

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	1
SCOPE OF THE REPORT	2
INTENDED AUDIENCE.....	2
METHODOLOGIES AND INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	3
RELATED BCC REPORTS	3
BCC ONLINE SERVICES.....	3
DISCLAIMER	4
 CHAPTER TWO: SUMMARY.....	 5
<i>SUMMARY TABLE GLOBAL PROJECTIONS FOR REVENUES FROM E-WASTE MATERIALS BY MATERIAL TYPE, THROUGH 2014 (\$ MILLIONS)</i>	 5
<i>SUMMARY FIGURE GLOBAL SALES PROJECTIONS FOR E-WASTE RECYCLING BY TYPE, 2008-2014 (\$ MILLIONS)</i>	 6
 CHAPTER THREE: OVERVIEW	 7
<i>FIGURE 1 U.S. MSW STREAM BY TYPE, 2009 (%)</i>	8
WHAT IS E-WASTE?.....	8
TRENDS IN INDUSTRY GROWTH.....	9
<i>FIGURE 2 GLOBAL E-WASTE GENERATED BY REGION, 2009 (%)</i>	10
HISTORY OF E-WASTE INDUSTRY	10
RECYCLING CHAIN.....	11
COLLECTION.....	11
DISMANTLING	11
END PROCESSING.....	12
DEMAND DRIVERS IN E-WASTE INDUSTRY	12
GROWTH IN ELECTRONIC EQUIPMENT USAGE	13
SHORTER PRODUCT LIFESPANS	13
<i>TABLE 1 AVERAGE LIFE SPAN OF SELECTED ELECTRONIC PRODUCTS (YEARS)</i>	 13
<i>FIGURE 3 GROWTH IN GLOBAL COMPUTER, CELL PHONE, AND DIGITAL CAMERA USAGE, 2004-2009 (MILLION UNITS)</i>	 14
TRANSITION TO THE DIGITAL ECONOMY.....	14
AFTERMARKET LOGISTICS TRENDS	15
<i>TABLE 2 SELECTED U.S. RETAIL/MANUFACTURING PARTICIPANTS IN RECYCLING PRODUCTS, 2009</i>	 15
<i>FIGURE 4 GLOBAL ELECTRONICS RECOVERY, RECYCLING, AND DISPOSAL PRACTICES, 2008 (%)</i>	 16
<i>FIGURE 4 (CONTINUED)</i>	17
RULES ON E-WASTE EXPORTS ARE BECOMING STRICTER	17
Hazardous Waste Laws.....	18
Costs of International Hazardous Waste Compliance	18

Global Materials Declaration.....	18
Level A and B Materials.....	19
<i>TABLE 3 GLOBAL MATERIAL DECLARATION: LEVEL A MATERIALS, 2007</i>	19
<i>TABLE 4 GLOBAL MATERIAL DECLARATION: LEVEL B MATERIALS, 2007</i>	20
CHAPTER FOUR: E-WASTE MARKET BY MATERIAL TYPE.....	21
IMPACT OF GLOBAL RECESSION ON MATERIALS MARKETS.....	21
OVERALL MATERIALS MARKETS.....	21
<i>FIGURE 5 COMPOSITION OF EOL ELECTRONICS (%)</i>	22
COMMODITY PRICING.....	23
Plastics.....	23
Silica Recycling.....	23
PROJECTIONS FOR GLOBAL SALES.....	23
<i>TABLE 5 GLOBAL SALES FORECAST OF E-WASTE MATERIALS BY MATERIAL TYPE, THROUGH 2014 (\$ MILLIONS)</i>	24
RECYCLED METALS.....	24
<i>TABLE 6 PROJECTED GLOBAL SALES OF RECYCLED METALS BY TYPE, THROUGH 2014 (\$ MILLIONS)</i>	25
ALUMINUM (AL).....	25
Pricing Trends.....	26
COPPER (CU).....	26
Pricing Trends.....	26
GOLD (AU).....	27
Pricing Trends.....	27
LEAD (PB).....	27
Pricing Trends.....	28
NICKEL (NI).....	29
Pricing Trends.....	29
SILVER (AG).....	29
Pricing Trends.....	29
STEEL.....	30
Pricing Trends.....	31
TIN (SN).....	31
Pricing Trends.....	31
ZINC (ZN).....	32
Pricing Trends.....	32
OTHER METALS.....	32
Antimony (SB).....	32
Chromium (CR).....	33
Mercury (HG).....	33
<i>TABLE 7 MERCURY SUBSTITUTES</i>	34
END MARKETS FOR RECYCLED METALS.....	34

<i>TABLE 8 ENERGY SAVINGS ESTIMATED BY THE USE OF</i>	
<i>RECYCLED METALS (%)</i>	35
RECYCLED PLASTICS.....	35
POTENTIAL MARKETS FOR EOL PLASTICS.....	36
<i>TABLE 9 POTENTIAL MARKETS FOR EOL PLASTICS EXTRACTED</i>	
<i>FROM ELECTRONICS</i>	36
<i>TABLE 9 (CONTINUED)</i>	37
CREATING PURE PLASTIC FROM RECYCLED MATERIALS.....	37
THE RECYCLED PLASTICS MARKET.....	37
<i>TABLE 10 PROJECTED GLOBAL SALES OF RECYCLED PLASTICS</i>	
<i>BY TYPE, THROUGH 2014 (\$ MILLIONS)</i>	38
ABS	38
Pricing Trends	38
EPOXY	39
Pricing Trends	39
PC	39
Pricing Trends	39
PC/ABS	39
Pricing Trends	40
PE	40
Pricing Trends	40
PPE/HIPS OR PPO	40
Pricing Trends	40
PS (INCLUDING HIPS)	40
Pricing Trends	40
PVC	41
Pricing Trends	41
OTHER RESINS	41
Pricing Trends	42
RECYCLED SILICA	42
<i>TABLE 11 PROJECTED GLOBAL SALES OF RECYCLED SILICA,</i>	
<i>THROUGH 2014 (\$ MILLIONS)</i>	42
PRICING TRENDS	43
METALS IN CRTS.....	43
LEAD OXIDE (PBO)	43
MERCURY (HG)	44
BARIUM (BA).....	44
CADMIUM (CD).....	44
CHAPTER FIVE: E-WASTE MARKET BY TECHNOLOGY APPLICATION	45
APPLICATIONS	45
<i>FIGURE 6 GLOBAL E-WASTE MATERIALS MARKET SHARE BY</i>	
<i>APPLICATION, 2009 (%)</i>	46
LARGE HOUSEHOLD APPLIANCES	46
SMALL HOUSEHOLD APPLIANCES	47

IT EQUIPMENT	47
ENTERTAINMENT SYSTEMS	48
TELECOMMUNICATIONS EQUIPMENT	48
MEDICAL EQUIPMENT.....	48
OTHER	49
RECYCLED METALS	49
<i>TABLE 12 GLOBAL REVENUES FROM RECYCLED METALS BY</i>	
<i>APPLICATION, THROUGH 2014 (\$ MILLIONS)</i>	49
LARGE AND SMALL HOUSEHOLD APPLIANCES	49
IT EQUIPMENT	50
COMPUTERS AND PERIPHERALS.....	50
Display Devices.....	50
Network Equipment	51
Office Equipment.....	51
ENTERTAINMENT SYSTEMS	51
COMMUNICATIONS EQUIPMENT	51
MEDICAL EQUIPMENT.....	52
OTHER EQUIPMENT	52
RECYCLED PLASTICS.....	52
<i>TABLE 13 PROJECTED GLOBAL MARKET FOR RECYCLED</i>	
<i>PLASTICS, BY APPLICATION, THROUGH 2014 (\$ MILLIONS)</i>	53
LARGE HOUSEHOLD APPLIANCES	53
SMALL HOUSEHOLD APPLIANCES	53
IT EQUIPMENT	53
Display Devices.....	54
Network Equipment	54
Office Equipment.....	54
ENTERTAINMENT SYSTEMS	55
COMMUNICATIONS EQUIPMENT	55
MEDICAL EQUIPMENT.....	55
OTHER EQUIPMENT	56
RECYCLED SILICA	56
<i>TABLE 14 PROJECTIONS FOR GLOBAL SALES OF RECYCLED</i>	
<i>SILICA BY APPLICATION, THROUGH 2014 (\$ MILLIONS)</i>	56
LARGE HOUSEHOLD APPLIANCES	57
SMALL HOUSEHOLD APPLIANCES	57
IT EQUIPMENT	57
Display Devices.....	57
ENTERTAINMENT EQUIPMENT.....	57
COMMUNICATIONS EQUIPMENT	57
MEDICAL EQUIPMENT.....	58
OTHER	58
CHAPTER SIX: INDUSTRY STRUCTURE.....	59

<i>TABLE 15 SELECTED ACQUISITIONS IN THE RECYCLING MARKET, 2005–2009</i>	59
<i>TABLE 15 (CONTINUED)</i>	60
GLOBAL SCRAP METALS INDUSTRY	60
<i>TABLE 16 TOP GLOBAL FERROUS SCRAP METAL RECYCLING COMPANIES AND THEIR PRODUCTION, 2008 (MILLION TONS)</i>	61
PLASTICS	61
U.S. SCRAP PLASTIC RECYCLERS.....	61
GLOBAL SCRAP PLASTIC RECYCLERS	62
<i>TABLE 17 MAJOR GLOBAL PLASTIC RECYCLERS, 2009</i>	62
GLASS	63
U.S. SCRAP GLASS RECYCLERS	63
GLOBAL SCRAP GLASS RECYCLERS	63
<i>TABLE 18 MAJOR ELECTRONICS GLASS RECYCLERS WORLDWIDE, 2009</i>	64
 CHAPTER SEVEN: E-WASTE TECHNOLOGY DEVELOPMENT	65
E-WASTE TECHNOLOGY DEVELOPMENT	65
METALS	66
<i>TABLE 19 INTEGRATED CIRCUIT DEMANUFACTURING</i>	66
SHREDDERS	67
MEMBRANE TECHNOLOGY	67
ION EXCHANGE RESINS	67
<i>FIGURE 7 GLOBAL MARKET SHARES OF METALS RECOVERY AND REUSE BY TECHNOLOGY, 2009 (%)</i>	68
PLASTICS	68
<i>FIGURE 8 GLOBAL MARKET SHARES OF PLASTIC RECYCLING PROCESSES BY TECHNOLOGY, 2009 (%)</i>	69
MECHANICAL SORTING.....	69
CHEMICAL SORTING	69
FLAME RETARDANT PROCESSING	70
SILICA.....	70
GLASS-TO-GLASS RECYCLING	70
LEAD SMELTING-GLASS RECYCLING	71
<i>FIGURE 9 GLOBAL MARKET SHARES OF GLASS RECYCLING PROCESSES USAGE BY TECHNOLOGY, 2009 (%)</i>	71
 CHAPTER EIGHT: GOVERNMENT REGULATIONS.....	72
BASEL CONVENTION	72
GLOBAL MATERIALS DECLARATION	73
TCO '95	73
EUROPE.....	73
WEEE	74
ROHS	74
U.S.	75

COLLECTION AND RECYCLING	75
EXPORTATION	75
U.S. FEDERAL LEGISLATION.....	76
E-WASTE WORKING GROUP	76
PLUG IN TO RECYCLING CAMPAIGN.....	76
JOBS THROUGH RECYCLING GRANTS.....	76
ELECTRONIC PRODUCTS ENVIRONMENTAL	
ASSESSMENT TOOL (EPEAT).....	77
WASTEWISE.....	77
U.S. STATE INITIATIVES.....	77
CALIFORNIA	78
HAWAII	78
ILLINOIS.....	78
INDIANA	78
KENTUCKY	78
MAINE.....	79
MARYLAND	79
MASSACHUSETTS	79
MICHIGAN.....	79
MISSOURI.....	79
MINNESOTA	79
NEBRASKA.....	80
NEW HAMPSHIRE.....	80
NEW JERSEY	80
NEW MEXICO	80
NEW YORK CITY	80
NORTH CAROLINA	81
OKLAHOMA	81
OREGON	81
PENNSYLVANIA.....	81
RHODE ISLAND.....	81
SOUTH CAROLINA.....	81
TEXAS	82
UTAH.....	82
VERMONT	82
VIRGINIA.....	82
WASHINGTON STATE.....	82
WEST VIRGINIA	82
WISCONSIN.....	83
CHINA.....	83
IMPORTATION OF E-WASTE	83
JAPAN.....	83
AUSTRALIA.....	84
CANADA	84

TAIWAN	85
PRODUCER RESPONSIBILITY	85
CHAPTER NINE: PATENT ANALYSIS	86
METALS	86
<i>TABLE 20 U.S. METALS RECYCLING PATENTS, JANUARY 2000 TO</i>	
<i>MARCH 2010</i>	86
<i>TABLE 20 (CONTINUED)</i>	87
<i>TABLE 20 (CONTINUED)</i>	88
PATENTS BY ASSIGNEE.....	88
<i>TABLE 21 U.S. METAL RECYCLING PATENT SHARES BY</i>	
<i>ASSIGNEE, JANUARY 2000 TO MARCH 2010 (NUMBER OF</i>	
<i>PATENTS%)</i>	89
PATENTS BY TECHNOLOGY	89
<i>TABLE 22 U.S. METAL RECYCLING PATENT SHARES BY</i>	
<i>TECHNOLOGY, JANUARY 2000 TO MARCH 2010 (NUMBER OF</i>	
<i>PATENTS/%)</i>	89
PLASTICS	90
<i>TABLE 23 U.S. PLASTICS RECYCLING PATENTS, JANUARY 2000</i>	
<i>TO MARCH 2010</i>	90
<i>TABLE 23 (CONTINUED)</i>	91
<i>TABLE 23 (CONTINUED)</i>	92
<i>TABLE 23 (CONTINUED)</i>	93
<i>TABLE 23 (CONTINUED)</i>	94
PATENTS BY ASSIGNEE.....	94
<i>TABLE 24 U.S. PLASTIC RECYCLING PATENT SHARES BY</i>	
<i>ASSIGNEE, JANUARY 2000 TO MARCH 2010 (NUMBER OF</i>	
<i>PATENTS/%)</i>	94
PATENTS BY TECHNOLOGY	94
<i>TABLE 25 U.S. PLASTIC RECYCLING PATENT SHARES BY</i>	
<i>TECHNOLOGY, JANUARY 2000 TO MARCH 2010 (NUMBER OF</i>	
<i>PASTENTS/%)</i>	95
GLASS	95
<i>TABLE 26 U.S. GLASS RECYCLING PATENTS, JANUARY 2000 TO</i>	
<i>MARCH 2010</i>	95
<i>TABLE 26 (CONTINUED)</i>	96
PATENTS BY ASSIGNEE.....	97
<i>TABLE 27 U.S. GLASS RECYCLING PATENT SHARES BY ASSIGNEE,</i>	
<i>JANUARY 2000 TO MARCH 2010 (NUMBER OF PATENTS/%)</i>	97
PATENTS BY TECHNOLOGY	97
CHAPTER TEN: COMPANY DIRECTORY	98
METAL RECYCLERS	98
AERC RECYCLING SOLUTIONS.....	98
Business Overview	98

Financials.....	99
COMMERCIAL METALS CO.....	99
Business Overview	99
Financials.....	99
THE DAVID J. JOSEPH CO.	99
Business Overview	100
Financials.....	100
FERROUS PROCESSING AND TRADING CO.	100
Business Overview	100
Financials.....	100
GERDAU AMERISTEEL.....	101
Business Overview	101
Financials.....	101
OMNISOURCE CORP.	101
Business Overview	101
Financials.....	102
PSC METALS, INC.	102
Business Overview	102
Financials.....	102
SIMS METAL MANAGEMENT	102
Business Overview	103
Financials.....	103
SCHNITZER STEEL INDUSTRIES	103
Business Overview	103
Financials.....	103
TUBE CITY IMS	104
Business Overview	104
Financials.....	104
WASTE MANAGEMENT	104
Business Overview	104
Financials.....	105
PLASTICS	105
AVANGARD INNOVATIVE	105
Business Overview	105
Financials.....	105
BUTLER MACDONALD.....	106
Business Overview	106
Financials.....	106
CONIGLIARO INDUSTRIES	106
Business Overview	106
Financials.....	107
DEKKA RESINS, INC.	107
Business Overview	107
Financials.....	107

ECO INTL.....	108
Business Overview	108
Financials.....	108
FORTUNE METALS AND PLASTICS	108
Business Overview	108
Financials.....	109
KW PLASTICS	109
Business Overview	109
Financials.....	109
MBA POLYMERS, INC., USA.....	109
Business Overview	109
Financials.....	110
PARC CORP.	110
Business Overview	110
Financials.....	110
PLASTINUM POLYMER TECHNOLOGIES CORP.....	110
Business Overview	111
Financials.....	112
UNITED PLASTIC RECYCLING	112
Business Overview	112
Financials.....	112
GLASS	113
AMERICAN RETROWORKS, INC.	113
Business Overview	113
Financials.....	113
CRT RECYCLING.....	113
Business Overview	113
Financials.....	113
DLUBAK GLASS	114
Business Overview	114
Financials.....	114
UNIVERSAL RECYCLING TECHNOLOGIES (FORMERLY CRT PROCESSING, LLC).....	114
Business Overview	114
Financials.....	115
REGIONAL RECYCLERS.....	115
UNITED STATES	115
Asset Recovery Corp.	115
Fox Electronics	115
Midwest Electronic Recovery	115
Mid-States Recycling and Refining.....	115
Silicon Salvage.....	116
Total Reclaim, Inc.....	116
United Datatech	116

EUROPEAN	116
Metals.....	116
Alba Group (Alba R-plus GmbH)	116
Business Overview	116
Financials	117
Coolrec BV (See Van Gansewinkel)	117
Euro Metal Recycling SL (EMR)	117
Business Overview	117
Financials	118
Electrocyling GmbH	118
Business Overview	118
Financials	118
Immark AG	118
Business Overview	118
Financials	119
Kuusakoski OY	119
Business Overview	119
Financials	119
Nickelhütte Aue GmbH (NHA)	120
Business Overview	120
Financials	120
Stena Technoworld AB	120
Business Overview	120
Financials	121
Super Dragon Technology Co., Ltd.	121
Business Overview	121
Financials	122
Umicore	122
Business Overview	122
Financials	122
Plastics	123
Axion Recycling, Ltd.	123
Business Overview	123
Financials	123
Plastic Herverwerking Brabant (See Van Gansewinkel)	123
Van Gansewinkel Groep	124
Business Overview	124
Financials	124
SELECTED REGIONAL COMPANIES	124
A.H. INTL. PVT., LTD.	124
AMBIENTE-RECUPERAÇÃO DE MATERIAIS PLÁSTICOS S.A.	125
ART RECYCLING TECHNIK GMBH	125

HI-TECH RECYCLING	125
KES METALS.....	125
OMAPLAST	125
ORION BV	126
POOJA METAL INDUSTRIES	126
SHENG FOONG PLASTIC INDUSTRIES SDN BHD.....	126
APPENDIX	127
ORGANIZATIONS.....	127
NORTH AMERICA	127
Aluminum Assoc.	127
American Copper Council.....	127
The Technology Association of America	127
American Iron & Steel Institute	127
American Chemistry Council	128
Association of Postconsumer Plastic Recyclers	128
Basel Action Network.....	128
California Resource Recovery Assoc.	128
Canadian Plastics Industry Assoc.	128
Canadian Steel Producers Assoc.....	128
Electronics Industry Alliance.....	129
Institute of Scrap Recycling Industries	129
Metals, Minerals and Materials Society.....	129
National Recycling Coalition.....	129
Silicon Valley Toxics Coalition.....	129
Solid Waste Association of North America	129
Steel Recycling Institute	130
EUROPE.....	130
Belgium Recycling Federation	130
British Metals Recycling Assoc. (BMRA)	130
British Plastics Federation (BPF).....	130
Bureau of International Recycling (BIR).....	130
European Electronic Component Manufacturers Assoc. (EECA).....	131
European Electronic Recyclers Assoc. (EERA).....	131
European Environmental Bureau (EEB)	131
European Plastics Recyclers (EuPR)	131
Industry Council for Electronic Equipment Recycling	131
World Steel Assoc.	132
Petcore.....	132
PlasticsEurope	132
REST OF WORLD.....	132
Aluminum Federation of South Africa	132
Asociación Nacional de Industrias del Plástico (ANIPAC).....	132
China Iron & Steel Assoc.	133

Chinese Society for Metals	133
CEMPRE	133
Japan Electronics and Information Technologies Industries (JEITA)	133
Japan Institute of Metals	133
The Japan Plastics Industry Federation	133
INARE (Instituto Nacional de Recicladores A.C.).....	134
Latin American Iron and Steel Institute.....	134
Manufacturers Association for Information Technology (MAIT)	134
South African Iron and Steel Institute.....	134
Southeast Asia Iron & Steel Institute	134