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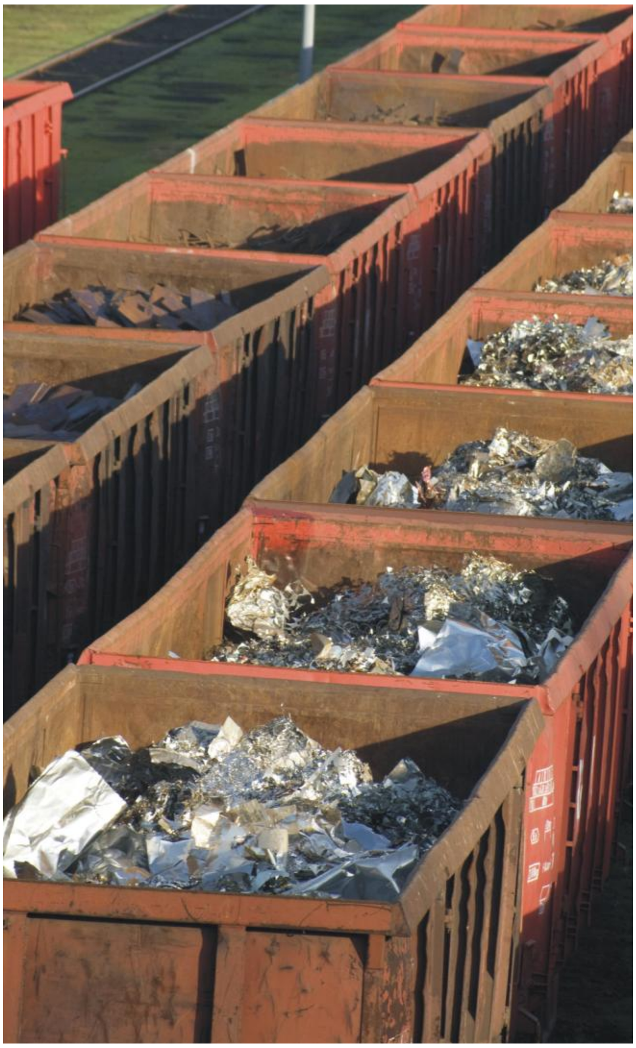

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The Metal Recycling Market in Europe

Extract

Market volumes – Plants – Strategies – Trends

Cologne, November 2010

ecoprog GmbH

The Metal Recycling Market in Europe

One year after the crisis, the European metal recycling market is back on a growth path. In 2010, approximately more than 100 million tons of scrap steel are sold in Europe. Compared to 2009, the market volume increases by almost 70 per cent. Since last year, the price for a ton of scrap steel has increased by about 50 per cent, the amount of produced scrap steel by approximately ten per cent.

One can expect a further growth in the future. On the one hand, the great global demand for crude steel, especially as a consequence of the infrastructure development in the emerging countries, is a market driver. At the same time, the recovering economy and the again increasing industrial production in Europe result in growing amounts of new and old scraps. In the long run, especially the environmental legislation of the European Union will cause higher recycling rates and, hence, increasing amounts of scrap.

In 2012 already, the European metal recycling market will probably not only achieve the pre-crisis, but even rise above it. This will only happen, however, if the global economy remains stable.

In the light of this development, ecoprog GmbH has analysed the European metal recycling market in detail. In doing so, we have not only included our own market knowledge, but also the expertise of public administrations, associations and shredder plant operators.

The up to date analysis of figures, facts, estimations and trends in the European market for metal recycling is of interest for producers, suppliers, operators, business associations, research institutes and consultants.

The study "The Metal Recycling Market in Europe" includes:

- A detailed analysis of all essential political, economic, managerial and technical trends in the European market for metal recycling.
- A concrete differentiation of the current and future market volumes in the scrap steel production by countries – up to and including 2014, based on a transparent and comprehensible methodology.
- A description of more than 300 shredder plants in Europe, including essential technical data and contact addresses.
- An analysis and description of the most important shredder plant operators in Europe, including their market shares.

The study is available in **English and German from 2,900,- euros plus VAT.**

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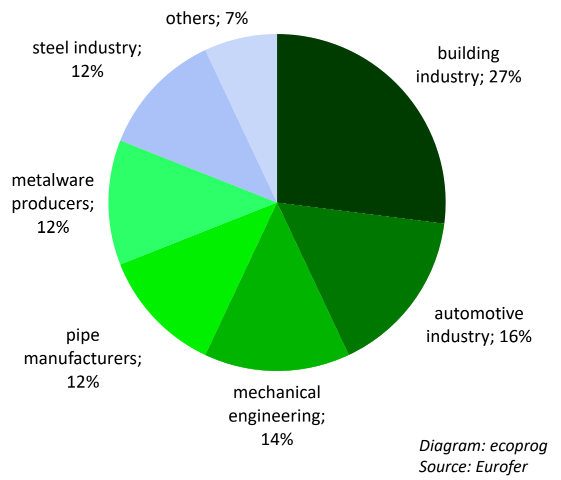
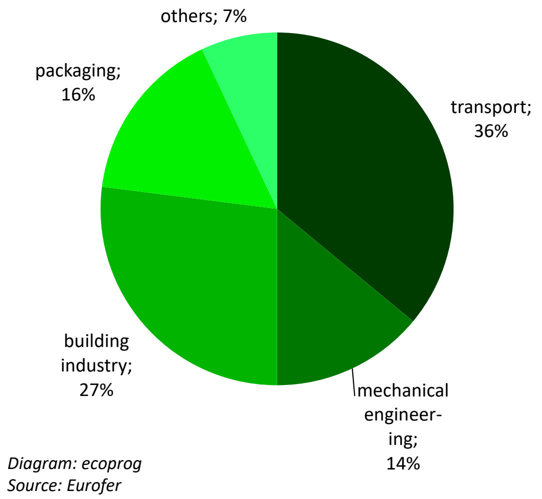
There are numerous other metals, of course, like gold, silver or non-ferrous heavy metals. These, however, do not occur as distinct scraps, but as parts of other scraps, like ferrous scrap or steel scrap.

In the following, the sources and scopes of application of the most important scraps and the metals extracted from them are explained:

<table>
<tr><th>Source of waste</th><th>Description</th></tr>
<tr><td>
</td><td>Steel and iron:
Iron and ferrous steels (steel: share of iron is larger than any other element of the total mass of steel) are the most used metals in Europe. This is, amongst others, due to the versatile applicability of this material. This versatility is reflected in the sources of ferrous scraps.</td></tr>
<tr><td>
</td><td>Aluminium:
The application ranges of aluminium are more differentiated than those of iron and steel, due to the good thermal and electrical conductance of the material. For example, aluminium has considerable advantages for applications in the field of aircraft construction. The recycling of aluminium is especially interesting in Europe, due to the small occurrence of the primary raw material bauxite, the long route of transport and the considerably lower energy consumption during recycling (about five per cent of the original energy demand are consumed). Hence, it is important to know the single sources of aluminium scraps in order to identify possible new sources of supply.</td></tr>
</table>

Poland

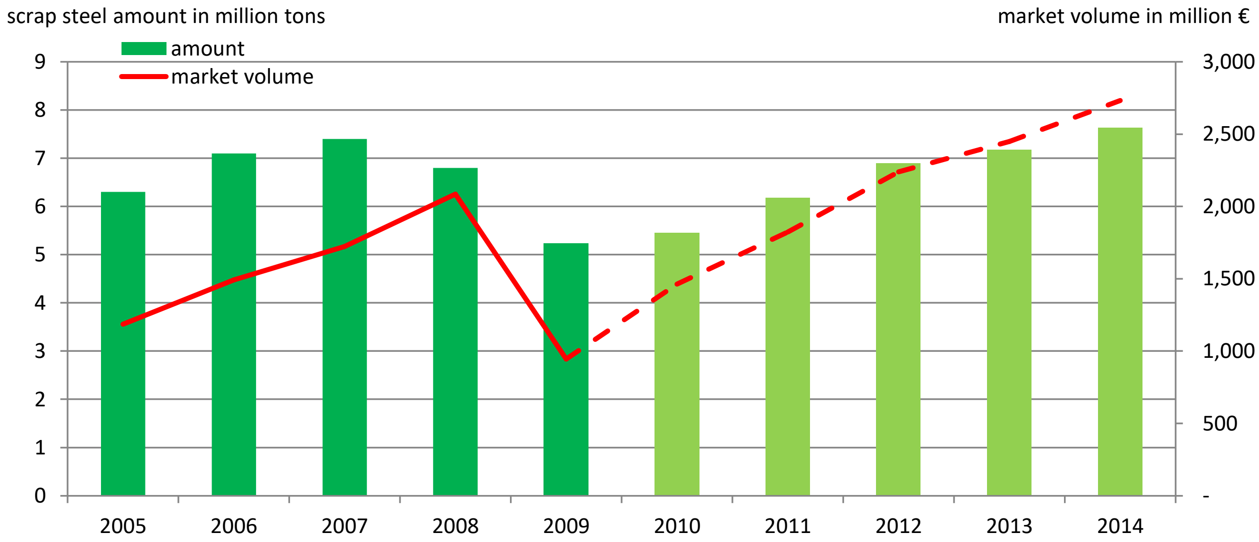
Population (million inhabitants)	38.1	Number of shredders	5
Total amount of waste (1,000 t/a)	263,000	Net exports/Steel scrap consumption	11.3%
Accrued amount of steel scrap 2008 (1,000 t/a)	6,800	Shredder capacity (HP)	17,500

Market development

The steel scrap production in Poland has increased steadily since the country had joined the EU in 2004 – until the year before the economic crisis, the growth rates amounted to an average of eight per cent. This considerable increase of the produced amounts of steel scrap is the result of an above-average economic growth (four to six per cent) since the accession to the EU. New requirements in terms of environmental regulations within the framework of EU policy are also responsible for the positive development of the steel scrap amounts.

Despite this growth, the Polish scrap market had still been underdeveloped before the crisis. The amount of scrap per head only amounts to 180 kilogrammes – this is one of the lowest amounts in Europe.

Figure 1: Market forecast Poland



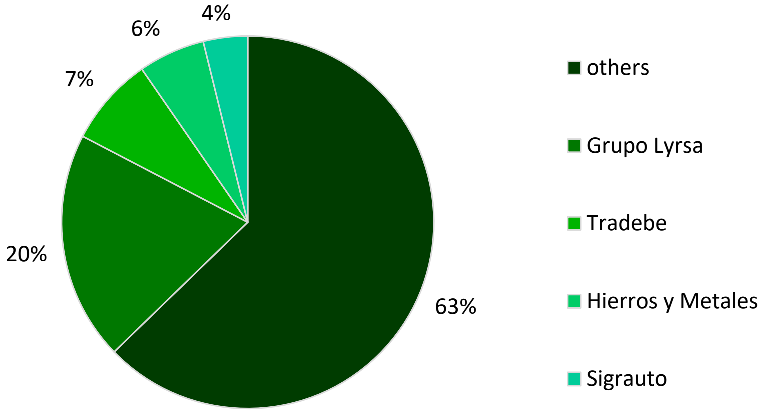
Data up to 2008: World Steel Association, forecast from 2009 on, source: ecoprog

Poland has a lot of catching up to do when it comes to implementing the European waste legislation – this is the most important reason for these comparatively bad. We expect the requirements and the treated amounts to increase considerably in the years to come, especially in terms of the End-of-Life Vehicles Directive and the Waste Electrical and Electronic Equipment Directive.

Shredder

With 26 shredder plants, Spain ranks fifth in Europe – after France, Italy, Germany and the United Kingdom. 21 companies operate them. Most of the operators are small or medium-sized companies and most of them are exclusively active in the field of metal recycling. The share of the installed shredder capacity of most of the operators is less than ten per cent. The only exception is Grupo Lyrsa – its share at the installed shredder capacity amounts to almost 20 per cent.

Figure 2: Shares of competitors at total installed capacities (HP) in Spain



Data for 2010, source: ecoprog

Grupo Lyrsa specialises in the recycling of material flows. Amongst metal waste and other materials, Grupo Lyrsa also treats paper and glass waste. Only Tradebe and Hierros y Metales offer services in the whole recycling industry, just like Grupo Lyrsa.

Consumption

In 2008, 9.9 million tons of scrap steel emerged in Spain. 15 million tons of steel scrap were needed for the secondary steelmaking and 1.3 million tons of steel scrap were used for primary steelmaking.

In terms of crude steel production, Spain ranks third – after Germany and Italy – in the EU. In 2008, almost 18.6 million tons of crude steel were produced in Spain. Amongst these three countries, Spain has the largest share of secondary steelmaking at the total crude steel production (78 per cent). About 14.6 million tons of crude steel were produced by using secondary steelmaking in 2008. Additionally, about four million tons of crude steel were produced by using primary steelmaking.

Leeds

EMR Leeds

53 Pontefract Road, Hunslet
LS10 1SP Leeds
Tel.: 0044 113 272 1700
Fax: 0044 113 272 1900
info@emrltd.com

Status: active
HP: 3,000
Throughput: 3,300 t/w

Liverpool 1

EMR Liverpool (Alexandra)

Alexandra Building, Alexandra Dock 1, Bootle
L20 1BX Liverpool
Tel.: 0044 151 944 7500
Fax: 0044 151 944 1486
info@emrltd.com

Status: active
HP: 10,000
Throughput: 11,000 t/w

Liverpool 2

S. Norton & Co Ltd.

Bankfield House Bankfield Mill Regent Road
L20 8RQ Liverpool
Tel.: 0044 151 955 3300
Fax: 0044 151 955 3399
info@s-norton.com

Status: active
HP: 5,000
Throughput: 50,000 t/a
Manufacturer of the shredder: Lindemann

London

Bishopsgate Iron & Steel

9A Thames Road Industrial Estate
E16 2EZ London
Tel.: 0044 20 7511 7773
Fax: 0044 20 7511 9529
info@bgisltd.com

Status: active
Manufacturer of the shredder: VJD

Manchester

S. Norton & Co Ltd.

Tenax Road Trafford Park
M17 1JT Manchester
Tel.: 0044 1618720466
Fax: 0044 161 872 9328
info@s-norton.com

Status: active
HP: 2,000
Manufacturer of the shredder: Lindemann

Montrose

John Lawrie (Aberdeen) Ltd.

Forties Road, Forties Road Industrial Estate
DD10 9ET Montrose
Tel.: 0044 1674 672005
Fax: 0044 1674 677911
info@johnlawrie.com

Index: Shredder

Price and product information

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