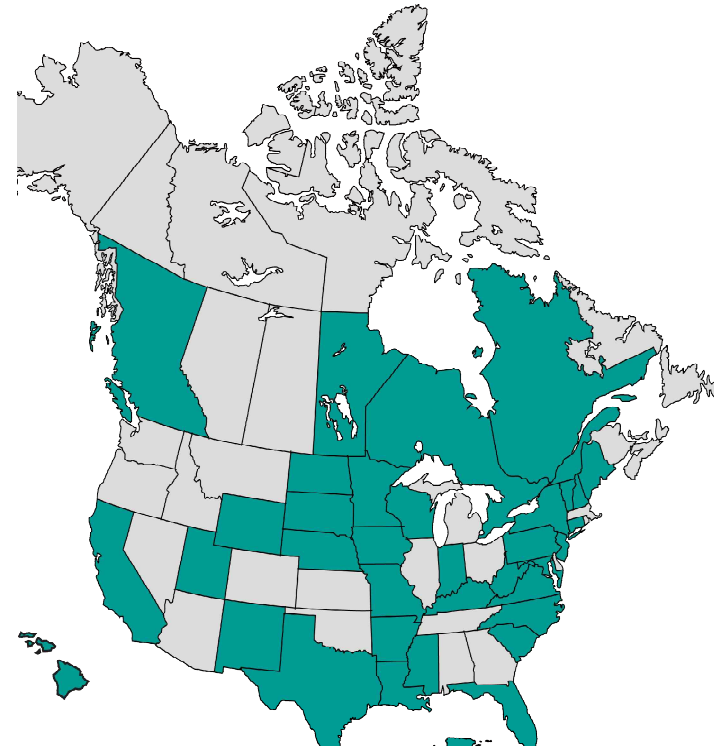


**Call2Recycle, Inc.**

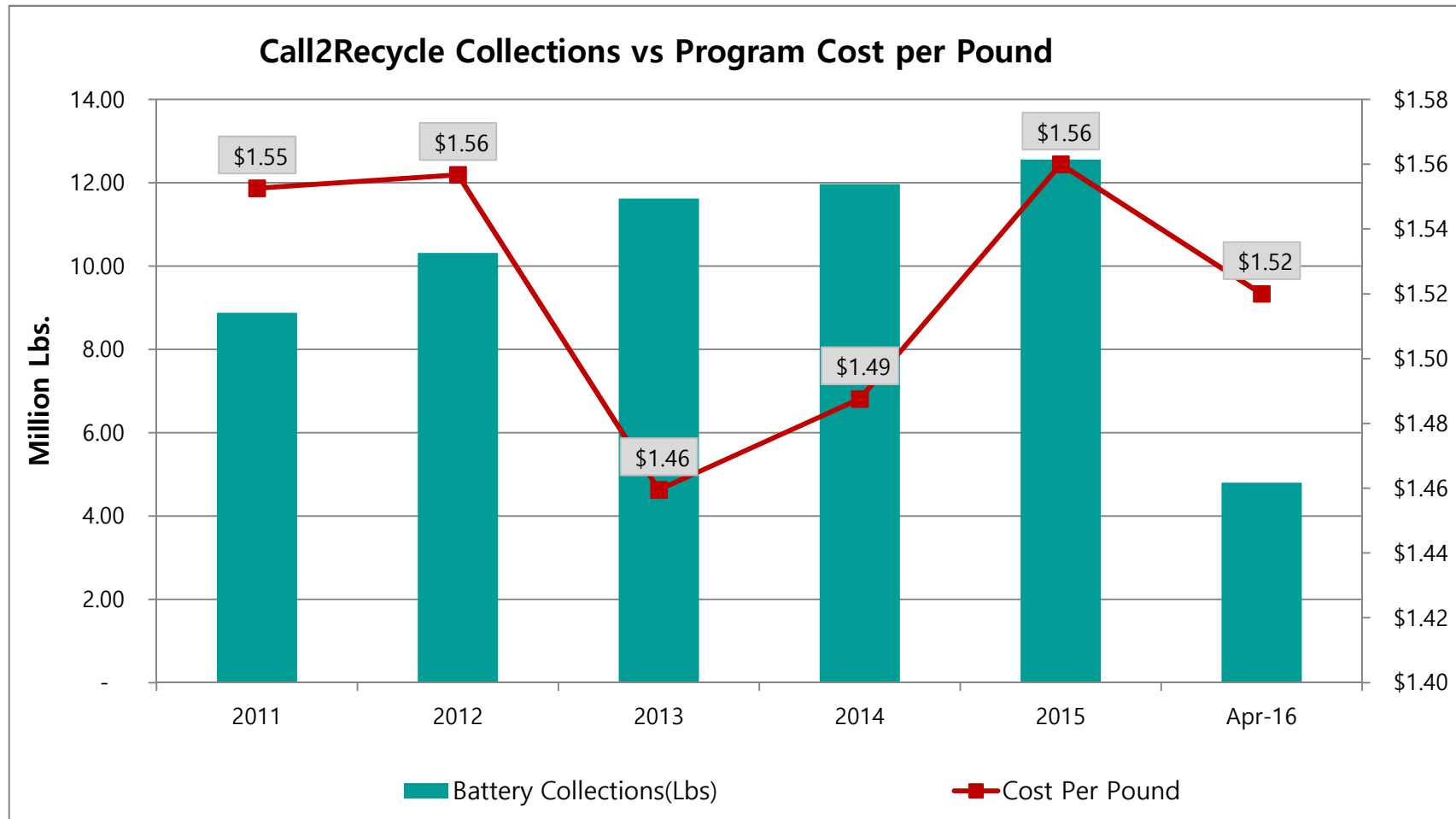
Presented by:  
**Carl E. Smith**  
**CEO & President**

## A BRIEF OVERVIEW OF THE CALL2RECYCLE® PROGRAM

- Mandatory all-battery programs: Provinces of Quebec, Manitoba & British Columbia.
- Mandatory primary only battery programs: Province of Ontario & state of Vermont.
- Mandatory rechargeable only battery programs: states of New York & Minnesota.
- Mandatory nickel cadmium only battery programs: states of Florida, Maryland, Iowa, New Jersey & Maine.
- Mandatory small sealed lead acid only programs: approximately 20 US states.
- Voluntary all-battery programs: all Canadian provinces except those above.
- Voluntary rechargeable programs: all US states except those above.

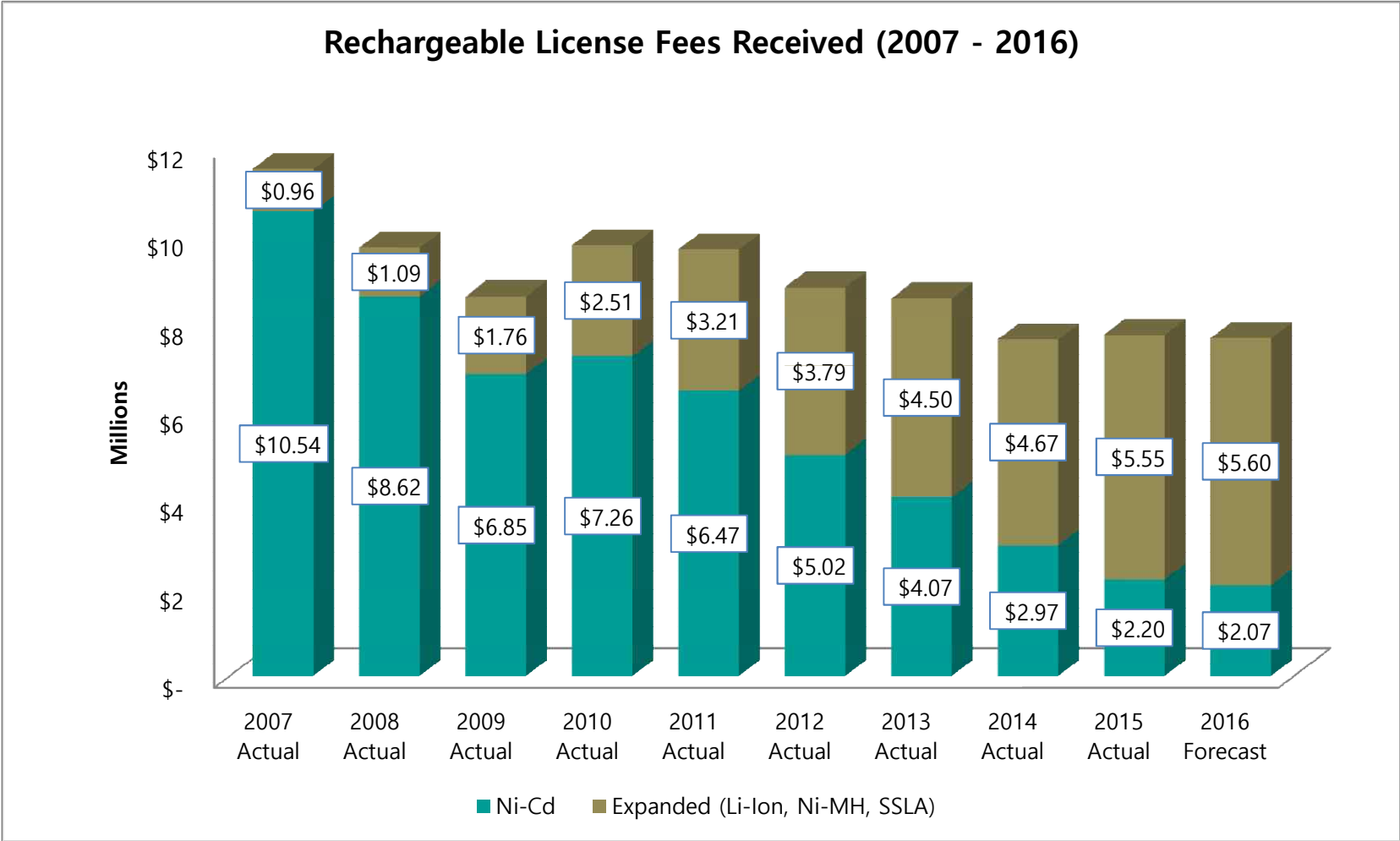


## FIRST, THE NUMBERS...



We will collect in excess of 6 million metric tonnes of batteries in 2016.

# FIRST, THE NUMBERS



## FIRST, THE NUMBERS

Call2Recycle® Program Collection Summary Thru 8/31/2016				
	YTD Actual			
	2016	2015		
Rechargeable Batteries	Lbs. Collected	Lbs. Collected	Increase	% incre
<b>Consolidated USA/Canada</b>				
NiCd	1,907,206	1,755,304	151,902	8.65%
Liion	1,516,451	1,570,796	(54,345)	-3.46%
Ni-MH	568,006	488,637	79,369	16.24%
SSLA	1,524,291	1,359,819	164,472	12.10%
	5,515,954	5,174,556	341,398	6.60%
<b>USA Only</b>				
	Lbs. Collected	Lbs. Collected	Increase	% incre
NiCd	1,447,915	1,454,641	(6,726)	-0.46%
Liion	1,256,712	1,371,531	(114,819)	-8.37%
Ni-MH	424,824	395,192	29,632	7.50%
SSLA	1,256,262	1,125,488	130,774	11.62%
	4,385,713	4,346,852	38,861	0.89%
<b>Canada only</b>				
	Lbs. Collected	Lbs. Collected	Increase	% incre
NiCd	459,291	300,663	158,628	52.76%
Liion	259,739	199,265	60,474	30.35%
Ni-MH	143,182	93,445	49,737	53.23%
SSLA	268,029	234,331	33,698	14.38%
	1,130,241	827,704	302,537	36.55%
<b>Primary Batteries</b>				
	2016	2015		
	Lbs. Collected	Lbs. Collected	Increase	% incre
USA	853,428	236,417	617,011	260.98%
Canada	3,029,320	2,640,485	388,835	14.73%
	3,882,748	2,876,902	1,005,846	34.96%
<b>Total Battery Collections</b>	9,398,702	8,051,458	1,347,244	16.73%

### Some items to note:

- Ni-Cd batteries are still the most collected rechargeable chemistry and growing the most. Their sales may be decreasing but they are still prominent in the waste stream.
- Lithium-ion, despite sales, are not as available for collection as other rechargeables.
- We collect almost as much batteries in Canada as we do in the US.
- In the US, primary battery collections are growing faster than all other chemistries.

## FIRST, THE NUMBERS...(VERMONT)

Batteries Collected (Lbs)	Primary			Rechargeable			Total		
	2015	2016	% Chg	2015	2016	% Chg	2015	2016	% Chg
Retail	81	2,573	3077%	6,724	3,324	-51%	6,805	5,897	-13%
Municipality	810	21,776	2588%	10,236	17,933	75%	11,046	39,709	259%
Other	45	4,167	9160%	3,226	4,790	48%	3,271	8,957	174%
<b>Total</b>	<b>936</b>	<b>28,516</b>	<b>2947%</b>	<b>20,186</b>	<b>26,047</b>	<b>29%</b>	<b>21,122</b>	<b>54,563</b>	<b>158%</b>



Battery Collections Bulk vs Box						
Sector	Bulk			Box		
	2015	2016	% Chg	2015	2016	% Chg
Retail	4,595	0	-100%	2,210	5,897	167%
Municipality	8,837	35,558	302%	2,209	4,151	88%
Other	1,370	3,713	171%	1,901	5,244	176%
<b>Total</b>	<b>14,802</b>	<b>39,271</b>	<b>165%</b>	<b>6,320</b>	<b>15,292</b>	<b>142%</b>

Vermont	Jan - June 2015	Jan - June 2016
Incoming Inquires from Sites	29	70
Outbound Calls to Sites	2	266
New Site Enrollments	11	76
New Enrollment Participation	18%	36%
Boxes Sent	329	968
Boxes Received	246	468

# of Active Drop-Off Sites	
Sector	Jul-16
Retail	56
Municipality	63
Other	16
<b>Total</b>	<b>135</b>

**96% of Vermonters are within 10 miles of a Call2Recycle collection site**

## KEY DEVELOPMENTS (IN NO PARTICULAR ORDER)

### THE CALL2RECYCLE VOLUNTARY PROGRAM

- Without mandates, our voluntary efforts have no leverage to increase fees on stewards or compel participation; it is not financially viable in the long-term.
- Plus, our voluntary program has lulled policymakers and stewardship advocates into believing that there is no real need to create a mandatory program.
- To supplement stewardship fees, we are creating a fee-based service for organizations that are not publicly-facing (e.g., businesses).

### BATTERY PROCESSORS

- There are no longer US-based lithium ion processors and only one (small) Canadian processor. We have already shipped 1 million tonnes of lithium ion batteries to Korea (SungEel) and Belgium (UMICORE) this year for processing.
- Only one jurisdiction (Ontario) regulates recycling efficiency and that was prompted by a processor.
- Two bankrupt processors are causing uncertainty and capacity limitations in the marketplace.



## KEY DEVELOPMENTS (IN NO PARTICULAR ORDER)

### CANADA

- Due to ambitious collection targets in Canada, stewards can no longer afford to internalize costs. Moving to visible (EHF) fees in select provinces by February 1.
- Under EHF, most battery companies will no longer be obligated stewards; retailers charging at point of sale will remit to our program.
- As a result, Call2Recycle, Inc. will spin-off Call2Recycle Canada as of January 1; will still provide basic support and administrative services under contract.

### LEGISLATION

- Legislation to require battery stewardship failed in the states of Texas, New York, Connecticut and Maine in 2016.
- Rechargeable battery industry no longer advocates for battery stewardship legislation (although the primary industry still does) due to internal opposition.
- Legislation still likely to be considered in California, Minnesota, Maine, Texas and Connecticut in 2017.





## CONTACT INFORMATION

thank you!

### **CARL E. SMITH**

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