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Consumer Electronics Association

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Consumer Electronics Association (CEA)<sup>®</sup>

CE Industry Activity and Trends

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# Consumer Electronics Association

- Represents more than 2,000 companies in the \$208 billion U.S. consumer electronics industry
- Membership includes component suppliers, device manufacturers, retailers, distributors and service providers



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# Electronics Recycling – The Big Picture

- Significant material recovery potential
- Improper disposal in developing countries
- Consumer electronics evolve quickly
- High priority for consumer electronics industry, but challenging
  - Electronics products are widely distributed
  - Collection depends on consumer behavior
    - Consumers own these devices until they dispose
  - The CRT market

# State Laws and Electronics Recycling

- Now 25 states with some form of e-waste mandate
  - First state was California with financing based on consumer fee
  - The next 24 states enacted producer responsibility laws (i.e., cost internalization) in many forms
- No two states are the same
  - A challenge for compliance, operations

# Consumer Electronics Industry Issues

- A national approach is critical
  - Variation in state mandates is a long-term problem
  - Recycling should be viewed as a component of a company's business model
  - A national operational model is what is needed
- An industry-led approach is the ideal

# The Voluntary Challenge: eCycling Leadership Initiative

- Announced April 13, 2011 at the Best Buy store on Wisconsin Avenue
  - Announcement participants in person or by statements of support: Samsung, Dell, Sharp, HP, Sony, Panasonic, Toshiba, Best Buy
  - The first industry-wide and nationwide recycling initiative of the consumer electronics industry.
  - The Billion Pound Challenge



# Guiding Principles (Voluntary)

- Electronics should be recycled responsibly
- National solution for a national problem
- All parties must be held to high industry standards
- Recycling programs should be convenient for the public

# The eCycling Leadership Initiative

- Commitment to recycling **quality and quantity**
- Increase **opportunities** for consumers to recycle consumer electronics
  - Now sponsoring more than 8,000 permanent collection sites nationwide
  - Invest in improving collection infrastructure





# The eCycling Leadership Initiative (cont)

- Increase **awareness** of collection opportunities among consumers
  - 58% knew where to recycle electronics (2010)
  - Up to 63% know in 2012
  - GreenerGadgets.org, PSAs, curriculum (YMI)
- Report **progress** annually
  - CEA second annual report published in 2013
    - 585 million pounds recycled in 2012
    - More than 99% recycled is 3<sup>rd</sup> party certified



# Progress & Challenges

- Will we get to a billion pounds in 2016?
  - Probably, but still a stretch goal
    - Would require 15% annual increases
    - Most recycling costs are going up
  - Collection pounds at existing locations: still increasing?
  - Rate of increase of collection locations is slowing
- Expansion of state patchwork has slowed to a crawl
  - eCycling Leadership Initiative has filled some of the void

# Another Challenge: CRTs

- Demand of CRT glass is waning
  - Glass to glass recycling on the decline
  - Lead smelter demand holding steady
- Recent studies on CRT management and stockpiling
- Landfill bans in 19 states
  - Also CRTs from fed government sources

# CRTs (cont)

- New glass processing capacity?  
Landfilling?
- Need more applications for CRT glass
- CEA Crowdsourcing Challenge on CRTs
  - In 2011/2012 with EDF
  - In 2013 with ISRI
- Still probably a decade of significant CRT flows into the recycling/SW stream

# Trends: Electronics Recycling Laws

- No new states since 2012
  - Scalable prototype law just enacted in SC, amended law passed in 2010
  - Could provide a model for federal authorization
- “Churn” of existing laws to keep up with changes in product scope, markets, implementation
- Discussion of export legislation (Congress)

# Trends: Material & Product Flows

- Getting close CRT flow peak
  - Computer monitor CRTs already have peaked
  - TVs probably during the next couple years
- Less material going into new products
- Moving to mobile devices
- Change is a constant

# Trends: Recyclers

- Recycler Third Party Certification nearly ubiquitous
  - R2 has more than 300 facilities in the US
  - eStewards has more than 150
- “Compliance market” growth and challenges
  - Tough for smaller recyclers
- Trade-in market for mobile devices

# Industry Strategic Vision

- Long term vision for our industry:
  - Integrate recycling into company business models, not just a compliance issue
- Long term vision for consumers:
  - Make recycling used electronics as easy as buying new ones





# For More Information....



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