n 2005, the electronics recycling world looked a bit different than it does today. OK, that might be a bit of an understatement.

We started that year with two states – California and Maine – having already passed very different approaches to financing programs (fitting that they were on opposite coasts), and the industry itself, while growing every year, was still predominantly made of smaller firms. The industry association at the time – the International Association of Electronics Recycling (IAER) – conducted a survey in 2005 and found that there were over 500 electronics recycling operations in the U.S., and a majority of them processed less than 5 million pounds per year.

It was also in 2005 that the National Center for Electronics Recycling (NCER) was formally established, so it seems appropriate to celebrate our first 10 years with a look back on the major developments over the last decade.

Hopes for national policy

The NCER was formed to pick up on some of the discussions and ideas that were developed during the National Electronic Product Stewardship Initiative (NEPSI), which was a multi-stakeholder dialogue convened by U.S. EPA between 2001 and 2004. Although the ultimate goal of NEPSI – a comprehensive national recycling program that included a financing mechanism – was not achieved, there were many areas of agreement on basic elements of a program.

In addition, stakeholders agreed more could be done to gather data, spread best practices and foster initiatives to enhance the nation’s e-scrap infrastructure, perhaps through a national third-party organization that would ultimately manage a national system. The original idea behind NCER was to pick up on these areas of agreement, and, thanks to funding from a federal grant through West Virginia University, the organization kicked off on a mission to do just that.

Despite the lack of a federal agreement, there was another significant event on the national level in 2005. EPA hosted a national meeting on the key issues at the time, which involved months of planning ahead of time. The participants were asked to work on specific project areas, and NCER came away with a few data initiatives and a closer look at how a third-party group could operate. The biggest outcome of the meeting, however, was
the identification of a need to develop a new certification for electronics processors that could be backed by a large group of stakeholders, including EPA. This led to many years of meeting and the ultimate R2 and e-Stewards split.

Also in 2005, major changes in the markets for CRT glass were already being seen as domestic production was almost gone with the closing of plants run by Thomson, Corning-Asahi and Technglas in 2003 and 2004. Although these moves were not surprising with the transition to flat panel displays, it had an impact on the markets available and their distance to various key players.

The IAER report in 2005 noted that computer equipment was the dominant type of equipment processed, and the majority of the volume came from business and government agencies. Meanwhile, on the consumer program front, the collection efforts undertaken by Minnesota’s Hennepin County were seen as a model for high collection volumes – the county’s 2004 per capita collection total was 3.4 pounds.

In the policy world in 2005, the state laws in California and Maine would set the stage for a debate that would last several years and get played out in numerous state legislatures. California had ushered in a system based a recycling fee paid by consumers of new products, while Maine’s e-scrap law relied on producer responsibility (called “limited” at the time). Those two laws passed before 2005, but more than 20 other states would introduce legislation on electronics recycling that year, and six states completed or had ongoing study committees. Maryland was the only state to pass a law in 2005, and, interestingly, it was developed after a study committee recommended no state action.

Familiar challenges alongside fresh pathways

Several of the issues in front of us in 2015 were also talking points a decade ago. The first is the difficulty with properly managing CRT glass. Some observers boldly predicted that CRT glass would be gone from the recycling market by now, but the legacy of CRTs continues to present an enormous challenge to the industry due to the glut of glass appearing without new CRTs to produce.

In addition, although many companies in the industry have come and gone, there are numerous smaller firms that are still active in 2015, and we haven’t seen consolidation to the point where the industry is made up of just a handful of companies. There are certainly a number of companies handling larger volumes than in 2005.

The adoption of new state laws, on the other hand, has slowed to a trickle. Instead of a rush to get laws implemented in 40 to 50 states, as some may have expected 10 years ago, we now seem to be stuck on 25. Those 25 states are continually updating and amending their programs to attempt to deal with challenges, but no new state has passed a law in over three years.

However, those laws have had a definite impact in increasing the number of collection opportunities for consumers. The state programs, along with voluntary collection efforts from retailers and other entities, mean that many more collection points are available to consumers than a decade ago, and many of these outlets offer collection for free.

The certification effort that was kicked off on a large scale 10 years has evolved and greatly affected the industry. Gaining R2 or e-Stewards certification has become a near necessity for companies looking to work under state laws or for manufacturer programs. Both standards have released updated versions within the last two years.

Finally, as far as NCER goes, we are definitely not the national third-party organization that may have been envisioned during the NEPSI discussion. NCER is active in managing systems under state contracts on both sides of the country, helping to manage programs in Oregon and Vermont.

And we are always looking for sources of data to gain a more complete picture of the electronics recycling infrastructure. In 2015 there remain many areas of the country where we know very little about how much is collected – and we know even less about where any collected material might be going.

Perhaps it will take another 10 years to finally have a grasp on some of these basic questions. ESN

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