

Global Ferrous Scrap Outlook

Recent issues of *Recycling Today Global Edition* have provided views of the ferrous scrap recycling sector from numerous vantage points, including Asian steel-making capacity growth, European market factors, and a recently compiled list of European auto shredding plants, along with a brief history of autoshredding in Europe. In this report, we've compiled that recent coverage, providing an updated look at some of the major market forces that are affecting the demand for and supply of scrap steel.



Steel Output in China

By Brian Taylor

The rapid industrialization, infrastructure build-out and urbanization of China has created a steel industry there that now produces half of the world's steel annually. China's steel industry may yet manage a little more growth, but many signs—including warnings about overcapacity from the nation's own economic ministries—point to the peak having been reached in China's steel intensity curve.



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Statistically, that means other parts of the world will have to contribute more if the global industry is going to record steady gains in output in upcoming years similar to the ones that have been posted consistently since the mid-1990s.

THE END OF AN ERA

Brussels-based Worldsteel (www.Worldsteel.org) collects information from more than 65 steel-producing nations and aggregates it to determine national, regional and global steel output trends. The organization also interprets and analyzes the data it collects to make near-term forecasts, and what it sees for China in 2015 is a flattening out of its once furious pace of growth.

Based on the information it had for the first six months of 2014, Worldsteel predicted slow steel consumption and output growth in China for the rest of 2014 and into 2015.

“Apparent steel use in China is expected to slow to just 1.0% growth in 2014 to 748.3 million tonnes, with rapid cooling of the real estate sector as the government's efforts to rebalance the economy curtails investment and weakens business sentiment,” the organisation predicted in October of 2014 (before year-end statistics had been calculated).

“The weak growth momentum will continue into 2015, and China's steel apparent steel use will grow by 0.8% to reach 754.3 million tonnes in 2015,” Worldsteel further predicted.

Worldsteel and the chairman of its Economics Committee, Hans Jürgen Kerkhoff, however, also correctly noted that the Chinese government was likely to attempt to enact economic stimulus measures to keep its construction and steelmaking sectors humming.

“The possible use of targeted stimuli and easing of restrictions on the real estate market in response to slower GDP growth could increase the forecast,” noted Worldsteel in mid-October. China's central bank subsequently took steps in mid-November to increase liquidity within its banking system and cut interest rates in late November.

Investors and economists were watching China's economic data intensely in December, however, as the National Bureau of Statistics purchasing

VOLUME LEADERS

China may not yet have the world's largest economy, but its steel industry has been the global leader in output for many years.

Worldsteel, based in Brussels, gathers steel production statistics from more than 65 nations around the world. Its data for the first 10 months of 2014—the most current figures available at press time—show the extent of China's output compared to the next nations in line.

For the first 10 months of 2014, these nations ranked one through 10 in steel output:

1. China	685.3 million tonnes
2. Japan	92.5 million tonnes
3. United States	73.7 million tonnes
4. India	69.5 million tonnes
5. South Korea	59.5 million tonnes
6. Russia	58.9 million tonnes
7. Germany	36.1 million tonnes
8. Brazil	28.6 million tonnes
9. Turkey	28.4 million tonnes
10. Ukraine	23.4 million tonnes

manager's index (PMI) for November fell to 50.3, down from 50.8 in October and indicating only slight economic growth.

A separate PMI survey conducted by HSBC Bank indicated a 50.0 PMI in China for November, a baseline figure indicating flat industrial production and no economic growth.

Even if China's economy manages to come close to its stated goal of 7.5% GDP growth in 2015, a shift away from manufacturing and infrastructure-based growth to greater consumer spending may signal the end of the era for the most intense demand for steel.

The mode of China's economic growth in the past two decades has been tied to major industrial, retail, commercial and apartment construction and infrastructure projects such as highways, bridges, hydro-power and rail networks that consume massive amounts of steel.

Although the emerging Chinese middle class's demand for automobiles and appliances will help absorb steel, it may prove difficult to match the intense demand stemming from infrastructure projects and the initial burst of urbanization.

"In China, the rebalancing and transition towards a consumption driven economy is not without challenges and uncertainties," says Kerkhoff.

A REBOUND WITH INADEQUATE BOUNCE

As China's steel industry executives adjust to fundamental changes to that nation's economy, executives and managers in Europe and North America are tired of a "business as usual" atmosphere of economic listlessness.

In terms of the steel sector, the slow growth in North America and the lack of growth in Europe has led to stalled steel demand and output for several years running. Worldsteel sees some signs that the long-term chill is lifting, but laces its expectations with caution.

"The developed economies fared well [in 2014]," says Kerkhoff. "Recoveries in the EU, United States and Japan are expected to be stronger than previously thought, but not strong enough to offset the slowdown in the emerging economies. In 2015 we expect steel demand growth in developed economies to moderate, while we project growth in the emerging and developing economies to pick up."

Japan's hoped-for recovery under Prime Minister Shinz Abe and his "Abenomics" regimen appears to have stalled considerably. "In Japan, following a 2.1% increase in apparent steel use in 2013, steel demand in 2014 is revised upward to increase by a further 2.3% to 66.8 million tonnes, aided by governmental economic policies," says Worldsteel. "However, as the positive impact of Abenomics fades away and with another expected consumption tax hike, steel demand is expected to decline by 1.5% in 2015."

Steel production in the United States has been relatively flat in 2014, with imported steel products filling part of the growing demand for steel in that nation. "In the United States, after a decrease of 0.4% in apparent steel use in 2013, steel demand is seen increasing by 6.7% to 102.2 million tonnes in 2014," writes Worldsteel. "Steel demand is expected to increase by 1.9% in 2015."

Long-dormant Europe showed signs of revival in the first half of 2014, but disappointing signals are pointing to another potential year of disappointment in 2015. “The recovery in the EU has gained further momentum in 2014, and steel demand outlook has improved considerably to grow by 4% to 145.9 million tonnes after increasing by 0.8% in 2013,” writes Worldsteel.

“The improvement reflects a pickup in steel using sectors in most countries, but notably the United Kingdom and Poland and those countries that underwent structural reforms,” adds the group. “Apparent steel use in 2015 is projected to grow by 2.9%. However, the EU is facing new challenges with disinflation and geopolitical tensions threatening the continued recovery.”

EMERGING OR RECEDING?

Throughout this century the fortunes of the BRIC economies (Brazil, Russia, India and China) have been a focus of attention for investors, economists and multinational company executives.

In 2014 and 2015, in addition to China reaching restraints on its steel output growth, several of the other BRIC countries are combatting symptoms of stalled economic growth.

Russia’s long-time leader Vladimir Putin has resurrected portions of that nation’s economy sufficiently to achieve what appears to be enduring support from the people of Russia. However, an over-reliance on oil revenue and an inability to get along with neighbours is beginning to harm Russia’s economic fortunes.

According to Worldsteel, the outlook for apparent steel use in the Commonwealth of Independent States (CIS) nations (Russia and the eight neighbouring nations of Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Tajikistan and Uzbekistan) “has been revised down significantly in 2014 by 3.8% to 56.9 million tonnes following 2.8% growth in 2013.” Worldsteel cites “the crisis in Ukraine” as the leading factor.

“In Russia, the weak trend in steel using sectors in the second half of 2013 continued, and in 2014 weak infrastructure investments combined with the impact of the geopolitical tensions constrained steel demand, leading to -0.5% growth. In 2015, assuming a stabilisation of the political situation, CIS steel demand will grow by 1.9%.”

India’s fortunes look much better, according to Worldsteel. “India’s outlook is improving following the election of a new government [that] is promising pro-business reforms. In 2014, India’s steel demand is expected to grow by 3.4% to 76.2 million tonnes in 2014, following growth of 1.8% in 2013,” says the organisation. “In 2015 structural reforms and improving confidence will support a further 6% growth in steel demand, but elevated inflation and fiscal consolidation remain key downside risks to the outlook.”

Steelmakers in Brazil, meanwhile, face challenges tied to low levels of corporate investment in South America. “In Central and South America, apparent steel use forecasts have been revised down, with most countries registering negative growth,” says Worldsteel.

The varying set of circumstances around the globe has Worldsteel predicting slower overall steel sector growth in 2015 compared to 2014. “Worldsteel forecasts that global apparent steel use will increase by 2.0% to 1.562 billion tonnes in 2014, following growth of 3.8% in 2013. In 2015, it is forecast that world steel demand will grow by another 2.0% and will reach 1.594 billion tonnes.

Ferrous Scrap: A Market Report

By the Staff of Recycling Today Global Editions

Statistical indicators point to a stagnant steelmaking sector and lower prices being paid for ferrous scrap, but that hasn't necessarily caused ferrous scrap recyclers to rest up as they head into 2015.

Scrap processors and traders in Europe report that while supply is tight, flows have not dried up and renewed interest from overseas and regional buyers may soon help bid up the prices of ferrous scrap after a period of declines in the fourth quarter of 2014.

One northern Europe-based scrap trader says weather and falling prices have indeed crimped supply. "There is little availability now as we head into winter and the holiday season," he said in mid-December.

Winter weather is partly to blame, he says "The winter is not assisting such a situation in some places. The scrap supply is tight; European availability is extremely poor as most yards are empty and/or people have sold short."

The trader says overseas buyers with a renewed interest in buying ferrous scrap are going to run into problems not only in Europe but also in North America and Australia. "Given the strength of the U.S. domestic steel market, we hear there is no availability from the U.S. East Coast until January and that the U.S. West Coast and Australia are sold out until February."

The end result in Europe, he says, will be orders going unfulfilled. "We are hearing about initial postponements of shipments because of a lack of material."

A trader based in the United Kingdom acknowledges that supplies are tight, but says scrap is continuing to flow in his operating region. The U.K. trader says smaller dealers do not want to be left holding inventory in a volatile market.

"We continue to see availability of material even though prices are only going down," he comments. "So as such there is not a tight holding back from smaller yards to move material up the supply chain, and I believe that is because no one wants a speculative position of any kind, and they would rather live in the world of today."

As of mid-December, the U.K. trader was not yet convinced the market had reached a point where renewed demand would help boost prices back up. "As far as demand is concerned, there are no robust, hungry, keenly enthusiastic buyers because there is always someone who is able to sell them material at a price that is workable for them," he comments. The trader adds, "And this price currently is invariably lower than yesterday's price."

Steel prices dropped through much of the fourth quarter of 2014, and steelmaking statistics gathered by the World Steel Association (Worldsteel), Brussels, are pointing to a global market where output could move in reverse if China's need for steel has indeed peaked.

The world's steel production figures for October 2014, April 2014 and October 2013 are each in the 136.7 million tonne range, indicating a plateau in steelmaking that is largely tied to the sputtering of China's steel output.

China, which produces half of the world's steel annually and is by far the world's leading steel producing nation, has rarely seen flat steel output numbers in the past two decades. But its monthly steel output figure for October 2014 (67.51 million tonnes) is actually below the year-ago figure from October 2013 (67.73 million tonnes).

CRUDE STEEL PRODUCTION – Select Nations (in tonnes)			
	Oct. 2014	Apr. 2014	Oct. 2013
China	67.51 million	68.83 million	67.73 million
United States	7.31 million	7.03 million	7.36 million
Germany	3.54 million	3.71 million	3.76 million
Turkey	2.71 million	2.62 million	3.05 million
India	7.08 million	7.01 million	6.52 million
Brazil	3.05 million	2.77 million	2.97 million
Global Total	136.7 million	136.6 million	136.7 million

Source: Worldsteel Association, www.worldsteel.org

NEW PASSENGER CAR REGISTRATIONS – Select European Nations			
	Oct. 2014	Apr. 2014	Oct. 2013
France	160,149	166,959	166,495
Germany	275,320	274,097	265,441
Italy	121,736	119,099	111,466
Netherlands	35,424	28,479	36,315
Spain	76,073	80,174	60,304
United Kingdom	179,714	176,820	157,314
Europe Total*	1,112,628	1,129,829	1,047,288

Source: Association des Constructeurs Européens d'Automobiles, www.acea.be
 *Europe figure includes EU28 + the EFTA (European Free Trade Association area)

SELECT FERROUS SCRAP EXPORT FIGURES (For outbound U.S. scrap; in tonnes)			
	Aug. 2014	Feb. 2014	Aug. 2013
Turkey	321,000	202,000	531,000
China	102,000	52,000	216,000
South Korea	277,000	163,000	232,000
Taiwan	201,000	178,000	317,000
India	40,000	17,000	27,000
Egypt	61,000	0	0
Total U.S. Exports	1,580,000	1,200,000	1,690,000

Source: U.S. Census Bureau and U.S. Geological Survey, <http://minerals.usgs.gov>.

China's housing market (housing largely comprised of steel-framed apartment towers) has cooled considerably, and economists around the world are calling into question the ongoing ability of China's central government, its local governments and its five large state-owned banks to continue to pour money into steel-intensive infrastructure projects.

Steel producers and ministries of trade and commerce in other parts of the world are already gearing up to combat what they see as current and anticipated finished steel dumping practices as Chinese steelmakers try to draw down inventories of billets, slabs and coils of steel.

According to a Bloomberg report in November 2014, the China Iron & Steel Association says the nation's steel producers will likely export 80 million tons of finished steel in 2014—greater than annual output in the United States. A Japanese trade association asserts the real export figure from China will exceed 100 million tons, which would be on par with Japan's annual production.

Ferrous scrap recyclers in many parts of the world have a vested interest in such trade battles, as they would likely prefer that scrap-fed electric arc furnaces closer to home produce more steel while the basic oxygen furnaces of China scale back their output and limit their exports.

A List and Map of Auto Shredding Plants in Europe, 2014

Introduction by Lisa McKenna; Map and list provided by the Bureau of International Recycling in cooperation with the European Shredder Group of the European Ferrous Recycling & Recovery Federation, with additional information provided by ARGE-Shredder GmbH (Austria), FEDEREC (Fédération des Entreprises du Recyclage, France), BDSV (Germany), Metaal Recycling Federatie of Netherlands, RecycleMetals.org (U.K.), and direct reporting by companies.

The European Union's auto shredding capacity has grown significantly in recent decades, with more than 300 plants now in operation.

The growth of auto shredding in Europe has occurred alongside the growth of the technology in the U.S., where the auto shredder was first introduced in 1958.

When affiliated publication *Recycling Today* published a comprehensive count of auto shredders around the world in 2001, it used a figure of 202 shredders in the 28 nations that are now part of the European Union (EU), based on data from the Bureau of International Recycling (BIR), Brussels.

What follows is *Recycling Today Global Edition's* inaugural list of auto shredding locations in those 28 member states, plus shredding locations in Norway.

According to Anthony Bird of The Bird Group of Companies Ltd., Europe's first operating auto shredder was installed at Bird Fragmentation Limited of St. Helens in the U.K. Bird says he personally supervised the 1966 installation of the Lindemann-Newell 3,000-horsepower shredder and afterburner. He also related the story of the much-publicised opening ceremony during which Duncan Sands, son-in-law of

Sir Winston Churchill and one of Britain's leading politicians at the time, officially opened the plant in St. Helens Lancashire.

According to Bird, "the opening received national publicity and was on all the newsreels in U.K. cinemas at that time. The headquarters of the British Police, Scotland Yard, paid particular interest to this machine because of its capacity for the total destruction of motor cars and anyone or anything which might have been inside them."

Scott Newell, CEO of The Shredder Company, based in Texas in the United States, is the son of Alton Newell, who patented a number of auto shredding innovations in the late 1950s. Newell became a familiar brand throughout Europe in the late 1960s, after Alton's company partnered with Lindemann Engineering of Germany, Europe's largest manufacturer of shears and hydraulic processing equipment for the industry, says Scott Newell.

"We licensed Lindemann to build shredders according to my father's patents," says Newell. The agreement ensued for the next 17 years, says Newell, during which he helped the company sell close to 50 machines throughout Europe.

The shredding concept caught on quickly, Newell says, as recyclers began to realize, "shredding was the way to process scrap metal," he says. "It produced the best metal and it did it the most efficiently."

After the original licensing agreement was completed, Newell went on to sell another 40 shredders in Europe during the late 1980s and through the 1990s, he says.

The number of shredders has grown dramatically over the ensuing decades, resulting in what is now around 350 shredders within the EU plus Norway, according to the BIR; the European Ferrous Recycling and Recovery Federation, and its shredder group, the European Shredder Group.

However some believe it is likely reductions may occur in the coming years, as a number of changes are on the horizon for European shredder operators.

Ross Bartley, BIR environment and technical director and environmental and technical officer of the European Shredder Group, says 2015 targets set by Europe's End-of-Life Vehicles Directive may have an impact. At that time, all EU shredders will be required to achieve a 95% recycling/recovery rate on end of life vehicles.

In addition, a number of groups have been drafting the EU Shredder Best Available Techniques Reference Document (BREF). The document will, among other things, set new industrial emissions limits for all EU shredders.

Bartley says the legislation and the document could have a significant impact on shredder operators in the coming years, possibly leading to closures of companies that don't meet the new standards.

Heiner Guschall, director of shredder systems integration company SICON of Germany, holds a similar view. "There are going to be huge changes in the business," he says referring to the fact that some European plants may be overdue for upgrades. "We'll see how many shredders do this and if this high level of investment can be justified. Definitely there are some challenges for the industry in the next few years."

Guschall says Europe's shredding capacity, much like in the U.S., is excessive and likely to contract in the coming years. Part of this may occur from attrition, with smaller shredders closing after acquisition by larger companies.

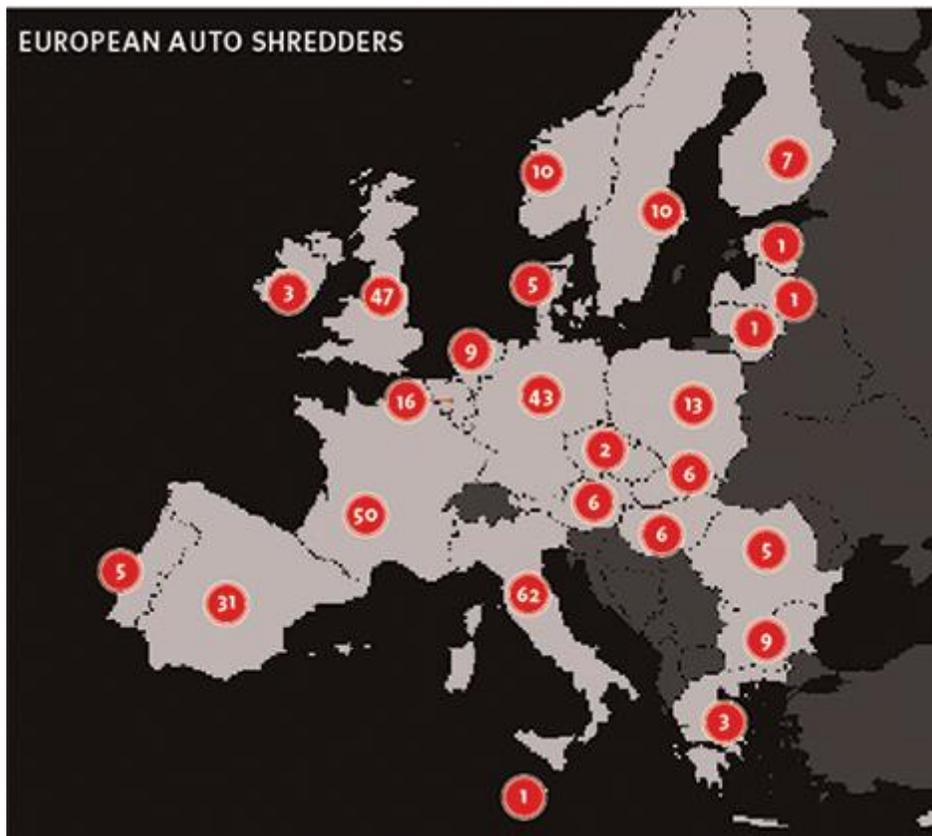
As of late 2014, however, some 350 auto shredders were operating in the EU-28 member states and Norway, handling a task that has become emblematic of the scrap recycling industry.

It is our intention to provide the most accurate and comprehensive list possible. If you spot errors or omissions in the maps and list below, please let us know. Send an email to Lisa McKenna at lmckenna@gie.net and we'll include the information in a future issue of *Recycling Today Global Edition*.

For online maps of these auto shredding facilities, visit:

<http://batchgeo.com/map/3624c302d30786a9d2b1053c494983fb> for a map of auto shredding plants in Western Europe

<http://batchgeo.com/map/a3a7cb50647095494a1feb1d14496472> for a map of auto shredding plants in Eastern Europe.



EUROPEAN AUTO SHREDDERS LIST

AUSTRIA

Amstetten
Metal Recycling Mü-Gu
GmbH
Edt bei Lambach
Graz Brothers GmbH
Götzis
Loacker Recycling GmbH
Hall in Tirol
Ragg GmbH
Knittelfeld
Fritz Kuttin GmbH
Laxenberg
Scholz GmbH

BELGIUM

Aubange
Recylux S.A.
Brussels
Georges-Derichbourg
Chatelet
Cometsambre S.A.
Engis/Liège
Belgian Scrap Terminal
Geel
Van Dalen Belgium
Genk
Stassen Recycling N.V.
Stellimet
Ghent
Retra N.V.
Kalloy/Antwerp
Belgian Scrap Terminal
Marchienne au Pont
Georges-Derichbourg
Keyser & Fils S.A.
Menen
Galloo N.V.
Mol
Van Hees Metalen
Mons
Cometsambre S.A.
Willebroek
Belgian Scrap Terminal
Zutendaal
Recylux S.A.

BULGARIA

Devnya
Nadin
Transins Industry S.A.
Pernik
Stomana Industry S.A.
Plovdiv
Nadin
Sofia
Nadin
Ecometal Engineering Ltd.
(2)
Rovotel
Stara Zagora
Phoenix Inverce

CZECH REPUBLIC

Kladno
Kovosrot Kladno a.s.
Tlumacov
Metalscrot Tlumacov

DENMARK

Grenaa
Stena Metall Group
Hadsund
H. J. Hansen

Odense C

H. J. Hansen
Østerbro (Copenhagen)
Stena Metall Group
Roskilde
Stena Metall Group

ESTONIA

Tallinn
Kuusakoski

FINLAND

Eurajoki
Eurajoen Romu Oy
Heinola
Kuusakoski
Kajaani
Kajaainin Romu Oy
Kuopio
Kuusakoski
Lapua
Kuusakoski
Pori
Stena Metall Group
Vantaa
Kuusakoski

FRANCE

Anneville
Eska-Derichbourg
Aniche
Galloo-Carmi
Athis Mons
Revival-Derichbourg
Blaringhem
Baudalet
Boulazac
Simmet
Brest
Guyot Environnement
Carros
Purfer-Derichbourg
Champagne
S.A.S.U. Passenaud
Recyclage
Chenove
Ets Metallurgiques E. Godard
Clairoix
Briou
Colomiers
AFM Recyclage
Condette
Strap-Derichbourg
Coulombiers
AFM Recyclage
Dairville
Detouef Recyclage
Elliant pres de Rospenden
Le Floch
Esmans
Marchetto
Fosse
Revival-Derichbourg
Francois
Eska-Derichbourg
Gennevilliers
Revival-Derichbourg
Golbey
Eska-Derichbourg
Gond Pontouvre
Simmet ancien Bemon
Halluin
Galloo France

Illzach

Marx Spaenlin-Derichbourg
Isigny-Le Buat
SIREC
Issoire
Praxy Centre
La Chapelle St. Luc
Bartin Recycling
Le Pian Medoc
Decons Récupération
Ledenon
Purfer-Derichbourg
Limay
Alpa
Guy Dauphin Environnement
Marignane
Purfer-Derichbourg
Marquette
Galloo-Cible
Marseille
Profer
Montereau Fault Yonne
Revival-Derichbourg
Monteux
Rossi Recyclage
Montoir-DeBretagne
Guy Dauphin Environnement
Nantes
AFM Recyclage
Nersac (pres Angouleme)
Sabatier
Rocquancourt
Guy Dauphin Environnement
St. Apollinaire
Acyclea-Praxy
St. Etienne
Jean Meli
St. Marcel
Purfer-Derichbourg
St. Pierre de Chandieu
Purfer-Derichbourg
St. Pierre des Corps
Ets J. Menut
St. Sauve
Stap-Derichbourg
Salaise sur Sanne
Guy Dauphin Environnement
Strasbourg
Eska-Derichbourg
Guy Dauphin Environnement
Vierzon
RIC Environnement
Villeneuve
AFM Recyclage

GERMANY
Baar-Ebenhausen
Thyssen Dück GmbH
Bochum
BRW Bochumer Recycling
Wertstoffhandel GmbH
Brandenburg
TSR
Bremen
Interseroh Jade Stahl
Löbl Rohstoffbetriebe GmbH
& Co. KG
Dortmund
TSR
Duisburg
TSR

Eberswalde

The Steil Group (2)
Eppingen
Alba R-Plus
Eschweiler
The Steil Group
Espenhain
Scholz Recycling
Essen
Richter GmbH
Essingen
Scholz Recycling
Flensburg
Nord-Schrott
Hamburg
TSR
Herbteringen
SWH Shredderwerk
Herbteringen GmbH
Hildesheim
Willi Hennies Recycling
GmbH
Homburg
SRP-Saarländische
Rohprodukte GmbH
Krefeld
IMR Innovative Metal
Recycling
Lahnthal
Marburger Rohstoffverwer-
tung Johannes Völker
Leer
Interseroh Evert Heeren
Lubeck
ISR-Lübecker Schrotthandel
GmbH
Ludwigshafen
Günther Schmelzer GmbH
Mannheim
TSR
Merkers
RVT Rohstoffverwertung
GmbH & Co. KG
Munich
Thyssen Dück
Rohstoffhandel
Nuremberg
Derichbourg Umwelt
Max Aicher Recycling
Osnabrück
Münz & Söhne
Regensburg
RVR Rohstoffverwertung
Regensburg GmbH
Reuth
Derichbourg Umwelt
Riesa
FeraPi Stahl
Rostock
Interseroh
Saalfeld
Scholz Recycling-SRT Schrott
Salzgitter
DEUMU
Straubing
H. Carnuth KG
Trier
The Steil Group (2)
Wetzlar
Rohstoff-Verwertung GmbH
Wilhelmshaven
Interseroh Jade Stahl

Wörth an der Isar

Iwan Koslow GmbH
& Co. KG
Würzburg
Preuer
GREECE
Thessaloniki
Konstantinidis Bros.
Sidenor S. A.
Volos
Steelworks of Volos S.A.

HUNGARY

Budapest
Ereco Zrt.
Mü-Gu Kft.
Fehérvárcsurgó
Akcifer Kft.
Jobbágyi
Klein Metals Kft.
Miskolc
Shredder Center Kft.

IRELAND

Cork
Hammond Lane Metal Co.
Ltd.
Dublin
Hammond Lane Metal Co.
Ltd.
Limerick
Clearcircle/One51 Group

ITALY

Ancona
G.B.F. Metalli S.r.l.
Arese
Rotamfer S.P.A.
Arzano
Cartofer S.r.l.
Bagnatica
Nicolli Ecosider S.r.l.
Bari
Centro Riciclo Sud
Bollate
Metalmilv S.r.l.
Nuova Beretta S.r.l.
Borgo San Lorenzo
Geo Ambiente Waste
Brescia
RMB S.P.A.
Cagliari
West Recycling S.r.l.
Caivano
Del Fran S.r.l.
Calcara di Crespellano
Italmetalli S.r.l.
Camin
Acciaierie Venete S.P.A.
Carré
Nuova Europ Metalli
Castelnuovo del Garda
Rotamfer S.P.A.
Catania
Alfa Acciai
Auto Demolizioni Express S.r.l.
Imprint S.r.l.
Cervaro
Ragmetal S.r.l.
Cesena
Pagliarani Natale
Chiarano
Gruppo Dir Metal



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