Cathode Ray Tube (CRT)\textsuperscript{1} Management in the United States

Executive Summary

Over a two week period in March/April 2013, the Northeast Recycling Council, Inc. (NERC) conducted a national survey regarding CRT management in the U.S. The survey was instigated and funded by the Consumer Electronics Association (CEA). The survey focuses on electronics recycling, not reuse, of CRTs in order to provide additional data on the state of the U.S. market.\textsuperscript{2}

Ample markets and downstream vendors exist for CRT recycling in the United States. Recyclers rely on intermediary or downstream vendors to process their glass. Cost, rather than capacity, is the primary driver in selecting downstream vendors. The amount of CRT volume sent for processing remains the primary cost differentiator. Market supply of CRTs is stable or decreasing.

Key Findings

- A total of 68,000 tons of CRTs are currently onsite pending processing or shipment
- 91% of respondents routinely ship CRTs as they accumulate to their downstream processors
- Two-thirds of respondents (72%) are not having trouble finding downstream vendors
- Glass
- Pricing remains the biggest challenge in securing proper recycling (87%); lack of access to downstream markets also a challenge (52%) for those that had problems other than pricing.
- Small operators experiencing problems in finding downstream vendors
- Half of the CRT tonnage (47%) was accounted for by voluntary residential/state mandated programs, then 32% collection from commercial sources, and 11% from government, and 10% from ‘other’
- Half of the companies (49%) reported no change or a decrease in CRT tonnage in the past 12 months
- Two-thirds (66%) of the respondents expect to see the same trends for the next two years; whether stable, increasing, or decreasing
- Glass-to-glass processing was the most common downstream destination (47%)

Response rate

- 33\% overall response rate: 104 responses were received.
- 25\% of the responses were completed surveys. These 82 surveys were used in the results analysis.
- 90\% of respondents are certified to R2, R2/RIOS, e-Stewards, or a combination of these certifications.

\textsuperscript{1} For purposes of the survey, CRT was defined as disassembled and demanufactured CRTs and their glass-related components only. This includes, for example, whole CRT units, bare CRT tubes as well as separated funnel glass, panel glass, cleaned glass, and cullet from CRTs. It did not include plastic or metal components.

\textsuperscript{2} This survey was not designed or intended as a scientific sampling of the e-scrap recycling industry. This survey draws no conclusions about stockpiling or speculative accumulation. Survey Monkey was used to conduct the survey, with invitations to participate in the survey being sent to 275 companies. In addition, articles and emails announcing the survey made it available to any company that chose to respond.