

ENVIRONMENTAL STEWARDS,
JOB CREATORS, ECONOMIC LEADERS

www.isri.org



Voice of the Recycling Industry

Institute of
Scrap Recycling
Industries, Inc.

The State of the U.S. Electronics Recycling Industry

Eric Harris – ISRI

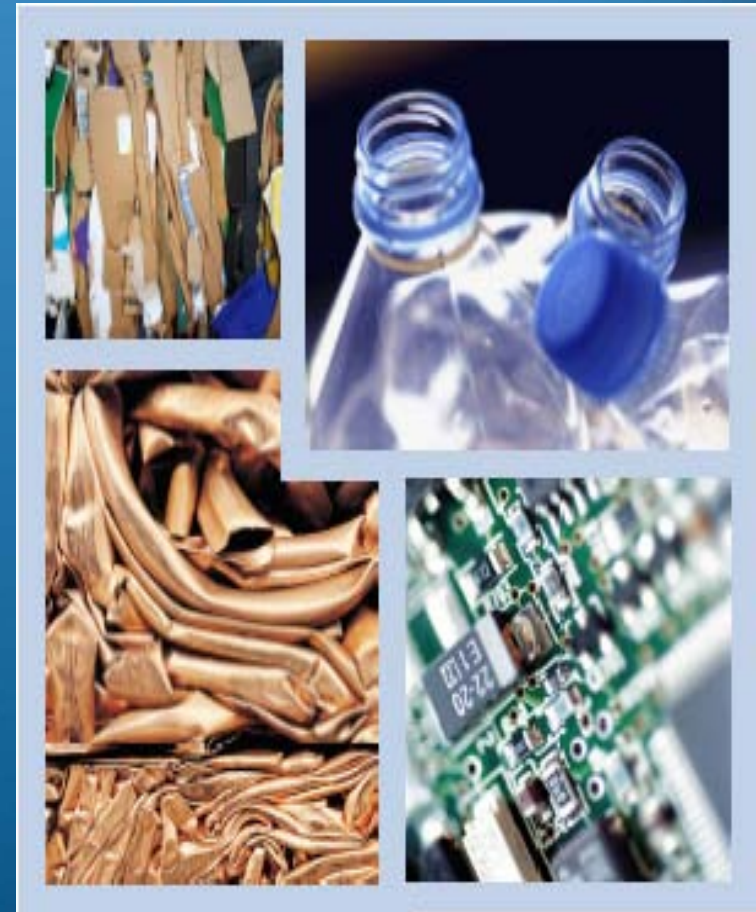
Metropolitan Washington Council of Governments
Recycling Committee January 19, 2012

Presentation Overview

- ISRI Overview
- Electronics Recycling Policies
- IDC Survey
- Key Findings
- Export Ban, Bad Idea

ISRI - Process, Broker & Consume

Over 1,650 member companies,
5000+ facilities that process,
broker & consume scrap metals,
paper, plastics, glass, textiles,
electronics and rubber.



ISRI & Electronics Recycling

- Represent ~ 400 companies that process, broker or consume electronics scrap
- Robust, Electronics Division
 - advocacy/policy development
 - standards and certification
 - commodity specifications
 - education and training
- Fastest Growing Segment

ISRI's Electronics Domestic Policy

In 2005, created a domestic policy that promotes–

- Producer Responsibility
- Design for Recycling®
- Specification Grade Commodities
- Landfill Bans
- R2/RIOS®



www.CertifiedElectronicsRecycler.com

ISRI's Electronics Export Policy

In 2010, created an export policy that is—

- Socially-responsible
- Protects worker health and safety
- Ensures environmentally sustainable practices globally

ISRI's Electronics Export Policy

- Free and Fair Trade of Specification Grade Commodities
- Bans Exports for Land filling
- Tested, Working for Direct Reuse
- Data Sanitized, Purged or Destroyed
- Packaged and Transported to Protect Human Health and the Environment
- Downstream Due Diligence for Any Facility Located Outside of the United States
 - Must be legal to export and import

IDC Survey

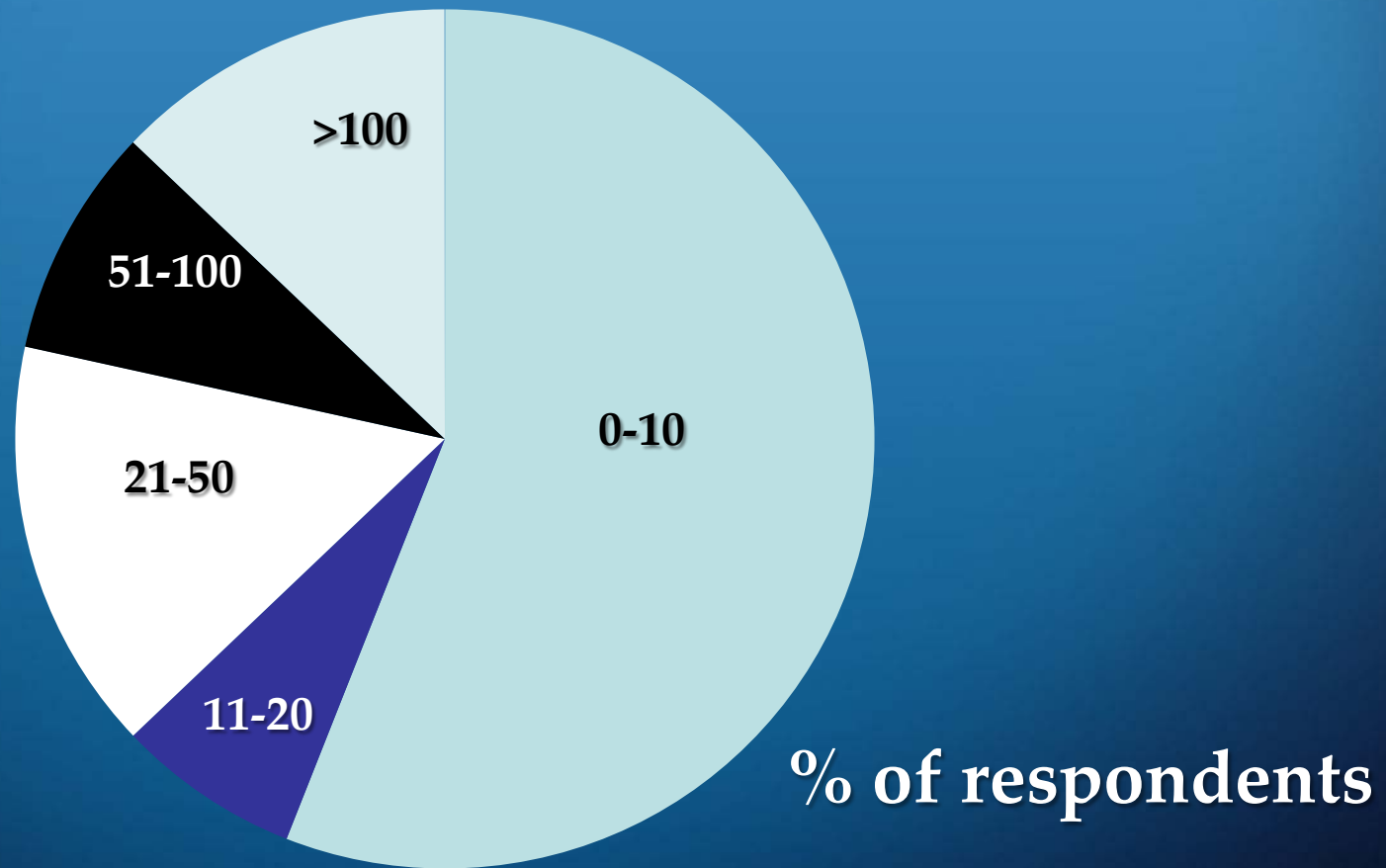
- **Conducted by International Data Corporation**
–independent, global market researcher
- **Survey participation provided a statistically accurate and comprehensive representation of the market**
- **Survey data and IDC industry data used to estimate industry metrics**

Company Profiles

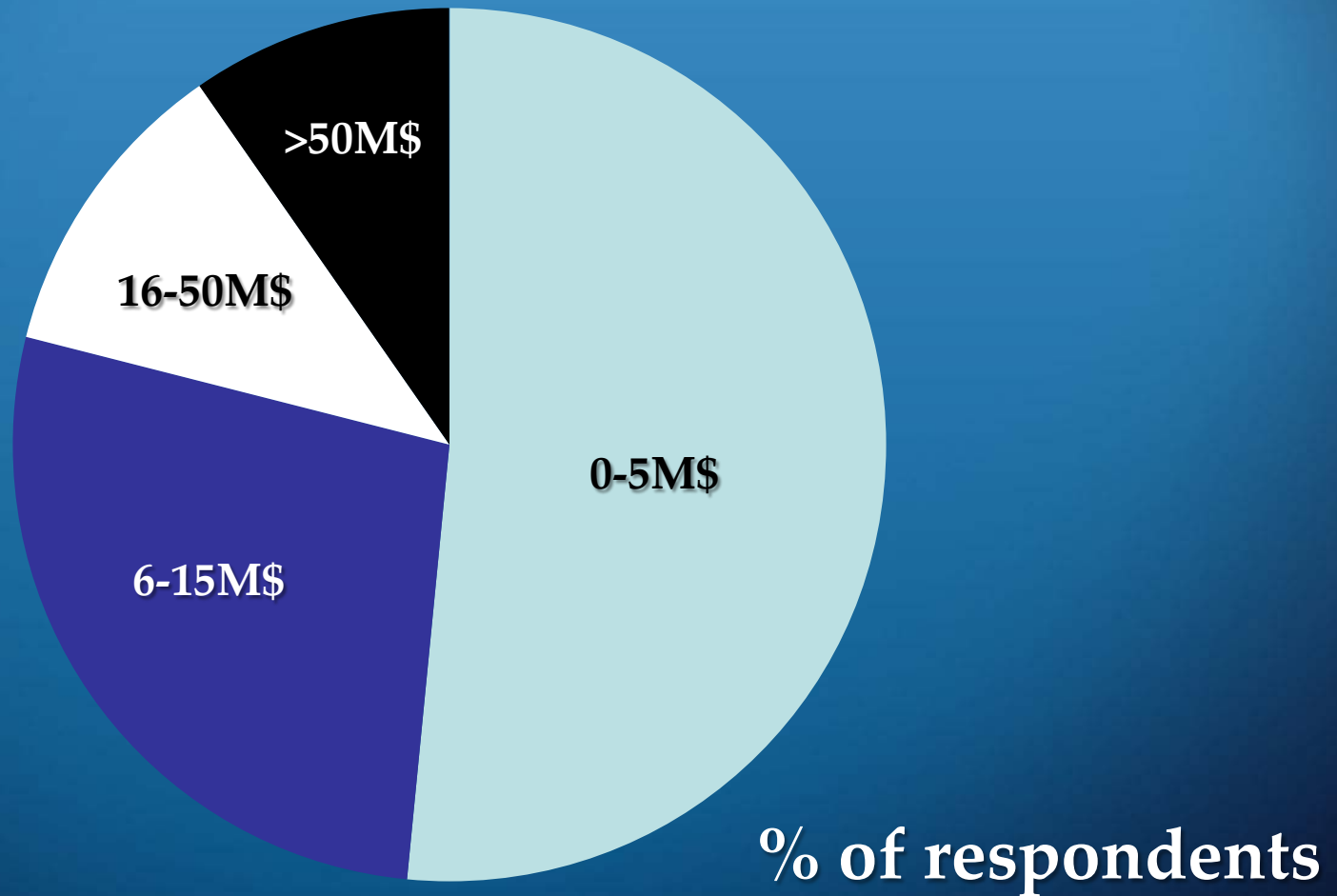
- **Survey Respondents – 182 U.S. organizations**
 - **57% Electronics Recyclers**
 - **16% Scrap Recyclers**
 - **4% OEMs**
 - **16% Not-for-Profit Organizations**
 - **7% Other**
- **50% ISRI Members/50% Non-Members**
- **All regions of the U.S.**
- **Large, Medium, and Small companies**

Full Time Employees (FTEs) – 2010

(Electronics Recycling Operations)

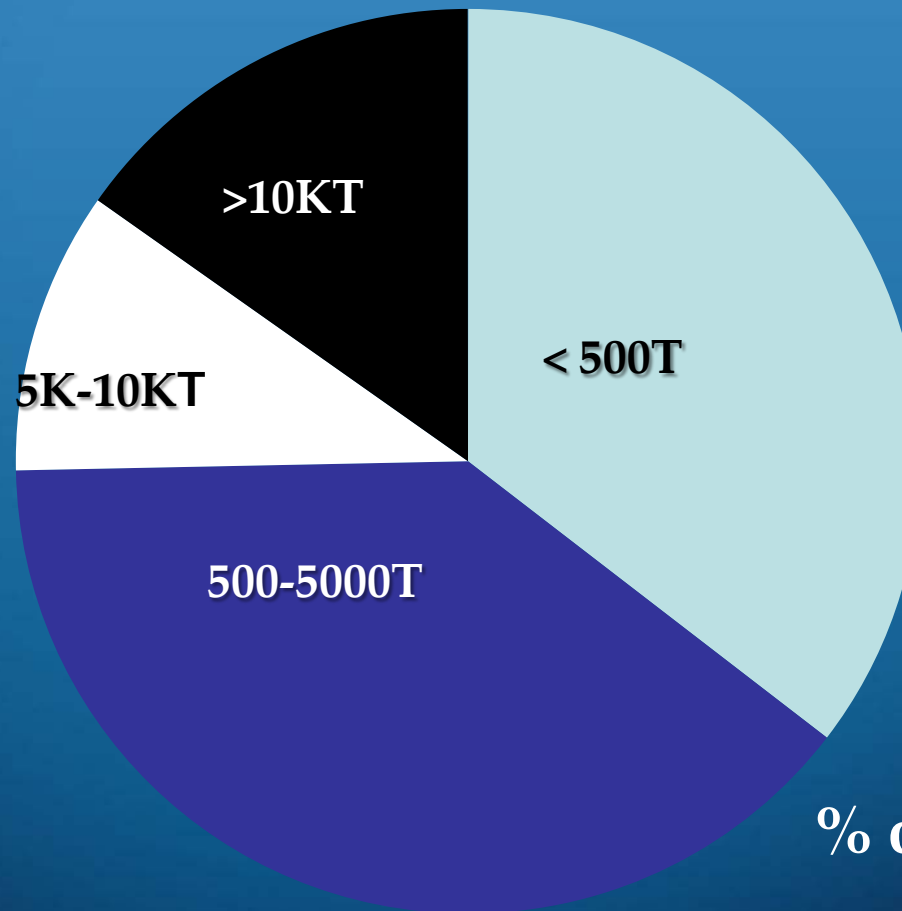


Electronics Recycling Revenue - 2010



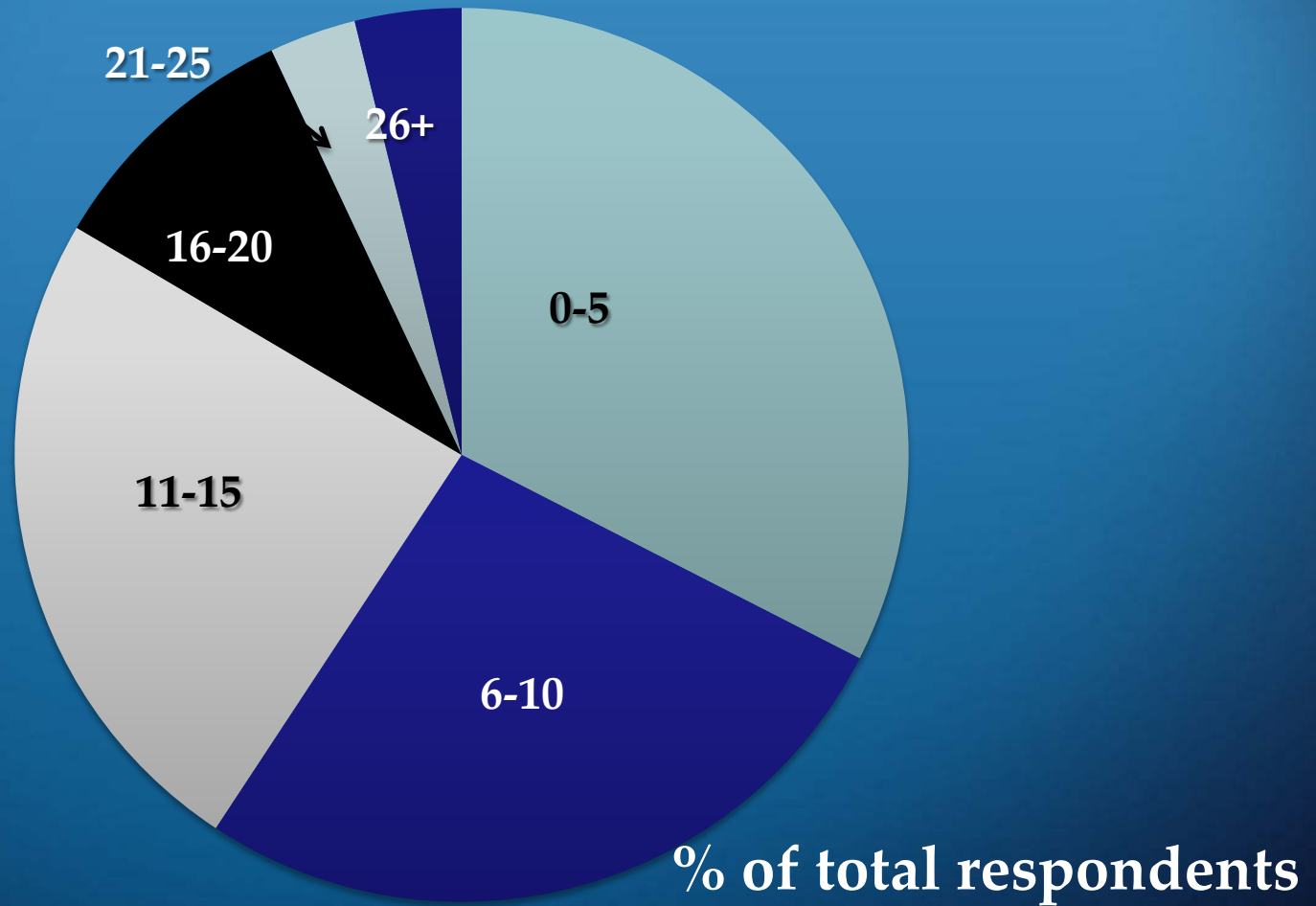
2010 Input Volume of Electronics Processed

(U.S. short tons)

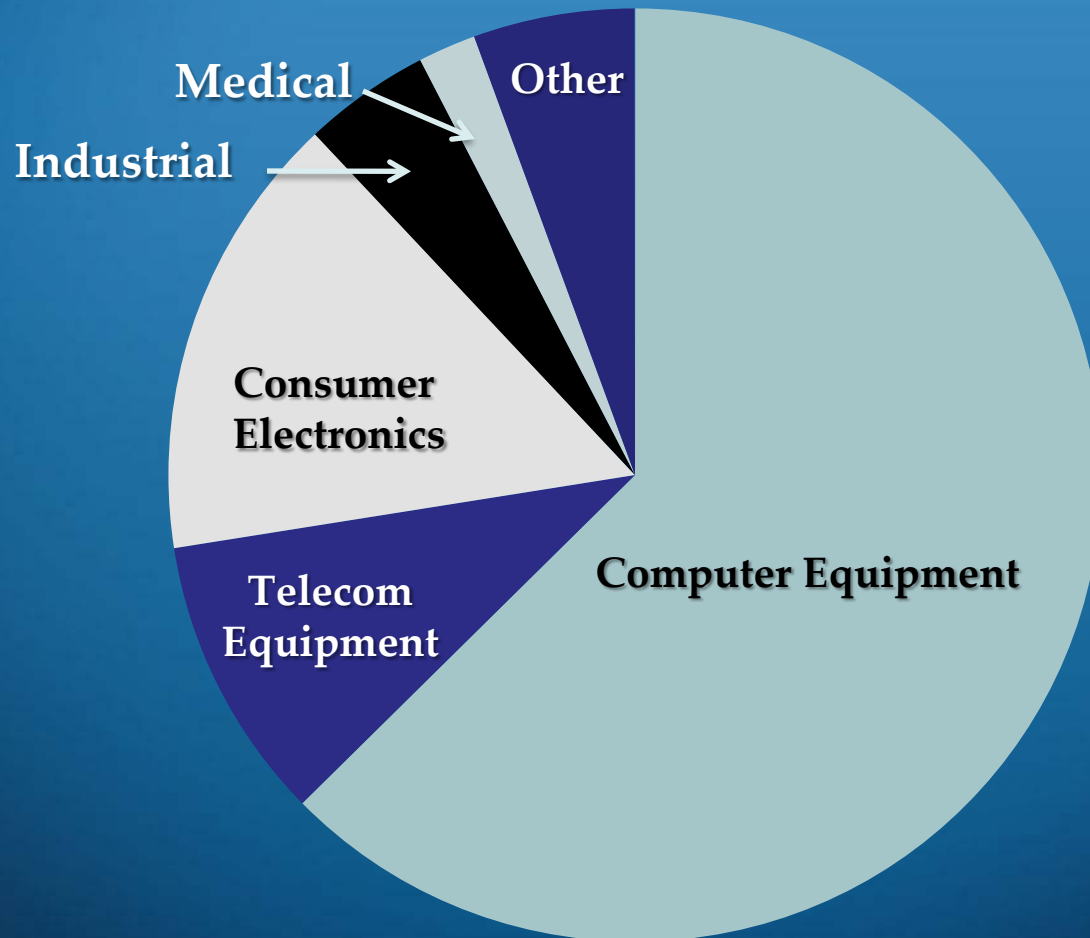


% of respondents

Years in the Electronics Recycling Business

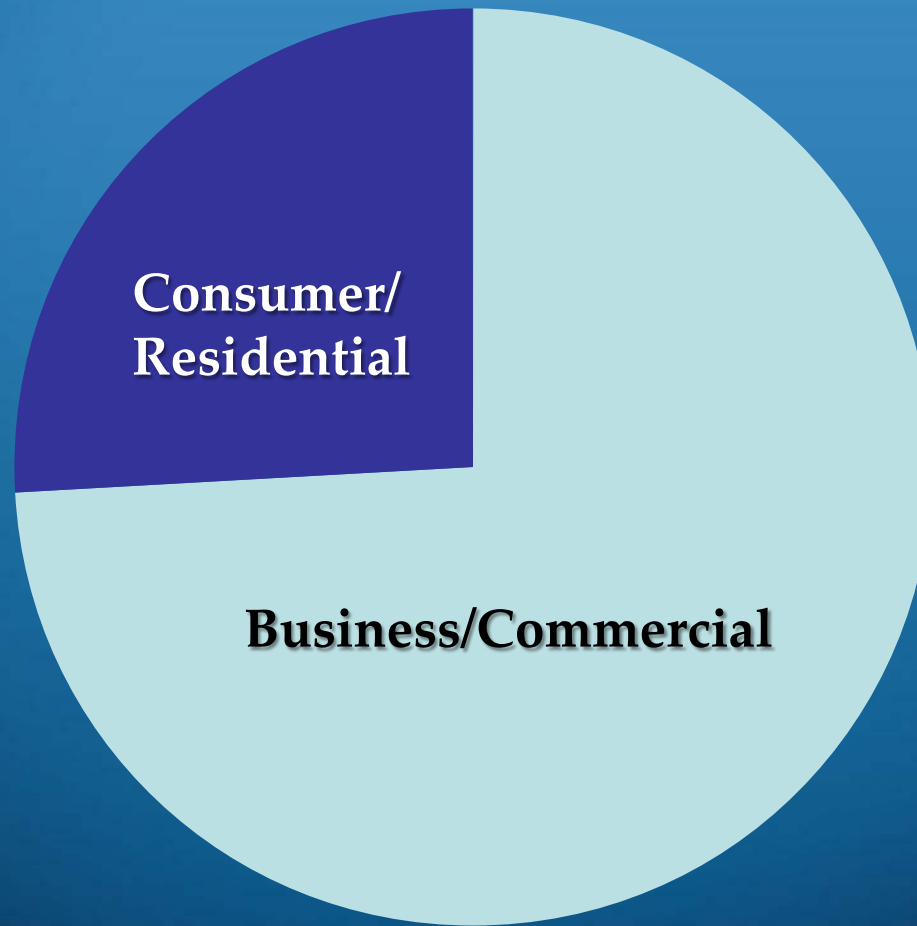


Types of Equipment Recycled



% by Weight

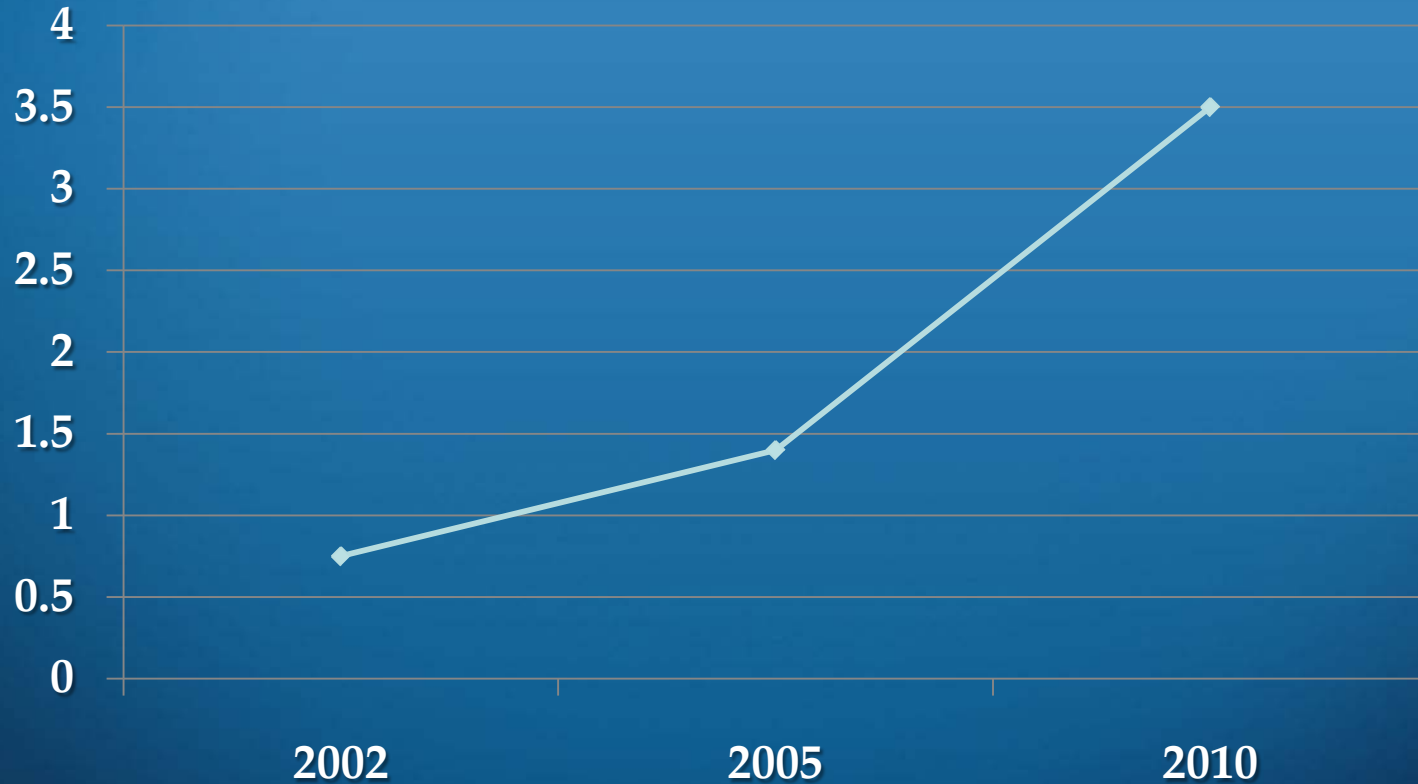
Sources of Equipment



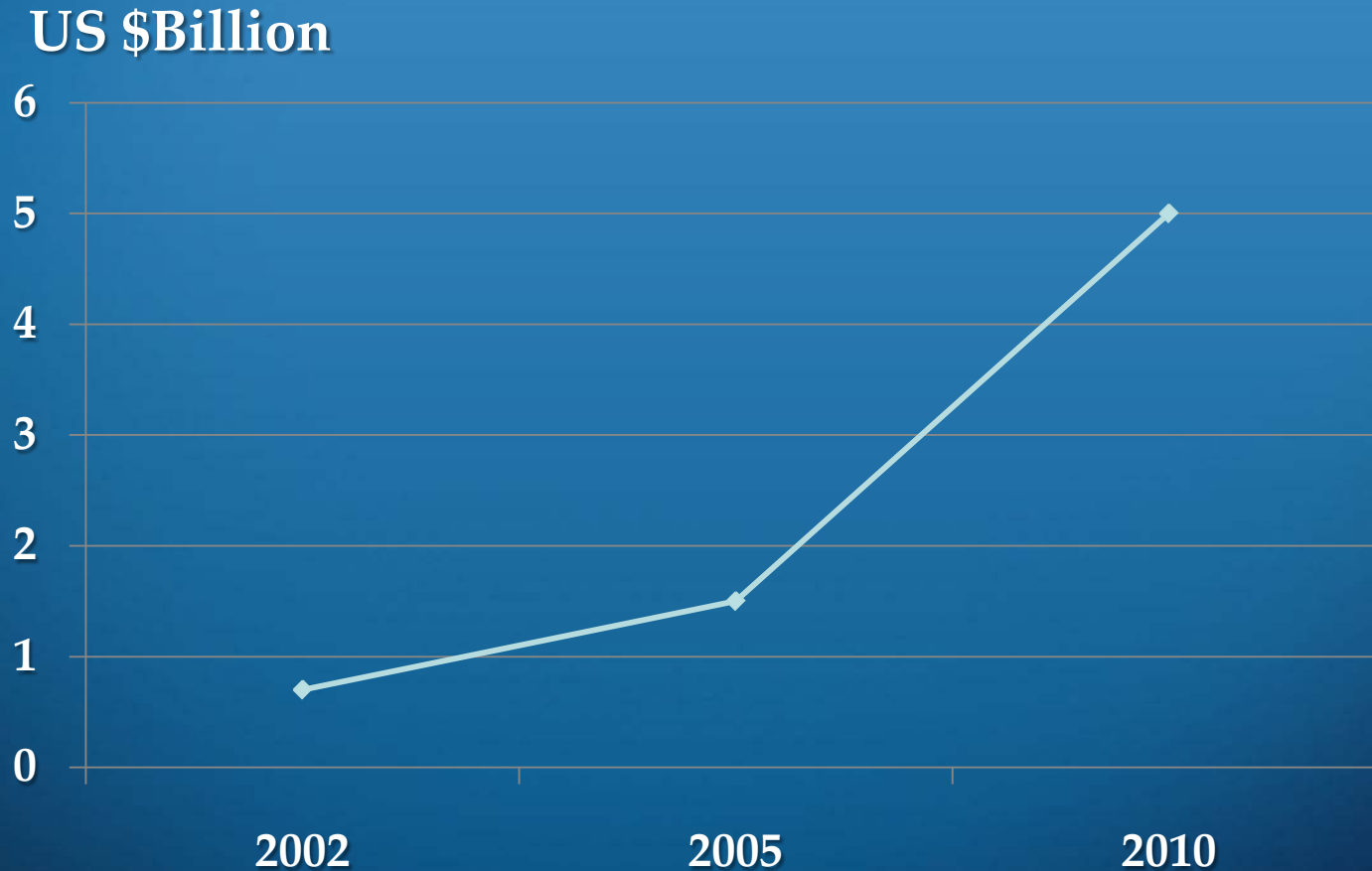
% by Weight

Total Volume of Electronics Recycled (U.S.)

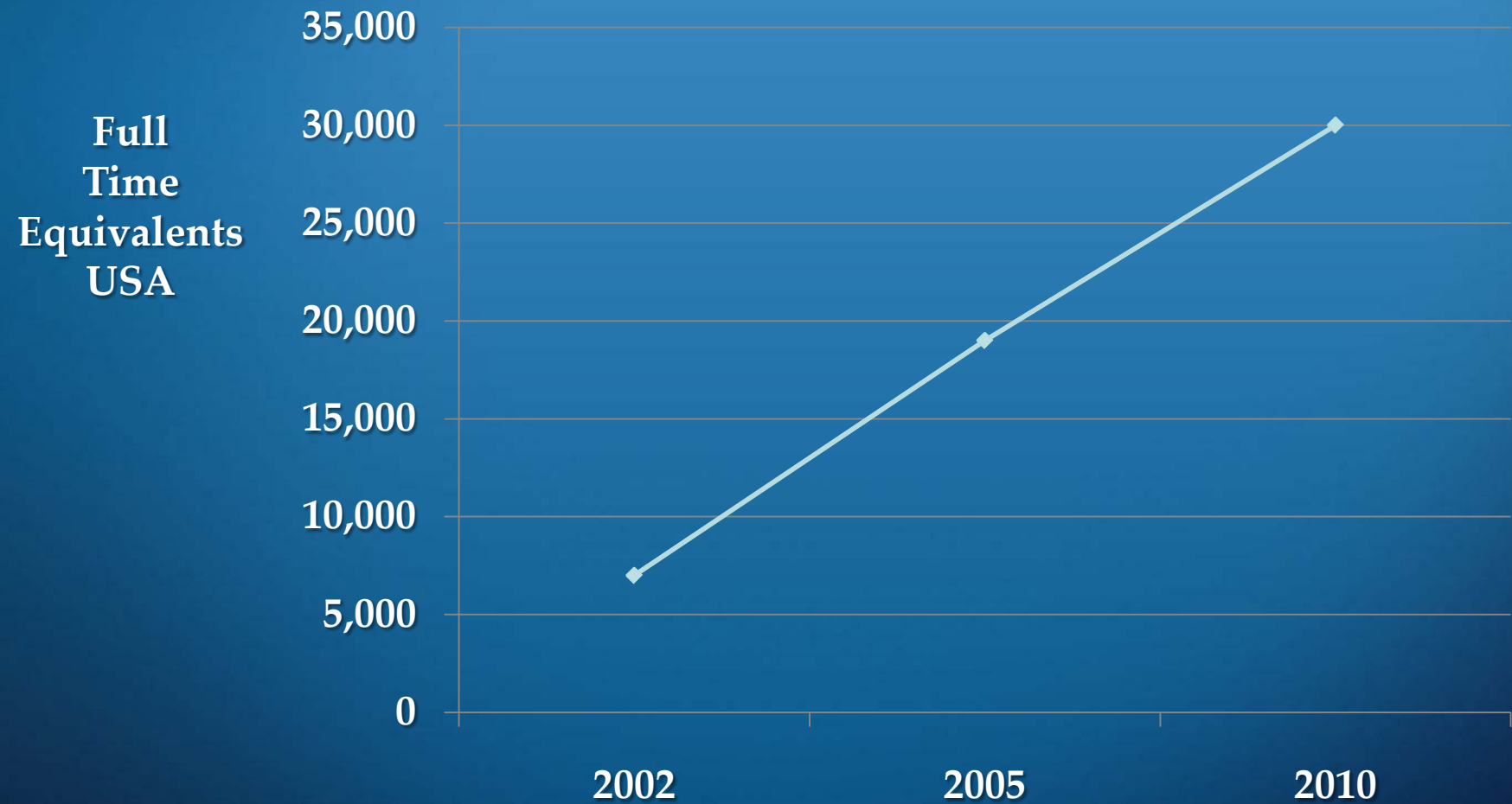
M Tons



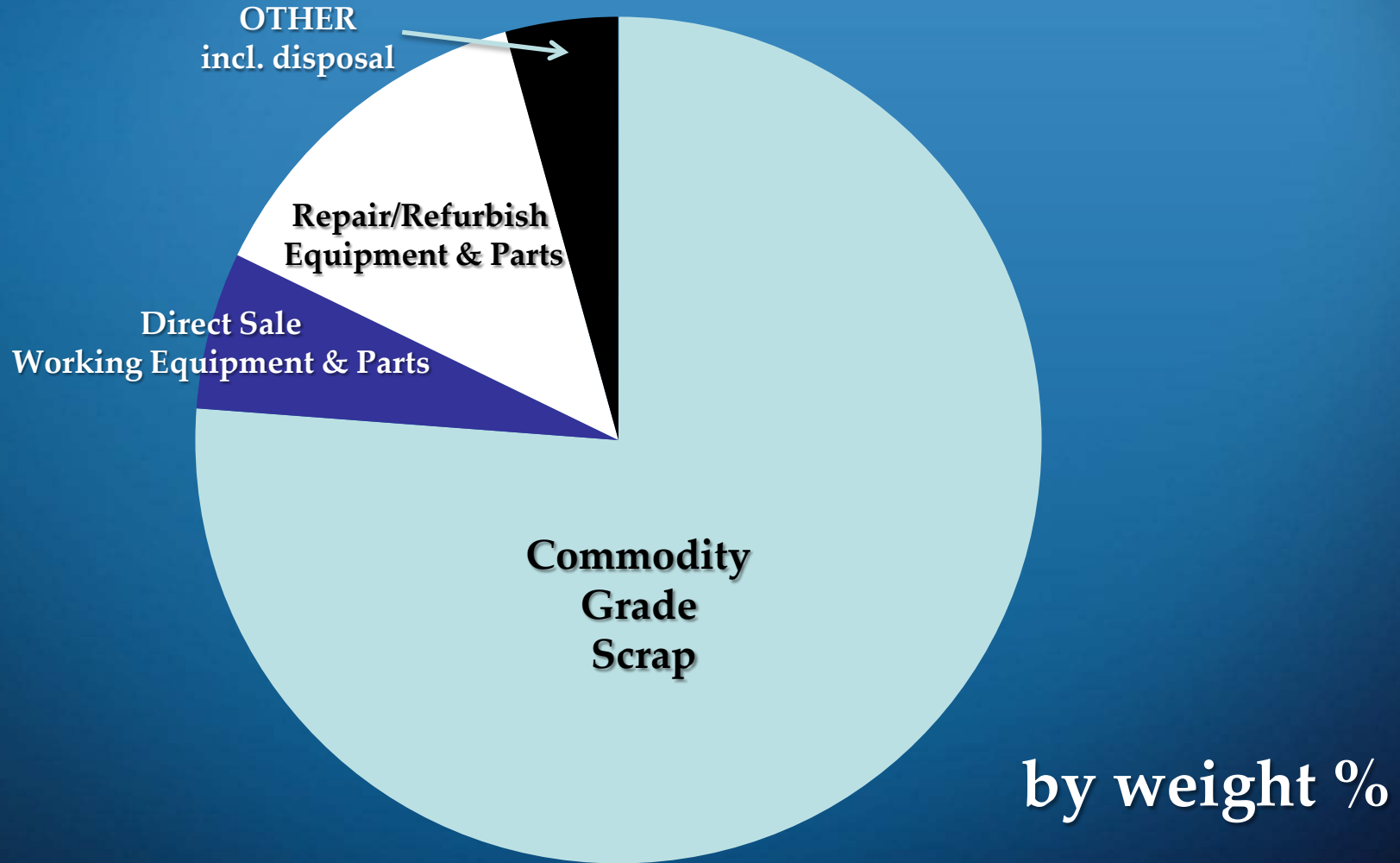
Electronics Recycling Revenue – Trend (U.S.)



Full Time Employees in Electronics Recycling



Outputs of Electronics Recycling in the U.S.



OEM Perspectives

- **Priorities for Selecting a Recycler**
 - Downstream due diligence
 - Data & facility security
 - Pricing
 - Third party certification
- **Certification Preferences for selecting Recyclers**
 - R2/RIOS™ most frequently cited



Key Challenges

- **For Electronics Recycling Companies**
 - Cost of operations
 - Securing supply of equipment
 - Markets for commodities and products
- **For Electronics Recycling Industry**
 - CRT glass markets
 - Legislation/regulations
 - Consumer electronics

Estimates of total U.S. Industry (2010)

- Volume Processed ~ 3-4M tons
- Gross Revenue ~ US\$5 billion
- Employment (FTE) ~ 30,000 (up to 45,000)
- CAGR ~ 20%

Key Findings for U.S. Market

- Quick growth and more growth
- Incentives needed for household electronics
- Premium standards, R2/RIOS™, on the rise
- Electronics are recycled in America, not “dumped” overseas

Export Ban: Bad Idea

- **The ban is not needed: 80% myth is just that, a myth**
- **Violates US trade obligations under GATT and WTO**
- **Dangerous RCRA Precedent for Products and Recyclables**
- **Major Carve-out for OEMs**

Promote Sustainable Recycling Globally

ISRI condemns “sham” recycling and illegal exports.

ISRI's commitment: electronics recycling must be done right anywhere and everywhere in the world.

Thank You

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