

ECONOMY & RECYCLING

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Waste Management: Colorado/Utah Area

I Think **GREEN**® Every Day.



Recycling Operations: National Snapshot



104 Material Recovery Facilities (MRFs)

- 30 Single Stream Facilities
- 24 Construction and Demolition (C&D) Processing Centers

E-Waste

- 5 Electronics Processing Plants (eCycling Services)

Austin, Tx; Oklahoma City, OK; Denver, CO; Minneapolis, MN; Springfield, MA

FUN FACTS: Commodity Marketing and Trading Services

- Market 7.6 Million Tons/year of Commodities
- Enough to fill the Empire State Building more than 11 times



Great operations

Be safe. Do it right the first time.

Recycling Operations: Colorado/Utah Area



Colorado/Utah

- 6 Material Recovery Facilities (MRF's)
- 1 C&D Processing
- 1 eCycling

FUN FACTS:

- Denver's MRF processes 7,000 tons of paper per month
- One ton of paper recycled saves roughly 17 trees, enough energy to power an average home for six months, and roughly 7,000 gallons of water



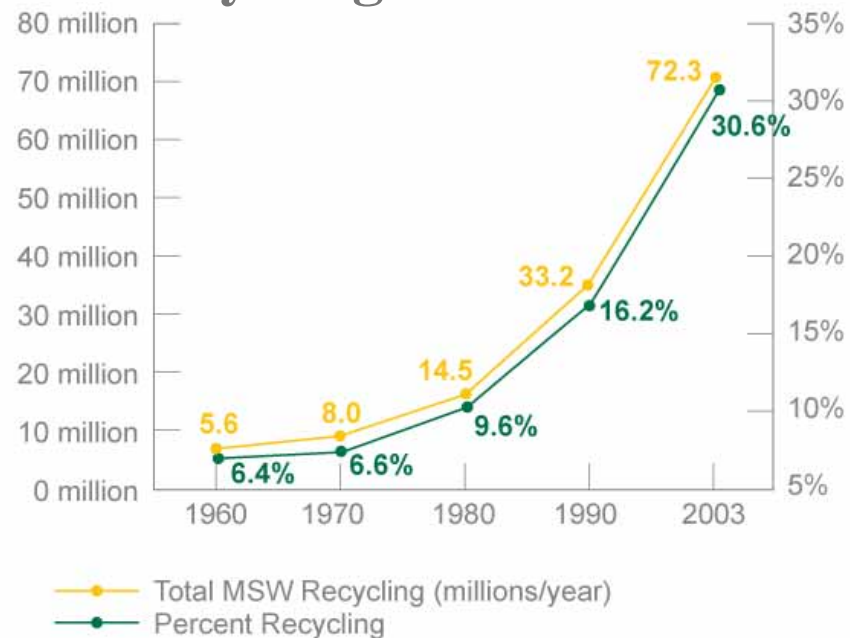
Respected brand
Have pride. Be clean. Be professional.

The Good News



- Americans are recycling more – and the U.S. EPA hopes this will continue, setting a goal of 35%

MSW Recycling Rates 1960-2003



Empowered employees
Fix it. Fix it now. Have fun.

What Does this Mean for Colorado & Utah?



Local Examples....

- About 83% of our CO/UT curbside volume flows through Single Stream MRFs
- In Denver, recycling participation rates increased well-over 40% when single-stream services were provided



Engaged customers
Prefer us. Recommend us.

Why Single Stream Works



- Increased participation from public
- Ease of use, no need to bag recyclables
- Reduce hauler unit costs (time per stop, trucks on street)
- Increased employee safety
- Increased volume

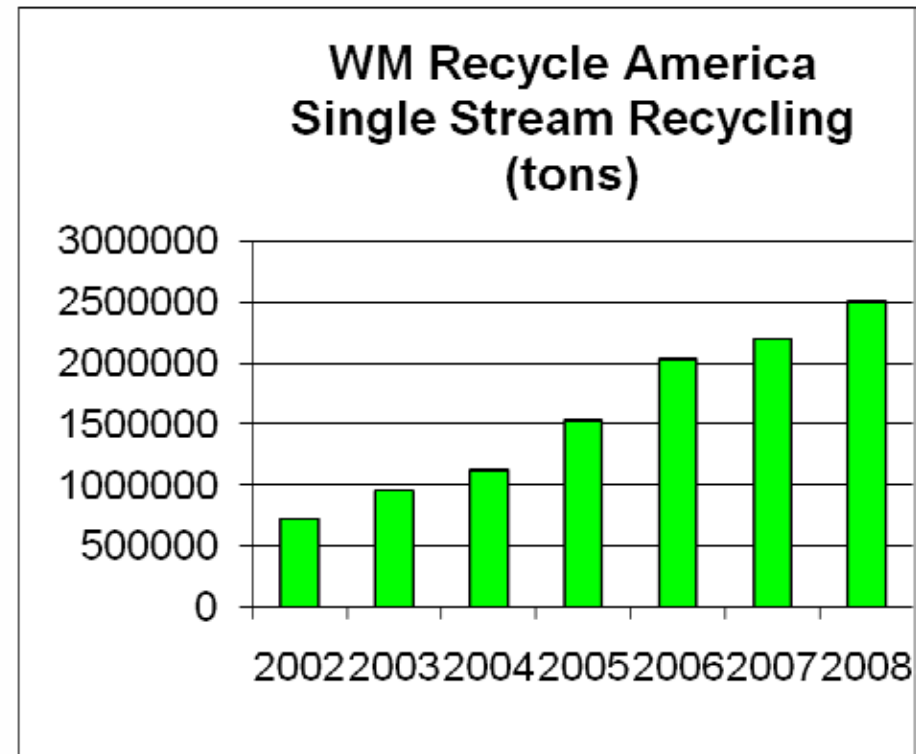


Neighbors of each other and our environment
Treat everyone with dignity and respect. Protect the environment.



Recycling Participation Rates

- From 2002 to 2008, the volume of material processed in our single-stream recycling facilities tripled, from about 722,000 tons in 2002 to 2.5 million tons in 2008.
- We currently handle 8 million tons annually and have a lofty goal to process more than 20 million tons by 2020



Single Stream Recycling



PROS	CONS
Decreased Collection Costs	Increased Capital/Facility Costs
Allows Automated Collection	Potential Increased MRF* Residue Levels
Higher Participation Rates	Potential for Increased Contamination of Recyclables
Potential Switch to Compaction Vehicles	Increased Labor Costs for Processing

*MRF: Materials Recovery Facility

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The Economy & Recycling



Swings in Commodities Markets

Fiber

ONP - 8/08:\$162; 10/08:\$131; 11/08:\$58; 2/09:\$42; 9/09:\$80

OCC - 3/08: \$141; 10/08:\$90; 11/08:\$44; 1/09:\$28; 9/09:\$80

Plastics

HDPE Natural – 10/08:\$840; 1/09:\$240; 9/09:\$440

PET – 10/08:\$540; 1/09:\$100; 9/09:\$240

Metals

Aluminum cans – 9/08:\$1,500; 1/09:\$500; 9/09:\$800

Steel cans – 10/08:\$150; 2/09:\$10; 9/09:\$60

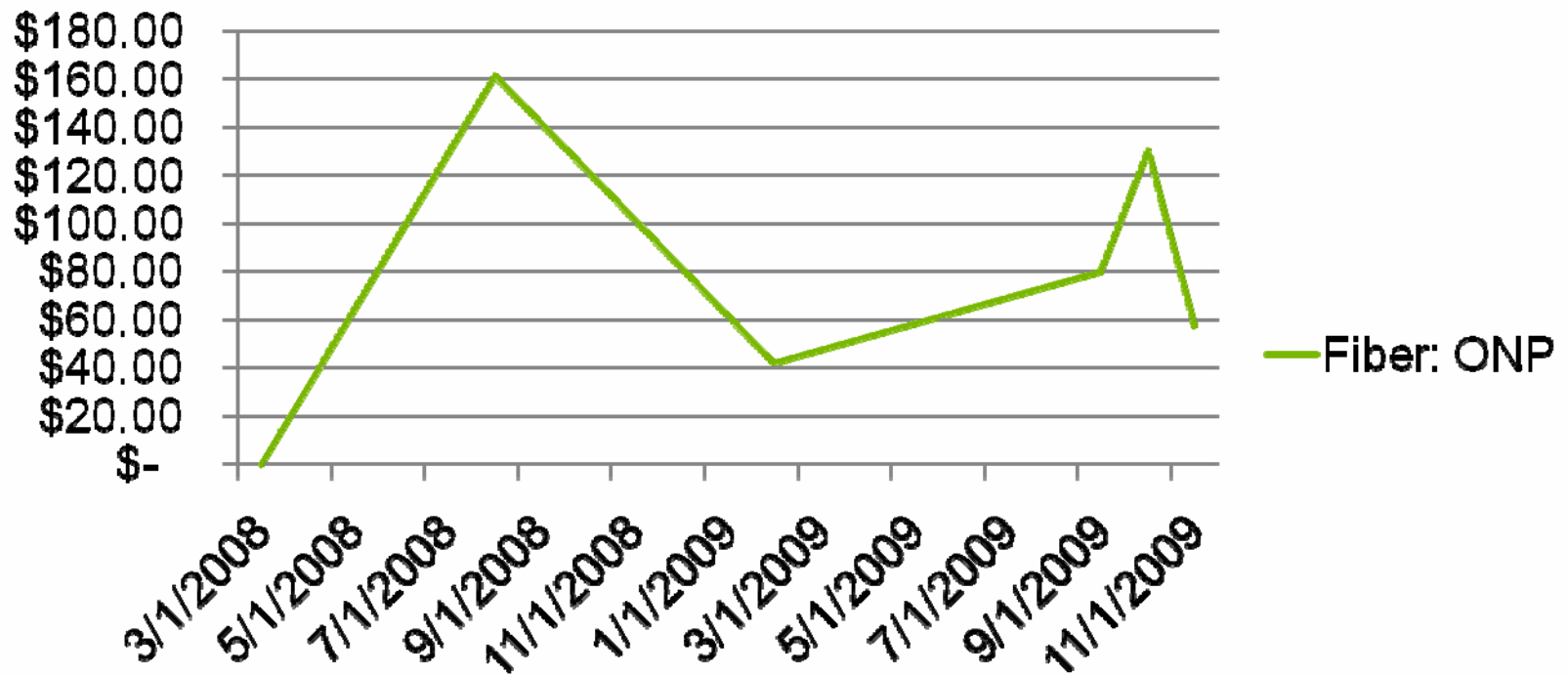


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Fiber ONP: Market Illustration

Fiber: ONP



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Key Factors Impacting Recycling Market



- Ease and Accessibility of Recycling Services
 - **Example:** Single Stream Recycling
- Consumer Interest, Demand and Participation
 - **Example:** Recycling Participation Rates
 - **Example:** Bottled Water
 - **Example:** Buy Recycled Products/Close the Recycling Loop
- Market Demands
 - **Example:** Domestic Newsprint Production
- Regulations

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We All Benefit From Recycling



Recycling helps the environment by:

- Reducing greenhouse gas emissions
- Lessening the need for new landfills, thereby preserving open space
- Saving energy
- Cutting air pollution
- Conserving resources for future generations

The Recycling Industry:

- Provides stable, beneficial jobs
- Generates state and local government revenues
- Stimulates capital investments
- Helps the environment
- Recycling is great for the economy and our environmental health and sustainability

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