some adverse effects: for example, Sauro Ballerini of Italy pointed to a drop in wiping cloth demand resulting from reduced industrial activity while Mr Zerroug revealed that collection container yields have been 16% lower in France when compared to last year.

Providing a perspective on the US market, Eric Stubin of textile recycling association SMART reported a decline of around 10% in rag prices over the previous two to three months as well as 'softening' demand from the export market. Larry Groipen of ERC Wiping Products Inc. in the USA then warned of potential disruption to used clothing and footwear exports as a result of efforts to develop new standards within the International Organization for Standardization (ISO).

National waste plan

According to Hans Brak of Handel-sonderneming Brak BV in the Netherlands, the Dutch government has introduced a National Waste Plan which

seeks to intensify the collection of used textiles. Fearing this might lead to serious problems such as a major increase in lower-grade volumes, domestic association Vereniging Herwinning Textiel (VHT) - of which Mr Brak is Chairman - has brought together all interested parties within the textiles chain to discuss the issues raised.

VHT's Secretary Martijn van Leeuwen outlined several possible options for helping to secure the industry's future, including finding new applications for the lower grades of used textiles and arriving at more efficient processing methods for these same materials. The speaker acknowledged that consideration may also be given to some form of producer responsibility; experience gained with the eco-levy system in France - both positive and negative - will be evaluated, he added.

The guest presentation from lawyer Dr Oliver Bertram of Germany-based Kleiner Rechtsanwälte looked at the potential for minimum wage legislation to impact on the recycling sector, with particular reference to developments in his home country and several other European nations. Referring to earlier discussion of the link between recycling and waste legislation, he concluded: 'So long as your primary business is waste, you will not be able to escape this minimum wage.' □



BIR Textiles Division President Olaf Rintsch of Germany-based Textil Recycling K&A Wenkhaus.



Alexander Gläser of the German Fachverband Textil-Recycling (left) and Klaus Löwer of Hans Löwer Recycling in Germany.



Hans Brak of Handel-sonderneming Brak in the Netherlands (left) and Martijn van Leeuwen, Secretary of the Dutch textile recycling association VHT.

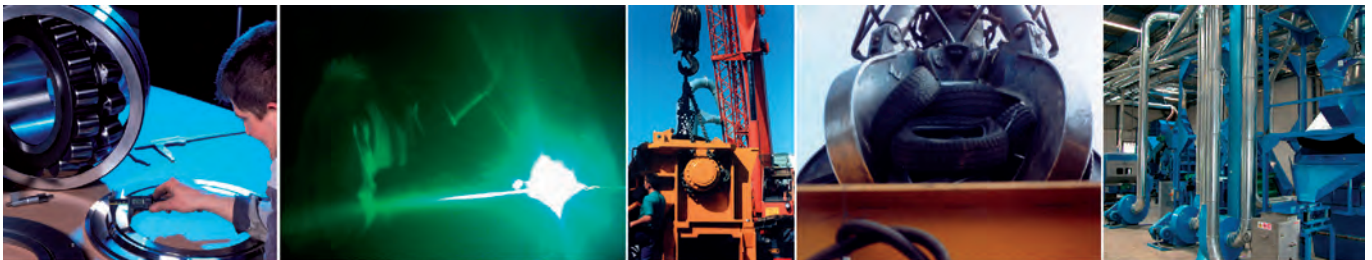


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Plastics & Tyres

Plastics recycling: a 'sunrise industry'



A huge number of opportunities await the 'sunrise industry' of plastics recycling, the BIR Plastics Round-Table in Amsterdam was assured by its Chairman, Surendra Borad of Gemini Corporation NV in Belgium.

By way of example, Mr Borad pointed to a study which has concluded that '7% of the EU greenhouse gas reduction target will be achieved if land-filled plastics are either recycled or recovered into energy'. Recycling can also help to alleviate the 'large deficit in polymers' set to emerge in Europe and the USA. Turning to market conditions in India, Mr Borad described as 'worrying' the

virtual suspension of scrap imports into the important Kandla special economic zone; differences in the interpretation of rules have meant that 'recyclers are facing difficulties in clearing the goods'. Unlike its counterpart in China, the Indian government regards scrap as waste rather than as a raw material, he reminded delegates.

Mr Borad also highlighted 'good business' for US exporters to Indonesia and Vietnam. In China, meanwhile, an over-supply situation has developed owing to a combination of heavy ordering in previous months and the impact on industrial activity levels of the country's early-October holiday, observed Jacques Musa of Veolia Propreté France Recycling. He also noted that plastics collection volumes in

Europe are 30% lower than last year and that the majority of recyclers in France are operating at 60% of their capacity.

Post-shredder technology

Guest speaker Pieter Kuiper, Project Manager at Auto Recycling Nederland (ARN), explained that his organisation will shortly focus on post-shredder technology at a specially-built facility in Tiel to help the Netherlands in its bid to comply with the EU requirement to recycle 95% by weight of a car by the year 2015. According to Mr Kuiper, ARN has already recycled 18 000 tonnes of car bumpers, 1300 tonnes of grilles, 2200 tonnes of hub-caps and 20 000 tonnes of polyurethane foam.

Fellow guest speaker Ed Flohr, an inde-

pendent industry expert, said that large companies are 'gaining ground' in the waste management and recycling fields, and that 'the intensity of competition will grow'. However, flexible smaller businesses will still be in a position to take advantage of: isolated geographical markets; special materials; new sources; new customers; and 'states of confusion' such as 'a market in flux'. □



Guest speaker Pieter Kuiper, Project Manager at Auto Recycling Nederland (ARN).



From left: Peter Daalder of Daly Plastics in the Netherlands, BIR Plastics Round-Table Chairman Surendra Borad of Gemini Corp. in Belgium, and Jacques Musa of Veolia Propreté France Recycling.

Used tyres continue to tread new ground

Recovery and recycling of used tyres has enjoyed strong growth in Europe over the past 10 to 15 years. And a few of the wide-ranging initiatives to improve the sustainability of this ubiquitous product were highlighted at the latest BIR Tyres Round-Table in Amsterdam.

Tyres Committee Chairman Barend Ten Bruggencate indicated that scrap tyres play an accepted role in, among other applications, artificial sports pitches, cement kilns and civil engineering. As a result of the growth of these end markets, Europe has increased its tyre recovery rate from 38% in 1994 to 91% in 2008; the

latter figure incorporates 39% materials recycling and 32% energy recovery, according to latest figures from the European Tyre & Rubber Manufacturers' Association (ETRMA).

The management of end-of-life tyres has 'improved very much' - notably among newer EU member states such as Poland, Romania, Hungary, Estonia and Lithuania, Mr Ten Bruggencate told delegates. EU legislation - starting with the Landfill Directive's ban on dumping whole and then shredded tyres - has been a major factor in the recycling rate surge, he added.

Guest speaker Catherine Clauzade

highlighted research efforts within her own organisation aimed at finding and/or developing outlets for scrap tyres. The Director of Research & Development at Aliapur, the French body responsible for collecting, preparing and recycling end-of-life tyres, Ms Clauzade referred specifically to the substitution of foundry coke with shred from used truck tyres. Since foundry coke costs around Euro 200 per tonne, she added, 'it's a very good opportunity for us'. Other areas of study for Aliapur have included the use of processed end-of-life tyres in road drainage systems and equestrian surfaces, she added.

Almost 300 000 tonnes of scrap tyres entered the Aliapur system last year. And given that the used tyre sector remains 'a cost centre', one of body's goals is to reduce its charges for these incoming volumes. Since 2004, contributions have dropped from Euro 2.2 per passenger car tyre to Euro 1.50, Ms Clauzade revealed. Dr Wilma Dierkens, Associate Professor within the University of Twente's Faculty of Engineering Technology in the Netherlands, then told delegates of research into devulcanisation which aims to return at least half of the material for recycling into the original rubber products.

Matec - a paragon of organisation and technology



One of the most advanced recycling facilities in Japan is the Ishikari yard operated by Matec in Hokkaido prefecture. Recently, Recycling International took up a rare but welcome invitation to tour premises which represent a high water mark in the recycling of end-of-life vehicles, household appliances and e-scrap.

In May, on the day after the annual meeting of the Japan Iron & Steel Recycling Institute (JISRI), two vans drove out of cosmopolitan downtown Sapporo and into the lush Hokkaido countryside. It was a cool and damp morning, but the clouds had cleared enough to allow a view of the distant mountain ranges and, as the vans drew close to the ocean, large piles of clean ferrous scrap belonging to Matec, the leading scrap processor - both in terms of volume and technology - in the northern island prefecture of Hokkaido. Courtesy of JISRI, a few lucky visitors were about to enjoy a rare visit to one of Japan's most organised and technologically-advanced scrap recyclers.

The first van turned through the plant gates, stopped and discharged several Matec employees, a delegation from the Korean Iron & Steel Association (KISA) and then one from the China Association of Metalscrap Utilization (CAMU). Following close behind, the second van discharged more Matec employees, several JISRI board members and a representative from Metso Lindemann. The group of 20 quickly fanned out among the company's blue Liebherr cranes, towering piles of Japanese-classified HS1 ferrous scrap (a cleaner variation on HMSI) and, further into the yard, sprawling piles of lower-quality ferrous.

Mostly for export

'In Hokkaido, the only EAF makes rebar,' explained Liu Haijun, a Matec Director, a Chinese national and a nine-year employee of the company. 'So there's no local need for Matec's high-grade scrap.'

Thus, 60% of the 550 000 tonnes of ferrous scrap generated annually by Matec is exported to Korea and to other foreign ports which are - in many cases - closer to the company's yards than the traditional Japanese markets on the west side of the country. In contrast, Matec's non-ferrous production - which totalled roughly 120 000 tonnes in 2008 - is bought largely by domestic consumers. However, market conditions dictate those exports as much as shipping, and Matec - a company with a US\$ 300 million turnover in 2008 - is in a strong position to take

advantage of shifts in both international and domestic conditions.

Matec's six Hokkaido yards ring the southern perimeter of the island and are devoted to the full range of the area's recyclables, including paper, plastics and, most important, the various materials extracted from its booming licensed end-of-life vehicle (ELV) and appliance recycling business. Of these facilities, the largest is the sprawling, 26 000 m² Ishikari yard. On the Saturday morning that the JISRI-led delegation visited, much of the 90-employee facility was

idle. But even so, there was no mistaking its level of organisation and technology.

The group was led across a large car park where dozens of stacked, crashed cars awaited dismantling in one of

the company's several ELV warehouses. 'Most of Matec's ELVs are from accidents,' Mr Liu explained to me. He led the group past two fuel pumps supplied entirely by the residual petrol from arriving ELVs. According to Mr Liu, the company recovers enough fuel to power its fleet of trucks. From there, we entered a narrow warehouse, climbed two flights of stairs and stopped atop a balcony overlooking the company's vehicle dismantling line. Although not operating on the day of the visit, ELVs were on



The largest of Matec's six Hokkaido yards is the, 26 000 m² Ishikari yard.

the line, frozen in various states of dismantling since the previous day's shift had ended.

Eight-stage process

It's a highly organised affair. ELVs are attached to specially-designed platforms that move along rails as the vehicles are dismantled in an eight-stage process. Some of the equipment and processes are proprietary to Matec, while others - including a Honda-designed harness that flips what remains of the vehicles to help with the removal of the catalytic converter and differential - are the result of partnerships that, in some cases, are funded by the Japanese government and its closely-aligned automotive companies. In Japan, reuse rather than reprocessing is the preferred mode of recovery.

So, around the corner from the walkway, Mr Liu led us into a dim room where vehicle body panels are covered in plastic sheets and hung like garments from racks. Each of the parts is affixed with a bar-coded tag that,

'In Japan, reuse rather than reprocessing is the preferred mode of recovery.'

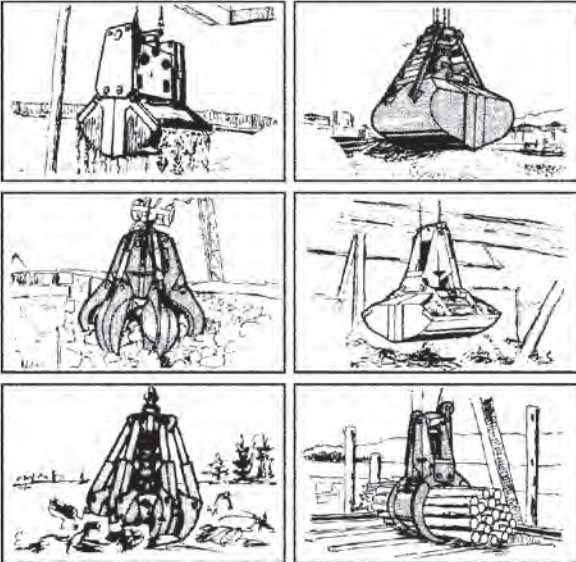


Around 60% of the 550 000 tonnes of ferrous scrap generated annually by Matec is exported to Korea and to other foreign ports.

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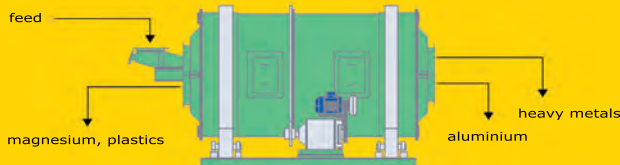
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Metso's history - and future - in Japan

The exhibition booths at this year's annual convention of the Japan Iron & Steel Institute (JISRI) in Sapporo were lined up outside of the conference hall and staffed by low-key rows of dark-suited men who waited for customers to approach. Conversations were low-key and quiet, and the overall ambience was more akin to a monastic recruitment drive than, say, a shredder sale.

Two thirds of the way down the row, Tetsuro Azuma, Metso Minerals' Senior Vice President for Recycling and Country Manager for Construction, was a bright and smiling contrast to the restrained atmosphere. Dressed in shirt-sleeves, he welcomed me into the company's booth, introduced his colleagues and then led me to a nearby sofa where we discussed the company's nearly 25-year history in Japan and its future.

'Prior to 1985, Lindemann shears and shredders were imported via trading companies,' he told me. 'There was no service.' But Japan was simply too big a potential and actual market to leave service to locals. So, in 1985, Lindemann Japan was established, and Mr Azuma - then a newly-trained engineer - went to work with two relocated German engineers. They were his teachers, and with them he learned Lindemann's high service standards and worked his way up in the company. Since then, Lindemann - now Metso - has sold more than 100 units in Japan, including shredders, shears, balers, briquetting machines and separators.

Market of opportunity

'Japan is a mature market,' he conceded. 'But it still has opportunity because of the many uses required of equipment, the demand for technology, and the changing waste stream.'

The Double Screw Press (DSP), for example, was designed to turn EU-generated automotive shredder residue (ASR) into briquettes that could be used as reduction material in steel plants. For various reasons specific to the EU, the technology was never fully embraced in Europe. In Japan, however, the technology was embraced and modified, and today there are seven of these machines operating on both coasts. On Japan's west coast, the stable DSP briquettes have been used as landfill on cramped cities' waterfronts. 'Osaka Bay, especially, has been modified by these briquettes,' Mr Azuma told me. 'So it's a nice business for Metso. It's a unique application for Japan designed in the EU.'

The more familiar parts of Metso's recycling lines also continue to evolve and thrive in Japan. The company currently has 10 rotary shears in operation, largely devoted to mixed household waste processed by local governments and industrial wastes processed in private facilities. However, because Japanese households are becoming more adept at sorting their recyclables, the public side of the rotary business is shrinking. 'Smaller shears are now more in demand - especially our 600- and 800-tonne models,' he told me. The smaller shears are developed at customer request and are semi-mobile.

Limited space

Meanwhile, Japan's shredder market remains highly competitive as it evolves from smaller machines into mid-sized units. According to Mr Azuma, of the roughly 180 shredders currently in operation in Japan, half of the units run at 1000 HP or less. The largest, so far as he knows, is a 4000 HP unit. 'Space is limited in Japan, power is expensive, and the environmental regulations are tight,' he told me. 'So the smaller shredders are the more important line.' Currently, Metso has 19 units in Japan, with some customers on their second generation of the company's equipment.

Looking ahead, Mr Azuma projected that light-duty and multi-duty shredders, with post-shredding technology, will be the company's growth area in Japan. He pointed to a recent unit installed at the advanced Phoenix Metal Group plant outside of Tokyo. Designed in partnership with Phoenix, the modest-sized shredder can handle both ELVs and white goods, and includes Freon recovery equipment. 'Small size, efficient operation, advanced tech,' he explained. 'That's the wave of the future.'



Tetsuro Azuma, Metso Minerals' Senior Vice President for Recycling and Country Manager for Construction.



Matec has adopted and adapted new technologies for processing e-scrap. It has acquired, among other machines, a Steinert eddy-current separator for sorting shredded e-waste and utilises flotation technology for the separation of plastics.



Matec runs its own automotive shredder residue separation plant. What can't be separated is eventually combined with shredded plastics and wood chips, and manufactured into high-quality fuel pellets sold to paper mills.




A van arrives at the Ishikari yard operated by Matec in Hokkaido prefecture in Japan.

Mr Liu explained, is inputted into a national used auto parts network that Matec and other ELV recyclers use to distribute their parts both within Japan and worldwide. Downstairs, past packaged headlamps, wiper motors, axles and other parts, Mr Liu stopped in front of a fully-automated multi-storey rack sorter into which workers were loading bar-coded engines for storage and eventual re-sale. Designed and supplied by Toyota, the sorter allows Matec to maintain a much larger and more organised used parts business than would otherwise be possible.

Outside, grapple cranes fed sheet metal into a 1250 HP Lindemann shredder while, nearby, rusted and broken vehicle bodies and old refrig-

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If the price of insulated wire is low, Matec sends it to China. If the price is high, it is sold in Japan.



Matec is still testing technologies to extract the rare metals from the e-waste.



All parts are affixed with a bar-coded tag that is inputted into a national used auto parts network that Matec and other ELV recyclers use to distribute their parts both within Japan and worldwide.



Crashed cars are being dismantled in one of the company's several ELV warehouses.

erators awaited their turn in the machine. Unlike most auto dismantlers in Japan, Matec runs its own automotive shredder residue (ASR) separation plant. Located across the street from the shredder, it was not part of the tour; however, Mr Liu explained that the company utilises several technologies to process the troublesome material, including flotation. What can't be separated is eventually combined with shredded plastics and wood chips, and manufactured into high-quality fuel pellets sold to paper mills. We were shown a warehouse where baled municipal and industrial plastics are shredded for this purpose and stored until they are ready for reprocessing.

Advanced and expensive

Finally, we were invited into a darkened warehouse crowded with old photocopiers, storage cages filled with hundreds of lap-tops, and piles of monitors. On the floor, bins and boxes were filled with circuit boards, gold connectors, floppy disks and shiny CDs. Like much of the Matec plant, this warehouse wasn't operating on the day of the visit. But the organisation was obvious and impressive: conveyor belts guide the appliances through the dismantling process. Along the way, troublesome materials are sorted for processing in an adjacent warehouse filled with the most advanced - and expensive - separation equipment available.

'This room is still a laboratory,' Mr Liu told the group. 'We are still testing the technology to extract the rare metals from the e-waste.' In the past, Matec - like most e-waste recyclers in Japan - would send circuit boards and similar materials to smelters. But it's long been Matec's policy to adopt and adapt new technologies as quickly as possible and so it has acquired, among other machines, a Steinert eddy-current separator for sorting shredded e-waste. Elsewhere, the company utilises flotation technology for the separation of plastics. As the delegation walked through the warehouse, admiring the shiny new equipment and - in one case - the unusually pure copper nuggets that have been recovered from its utilisation, the Chinese could be seen shaking their heads. 'Still cheaper to do the separation with



Matec recovers enough fuel from the residual petrol from arriving ELVs to power its fleet of trucks.

people,' one explained to me. 'It's not necessary to be so expensive.'

Glass becomes insulation

Necessary or not, Matec's laboratory is at the forefront of Japanese e-recycling. And Mr Liu is adamant that, once the company has determined the yields that can be obtained from it, the plant will go full-scale. It's worth noting too that e-waste isn't Matec's only technology front. Mr Liu mentioned that the company is now sending

its vehicle glass to a plant which turns it into insulation.

As we left, we passed a pile of insulated wire left beside a shredder. 'If the price is low,' said Mr Liu, 'we send

it to China. If the price is high, we keep it here.' It's not an altogether unique model: scrap processors in Europe and North America often make the same sort of calculations. But unlike these counterparts in other lands, Matec is located within days of its international customers, providing it with an unusually sensitive understanding of price fluctuations and their impact upon the flow of scrap into China. 'We consider ourselves a leader in this industry,' Mr Liu concluded, 'and part of that is because of where we are. It's an advantage.'



Liu Haijun, a Chinese national, is one of Matec's Directors and a nine-year employee of the company.

'ELVs are dismantled in an eight-stage process.'

Adam Minter is a Shanghai-based journalist who writes about business and culture for US and European publications. He also maintains a blog at: www.shanghaiscrap.com

Entsorga Enteco exhibition in Cologne

'Finally, the market is picking up'

Will the Entsorga exhibition, held in Cologne in late October, prove to be a turning point for the recycling machinery market? Only time will tell. What can be said with certainty, however, is that equipment manufacturers showcased their latest products at the German show and, importantly, received plenty of interest from potential buyers during the four-day event.

From exhibitors and visitors alike, an almost audible sigh of relief was to be heard at the Entsorga show in Cologne. There were plenty of reasons why the recycling exhibition could have failed: higher powers had decided to run other recycling events in the same week, including the Ecomondo exhibition in Italy and the BIR Convention in the Netherlands; exhibitors could have been forgiven for skipping the event to save money; and visitors from the recycling industry could have stayed away in large numbers in order to devote their time to more pressing concerns during this period of economic uncertainty.

And to be fair, the impact of these factors could be felt at the show: Entsorga's organisers reduced the exhibition area from five halls in 2006 to three on this latest occasion, with one hall not full owing to unsold space; some of the recycling industry's big names declined to book stand space; and the number of visitors fell from 43 000 in 2006 to 36 000. Nevertheless, visitors were attracted from a total of 90 countries while the 784 exhibitors were drawn from 30 countries.

Products and salesmanship

'The good thing about Entsorga is that it comes down to products and salesmanship,' explained one visitor. 'It isn't full of fancy marketing companies.' Furthermore, the exhibition halls were conveniently arranged, easy to navigate and spotlessly clean. And above all, recyclers were there in healthy numbers; indeed, there were probably more present than at the same event three years ago.

Feedback on the show from the exhibitors varied between neutral and very positive. It appears that they received plenty of interest in their products and services, and that some even clinched deals. 'Finally, the market is picking up,' some said with a look of hope in their eyes.

The next show will take place on June 6-9 2011 under the name 'Enteco Next', thus moving Entsorga to a two-year cycle. 'The development of the exhibition concept under the new name Enteco is being done because of an increased focus on raw material recovery,' explained Gerald Böse, Chief Executive Officer of Koelnmesse GmbH. 'The new two-year cycle is an important foundation for the future of the exhibition.'

Below, Recycling International rounds up some of the key news emerging from this year's show.

Sennebogen

According to the German company, the new Sennebogen 818 is a 'sorting and loading machine which is especially tailored to the recy-

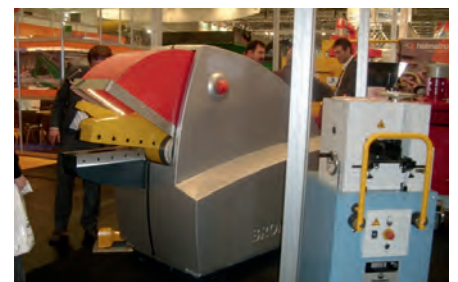


cling sector'. With an operating weight of 19.5 tonnes, this versatile and easily manoeuvrable machine has a compact design and features a rear-end radius of 2.3 metres and a total width of 2.5 metres.

The 818's orange peel grapple or sorting grab with reverse mechanism suits a wide range of sorting and loading applications. The boom is 9.2 metres in length and is controlled by a single hydraulic cylinder. The machine is equipped with a 97 kW diesel engine but will also be available with an electric motor.

www.sennebogen.com

Bronneberg & Jegerings



A new approach to the design of hydraulic alligator shears has been adopted by Dutch company Bronneberg & Jegerings with its newly-launched PowerBird type 500. The Helmond-based manufacturer and distributor hired an industrial designer to help it with the product's development.

The PowerBird offers adjustable cutting speeds and blade openings so as to handle both large and small pieces of material. Other features



include hydraulic hold-down as well as a shock-proof and transparent polycarbonate 'closed' safety guard. The PowerBird also includes forklift sockets as well as emergency-stop facilities in the pedal, control panel and on both sides of the machine at eye level.

According to Bronneberg & Jegerings, the shear is extremely quiet compared to its competitors and requires little maintenance owing to the elimination of redundant components and its minimalistic design.

www.bronneberg.com

Vecoplan AG

One of the largest recycling equipment manufacturers in Germany, Vecoplan AG celebrated 40 years of operation at Entsorga.

The highlight of the company's stand at the exhibition was the massive V-EBS high-performance shredder for producing refuse-derived fuel. Making its debut at the show, the V-EBS has undergone exhaustive testing to prove its worth in a wide range of applications. The 12.5-tonne

heavy solid steel rotor with over 400 kW of drive capacity is said to produce a highly homogeneous refuse-derived fuel granulate. The company's Recycling



Sales officer Stefanie Mueller presents Vecoplan's latest addition

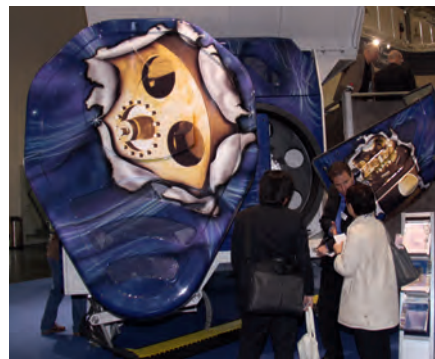
Division Manager Jorg Muller explained: 'The counter knives can be multiply adjusted by the user with the body in a relaxed posture without opening the unit and when the rotor is running.' The birthday boys and girls at Vecoplan pointed out that the four-mode rotor blades are robust and deal efficiently with extraneous materials. This shredding giant weighs around 29 tonnes but consumes only low levels of energy. It is claimed to deliver a high throughput thanks to the rotor, the speed of which can vary between 150 and 250 rotations per minute.

www.vecoplan.de

Lindner Recyclingtech

Another high-performance shredder for producing refuse-derived fuel was featured by Austrian company Lindner Recyclingtech. The company's Rammer press enables a 20% increase in volumes with its existing Jupiter shredder while also reducing the scope for material to fall out.

With 130 models sold over the past six years, this patented system is said to take the Jupiter to a new level. Marketing Manager Michaela Ulbing commented: 'This new machine has been created in response to feedback from our clients. Sometimes material falls out of the shredder but now everything is safe because we have a virtually closed circuit.'



Painted in a wild pattern, the redesigned Jupiter attracted a lot of attention.

This innovation has meant one change to the unit's dimensions, with its depth increasing 30%. And apart from the hydraulic drive, the system is completely maintenance free, according to Lindner Recyclingtech. Ms Ulbing says: 'Depending on the type of waste the client wants to process, he or she can quickly change the knives of the Jupiter to suit the particular requirement.'

In related news, the company has recently acquired a control systems manufacturer which means that its latest machines boast integrated controls.

www.l-rt.com

S+S Separation and Sorting

At Entsorga, German sorting specialist S+S presented one of its original MAG 4000 metal-from-glass sorters - in the condition in which it returned after 17 years of use at German recycling company Alba.



The old Mag 4000 sorter, as presented at the Entsorga.

The MAG 4000 could have continued sorting for years to come, said S+S, but Alba decided in March this year to replace it with its successor, the MAG 4400. This more recent device also separates metal from glass but comes equipped with the latest technology. The valves, which are directly mounted on to an air blow batten, combine with very short blow impulses to achieve maximum force. Metal contaminants can be located and then rejected with even greater precision, with up to 240 air nozzles 'shooting' at any metal particles. According to S+S, even high degrees of contamination present no problem for the MAG 4400. By applying a new valve technology, compact design and quick reaction times, loss of glass is said to be reduced to a minimum.

Peter Mayer, Sales Manager for Sorting Technology at S+S, adopts a positive perspective on the return of the older MAG 4000. 'To keep up to date with the latest sorting technology, it was time for a change,' he said. 'And even though the MAG 4000 should not be considered completely out of date, it will earn its place in the S+S museum.'

www.se-so-tec.com

Bollegraaf Recycling Machinery

Already announced in its company profile in Recycling International's October issue, Netherlands-based Bollegraaf Recycling Machinery and its affiliate Lubo Systems have developed two revolutionary systems: the Papermagnet and the Paperspike 2.

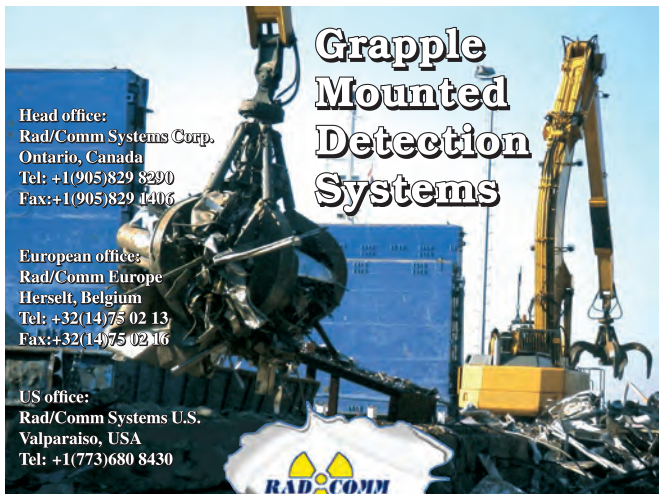
The Papermagnet is made up of a conveyor belt running at a steep incline, featuring holes to which suction is applied. This can be installed in a material recovery facility (MRF) after the glass breaker, the wind shifter and the star



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look at it all

Love was in the air...

Spring may be far away but love blossomed in Cologne as the Entsorga exhibition proved to be the perfect setting for a number of companies to announce link-ups.

Eva Maria Gerosch and Eric van Looy of Spanish separation specialist Toratec found their perfect match recently in Belgian optical sorting expert BEST and will continue under the name **BestToratec**. 'For a small company like ours, there is a need to find a good partner to enlarge our business,' said Ms Gerosch. The Barcelona-based firm has now created a platform to integrate BEST's optical sorting solutions with the mechanical separation qualities of Toratec equipment. For BEST, this development will have a direct influence on the scale of its activities in the recycling market.

Formerly of Steinert, Franz Heiringhoff showed off his shirt bearing the **RTT-Steinert** logo and immediately noticed that fellow Managing Director Bert Handschick - formerly of RTT - didn't have one. Fortunately, this did not spark an instant crisis between the two Germans; quite the opposite, they both claim to be very happy to be working with each other. Based in Zittau, RTT GmbH is a specialist in near-infrared technology while Steinert's focus is sensor sorting and magnetic separation. 'The Steinert brand name will continue alongside RTT-Steinert, which will be focused solely on the recycling markets,' explained Mr Heiringhoff. The company celebrated this get-together with a party during the Entsorga show at Steinert's premises in Cologne.

The 'talk of the town' at Entsorga was that M&J Industries of Denmark will operate under the wing of the giant Metso Corporation. 'For a long time, we have been looking for an established company in the waste recycling technology sector; the takeover of M&J is an opportunity for Metso to increase its activities in this particular area,' commented Heinz Gerdes, President of Metso's recycling business. This global conglomerate has found in M&J - to be known henceforth as **Metso Denmark** - an established partner in solid waste recycling equipment and a company with a strong reputation in scrap processing machinery. According to Mr Gerdes, M&J's existing customers will receive even better support through Metso's worldwide service centres. 'We have a lot of clients who are expanding their scope to also cover the recycling of other types of materials. An exciting new customer segment is energy companies that use this kind of equipment in the pre-combustion treatment of solid waste and biomass in their power plants,' adds Christopher Ribbing, also President of Metso Recycling.

And last but not least, our own Recycling International and Recycling Technology booth attracted a massive number of visitors, attending our live interviews or subscribing to our magazines. Both now operate under the **Huss Verlag** publishing company umbrella, and this first joint showing can be hailed a resounding success.

Rienk Jan van der Kooij and Richard Geerdink of Lubo present the Bollegraaf Paper Magnet.



screen to assist in the removal of paper and plastic film. 'We determined that during separation in a single-stream sorting process, a certain part consists of fine paper and plastic particles,' explained Operations Manager Richard Geerdink. 'This stream couldn't be separated before, but with the patent-pending Papermagnet, it can.'

The redesigned Paperspike 2 picks out deinking paper from the recovered paper stream. According to Bollegraaf, the principle is simple but very effective: material is fed in a single layer and the belt's spikes pierce the paper and cardboard; then, due to rigidity properties, paper immediately drops off whereas cardboard remains stuck on the spikes and is transported to the end of the line where it peels off and falls into a separate section.

The first-generation Paperspike was introduced in 2002. The second generation, developed with Germany-based Grumbach Recycling, includes a large drum on which the spikes are mounted. According to the manufacturer, the sorting quality of the Paperspike 2 is as good as that of its predecessor - but with the advantage that materials not belonging in the recovered paper can no longer damage the spikes and other machine components. This new version is designed in such a way that it can replace the earlier model in existing installations.

www.bollegraaf.com

Gauss Magneti

The air-less ESS metal sorting system from Italian magnet specialist Gauss Magneti is used mainly to complete the sorting process, together with other equipment such as magnetic and eddy-current separators. The ESS can be easily installed not only at the end of the sorting cycle but also in existing plants with



Andrea Morabito of Gauss Magneti



Photos and people left to right, clockwise: Kim Buchwald and Christopher Ribbing, Metso; the Huss Verlag booth; Franz Heiringhoff and Bert Handschick of RTT-Steinert; Paul Berghmans, Eric van Looy, Eva Maria Gerosch and Bert Van der Auwera of BestToratec.

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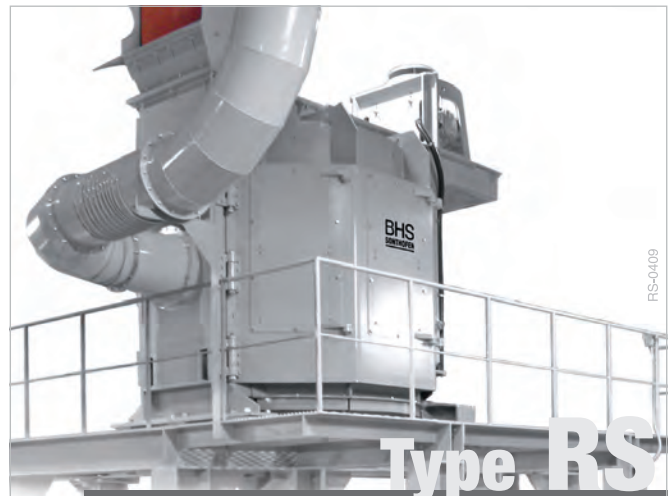
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Liebherr Recycling Days



Handling equipment manufacturer Liebherr wasn't present at the Entsorga; instead, the company featured their range of products during the Liebherr Recycling Days in Dortmund.

in diameter although special sizes are available if required. The feed chute is 2.3 metres wide and is thus suitable for grab loading.

www.mewa-recycling.de

— Strautmann Umwelttechnik —

The BaleTainer for the fully-automatic baling of PET was one of the centrepieces of the Entsorga Enteco show for German baling specialist Strautmann Umwelttechnik.

According to the Glandorf-based manufacturer, the press concept is particularly interesting: each bale consists of three slices which are automatically bound together to give a density similar to that achieved using a 180-tonne channel press. It can bale from 2 to 10 tonnes of PET per day, as well as paper and cardboard.

Strautmann Umwelttechnik also promoted the CutCompact - a briquetting press for expanded polystyrene with an integrated shredder capable of handling up to 100 kg per hour. The innovative press concept produces bale densities up to 700 kg per cubic metre, thereby helping users to reduce their transport costs. Material enters through a large opening of approximately 120 by 120 cm. Charging screws put the crushed material into the buffer. The press chamber is then continuously filled with up to 30 kg per hour of material which becomes compacted under a pressing force of 250 kN.

....and there was more:

And there were yet more innovations to be noted at Entsorga Enteco. First-time exhibitor **Mistra** from the Czech Republic promoted its new Kajman alligator shear, while Belgian manufacturer **Recuperma** showed off its MMC cutter with extra safety features. **Paal Group** redesigned its Pacomat 3 paper baler with horizontal wire ties, while fellow German manufacturer **Wagner Magnete** showcased its brand new L 0429 d non-ferrous separator. Italy's **Satrind** introduced its patented CL system - a technology that guarantees a small and uniform shred size from a two-shaft shredder. **HSM**, the German firm specialising in presses for paper and plastics, launched its automatic VK 12018 R channel baling press with a high force of 1200 kN. Austrian biomass and wood recycling expert **Komptech** showed off the brand new Axtor 7012 in Entsorga's outdoor area - a general-purpose wood processor with shred and chip modes. And finally, **Herbold Meckesheim** of Germany highlighted some new additions to its product range such as the Herbold Granulator and redesigned PET washing lines.

customised solutions. It detects metals that accidentally contaminate high-value process materials such as stainless steel.

According to Andrea Morabito from the Brescia-based manufacturer, the new ESS is based around high-sensitive metal sensors which control a low-energy system of electromagnetically-driven paddles. The sensors' sensitivity levels can be adjusted to provide the best set-up.

The air-less metal sorting system consists of a conveyor belt which transports the material across an array of metal sensors, staggered in such a way as to avoid neutral zones. Once a piece of metal piece is detected, the electrical cabinet activates the paddle at the discharge end of the conveyor belt in order to deflect the piece from the material flow.

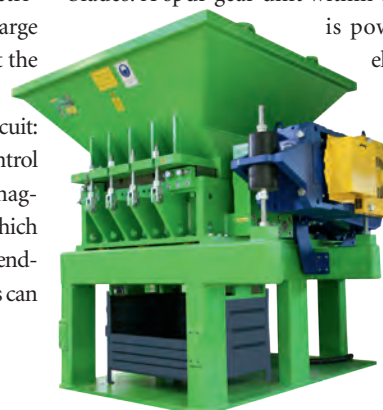
The paddle consists of an electromagnetic circuit: when a sensor detects a piece of metal, the control panel changes the polarity of the electromagnetic coil to produce a paddle movement which deflects the sensed item. Each paddle is independent from all the others and so machine widths can be varied from 500 mm to 2000 mm.

www.gaussmagneti.it

— MeWa Recycling Anlagen —

The universal CableCutter CC 1200 from Germany-based MeWa Recycling Anlagen was so new that it was not available to be displayed at the company booth. According to MeWa, this pre-shredder machine offers a throughput capacity of up to 3 tonnes per hour and can eliminate a complete work step when compared alongside other pre-, after- and fine-shredding solutions.

Of solid steel welded construction to give completely vibration-free operation, the machine works according to the guillotine shear principle and is equipped with changeable triangular blades. A spur gear unit within the machine is powered by an electric motor.



The granulator's screens are said to be easy to change and yield a grain size of a 20-50 mm



The same company is also behind the Liqui-Drainer, which is a new wet separator for filled PET bottles, beverage cans and Tetra Pak containers. With a compact design for ease of cleaning and transportation, the separator works in the following way: once material is introduced into the funnel, a rotor draws in up to 10 000 one-litre PET bottles per hour; the rotor technology cuts rather than crushes the bottles and the liquids drain off. The emptied vessels are automatically pushed out through a discharge tunnel into a briquetting press or container.

www.straumann-umwelt.de



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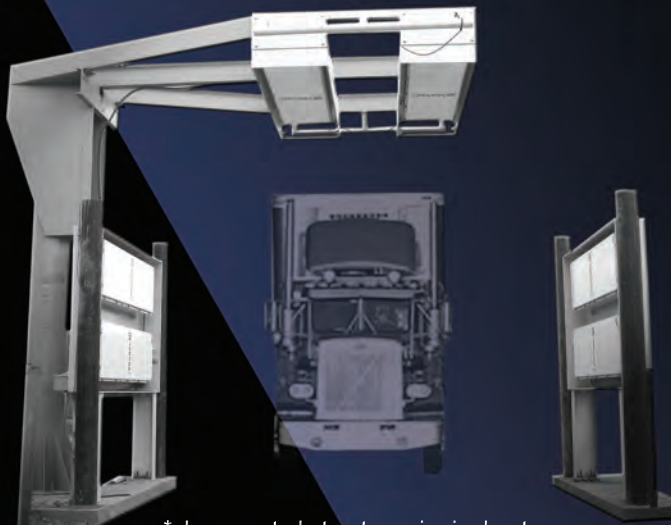


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Upstate Shredding aims high with plant upgrade

Upstate Shredding LLC - New York State's largest scrap metal processor and one of the biggest privately-held operators of its type on the US East Coast - is in the final stages of a US\$ 25 million upgrade of its Owego plant that now ranks it among the most state-of-the-art facilities in the recycling industry.



Upstate Shredding is investing US\$ 25 million in a plant upgrade/expansion with the aim of making its Owego base one of the largest, most technologically-advanced and cost-efficient scrap metal processing facilities in the world.

Industry experts tell us that there are few, if any, other plants in the world that have achieved our level of technical sophistication in the maximum recovery of metals from the waste stream and in environmental responsibility,' declares Adam Weitsman, President of Upstate Shredding LLC of New York State, USA. Innovations at Upstate include enclosing the 200 000-square-foot Owego complex where production of all grades of scrap metal is expected to approximate to 700 000 tonnes this year. Most plants of this type operate machinery outdoors where rain runs off metal residues to contaminate soil and water supplies. By walling and roofing the facility, and by installing a new storm-sewer system and an on-site water treatment plant, the goal of Upstate Shredding is to exceed the high standards set by the US Environmental Protection Agency and the New York State Department of Environmental Conservation, and to become the first 'green' plant of its type in the entire state.

'At a time when many businesses are retrenching, we are investing in the future,' states Mr Weitsman. 'This new

technology gives us a competitive advantage that is already helping to grow our business despite the economy.'

Advanced recovery technologies

Inside the plant, which shreds vehicles, household appliances and other forms of scrap, the company has - and is - in the process of adding several new, advanced metal recovery technologies, including:

- A 10 000 HP Riverside Engineering 122-inch Mega Shredder - a new-generation machine which can shred complete cars, trucks and motor blocks at a rate of 450 tonnes per hour. It is equipped with latest electronics, such as cruise-control and automatic feed adjustments to increase productivity and reduce energy consumption. Weighing over 500 tons, the new machine nearly doubles Upstate Shredding's production capacity at the Owego facility.
- A polishing drum magnet system which automatically removes electric motors containing copper armatures from vehicles, and eliminates the dangerous and inefficient practice of hand-picking motors from fast-moving conveyor belts. It results in virtually total recovery of these types of motors and improves worker safety.
- Four dynamic separation systems which use eddy-current technology to segregate non-ferrous metals such as aluminium, copper and brass from ferrous metals.
- A dual-energy X-ray separator system which identifies metal particles by atomic density and segregates aluminium from heavier metals such as zinc, copper and brass.
- Six Sandjet dry heavy media plants - a new technology which removes copper from aluminium.
- Optical colour sorters which separate yellow metals from red metals through the use of several ultra-high-speed, high-resolution video cameras. Images of metals travelling on a conveyor belt are relayed to a computer which analyses the metals by shape and colour to trigger automatic separation.
- A US\$ 8 million wire recovery system, described as a new and breakthrough method that is revolutionising the

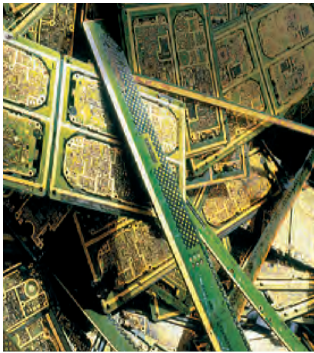
recovery of copper wire encased in plastic insulation. This technology recovers small-diameter wires from vehicles and appliances that were previously uneconomical to recycle and so went to landfill. Inductive metal detection is combined with near-infrared scanning to remove wires from the waste stream, separating insulation from copper and granulating the red metal to form a pure commodity.

Next: glass and plastics

'Our next goal is to recover glass and plastic as soon as we can find the technology to do it efficiently,' Mr Weitsman continued. 'Our corporate mission is to extract the last ounce of value from the materials we process, not only to keep material out of landfills but also to help conserve natural resources.'

Upstate Shredding's sister company Ben Weitsman & Son runs scrap operations in Owego, Binghamton and Ithaca. Upstate is building a new facility in Syracuse and is planning another in Scranton, Pennsylvania; both of these operations are set to come on stream in 2010. □

www.upstateshredding.com



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Ferrous

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Unexpected price boost

After several weeks characterised by the cautious approach adopted by most mill buyers, the second full week of November produced a significant run-up in ferrous scrap prices. As Recycling International went to press, cfr price indications for shipments from Europe and the USA to Turkey are as follows: US\$ 280-285 per tonne for standard quality HMS I/II 80/20 scrap; US\$ 285-290 per tonne for shredded; and US\$ 275-280 per tonne for the HMS I/II 70/30 mix.



Leading experts at the BIR Autumn Convention in Amsterdam late last month were putting their money on no major ferrous scrap price improvement in the short term. Among them, Vice President of Sims Metal Management Blake Kelley concluded his US and international market analysis with the comment: 'Scrap prices will most likely continue easing downward until demand and supply, whether actual or perceived, again are in

balance. This may not happen until very late December buying at the earliest, and more likely not until January, presuming recent economic improvements further develop.' Given the concerns voiced in Amsterdam over the strength and sustainability of steel and therefore scrap demand, there was some surprise that the scrap price weakness of early October gave way to a significant improvement towards the middle of November. At

the time of writing, buyers in the leading scrap-importing nation of Turkey have returned to the market in some strength, pushing prices back towards the levels of early October. However, mills are nervous that this upturn constitutes no more than a blip and that they may be buying immediately ahead of a market downturn.

China import boost

According to latest figures from the Turkish Statistical Institute (TUIK), the country's ferrous scrap imports amounted to 8.492 million tonnes in January-July this year - a full 30% shy of the 12.176 million tonnes arriving in the country during the corresponding period of 2008.

Turkey's crude steel production amounted to 2.127 million tonnes in September - only 1.8% short of the total for the same month last year, notes the World Steel Association (WSA). Nine months into the current year, Turkish output was running 13.5% behind the pace set in 2008 at 18.529 million tonnes.

By contrast, Chinese ferrous scrap imports jumped 28% in September this year to

1.3 million tonnes, with the USA supplying almost 500 000 tonnes of this total and Japan providing slightly more than 350 000 tonnes. In the first nine months of this year, China bought in 11.19 million tonnes of ferrous scrap, with the USA and Japan jointly accounting for around 70% of the total; thus, 2009 has become a record year for Chinese ferrous scrap imports, outstripping the previous high of 10.2 million tonnes established five years ago.

Increased buying interest

Chinese customs statistics are expected to reveal a somewhat more sedate pace to ferrous scrap imports during the early part of the fourth quarter although buying interest is understood to have improved in late October and early November at prices in excess of US\$ 300 per tonne cfr. China has reportedly bought more than 10 cargoes from US West Coast exporters since the start of last month.

This more positive move from China helped convince Japan's largest electric arc furnace operator Tokyo Steel to raise its scrap buying prices in early





November by upwards of US\$ 30 per tonne in some instances, thereby bringing to an end a series of rapid-fire reductions by the company which resulted in its purchase prices falling to a five-month low during October. Having started October at US\$ 255.17 per long ton, the Iron Age scrap price bulletin composite for HMS I was placed at US\$ 228.50 in early November. Several days ago, analysts in the USA were predicting a decline of perhaps US\$ 30 per ton in this month's shredded scrap prices in response to weak demand both domestically and internationally. As mentioned above, however, there have been signs of significantly increased purchaser interest since then.

'Continued margin pressures'

In other news, Daniel W. Dienst, Group Chief Executive Officer of Sims Metal Management, confirmed 'continued margin pressures' on the business despite a return to profit in the July-September quarter when net earnings after taxes amounted to A\$ 33.3 million (US\$ 30.2 million). Ferrous markets

have weakened in the current quarter, for which the company expects 'volatility and a continued challenging operating environment', he says.

Sims Metal Management purchased 3.6 million tonnes of scrap in the recently-completed quarter compared to 4.2 million tonnes in last year's corresponding period. Scrap intake and shipments increased 28% and 16%, respectively, when compared to the previous quarter.

These 'significantly improved results' are attributed in part to 'a steadier pricing environment and a return to more normalised trading conditions'. As the economic crisis abates, the company will remain focused on 'those factors within our control', including 'managing operating expenses, scrap costs and inventory turnover', Mr Dienst adds.

In the volatile world of scrap, experts are understandably reluctant to venture price predictions even for the near term. And so admiration is due Jason Schenker, President of Prestige Economics, LLC in the USA, who has come forward with forecasts for the next two years. Writing a guest column in the Friday Report pub-

lished by the US Institute of Scrap Recycling Industries (ISRI), he states: 'We are forecasting a muted upward trend in steel prices, with US hot rolled coil import prices per short ton averaging around US\$ 468 for 2009, US\$ 538 for 2010 and US\$ 575 for 2011. Given the relationship of steel scrap to hot rolled coiled pricing, we expect Scrap No 1 to average around US\$ 250, US\$ 325, and US\$ 375 for 2009, 2010, and 2011, respectively.'

Competing commodities

And so to the latest instalment in iron ore's see-saw year. Barely two months ago, spot prices were languishing below US\$ 80 per tonne cfr China for Indian fines with a 63.5% Fe content - a far cry from the US\$ 115 per tonne recorded during the first half of August. However, there are reports in early November of offers once again exceeding US\$ 100 per tonne cfr China - despite the best efforts of steel mill customers to stop an upward march in values which has been assisted by tight supply and port congestion in India. At the time of writing, offers above US\$ 105 per tonne cfr China have been reported.

Meanwhile, preliminary customs data indicate that China's iron ore imports surged from below 50 million tonnes in August to an all-time high of 64.6 million tonnes the following month. Low demand and the decline in scrap prices during the course of October adversely affected the pig iron market. For example, CIS export prices dropped typically US\$ 20 per tonne fob Black Sea.

A combination of low demand and already-sufficient stocks dented Turkish pig iron imports during August, according to the Turkish Statistical Institute (TUIK). Purchases fell 16% compared to the same month last year and were 9% lower than in July 2009. Rolling together the figures for the first eight months of the year, the country's pig iron imports were 27% down on the same period in 2008 at 527 012 tonnes.

Hot briquetted iron (HBI) export activity out of Venezuela has been extremely limited in recent months although

Metal Bulletin reports that a 30 000-tonne consignment is set to make its way to the USA before the end of the year at a price just north of US\$ 200 per tonne fob. With offers from China and Europe on a downward trend, an idling of capacity is not ruled out in Venezuela where the bid to nationalise HBI capacity is making slow progress.

Steel

In what proved to be another month of 50-million-tonne-plus crude steel output in China, September figures from the WSA highlighted clear signs of a production recovery in other key parts of the world. In the Ukraine, for example, output of 2.58 million tonnes bettered the total for September 2008 by 3.9%; and at the same time, production in South Korea fell just 2.4% short of that recorded in the corresponding month of last year at 4.44 million tonnes.

For the 66 countries reporting to the WSA, overall output amounted to 107.03 million tonnes in September - just 0.6% shy of the 107.723 million tonnes produced in the corresponding month of 2008. Thus, after three quarters of 2009, global output was running 16.4% behind that of last year at 866.037 million tonnes.

China remains the over-arching factor in this story: the country churned out 50.711 million tonnes of crude steel in September - a thumping 28.7% more than the 39.39 million tonnes made in September last year. In the first three quarters of the year, the country's output climbed 7.5% from 391.032 million tonnes to 420.401 million tonnes. For Asia as a whole, production was 14.9% higher in September this year at 69.241 million tonnes while the cumulative total was some 2.2% lower at 568.805 million tonnes.

China's leading steelmaker Baoshan has warned of a worsening of the over-supply on the domestic market while Luo Bingsheng, Vice Chairman of the China Iron & Steel Association (CISA), reckons that China's crude steel output could exceed 550 million tonnes this



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WSA: steel use to leap 9.2% next year

Next year, global apparent steel use will recover virtually all of the ground lost in 2009, the World Steel Association (WSA) is forecasting.

Demand is expected to follow up a decline of 1.4% to 1.207 billion tonnes in 2008 with a further contraction of 8.6% to 1.104 billion tonnes this year - a substantial improvement over the 14.1% slump predicted in April. And in 2010, world steel use is expected to grow 9.2% to approaching 1.206 billion tonnes, according to the WSA.

Daniel Novegil, Chairman of the organisation's Economics Committee, comments: 'The global recovery is stronger than we predicted in April. According to our current forecast, China will rebound 19% in 2009 and 5% in 2010. Emerging economies will slow down 17% in 2009, to grow 12% in 2010.' But he points to continuing uncertainties and concerns regarding the resilience of the global recovery - 'particularly for the Chinese economy in 2010, whose fast recovery in 2009 was largely enabled by such strong government stimulus policies'.

This year, China's apparent steel use is expected to leap 18.8% to 526 million tonnes, thereby accounting for almost 48% of the world total. If China's figures were removed from the equation, the projections suggest world steel demand would have fallen 24.4% in the current year. In India, however, apparent steel use is expected to grow 8.9% this year and 12.1% in 2010.

For both the North American Free Trade Agreement (NAFTA) bloc and the EU-27, the apparent steel use anticipated for 2010 equates to what was achieved back in 1991, thereby 'demonstrating the severity of the impact of the crisis on the steel industry', says the WSA. Meanwhile in Japan, a demand decline of 31.3% this year is thought likely to be followed by an upturn of 15.8% in 2010 to 61 million tonnes.

Outlook for apparent steel use (million tonnes)

	Annual totals			Year-on-year changes		
	2008	2009	2010	07/08	08/09	09/10
EU (27)	181.283	122.255	137.425	-8.2%	-32.6%	12.4%
Other Europe	25.316	20.813	23.817	-10.8%	-17.8%	14.4%
CIS	48.946	33.852	36.638	-13.5%	-30.8%	8.2%
NAFTA	128.955	82.771	96.932	-8.2%	-35.8%	17.1%
Central and South America	44.277	33.455	36.685	6.5%	-24.4%	9.7%
Africa	26.170	26.285	29.277	11.4%	0.4%	11.4%
Middle East	43.055	38.834	42.946	6.9%	-9.8%	10.6%
Asia and Oceania	709.010	745.471	801.866	1.8%	5.1%	7.6%
World	1207	1103.7	1205.6	-1.4%	-8.6%	9.2%
BRIC*	553.772	625.853	662.679	1.6%	13.0%	5.9%
World (excl. BRIC)	653.241	477.882	542.906	-3.8%	-26.8%	13.6%
World (excl. China)	764.049	577.493	653.032	-3.7%	-24.4%	13.1%

* BRIC = Brazil, Russia, India and China.
Source: WSA



year. Applying the brake to domestic output has become an urgent priority for the industry, he adds.

Higher Middle Eastern output

In common with China and the Ukraine, the Middle East also returned positive figures for September: the region's crude steel output edged 1.9% higher to 1.407 million tonnes to yield a nine-month total of 12.477 million tonnes (+2.2% compared to January-September 2008), reports the WSA.

In the EU, September production was 23.7% lower than last year at 13.171 million tonnes while January-September output showed a decline of 39.3% to 97.165 million tonnes. The US total was down 31.4% at 5.38 million tonnes for September and 47% lower for the cumulative period at 40.236 million tonnes. Having dropped 20.3% to 4.86 million tonnes in September, Russian output of crude steel was down 26.8% in the first three quarters of this year at 41.681 million tonnes, while the September and nine-month totals for Brazil were 2.6 million tonnes (-13.7%) and 18.338 million tonnes (-31.7%).

China's finished steel exports rose 19% from August to 2.47 million tonnes in September although this total is still 63% lower year on year, according to preliminary Chinese customs data. At the BIR Convention in Amsterdam, Dr Thomas Ludwig - CEO of German steel distributor Klöckner & Co SE - looked to dispel fears of runaway Chinese exports of steel by suggesting it is unviable for the Asian giant to import raw materials in order to make and export steel rather than higher-value, steel-containing finished products.

Recovery milestones...

In terms of the steel industry recovery, a milestone was achieved by leading steelmaker ArcelorMittal which, for the third quarter of 2009, reported its first net profit since the onset of the global economic crisis. However, Chairman and CEO Lakshmi Mittal insisted that

conditions remain 'challenging' and that the recovery could take 'several years'. With some idled capacity re-started, the company expects crude steel capacity utilisation to be around 70% in the fourth quarter.

Another recovery milestone was reached in the first week of October when the USA achieved a raw steel capacity utilisation rate of 60% for the first time in 11 months. Output climbed 2.2% to 1.446 million tons from 1.415 million tons in the previous week to yield a national average utilisation rate of 60.6%, according to the American Iron and Steel Institute (AISI). This compares to a low for this year of around 40%. Four months of solid upward momentum in the utilisation rate was halted in the final week of October as production slid 0.8% to 1.495 million tons from 1.507 million tons in the previous seven-day period, thereby cutting the utilisation rate from 63.2% to 62.7%. But in the first full week of November, a raw steel production total of 1.544 million tons pushed up utilisation to 64.7%.

...but sales difficult to make

As Blake Kelley of Sims Metal Management noted at the BIR Convention in Amsterdam, the march of the steel capacity utilisation rate towards 70% in the USA is causing concern given that 'steel sales are increasingly difficult to make' and 'true demand may not have developed'. US steel producers have failed to come close to matching their finished product price targets: in the case of hot-rolled coil, for example, the October average was more than 10% shy of the US\$ 600 per ton wanted by the mills.

And according to a report in Metal Bulletin, leading South Korean steel-maker Posco has amended its crude output target for this year to 29.5 million tonnes - equivalent to a reduction of 300 000 tonnes - in response to what it terms the 'lagging recovery' in steel demand. The news came despite an increase of more than 10% in the company's output during the

Magnetic ferrous separators, Eddy current separators, Metal sensor separators, X-Ray separators and color sorters

Investment capital

CRG Metals continues to increase its investment in recovery equipment made by SGM Magnetics.

Throughout 2007, Ken Siegel at CRG Metals, Spartanburg, S.C., has watched equipment supplied by SGM Magnetics harvest greater amounts of metal from the company's high-output auto shredding plant. Ken and his fellow managers have done more than watch, however, as they have also decided to increase the percentage of CRG's capital spending that goes toward the magnets, sensors and sorters made by SGM. At its Spartanburg shredding plant, CRG has lined up an impressive array of sorting equipment. "At this facility we have two 40-inch fines lines and two 60-inch fines lines," says Ken. Each line consists of a DSRP and an eddy current followed by an induction sensor sorting unit. The ultra-strong DSRP magnets made by SGM "strip out any residual ferrous left in the fluff," notes Ken. "The eddy currents then become more effective without that ferrous portion in the stream," he adds. "Those ferrous pieces can stick to the drum, reducing the effectiveness of the eddy current, but SGM has



designed the DSRP to alleviate those problems." Ken also praises the induction

sorters made by SGM. "They do a much better job in recovering smaller metal pieces and fractions than other models we looked at," he notes. The end result is that CRG has seen "a 3 to 4 percent increase in our overall recovery from our fluff," says Ken. "The overwhelming portion of that is in the small material; previously, we had not recovered that out of our product."

While the DSRPs have recovered additional ferrous scrap, the SGM eddy currents and the induction sorters have increased the company's recovery of both white and red nonferrous metals, notes Ken.

"We have recently merged with Atlantic Scrap, and our new partners have seen the improvements we have achieved and have decided to install a system that is almost a duplicate of what we have," Ken remarks. At the Atlantic Scrap plant in Smithfield, N.C., the plan is to outfit the downstream system exclusively with SGM units. "As we have partnered up, the managers at Atlantic have seen things in our system that they want to replicate, so they elected to go with a complete SGM system," says Ken. "It has definitely been a great experience working with the group from SGM," adds Ken. "They have been extremely supportive and the equipment they have provided has certainly exceeded our expectations."

third quarter to 7.88 million tonnes. Sounding a positive note, crude production from Tata Steel's Indian operations leapt 21% to 1.64 million tonnes during the quarter ending in September on the back of increased domestic demand; over the same period, sales

improved 19% to 1.45 million tonnes compared to 1.22 million tonnes in the corresponding quarter of last year.

Conclusions

With the year-end fast approaching, steel consumers' thoughts traditionally

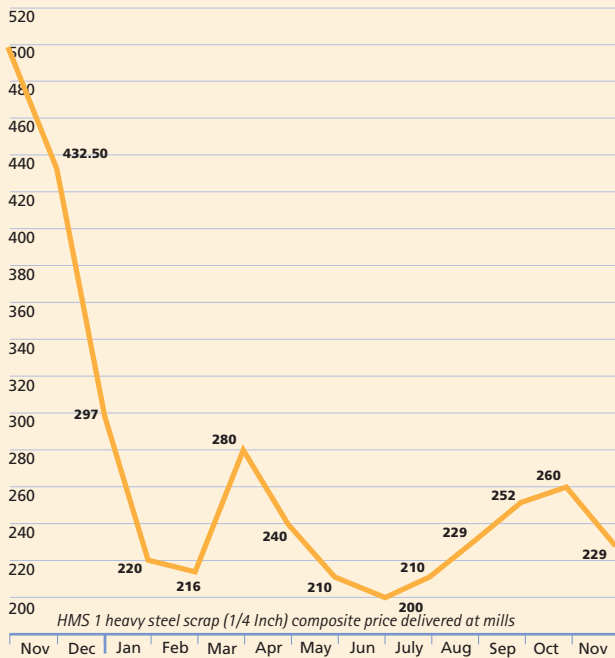
turn towards keeping their scrap stocks as low as possible for the holiday season. And with demand for steel still showing no signs of a major recovery, experts could have been forgiven for anticipating a relatively humdrum end to the year in ferrous scrap price terms.

The scale of the price improvement in the first half of November has been surprising and is not widely trusted. Certainly, many of the fundamentals suggest there is little scope for a further major break-out in ferrous scrap values over the coming weeks. □

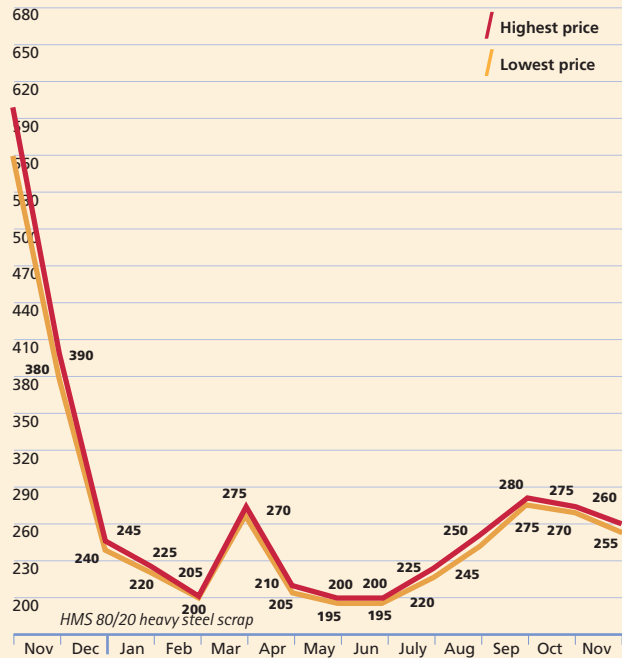
Ferrous Scrap Prices

Reference date: 9 November, 2009

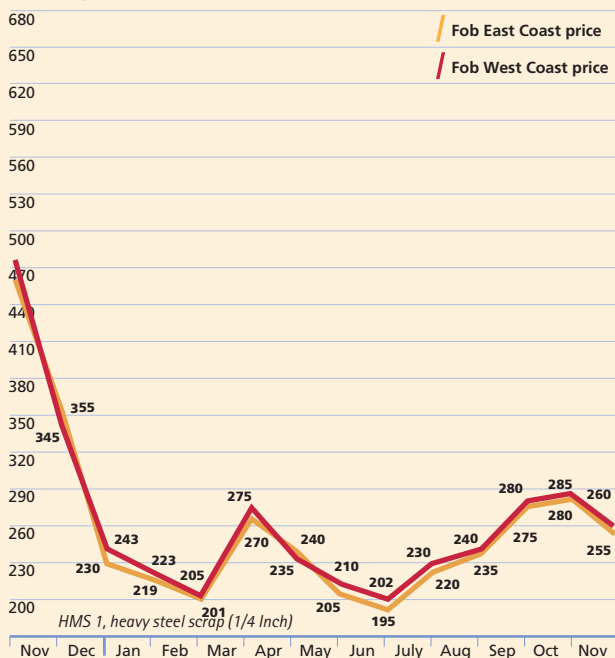
USA Domestic Scrap Prices (US\$/GRT)



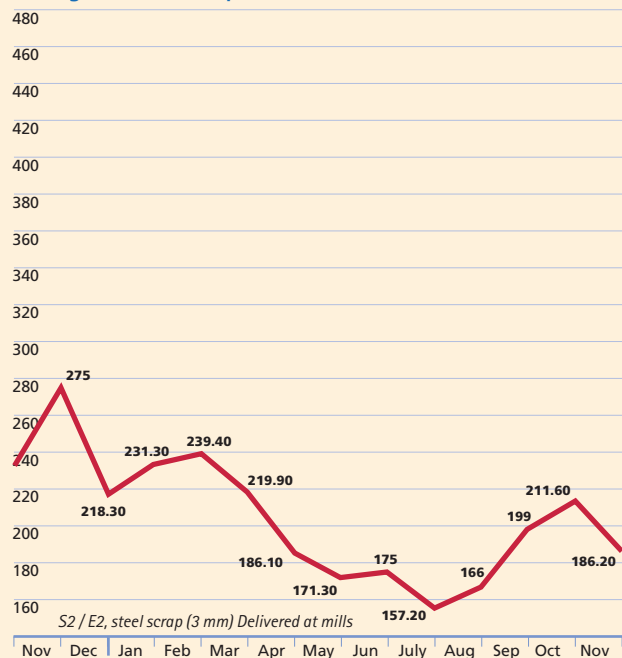
Fob Rotterdam Export Prices (US\$/t)



USA Export Prices (US\$/GRT)



Average German Scrap Prices (€/t)



Nickel & Stainless

Closed: November 6 2009

Banking on a brighter 2010

With the near-term outlook for the stainless steel industry appearing lacklustre, scrap experts attending the latest BIR Convention were clearly pinning their hopes on better market conditions emerging some time in 2010. At present, Rotterdam prices for 304 and 316 stainless steel scrap stand at, respectively, US\$ 1800-1875 and US\$ 2400-2475 per tonne. Ferritic 430 scrap (17% chrome) is attracting around US\$ 420 per tonne and 409 scrap (13% chrome) nearer US\$ 350.

While China's stainless steel melting output has been enjoying growth in 2009, production among the EU's 27 member states fell approximately 36% in the first eight months of this year.

At the BIR Autumn Convention in Amsterdam late last month, delegates were doubtful as to whether there would be a significant change in Europe in the short term although some hopes were expressed of a turn for the better in 2010. The weakness of the US dollar in relation to the Euro is slowing exports from Europe while the domestic markets have not yet recovered to the extent that had been expected.

During the latter weeks of October, buying interest declined among the steel mills while Asian purchases served to increase the discount from the LME price for the nickel price in scrap. Consequently, European scrap prices declined because of the change in the exchange rate with the US dollar. In early November, the 304 price stood at US\$ 1800-1875 per tonne while 316 was yielding US\$ 2400-2475. The International Nickel Study Group (INSG) reported a surplus for the metal of more than 90 000 tonnes in the first eight months of 2009; the organisation expects a total surplus of 70 000 tonnes for 2009 as a whole. It is worth noting

that nickel consumption of 115 300 tonnes in August exceeded production by 7100 tonnes - a situation not witnessed since February 2008. Probable reasons include production cuts and the continuing strike at Canada-based nickel producer Vale-Inco.

Based on predictions of the market trending towards a deficit, analysts at Barclays Capital reckon the LME cash average for nickel will be around US\$ 9.75 per lb next year (US\$ 21 450 per tonne).

The chrome outlook is currently mixed: on the one hand, traders are warning of a surplus in the coming quarters; while on the other, on-going energy problems in South Africa are resulting in huge vol-

umes of chrome ore being exported to China. The price agreed between producers and consumers of US\$ 1.03 per lb Cr is insufficient to cover producers' costs. From 7.727 million tonnes in 2007 and 7.458 million tonnes in 2008, chrome production is expected to fall to 5.544 million tonnes this year, partly due to the low output of ferritic steels. Prices of chrome scrap have reacted accordingly and, by early November, stood at US\$ 350 per tonne for the 409 quality and US\$ 420 for 430 material.

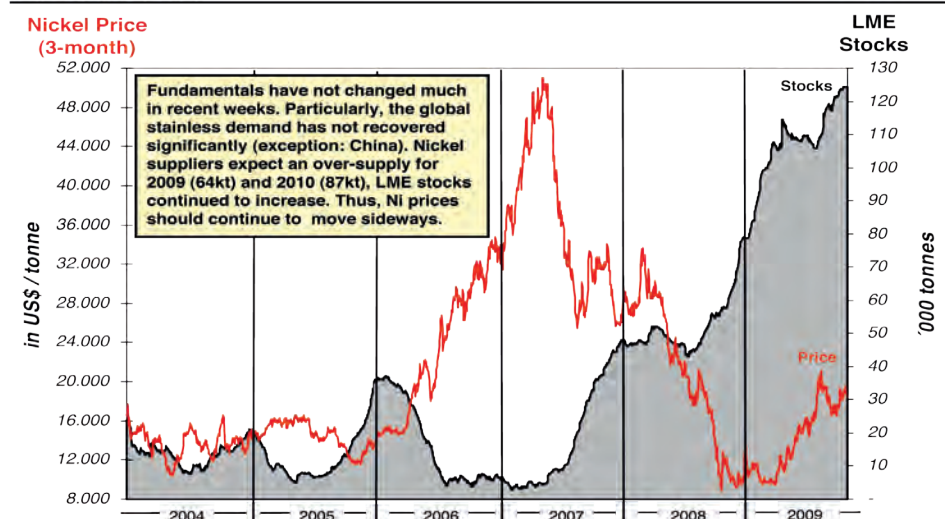
Europe

Despite recent increases, analysts are insisting the fundamentals of the nickel market do not justify higher prices given that demand is slow as a result of the weakness of the stainless steel industry and that supply is more than satisfying requirements. LME nickel prices have improved only on the back of rising values for some of the other base metals. In Germany, nickel cathode prices jumped some US\$ 1200 in early November to US\$ 19 225 per tonne. V2A (304)



LME Nickel Price (3-month) & LME Nickel Stock Levels

Status: October 28th, 2009





alloyed scrap was trading recently at US\$ 1830 per tonne and V4A (316) scrap at US\$ 2542.

China and elsewhere in Asia

According to figures from China's Customs Office, the country's exports of refined nickel and its alloys soared almost 483% in September this year to 3155 tonnes while total overseas shipments were 205% higher in January-September this year at 14 711 tonnes. Chinese imports of refined nickel reached 20 491 tonnes in September - an increase of 96% when compared to the figure for the same month last year but lower than the August 2009 total. Imports during the first three quarters of this year surged 128% to 211 114 tonnes. Large volumes of stainless steel on China's spot market dampened domestic buyers' enthusiasm for purchasing from overseas.

The nickel price failed to perform as well as other leading base metals in October,

starting the month at Yuan 136 260 per tonne (US\$ 19 890) and closing at Yuan 132 250 (US\$ 19 307). Most market participants are not too optimistic about a short-term recovery in nickel demand. The price in Shanghai has remained lower than the LME level and so downstream end users have not been encouraged to build up their inventories. Based on September figures from China's National Bureau of Statistics, the country's refined nickel production climbed 47.7% when compared to the same month last year and 8.3% from August 2009 to stand at 20 419 tonnes. Domestic output in the first three quarters of this year totalled 157 589 tonnes - up almost 16% on a year-on-year basis. Rising stock levels and slow stainless steel consumption will deter smelters from rebuilding their production capacities, it is believed.

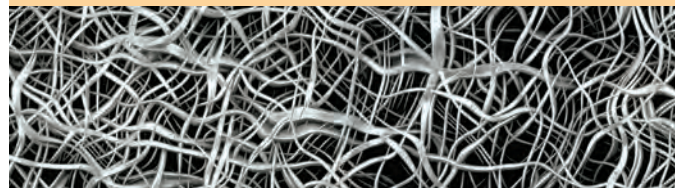
North America

At the time of writing, buying activity has been stirred to a limited extent by

Minor metals

Ferro-tungsten prices are relatively stable at US\$ 28-29 per kg despite the slow tool and high-speed steel markets. By early November, molybdenum prices stood at US\$ 33-35 per kg but Chilean molybdenum converter Molymet is forecasting a brighter future for this metal in 2010.

After several weeks of slow-down, cobalt prices jumped higher on the back of increasing demand: currently, prices for low-grade material are around US\$ 17-18 per lb. As a result of the slump in production of high-speed steels, ferro-vanadium prices have been falling for weeks and are currently down to US\$ 23.50-24.50 per kg. Tight supply of scrap has helped ferro-titanium 70% (maximum 4.5% aluminium) to maintain price stability at a low level of US\$ 3.80-4.40 per kg Ti.



the widespread belief that key mine closures in Canada will persist until the end of the year.

Addressing the BIR Convention in Amsterdam, Barry Hunter of Hunter Alloys LLC in the USA indicated that domestic demand for 18/8 and 316 scrap has

diminished but supply remains tight. 'Any US consumer demand will once again most likely be met with inflated scrap prices,' he said. Little change in the market can be expected before 2010 as US stainless steel producers are likely to look to minimise year-end inventories. □

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Non-Ferrous

Closed: November 9 2009

Copper surplus to grow next year - ICSG

Copper has continued to defy the global recession by posting further price increases over the last few weeks. However, there is some concern over stock levels in China and the strength of demand elsewhere in the world. LME cash prices as at November 9 were as follows (per tonne): aluminium US\$ 1886.50; copper US\$ 6531; lead US\$ 2319; zinc (Special High Grade) US\$ 2167.50; and tin US\$ 14 950.



Aluminium

After being outshone by other base metals in recent months, analysts are expecting light metal prices to rise more strongly than the others in 2010 owing to the need for processors to re-stock. In addition, the market's oversupply is expected to decline during the course of next year.

For the moment, however, aluminium's performance remains largely subdued; in Germany, for example, orders have ebbed from the automotive industry, resulting in reduced scrap arisings. The

country's aluminium wire scrap (Achse) price has been around US\$ 1870 per tonne of late - US\$ 100 higher than a month earlier - while aluminium turnings (Autor) have gained some US\$ 50 to reach US\$ 1076.

In the UK, price increases have been more muted, with commercial pure cuttings trading recently at US\$ 1185-1265 per tonne, mixed alloy/old rolled cuttings at US\$ 848-1027, and commercial turnings at around US\$ 664-727. In the Netherlands, meanwhile, new pure aluminium scrap has been fetching

US\$ 1640 per tonne and first-quality old rolled aluminium scrap US\$ 1491. Chinese imports of primary aluminium were catapulted 2371% to 117 004 tonnes in September 2009 compared to the same month last year to boost the January-September cumulative total by 1402%. Meanwhile, the country's output advanced 5.6% to 1.2 million tonnes in September although the figure for the first three quarters of 2009 dropped 7.6% to 9.1 million tonnes. The aluminum price on the Shanghai Yangtze spot market reached Yuan 14 960 per tonne (US\$ 2184) at the end of last month thanks to support from a weakening US dollar. However, indifferent downstream consumption and high stocks of primary aluminium on both the domestic and international markets are weighing down the metal's prospects.

China (plus Hong Kong) accounted for more than 70% of the 1.081 million short tons of aluminium scrap leaving US shores in the first eight months of 2009; the total dispatched to all overseas customers in the same period last year was just over 1.647 million short tons. Meanwhile, a Reuters survey of

28 analysts suggests the LME cash average for aluminium will be around US\$ 1951 per tonne next year.

Copper

According to the International Copper Study Group (ICSG), the refined copper market balance for 2009 is expected to show a surplus of around 370 000 tonnes because 'a decline in production will not be sufficient to overcome weakness in demand'. The excess is expected to grow to around 540 000 tonnes next year as lower copper demand encounters increased supply, the organisation adds.

The ICSG is predicting a decline in world refined usage of 1.6% to 17.7 million tonnes this year despite a 26% increase in China. It expects a recovery in copper usage in most copper-consuming countries during 2010, but lower industrial demand and partial draw-down of unreported inventories accumulated in 2009 is expected to reverse the growth in China's apparent usage and lead to an overall global decrease of around 0.7%.

Latest hard data from the ICSG indicate that, following five months of deficit,





the apparent refined copper market balance showed a surplus of around 2000 tonnes in July, primarily due to a drop in China's apparent usage based on lower net imports of refined copper and to a slowdown in EU apparent usage over the traditional holiday period. The apparent refined copper balance for the first seven months of 2009 indicates a production deficit of 186 000 tonnes as against a 207 000-tonne shortfall for the same period in 2008.

World usage fell around 1.3% in January-July 2009 when compared with the corresponding months in 2008, with a 47% increase in Chinese demand almost completely offsetting a decrease of 19.5% in the rest of the world. Global refined production dipped 1.1%, with primary production declining 0.3% whereas secondary production from scrap fell 5%, thereby 'reflecting the global scarcity of scrap in the early part of the year', according to the ICSG.

Based on data from China's Customs Office, imports of refined copper reached 561 997 tonnes in September, up 6.2% from August and 22% from September 2008; in the first nine months of this year, imports climbed 20% to 4.69 million tonnes. Excluding the 1 million tonnes built up by the State Reserve Bureau in the first half of 2009, China's stocks are expected to reach 1.2 million tonnes, according to the Beijing-based Antaika Information Development Company. Some experts believe China now has more copper than it needs at present.

On the Shanghai Yangtze spot market, the copper price jumped from Yuan 49 350 per tonne (US\$ 7204) on October 9 to Yuan 50 775 (US\$ 7412) by the end of the month, helped by a weakening US dollar.

According to China's National Bureau of Statistics, domestic refined copper output reached 394 800 tonnes in September - an increase of 20.5% over September 2008 and of 8.2% over August 2009. Capacities have been fully occupied during recent months such

that production climbed 8.2% to 3.1 million tonnes in January-September this year.

Some caution has been voiced in Europe in relation to the rising copper price. According to Bernd Drouven, Chairman of Germany-based Aurubis AG, demand is not improving as quickly as was expected. Almost all processors have witnessed an upturn in orders but cumulative output is still lower than in recent years.

More than enough copper scrap is available to the European market although high-grade production scrap is becoming tight. In Germany, bright wire scrap (Kabul) prices jumped more than US\$ 100 per tonne in October to reach US\$ 6161 at the month's end, while copper granules 1A (Kasus) have been fetching US\$ 6199 and non-alloyed bright wire I (Kader) around US\$ 6057 - some US\$ 200 above the price of a month ago. In the Netherlands, bright wire scrap prices have gained around US\$ 200 to US\$ 6412 per tonne.

According to latest figures from the US Commerce Department, August exports of copper and brass scrap jumped 21.5% from their July level to 74 309 short tons.

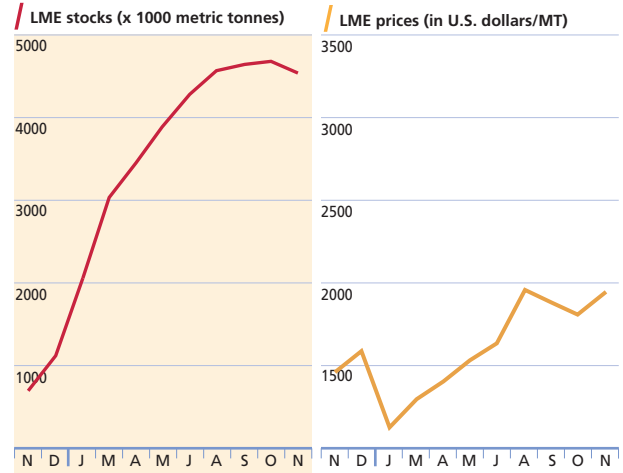
Lead

World supply of refined lead exceeded demand by 57 000 tonnes in January-August 2009 while reported stock levels climbed 61 000 tonnes, according to the International Lead and Zinc Study Group (ILZSG). World production of refined lead gained 1.6% thanks to higher output in China. The same country's apparent usage leapt 26.5% over the period to balance reductions elsewhere while its net imports totalled 142 000 tonnes compared to net exports of 14 000 tonnes in January-August 2008.

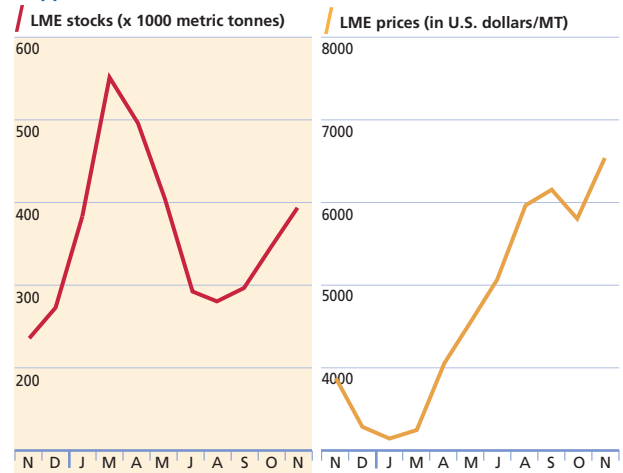
World refined lead output is forecast to climb 3.4% to 8.99 million tonnes this year, with an anticipated 20% leap in China 'more than balancing cutbacks in other countries'.

Global usage of refined lead is forecast

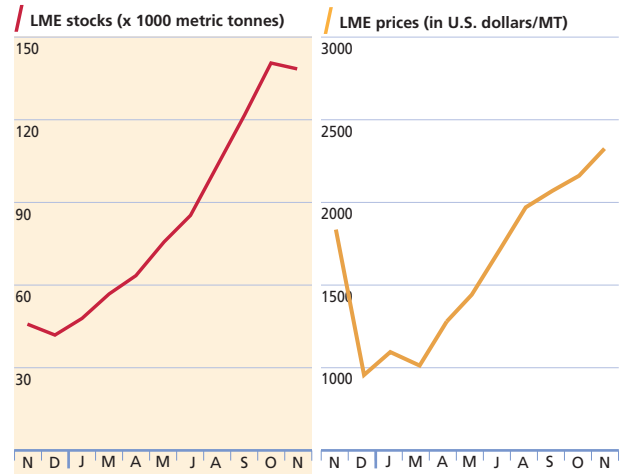
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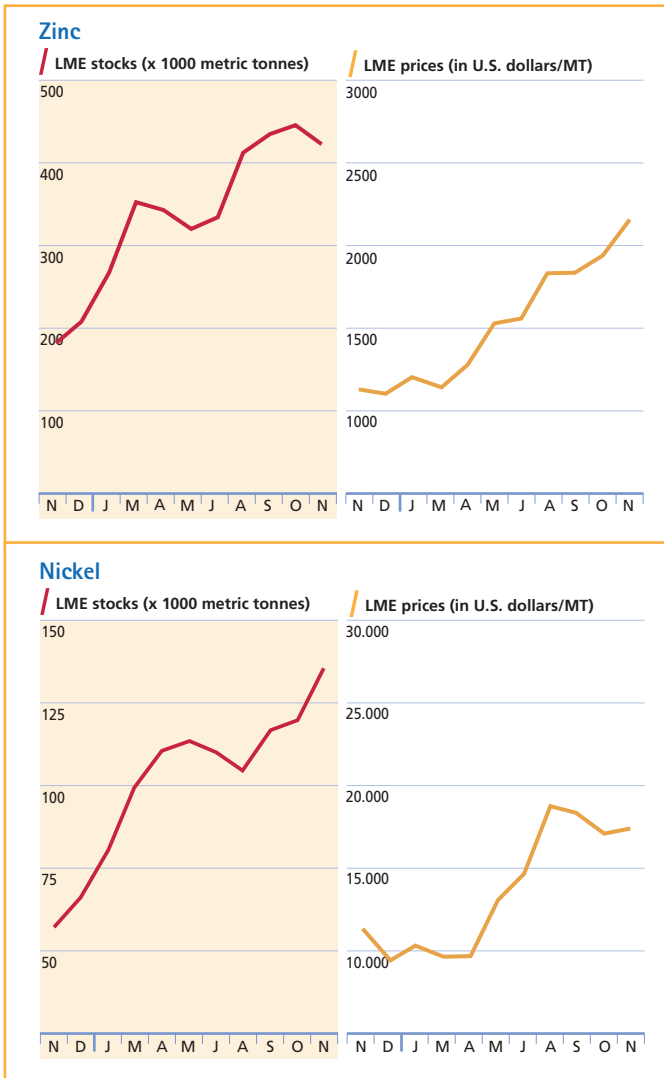
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to increase by 3% to 8.91 million tonnes in 2009 and by a further 7.2% to 9.55 million tonnes in 2010, states the ILZSG. There will be world refined lead surpluses of 80 000 tonnes in 2009 and of just over 100 000 tonnes in 2010, it calculates. China will see its apparent use grow 25% in 2009 and 7.8% in 2010 - 'at which point the country will account for approximately 45% of total world demand', according to the organisation. Meanwhile, demand in Europe is expected to decline 15.6% this year - 'to its lowest level in more than 50 years' - before mounting a recovery of 8.8% in 2010. In the USA, a contraction of 4.9% this year is expected to be followed by an improvement of 2.5% in 2010. In September, China's refined lead

imports fell 5.4% to 5938 tonnes but jumped 699% in the first nine months as a whole to 150 320 tonnes. Exports in the January-September period were 49% lower at 16 129 tonnes. On the Shanghai Yangtze spot market, lead began last month at Yuan 15 810 per tonne (US\$ 2380) and had edged up to Yuan 15 950 (US\$ 2328) by its close. China's largest lead smelter, Henan Yuguang Gold & Lead Co., closed down a plant in Henan province after children living in the area were found to have 'above-normal' levels of the metal in their blood. Compared to August, China's lead production fell 6.3% in September although the total of 342 000 tonnes was 8% above that for same month last year. Taking the January-September period as a whole, out-

put leapt 21% to 2.842 million tonnes. Traders in Europe are reporting a slight improvement in lead demand as battery producers prepare for the winter period. New soft lead scrap has been trading recently at around US\$ 2467 per tonne in Germany. In the Netherlands, meanwhile, old lead scrap prices have climbed to US\$ 1565 per tonne.

Zinc

Preliminary data from the International Lead and Zinc Study Group (ILZSG) for the first eight months of 2009 suggest that global output of refined zinc was 327 000 tonnes higher than demand and that total reported inventory levels increased by 361 000 tonnes, including 159 000 tonnes delivered to China's State Reserve Bureau (SRB). Global output of refined zinc increased by 4.3% in August to its highest monthly level of the year. China's net imports during the first eight months of 2009 totalled 559 000 tonnes compared to 75 000 tonnes during the same period of 2008.

Taking into account purchases made by the SRB, the ILZSG believes world supply of refined zinc will exceed demand by 380 000 tonnes this year and by 227 000 tonnes in 2010. A drop of 5.6% in global refined zinc demand to 10.76 million tonnes is foreseen for 2009 despite increases of 16.8% and 6.2% in, respectively, China and India. With consumption expected to improve in most countries next year, global usage is predicted to jump 11.9% to 12.04 million tonnes.

Zinc mine output is set to fall 5.4% to 11.08 million tonnes this year as a result of cutbacks and closures implemented mostly towards the end of last year, according to the ILZSG. However, an increase of 8.1% to 11.97 million tonnes is envisaged for 2010. Similarly, a 4.7% drop-off in refined zinc output to 11.14 million tonnes this year will be followed by a leap of 10.1% to 12.26 million tonnes next year, it is believed. According to China's Customs Office, the country's refined zinc imports in September were almost 5% higher than

in the same month last year at 35 652 tonnes; in the first three quarters of the year, the increase was a far greater 274% to 601 313 tonnes. Total exports fell 84% to 8626 tonnes over the same nine-month period.

The zinc price on the Shanghai Yangtze spot market fluctuated around Yuan 15 900 per tonne (US\$ 2321) during October owing to generally lifeless downstream consumption by zinc smelters. That said, exports of galvanised zinc plates to Europe have been on a steadily rising trend.

China's National Bureau of Statistics reports that domestic zinc production maintained a high level of 410 000 tonnes in September. Across the first three quarters of the year, output was up 5.2% to 3.2 million tonnes.

In Germany, old zinc scrap prices have jumped around US\$ 70 per tonne in recent weeks to some US\$ 1338, while in the Netherlands old alloy scrap has been trading recently at US\$ 1342. However, demand from Europe's zinc processors remains slow and buyers appear to be waiting for prices to fall before looking to re-stock.

US zinc scrap exports surged more than 53% when comparing July with August this year to reach 5634 tons for the latter month. □



Contributing to the Non-Ferrous Metals Market Analysis:

- Ralf Schmitz, German non-ferrous trade association VDM, Europe
- Lili Shi, journalist and consultant, China

Paper

Closed: November 9 2009

Healthy demand turns supply screw

Mills in Asia have provided massive support to the recovered paper market in the wake of the global financial and economic crisis. And their appetite remains strong at a time when new capacity is beginning to emerge in other areas of the world such as Eastern Europe. It comes as no surprise, therefore, that prices of most grades of secondary fibre are either stable or on a rising trend and that comparatively low levels of generation are continuing to test processors and exporters.



Europe Volumes short of pre-crisis levels

The volumes of recovered paper filtering through into merchant processors' facilities have shown some signs of improvement in recent weeks but the tonnages remain well short of pre-crisis levels.

With demand quite robust, most of Europe's mills have held their prices for November although spot lots continue

to attract higher levels. As regards export prices to Asia, OCC values have gained ground whereas mixed papers have been buoyed to some extent by the knock-on effect of healthy demand for the deinking grades in Europe and beyond. Reduced advertising and pagination levels have impacted on supply and ensured relatively stable deinking prices.

Meanwhile, some of the volumes that ordinarily would have been destined

for German board and liner mills are now remaining within Eastern Europe owing to the opening of new capacity in the region. Consequently, supply of the lower grades has become more difficult in Germany.

Decent demand from India and from several other Asian countries has boosted export prices of the middle grades of recovered paper. In Europe too, good orders from the mills across the range of qualities have served to push up prices. The market has been heavily influenced by a shortage of supply, not least because printers' shops have been far less busy since the onset of the global crisis. Tight supply conditions also apply to the higher grades of recovered paper, with good demand reported at slightly higher price levels than a month ago.

In total, recovered paper prices have benefited from demand being generally higher than production. Adding to this momentum is the fact that freight rates between Europe and Asia have increased again for November owing to cutbacks in the amount of overall

space on offer from the shipping lines.

Europe has played its part in quenching China's mounting thirst for recovered fibre. As revealed at the BIR Autumn Convention in Amsterdam late last month, Europe provided around 6.5 million tonnes of the 18.6 million tonnes imported by China in the first eight months of 2009. Europe's leading exporter - namely the UK - upped its shipments to China by 2.6% to 1.89 million tonnes despite the fact that its recovered paper exports to all destinations fell 10.8% to just short of 3 million tonnes during the January-August 2009 period, according to statistics from the UK's Confederation of Paper Industries.

North America Wood chip shortfall

The domestic OCC market appears to be in balance - with the exception of south-west USA where excessive rain over the last couple of months has prevented mills from tapping into their normal supply of wood chips. As a





result, consumers have been looking to buy additional volumes of OCC to make up for this shortfall in wood chip volumes.

Generation of OCC, mixed papers and news has shown no improvement. Speaking at the recent BIR Autumn Convention, Michael Moulton of Koch Pulp and Paper Trading told delegates that tonnages of recovered paper entering processors' facilities in the USA have fallen between 10% and 15% across the range of grades.

Most mills in the USA are reporting healthy recovered paper inventories but are continuing to buy their normal tonnages as part of their preparations for the forthcoming winter season when weather, for example, can impact heavily on collection patterns. There has been an improvement in exports of DLK and OCC to India and China, resulting in higher prices. For news and mixed papers, order levels have been improving from mills in South East Asia and prices have been gaining ground.

Higher November prices have also been

agreed for woodfree deinking grades such as sorted office paper and white ledger as demand has improved in both the domestic and export markets. Similar circumstances exist for pulp substitutes, generation of which is well short of the norm for this time of year. A negative factor affecting exporters of recovered paper is the significant increase in freight rates to many overseas markets. This upward trend is expected to continue for the foreseeable future.

Asia Generally healthy demand

South East Asia is continuing to demonstrate a healthy demand for OCC and for mixed papers but slightly reduced requirements for news & pams. The middle and higher qualities of recovered paper are moving well, particularly into India.

Despite the fact that collection volumes in Europe are generally lower than at this time last year, there is still sufficient tonnage to cover the demand currently emanating from Asia. □

Recycling limits require analysis, says ERPA

Given the difficulty of achieving ever-higher recycling rates in the EU, target-setters might have to address the technical limits of recycling - including the recyclability of fibres, the content of imported paper and the limit of packaging recovery because of food contact legislation, it was suggested at the autumn meeting of the European Recovered Paper Association (ERPA). The comment follows the European Recovered Paper Council (ERPC) monitoring report which highlighted a current average recycling rate of 66.6%. It found that the total amount recycled in Europe's paper mills last year amounted to 60.3 million tonnes - equivalent to an increase of 8.2 million tonnes since 2004.

Meanwhile, country-by-country reports delivered to the ERPA meeting underlined that secondary fibre demand is generally good whereas supply is weak and inventories carried by the mills are low. The Brussels gathering also heard a progress report on the amendment of the EU recovered paper grades list EN643, following which delegates agreed on the importance of addressing tolerances/impurities 'so that the document could be used as a guidance paper by the customs in case of control'.

ISRI opposes 'black liquor' tax incentives

The Institute of Scrap Recycling Industries (ISRI) is calling on the US Congress to rescind unintended 'black liquor' tax incentives for paper mills utilising virgin materials. These are creating a financial disincentive to paper recycling, according to the Washington-based industry body.

The heart of the issue is whether the pulping process by-product known as 'black liquor' should qualify paper manufacturers for an alternative energy tax credit. Paper producers have been using 'black liquor' as a fuel to run their mills since the 1930s; recently, these companies have tapped into US\$ 6.6 billion of tax credits available under the Alternative Fuels Provision - part of a 2005 bill intended to support the use of alternative fuels for transportation. In a letter to key members of the Senate Finance Committee, ISRI President Robin Wiener states: 'ISRI strongly opposes the "black liquor" tax incentives unintentionally afforded to virgin paper mills. This issue is of great concern to paper recyclers who have indicated the "black liquor" tax credit impedes paper recycling by providing paper mills that utilize virgin materials a competitive advantage over mills that utilize recovered fiber (recycled paper) in paper production.'

Leading research firm RISI recently published trend analyses indicating an increase in virgin containerboard output and a drop in recycled containerboard production as a result of the 'black liquor' credit - described by Mrs Wiener as 'a very troubling finding' from the perspective of paper recyclers.



Contributing to the Recovered Paper Market Analysis:

- Dick de Groot (Van Gelder Recycling, the Netherlands)
- Marielle Gommans (Bel Fibres, Belgium)
- Steve Vento (Vipa Lausanne SA, Switzerland)



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Textiles

Closed: November 12 2009

More supply chasing lower demand

With some customers requiring reduced volumes, the bumper crop of original material from autumn collections is creating a surplus in Western Europe, with the result that experts are not anticipating price increases over the winter period. In North America, a weak US dollar has encouraged demand for sorted clothing.



Europe

Over the past month, the European textiles recycling market has continued to witness an abundant availability of original material. The traditional autumn collections are yielding substantial volumes and collection containers are also proving to be well-filled. But with exporters reporting a further decline in Eastern European demand for original material, the surplus is currently being offered to

sorting companies in Central Europe. Prices of material yielded by collections are not expected to increase over the coming winter season; indeed, market participants are budgeting for a drop in prices over the short term. Demand for sorted clothing is lagging behind that recorded in the spring of this year, with the African markets following their normal pattern of ordering lower quantities in the autumn. These conditions can be attributed to a com-

bination of factors including: rising customs tariffs on used clothing; the unfavourable Euro-US dollar exchange rate; and a shortage of foreign exchange. And similar circumstances apply to sales outlets in Eastern Europe.

There is still an oversupply of some grades of wiping cloths and, as a result, these are proving very hard to sell. Bed feathers are in demand once again at stable prices.

North America

There has been an increase in business levels over the past month but demand for sorted clothing has been boosted solely by the weakness of the US dollar. Raw material prices have either remained unchanged or have softened slightly. The market for the highest-quality materials are certainly a little weaker than they have been in the past.

Volumes yielded by collection activities are declining, partly because of the onset of colder weather in many key regions of the world. The economic crisis is also impacting on the textiles recycling sector because the public is restricting its clothing purchases and is therefore discarding fewer items. Meanwhile, demand for wiping rags remains very poor. Goods are continuing to sell into India and Pakistan but at prices so low that no profit can be made.

Overall, expectations are of no major change in market conditions over the next few weeks. □

Contributing to the Textiles Market Analysis:

- Günther Krippendorf, FWS Alta-West, Germany
- Jerry Usatch, Dumont Export Corp., Philadelphia, USA



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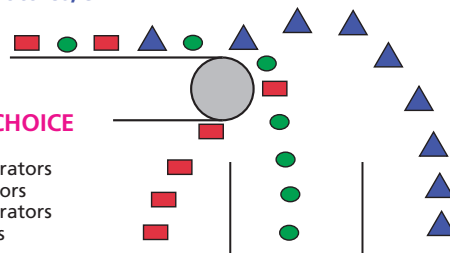
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