

Casella Waste Systems, Inc.

Senate Energy and Natural Resources Committee

Concord, N.H.

February 4, 2020

Giving Resources New Life[®]



Who We Are



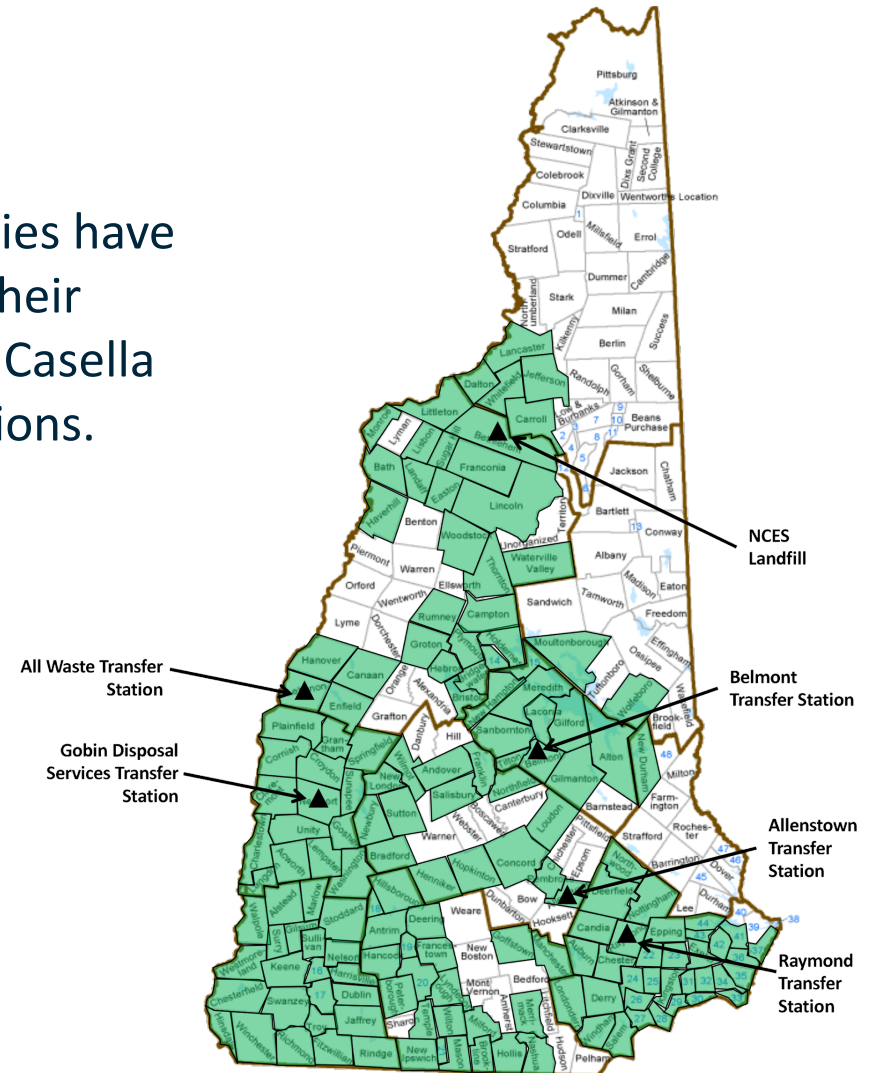
- **Founded in 1975 with one truck**
- **2,500 employees serving over 200,000 customers and 550,000 household**
- **\$724.4mm of revenues for the 12-months ended 9/30/19; publicly traded on NASDAQ:CWST**
- **Operations in MA, ME, NH, NY, PA, and VT**
- **Vertically integrated collection, transfer, disposal 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%**
- **Stock price has increased by 1,000% Since January, 2015**

Casella in New Hampshire

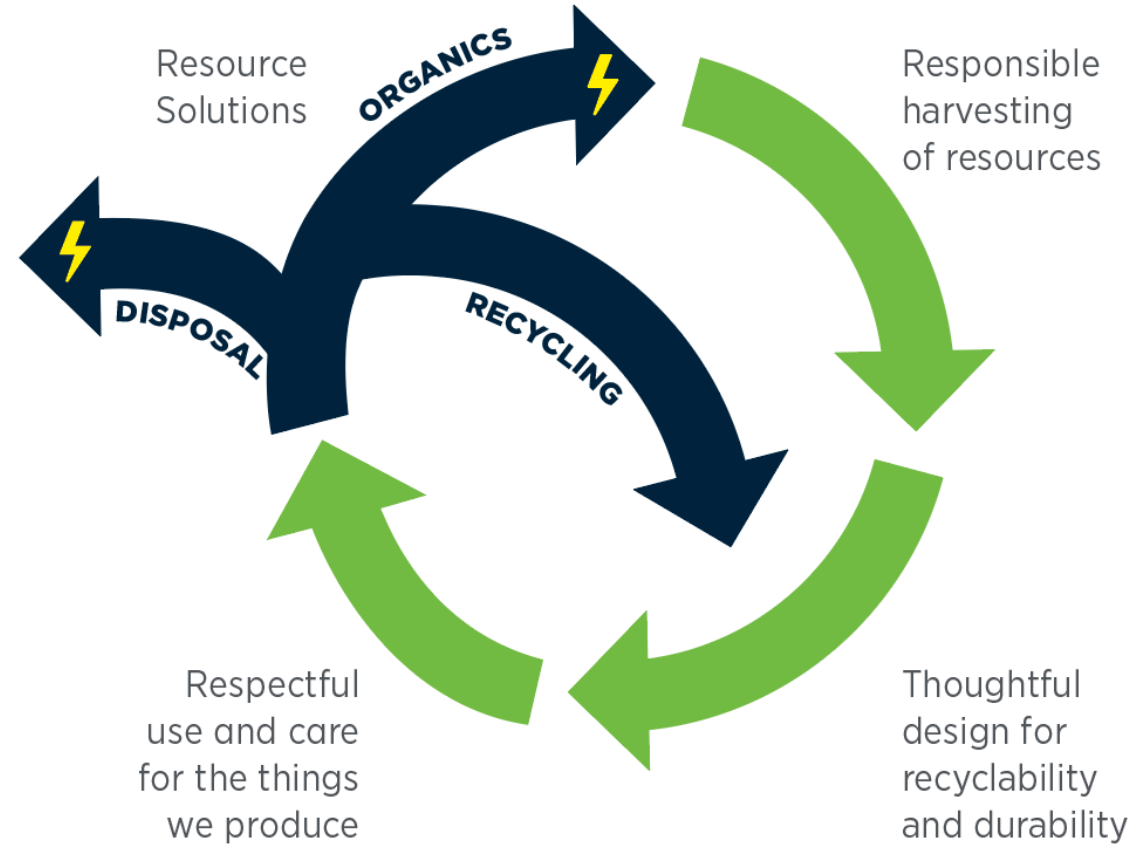
- Casella is a regional solid waste resource management company serving **50,000 households** and **5,500 businesses** throughout New Hampshire
- We directly employ **175 hardworking people**, with an annual **payroll of \$10 million**, at our New Hampshire facilities including:
 - 5 Transfer Stations
 - 3 Hauling Divisions
 - 1 Landfill

NCES Serves New Hampshire

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



A Holistic Approach to Resource Renewal



Recycling in Flux

- International markets such as Indonesia, Vietnam, and South Korea are following China's lead, allowing no more than 0.5% of "carried waste" 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 market over 800,000 tons per year
- 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 continuously advancing technology
- Recycling contamination is a function of the customer, not the process
- Recyclables are sold to the same markets regardless of process



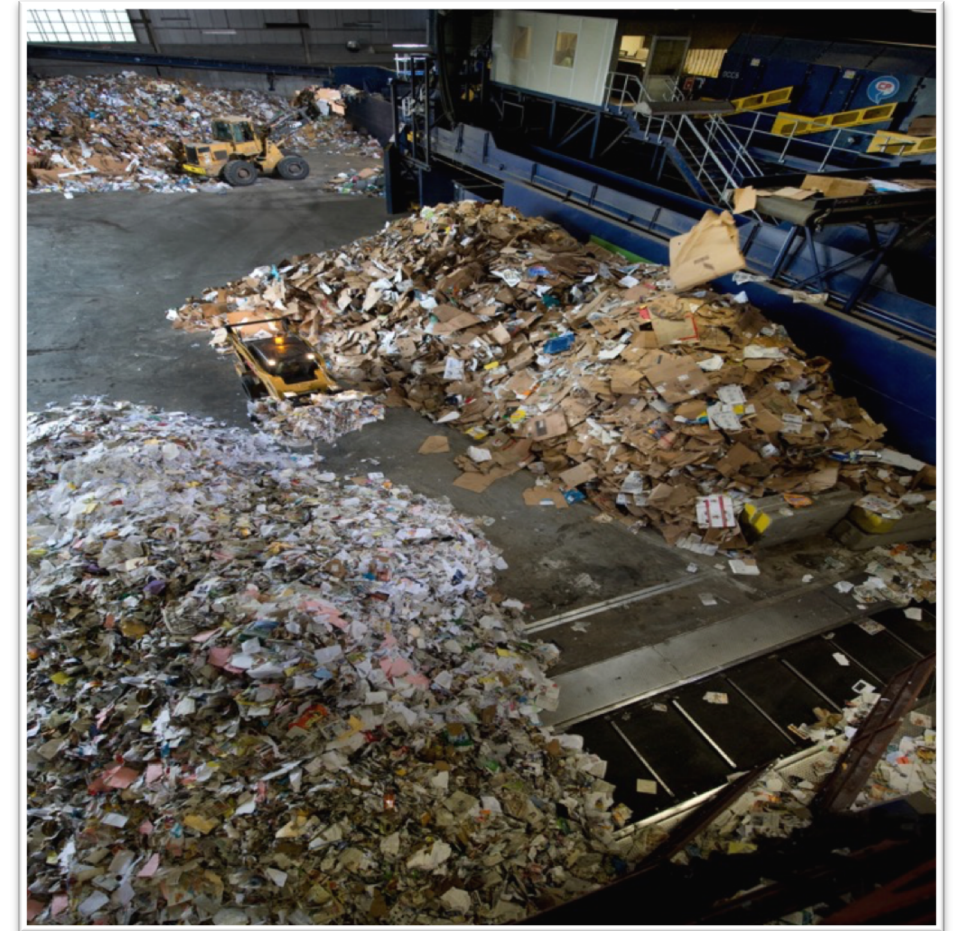
Future of Casella Recycling

- Casella invested \$9 million in recycling infrastructure last year
- 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!

To learn more, please visit:

casella.com



RECYCLING • SOLUTIONS • ORGANICS • COLLECTION • ENERGY • LANDFILLS