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Research Report on China's E-waste Disposal Industry, 2013-2017

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Abstracts

With the rapid development of information technology and the accelerated update and upgrade of electronic products, the elimination and recycling of electronic products become a problem of the world currently. At present, various e-wastes have become one of the solid wastes with a fast growth rate. For example, scrapped appliances such as computers, household appliances, and communication equipment as well as various waste materials and wastages generated in the manufacturing process of these appliances occupy enormous resources. Improper disposal of these e-wastes will cause tremendous pollution to the environment.

With the rapid development of economy, China’s e-wastes generate at an astonishing speed in recent years. In 2010, China became the second largest producing country of e-wastes worldwide, generating 2.3 million tons of e-wastes, only second to 3 million tons of the United States. In addition, large numbers of e-wastes are illegally or legally exported to China annually.

In the recycling and comprehensive utilization processes of e-wastes, phenomena of polluting the environment and damaging human health exist to varying degrees. In developed countries, e-waste disposal is a mature industry, with specialized agencies and equipment conducting harmless disposal to various e-wastes. However, China’s e-waste disposal industry is not yet mature currently. Driven by interests, e-waste recycling processing with extremely severe pollution is formed in many places of China. For example, there are considerable illegal manual workshops in many places of China. They organize workers to disassemble e-wastes into small parts, refining various metals. For example, they extract gold, copper, etc. by burning e-wastes; carrying out the separation of various types of components and materials by heating and other methods. Enormous toxic gases and wastages released in these processes, which not

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only pollute the atmosphere and rivers, but also tremendously threaten the health of workers and residents nearby.

E-waste is a special renewable resource. Although the pollution is enormous, it is also of relatively high recycling value. For instance, the metal content in computers exceeds 30%, and that in waste printed circuit boards is more considerable. In waste circuit boards, the copper content is up to 20%, which also contain metals such as aluminum and iron as well as trance amounts of rare and noble metals such as gold, silver and platinum. The plastic content in e-wastes is also very high. After melting, plastic can be used as the raw material of new products or as fuel.

China is a major producing and consuming country of electrical and electronic products. There are hundreds of millions of electrical and electronic products such as TV sets, refrigerators, washing machines, air conditioners, and computers produced annually. In 2011, the output of China’s TV sets, refrigerators and home freezers, washing machines, air conditioners, and computers separately was 120 million, 105 million, 66.71 million, 130 million, and 320 million sets.

According to incomplete statistics, the total recycling value of resource recycling industries in major developed countries worldwide is over USD 200 billion annually. In terms of the output, 45% of steel, 62% of copper, 22% of aluminum, 40% of lead and 30% of zinc worldwide, , are from the recycling of renewable resources. Among them, the vast majorities are obtained from e-waste recycling.

The recycling of e-wastes has pivotal influences on China’s national economy. Seen from the national situation, since the implementation of the “old-for-new policy” of household appliances, waste household appliances recycled are over 60 million sets, which obtains more than 500 thousand tons of valuable resources such as metal, plastic and glass through harmless dismantling disposal.

Before the implementation of the “old-for-new policy”, petty dealers are the main channel of waste electrical and electronic product recycling in China while the proportion of recycling and dismantling through normal channels is only 5% to 10%. However, during June 2009 and December 31, 2011, the implementation of the “old-for-new policy” of household appliances in China accelerated the centralized recycling and dismantling disposal of waste electrical and electronic products, which initially set up the recycling system of waste household appliances nationwide, establishing nearly 900 regular recycling enterprises, with recycling locations over 20 thousand.

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At present, there are over 100 regular e-waste disposal enterprises in China. Main profit modes of China’s e-waste industry include selling renewable resources acquired by recycling and obtaining government subsidies. In 2012, the profit of China’s e-waste disposal industry has exceeded CNY 3 billion.

Currently, China’s household appliances enter an outbreak stage of replacement. Recycling value of these appliances is considerable, which needs to be fully developed and utilized. It is expected that by 2015, the generating volume of China's e-wastes will be over 5 million tons. In the next few years, the annual number of major waste electrical and electronic products in China will be over 100 million sets. If harmless resource utilization is achieved, more than 1 million tons of resources such as noble metals, non-ferrous metals and engineering plastics will be provided.

China continuously improves e-waste recycling and comprehensive utilization management systems, introducing a series of encouraging and stimulus policies. Under the government regulations and industrial policy guidance, dismantling and in-depth utilization technologies of many enterprises tend to be mature, with increasingly high utilization added value of waste circuit boards, waste plastics, metals, etc. However, environmental pollution problems caused by e-waste disposal industries are still very prevalent in many regions.

There is huge space in China’ market for both e-waste recycling, disposal enterprises and e-waste disposal equipment manufacturers. It is expected that by 2017, the profit of China’s e-waste disposal industry will exceed CNY 10 billion.

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