



S T O W A R Z Y S Z E N I E
FORUM RECYKLINGU SAMOCHODÓW

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Analysis of the current state and necessary actions aiming at further development of the car recycling system

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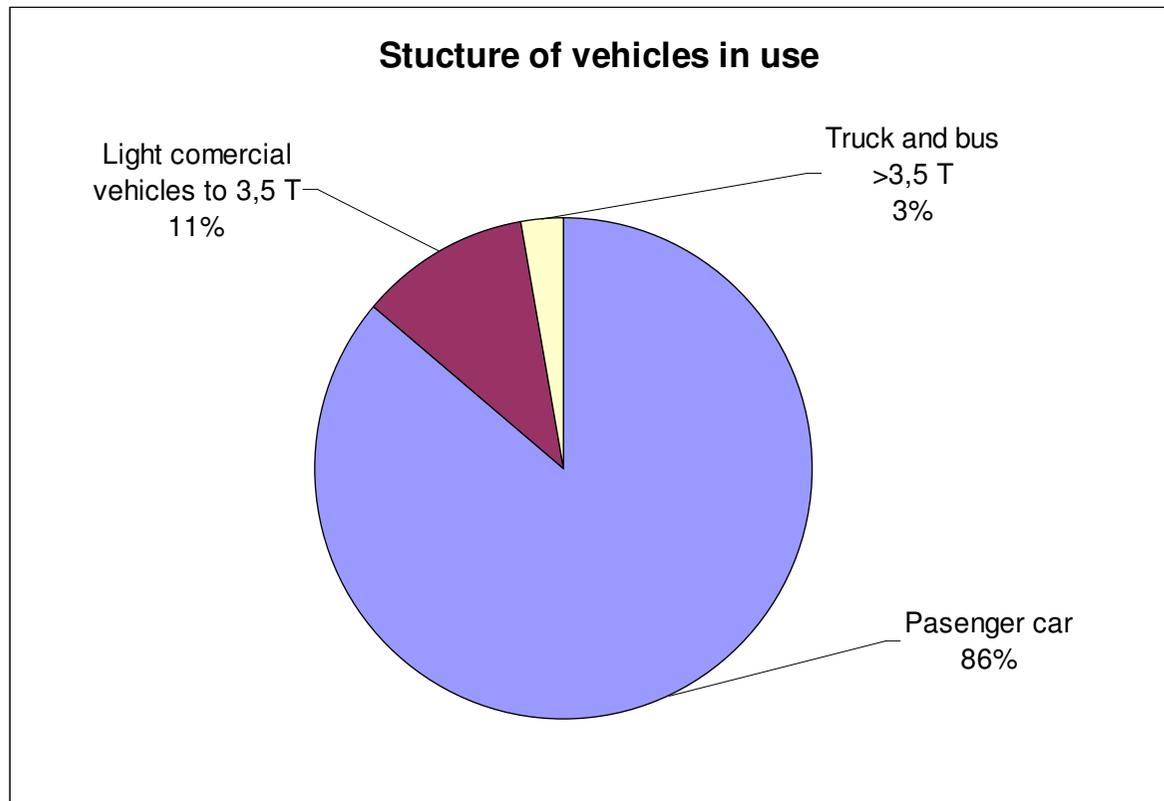
Objectives of the recycling system of end-of-life vehicles

- Collect **all** end-of-life vehicles.
- Collect and treat all end-of-life vehicles without endangering the environment.
- Reach expected by Directive 2000/53/EC levels: of reuse, recycling and energy recovery.



How many vehicles do we use and how do we divide them?

In 2007 in EU countries we have in use	262 911 783 data Anfac
In 2008	19 093 899 data Anfac
	24 145 788 data CEPIK
	21 336 913 data GUS
Number of insurance polices in Poland	16 766 043 data KNF



How many vehicles end their life each year?

- According to data taken from a study of GHK, 5.3 % of vehicles in use each year become end-of-life vehicles. On the basis of this rate, it may be established that in 2007 almost 13.5 million of vehicles become ELV in the EU.

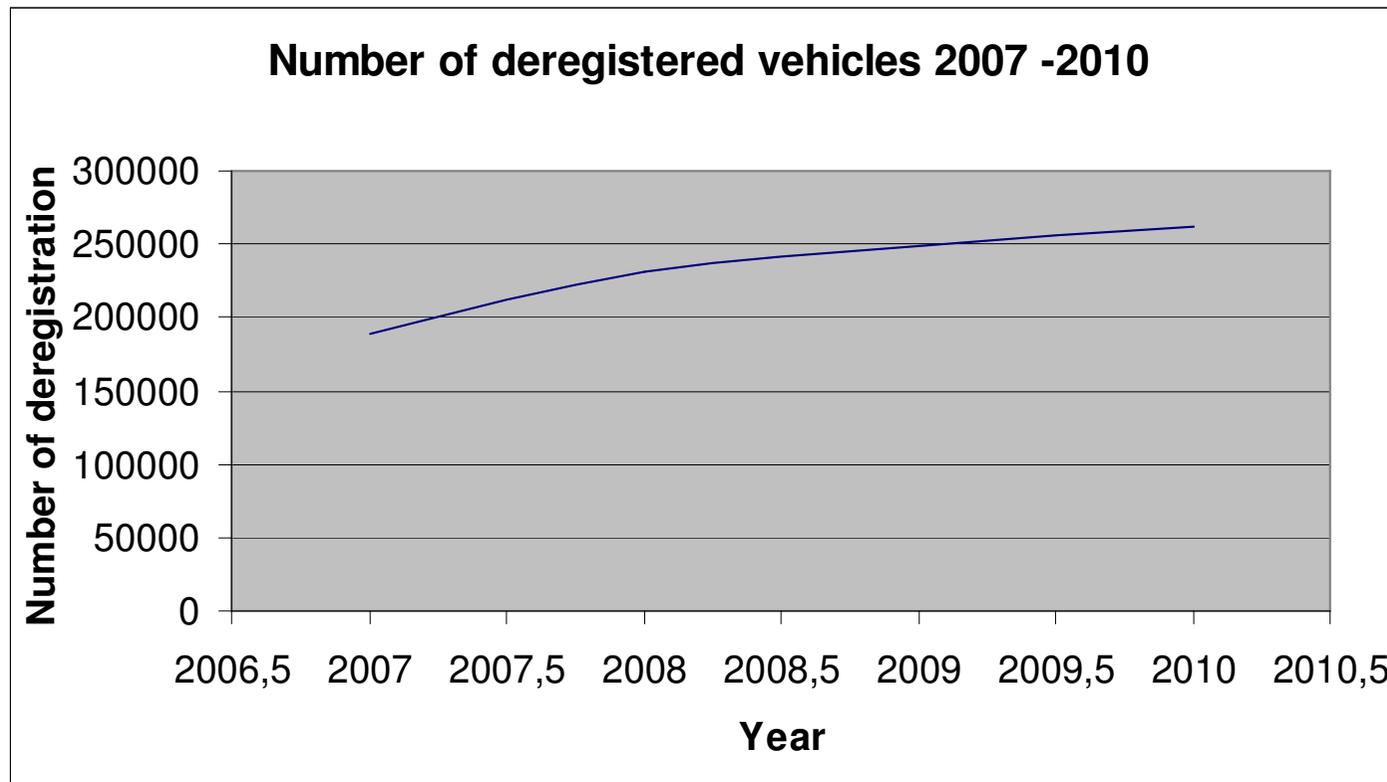
- In Poland accordingly to data we ought to have:

19 093 899 data ANFAC	1011977 ELV
24 145 788 data CEPIK	1279727 ELV
21 336 913 data GUS	1130856 ELV
16 766 043 data KNF	888600 ELV



How many end-of-life vehicles do we collect?

- According to the comparison of annual reports of particular countries of the European Union, prepared by the EU administration and published on 29 November 2009, which Paul FOX, president of EGARA, referred to on the IARC Conference in Basel in March 2010, in 2007 only 6.5 million of vehicles in EU countries found their way to the recycling system. This means that 7 million of vehicles did not end up in the recycling system. More than half of end-of-life vehicles did not end up in the system.
- In Poland



Why do not all vehicles find their way to the recycling system?

- Countries which export used-up vehicles do not account for their management!
- Dismantling stations cannot compete with conditions which end users are offered by the grey zone collecting end-of-life vehicles.
- The grey zone has fewer obligations:
 - it does not keep a special record of waste from end-of-life vehicles,
 - it is not obliged to achieve certain recovery and recycling levels,
 - its functioning is not so thoroughly defined as that of dismantling stations, so the most frequent result of an inspection is the sentence: “no dismantling of end-of-life vehicles has been established during the inspection”.
- Large enterprises have a too large influence on created law and state administration.
 - In the EU, Decision 2005/293/EC justifies failure to fulfil the obligation set forth in Directive 2000/53/EC to collect all end-of-life vehicles with a stipulation that vehicles which did not end up in dismantling stations shall be considered as reused.
 - In Poland, the work on preparing a regulation stating when a vehicle becomes waste have been continuing since 2003.
 - In Poland, insurance companies and their clients are not disturbed by the fact that the price offered for destroyed car includes not only the value of the remains but also of the vehicle's documents.
 - In Poland, the system of collecting data on the influence of shredders on the effectiveness of the recycling system is leaky.

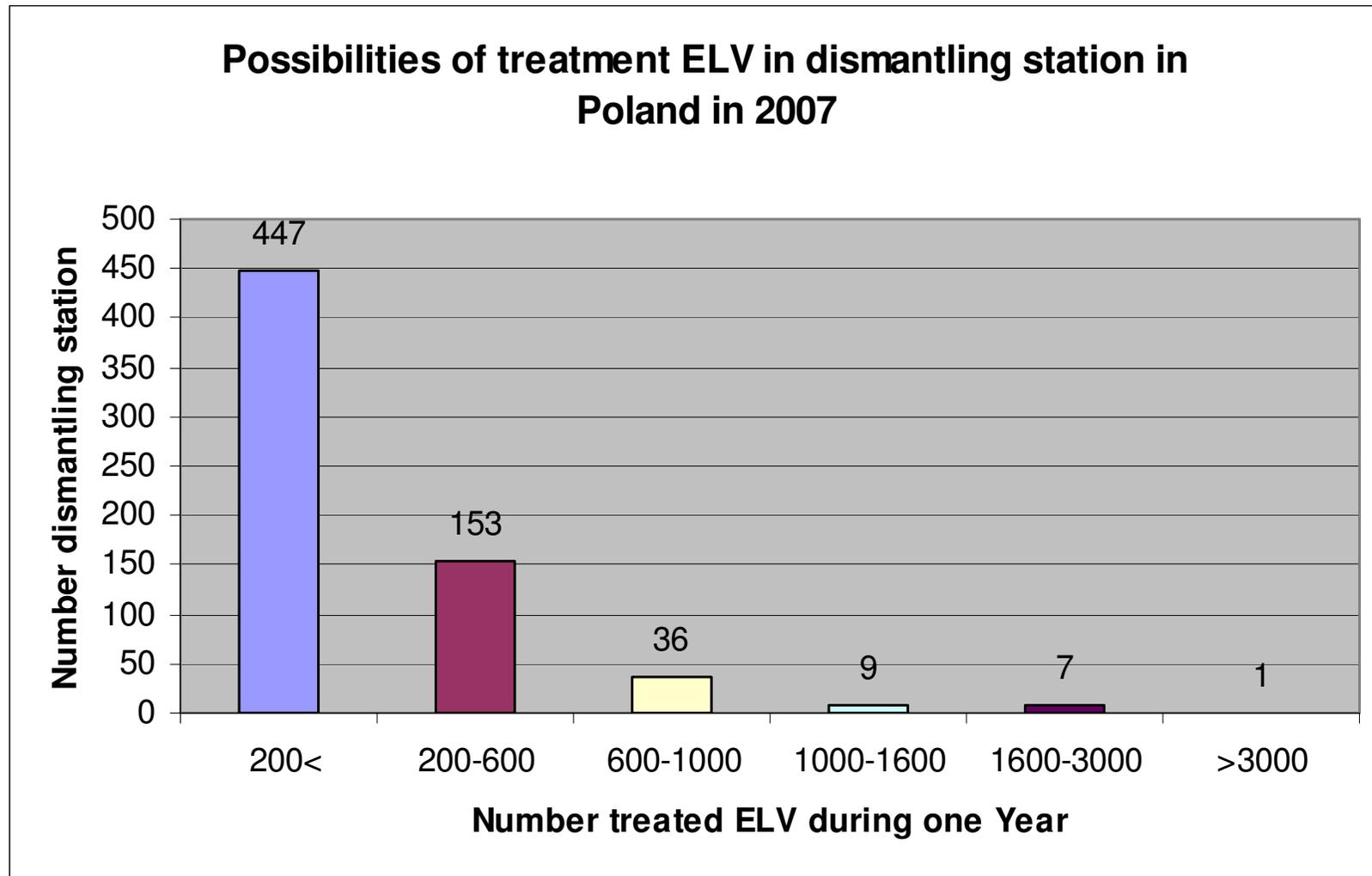


How and what does illegal treatment of end-of-life vehicles influence?

- Threat to and pollution of the environment with dangerous waste from vehicles are increasing. It should also be noted that water resources in Poland are rated among the lowest in Europe. The contribution of dangerous waste from vehicles to the pollution of water resources in Poland is larger than in other EU countries.
- The profitability of operating dismantling stations is decreasing. Dismantling stations have a low degree of work mechanisation. Operating costs of dismantling stations are high.
- We have a too thorough system for controlling dismantling stations and almost no system for controlling and exercising influence on the grey zone.
- We do not have data on the management of most of produced waste, including dangerous waste.

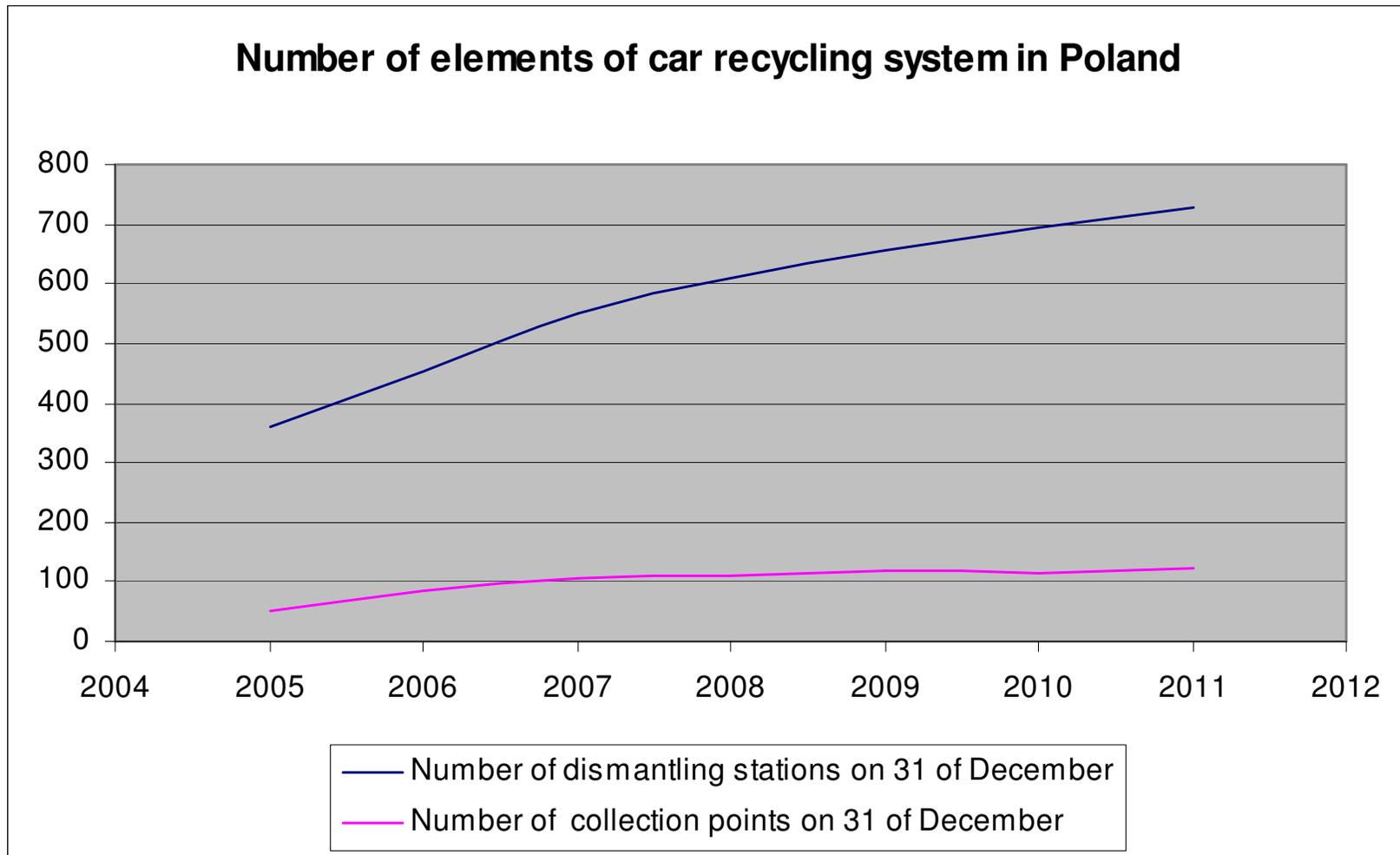


Possibilities of treatment ELV in dismantling station in Poland in 2007



Data MSWIA

Changes at number of elements of car recycling system in Poland



Assessment of the current state of the recycling system development

- In the entire European Union, there are no instances of developing a model vehicle recycling system.
- A **no-cost** environmental protection system does not exist.
- Environmental protection generates costs. Therefore there is the grey zone which does not bear the costs of environmental protection.
- A recycling system in which leader of dismantling stations bear main responsibility for the functioning of the system and business risk has no chances of development.
- A full picture of the waste and material flow may be acquired only by collecting data from all entrepreneurs operating within the vehicle recycling system.
- Only in Poland, one of the largest operators concerned with vehicles does not have specific obligations within the vehicle recycling system — insurance companies.



Does recycling of end-of-life vehicles have any chances of development?

- In Poland, over 1 million of end-of-life vehicles are to be managed annually.
- Material recycling is becoming increasingly competitive, as compared to acquiring materials from metal ores (natural resources).
- For a long time, Poland will continue to be a place where a considerable number of vehicles from Western Europe end their lives.



Proposed directions of actions aiming at the development of the vehicle recycling system

- Directing all end-of-life vehicles to the system by:
 - implementing a system of incentives for giving vehicles to dismantling stations only;
 - increasing the level of observance of law with regard to managing end-of-life vehicles.
- Linking insurance companies with the recycling system in order to remove barriers making it impossible to collect all vehicles and increase the degree of reuse of parts.
- Refining the system of recording waste in order to continuously monitor the effectiveness of the system:
 - Taking into account the shredding test when accounting for the weight of car waste.
 - Placing emphasis on correct management of operating fluids.



Poland has exceptional chances of the development of the car recycling system and should take advantage of them!

- In Poland, the threat with petroleum derivatives is very high due to water resources which belong to one of the lowest in Europe and worldwide.
- Therefore, effective control of the end-of-life vehicle waste management is necessary.
- In Poland, there are exceptionally advantageous conditions for the development of vehicle recycling on a large scale.
 - Large number of end-of-life vehicles.
 - Large dissemination of economic entities and low investment expenditures facilitate quick technology changes
 - Relatively low salaries
 - Search for specialisation for the development of the industry
 - Geographical location
 - Size of the country

