

Recycling & Solid Waste Study Committee (HB 617)

CONCORD, NEW HAMPSHIRE

September 20, 2019

Giving Resources New Life[®]



Committed to the Future of New Hampshire

A HISTORY OF SUCCESSFUL PARTNERSHIPS



ENVIRONMENTAL STEWARDSHIP

As a proud member of the New Hampshire Businesses for Social Responsibility, Casella is an advocate of NHBSR's "Clean Energy Principles" whose mission is to foster "Investments in Clean Energy to Help New Hampshire Businesses Thrive."

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CLIMATE
LEADERSHIP
AWARDS



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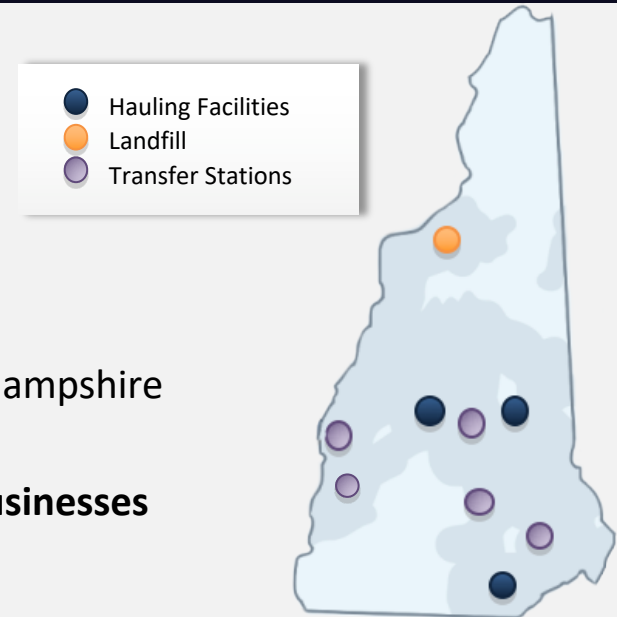
WHO WE ARE:

- Founded in 1975 with one truck
- 2,500 employees serving over 200,000 customers and 550,000 households
- \$700M in annual revenue; publicly traded on NASDAQ: CWST
- Operating in MA, ME, NH, NY, PA, and VT
- Vertically integrated collection, transfer, disposal and recycling operations
- Provide professional resource management services to over 10,000 business locations in over 45 states
- Recover over 800,000 tons of recycling and over 450,000 tons of organics for beneficial use each year
- Since 2005, cut companywide carbon emissions by 50%



Casella in New Hampshire

- Casella is a regional solid waste resource management company with several operating locations across the state of New Hampshire:
 - Hauling divisions and transfer stations
 - Owned and operated solid waste disposal facility
- We directly employ **175 hardworking people** across our New Hampshire operations, with an **annual payroll of \$10 million**.
- We provide solid waste recycling & disposal service to **5,500 businesses and 50,000 households** across New Hampshire.



| Employment | Annual Economic Impact | Materials Managed on Casella Trucks or through Facility Infrastructure |
|------------|----------------------------------|--|
| Total: | 175 | Recycling: ~37,000 tons |
| | Total payroll spend: ~\$10M | Disposal: ~350,000 tons |
| | Host Community Benefits: ~\$800k | Transfer Stations: ~215,000 tons |
| | Capital Expenditures: ~\$8M | Direct Land Application: ~14,000 tons |
| | New Hampshire Taxes: ~\$735k | Collection fleet: nearly 100 vehicles |
| | Commercial Customers: ~17,000 | |
| | Residential Customers: ~50,000 | |

NH Waste Disposal Facilities Facing Pressure

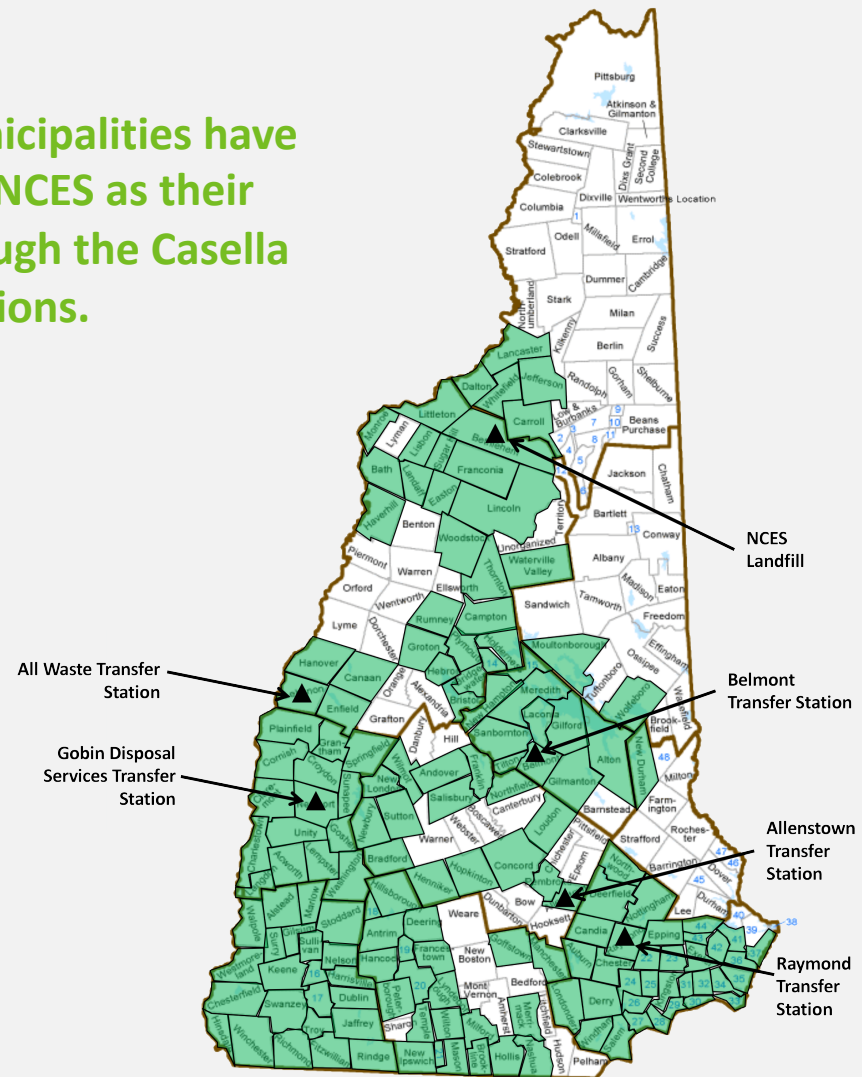
- ❑ TWO IN-STATE FACILITIES HAVE SHUT DOWN RECENTLY (CLAREMONT & FRANKLIN)
- ❑ THREE MAJOR LANDFILL SITES ARE AT OR NEAR ANNUAL CAPACITY
- ❑ CONCORD'S WASTE-TO-ENERGY FACILITY IS AT ANNUAL CAPACITY
- ❑ RECYCLING CRISIS IS PUTTING PRESSURE ON WASTE FACILITIES
- ❑ LACK OF RESOURCES AT DES CAUSES PERMITTING BACKLOG AND LENGTHENS TIMELINES

WITH NO NEW SITE PROPOSALS N.H. RESIDENTS AND MUNICIPALITIES COULD SOON FACE:

- Higher disposal costs
- The need to displace ~250,000 tons of waste due to the expected closing of NCES in 2024
- Increased risk to Southern N.H. if sites in Massachusetts stop accepting out of state waste
- Greater environmental impact through longer interstate hauling
- Instability in long-term economic planning
- The inability to manage their own environmental health and safety
- An estimated disposal shortage of 20 million tons over the next 20 years

NCES Serves New Hampshire

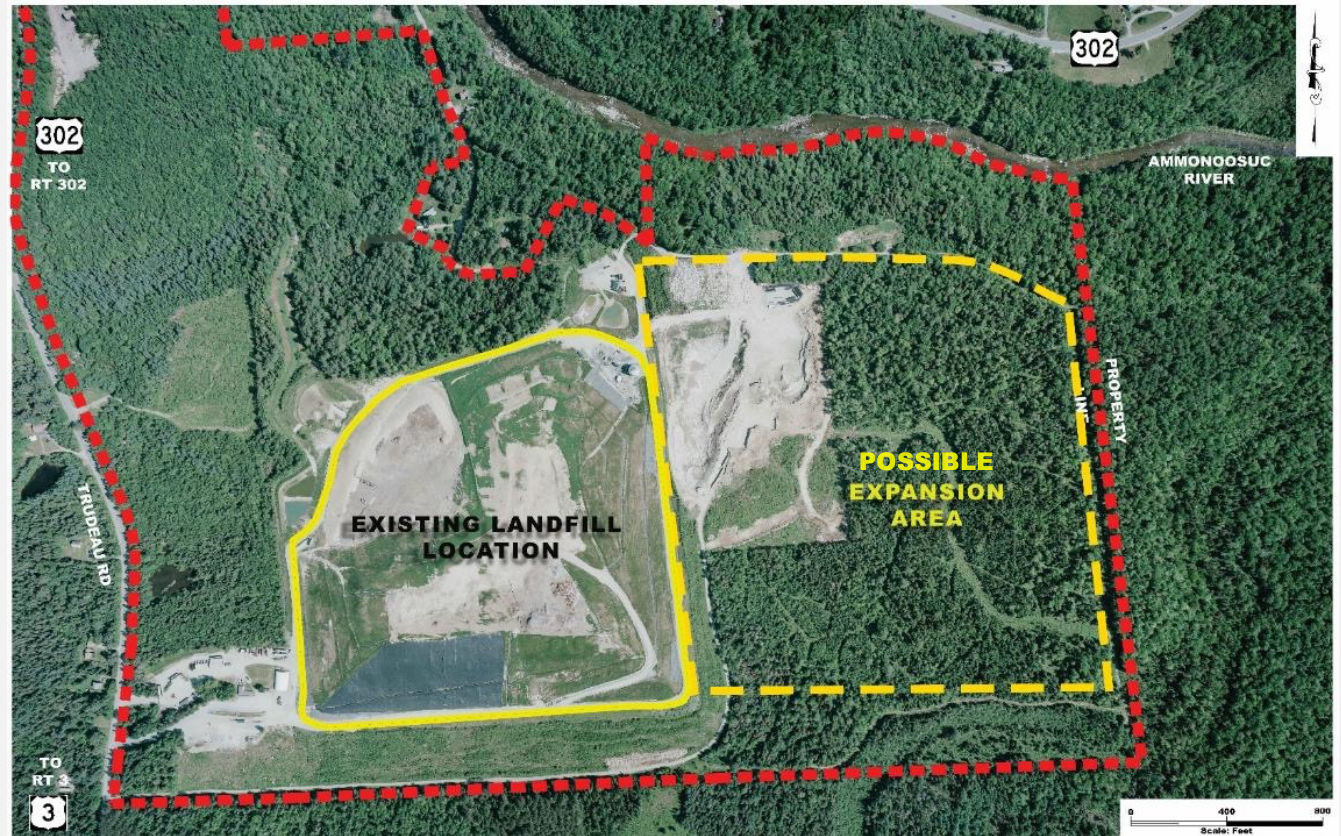
More than 150 New Hampshire municipalities have residents or businesses that rely on NCES as their disposal option either direct or through the Casella network of hauling and transfer stations.



Short-term Expansion Solution

NORTH COUNTRY ENVIRONMENTAL SERVICES – BETHLEHEM, N.H.

- At capacity +/- 2024 with current expansion area
- Final build out to the possible expansion area is the best solution
- Excellent transportation routes, no wetlands mitigation, facility is in an ideal site



Landfill Gas & Renewable Energy Projects



The Future of Disposal in New Hampshire

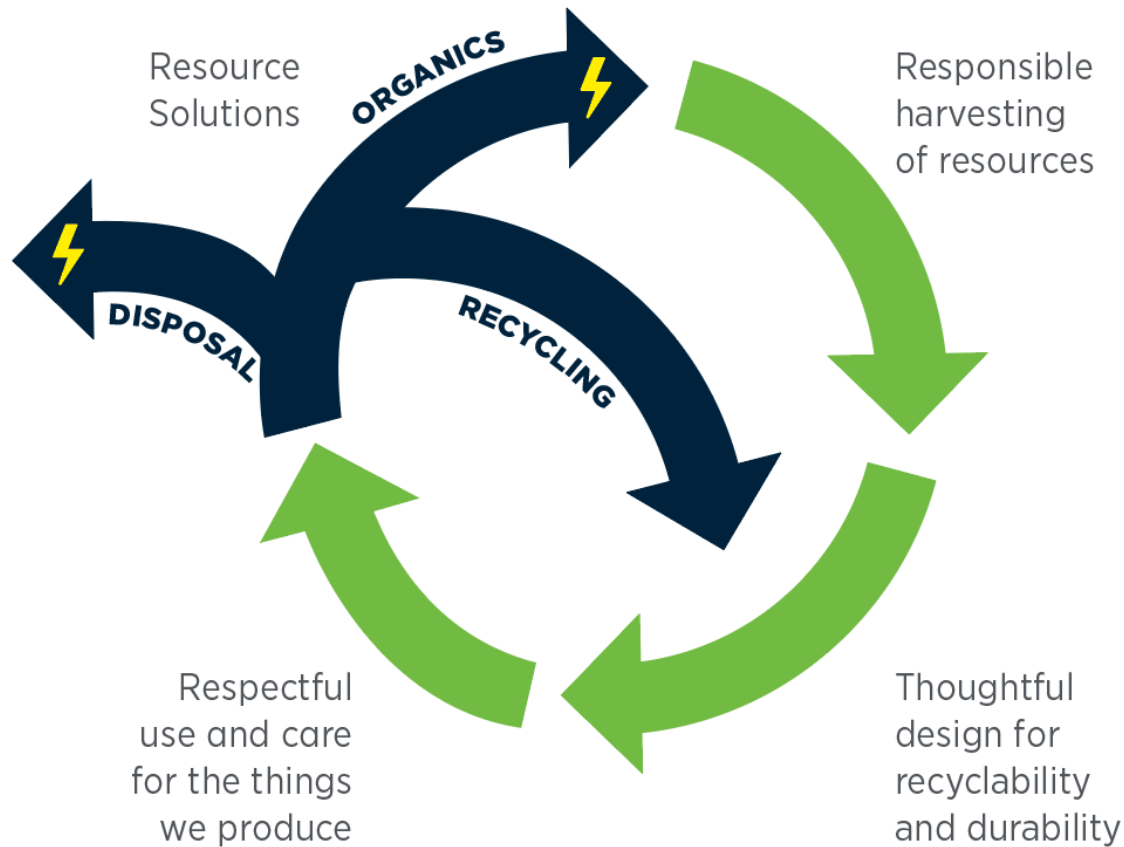
LONG-TERM SOLUTIONS ARE NEEDED

- The state needs new capacity whether through an expansion at existing sites or through a greenfield, low-emissions landfill
- Low-emissions landfills have a renewable energy component and are considered on par with waste-to-energy facilities by the EPA



A Holistic Approach to Resource Renewal

PARTNERING FOR RESOURCE RENEWAL



Recycling in Crisis

- Many international markets such as Indonesia, Vietnam, and South Korea are following China's lead and allowing no more than 0.5% of "carried waste" within the imported finished product while industry standard has historically been 2%
- Increased costs in processing
- No recycling capacity in New Hampshire, currently
- Domestic markets are returning slowly, 18-24 months



Casella Recycling

- 17 recycling operations
- Single stream, commercial, and source separated processing
- Process and markets over 800,000 tons per year
- Boston, MA MRF – 7th largest in the U.S. (210,000 tons processed in 2018)
- Process an average of 30,000 tons per year of New Hampshire recyclables



Zero-Sort® Recycling

- Single stream programs were developed for convenience and have increased recycle rates by 30%
- Single stream processing is separation through technology
- Recycling contamination is a function of the customer, not the process
- Recyclables are sold to the same markets regardless of process



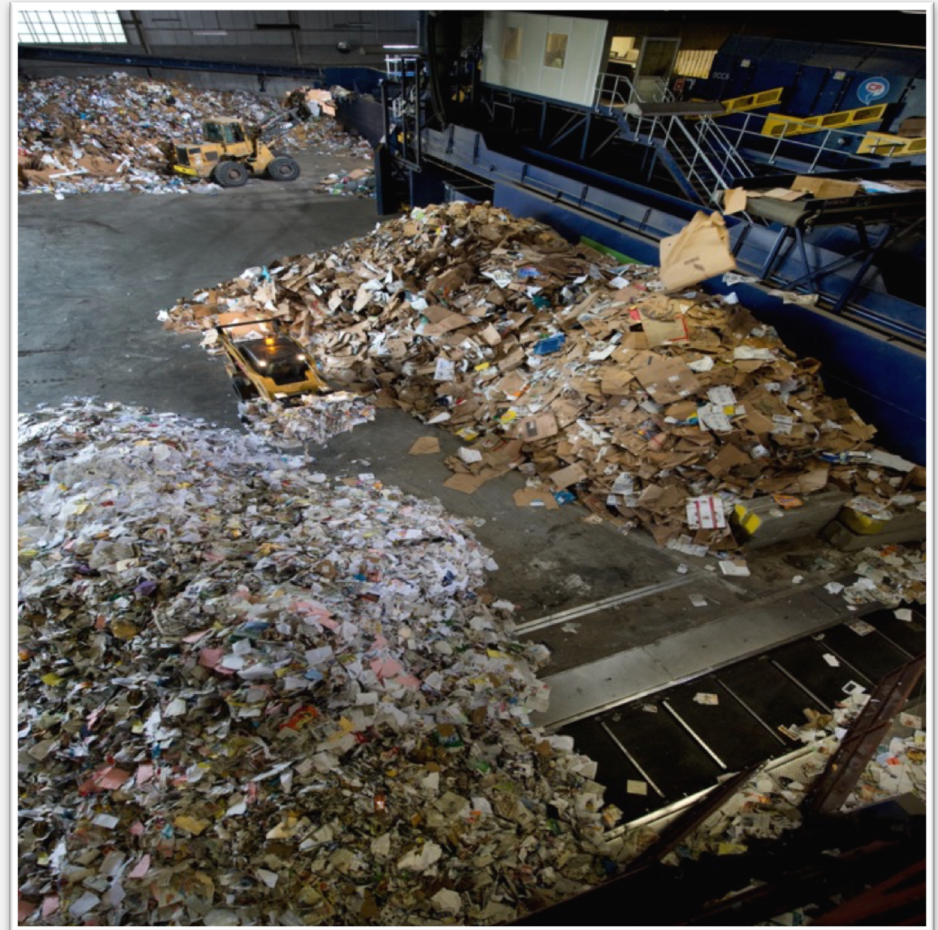
Future of Casella Recycling

- Casella investing \$9 million in Recycling (2019)
- Polishing/Ballistic Screens – extract further contaminants
- OCC Screening Retrofits
- Optical sorting for further upgrades
- Increased education through Recycle Better™ campaign



Future of Recycling in New Hampshire

- Commodity markets will return
- Recycling volumes are still strong
- Continued recycling investments
- A strong need for both recycling and disposal capacity
- Casella is committed to implementing a comprehensive system that includes new recycling and disposal capacity in the state of New Hampshire



Thank you!

Please Join Us:
September 28, 2019
10 am – 3 pm

NCES LANDFILL OPEN HOUSE

Tours, Education, and Family Fun



RECYCLING | COLLECTION | ORGANICS | ENERGY | LANDFILLS

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RUDARPA PROJECT AT NCES

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2018 SUSTAINABILITY REPORT OVERVIEW

Resource Solutions

We create value for our customers, communities, and our company by transforming waste into resources.

We do this by delivering safe and reliable Resource Solutions, which include **recycling, collection, organics, energy, landfills**, and **professional services**. Here's a quick snapshot that illustrates our sustainability efforts:



RECYCLING

In 2017, led by our Zero-Sort® Recycling facilities, we recovered nearly **800,000** tons of recyclable materials such as cardboard, paper, plastic, glass, and metal.



COLLECTION

In 2017, we provided safe, reliable, and environmentally-sound waste and recycling services to over **150,000** businesses, institutions, and municipalities throughout the northeast.



ORGANICS

We transform organic waste streams into nutrient rich **earthlife®** soil products, animal feed, and renewable energy. In 2017, Casella recycled over **400,000** tons of organic materials.



ENERGY

In 2017, we and our partners generated roughly **200,000** Megawatt-hours of renewable electricity. That is enough to meet the electrical needs of over **25,000** New England homes.



LANDFILLS

Every minute, our landfills can capture over **8,000,000** BTUs of gas. Safe, secure, and low carbon disposal facilities are an essential part of our full suite of Resource Solutions.

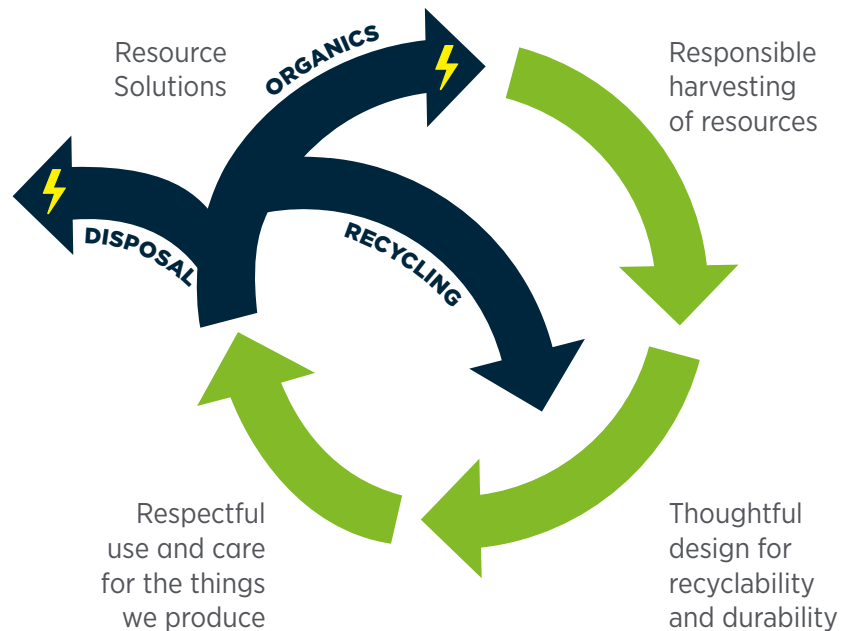


PROFESSIONAL SERVICES

We help our customers meet their resource management goals by providing consulting, sourcing, customer care, reporting, and other customized services.

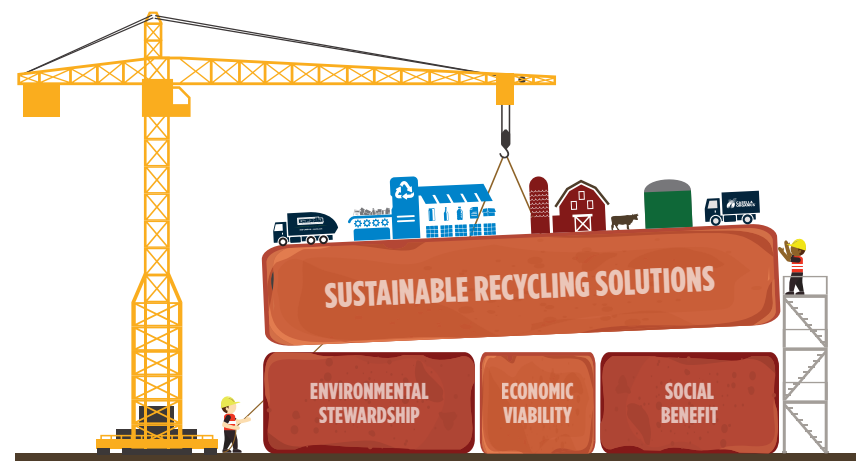
The Resource Renewal Cycle

We provide innovative Resource Solutions to help close the loop when environmental, social, and economic factors align to put materials to a higher and better use. To protect human health and the environment, we provide safe and secure disposal for materials that are not yet suitable for recovery.



True Sustainability

Recycling captures value from discarded materials and puts them to a higher and better use. Together with waste reduction and reuse, these are essential sustainability services. To endure, the recycling solutions we build must be on a solid foundation of environmental, economic, and social sustainability.



Download the full report at casella.com/sustainability

The Benefits of Recycling & Partnering with Casella

SHRINK YOUR WASTE AND GROW YOUR BUSINESS



BENEFITS OF RECYCLING

Recycling conserves natural resources, prevents pollution, saves energy, and reduces waste sent to disposal facilities. It can also support American manufacturing, create jobs, and increase economic security by providing a domestic source of materials. **For all of these reasons, when someone wants to improve the environmental impact of their business or household, recycling is often the first step they take.**

TRULY SUSTAINABLE RECYCLING

For decades, organizations across the country have sought to increase recycling rates by encouraging people to put more items in their recycling bins. Unfortunately, this practice benefits no one if those items are not actually recyclable. As a society, we recycle because much of the stuff we toss has value. We can capture that value and put those items to a higher and better use. Despite recycling being the right thing to do, it must be done right. Contamination from items such as plastic bags and trash add unnecessary costs. Eliminating sorting mistakes through education help to protect workers and sorting equipment and safeguard the recyclability of the other materials.



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TANGLERS
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SCRAP METAL ITEMS
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BATTERIES OF ANY KIND
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ELECTRONIC WASTE ITEMS
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PARTNERING WITH CASELLA

Recycling provides a perfect example of the teamwork involved in successful resource management. Households and businesses do their part to separate recyclable materials from their trash, and we do our part to collect, sort, and process them into high-quality raw materials for manufacturers to use in new products. Recycling works best when we all play our parts well.

Casella's Recycling Services:

- Zero-Sort® Recycling: *A state-of-the-art technology that allows all Zero-Sort recyclable material to be placed into one bin, which allows you to recycle more stuff more often. You just focus on filling the bin – we take care of the rest.*
- Brokerage Services
- Industrial/Specialty Recycling
- Managing Non-Salable Consumer Goods
- Public Advocacy

Since 1977 we have helped to pioneer the field of resource recovery. Did you know that in a year, we recover over **800,000 tons** of recyclable materials!

GIVING RESOURCES NEW LIFE®

Zero-Sort® recycling puts your discarded materials back into the world.



1 Recycling Collection

It starts with you tossing items like newspapers, boxes, bottles, and cans into your recycling bin. We pick these materials up from your home and take them to be processed at a Zero-Sort recycling facility.

2 Recycling Facility

At the Zero-Sort recycling facility we sort and bale commodities like aluminum, cardboard, paper and more. These serve as the source material for recycled products and packaging.

3 Manufacturing

Baled commodities are received by manufacturers as raw materials for making new goods.

4 New Products

Completing the loop, the recyclables you placed into your bin are transformed into new products like boxes, bottles, cans, packaging and even fleece jackets!



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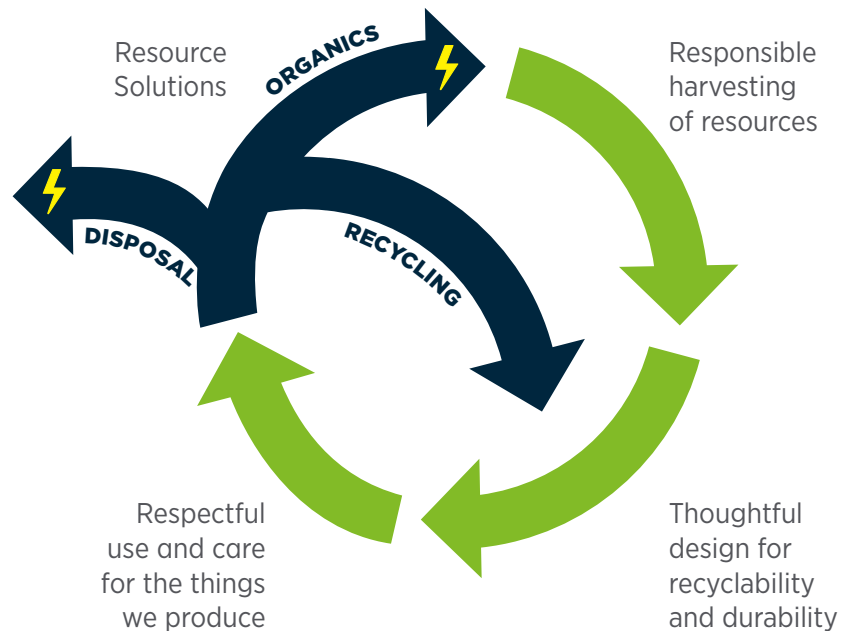


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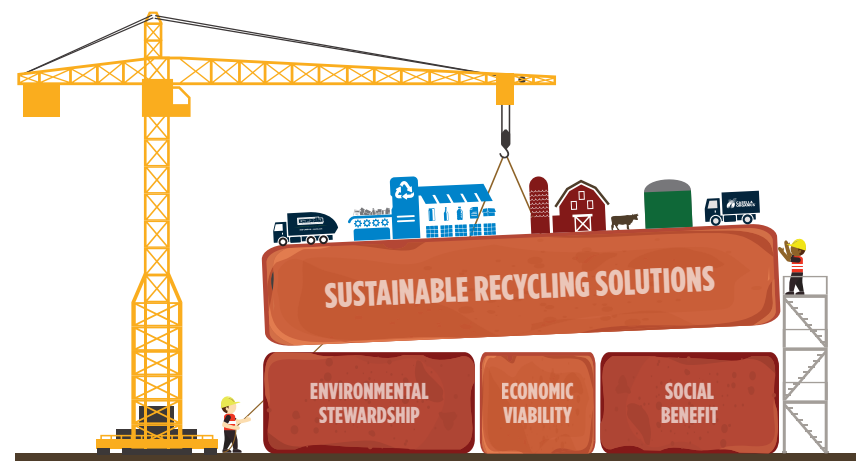
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