



Rethinking Recycling & Addressing Contamination

SWANA New Mexico

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New Mexico

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Waste Management in Summary

(Information presented in this report is for the year ending December 31, 2016, unless noted)

Waste Management, Inc. (NYSE: WM), based in Houston, Texas, is the leading provider of comprehensive waste management and environmental services in North America.



¹ As of Q3 2017. Updated to reflect most recent number as our natural gas fleet grows throughout the year, and our recycling infrastructure investments fluctuate.

Discussion Topics

Market
Challenges

Redefining
Success

Lessons
from the
Field

Resources

Quick Review of Market Changes & the Effects on Recycling

New Policies Create Global Challenges

2016

- China consumes 50% of world's recycled paper

2017

- Ban of mixed paper and mixed plastics announced
- Limits shipping licenses

2018

- China enforces new contamination limit 0.5%
- Shipping imports cease May 4 - June 4
- Limits bale quality inspectors
- Tariffs

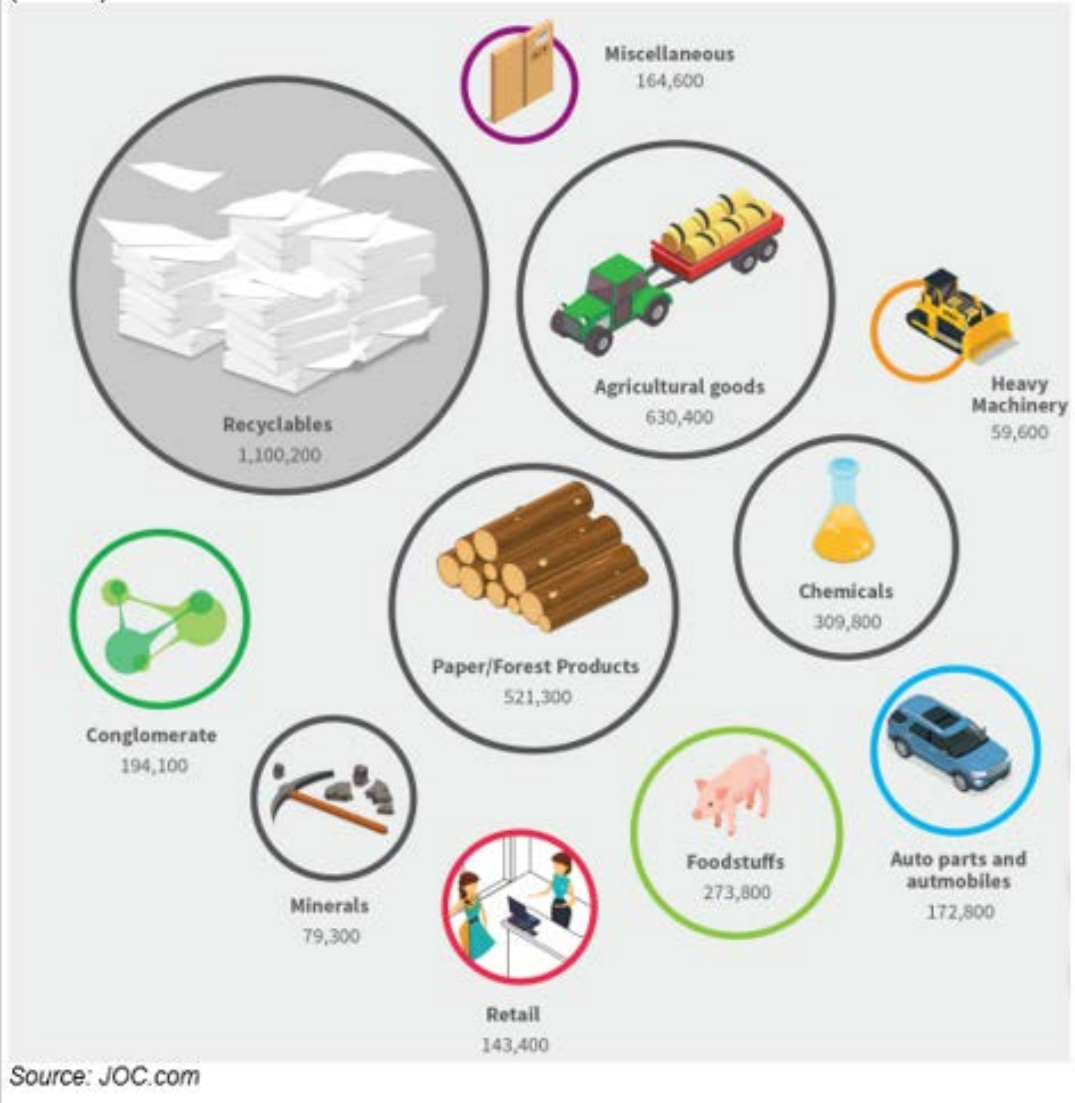
2020

- China to ban all recycling imports (all international markets)

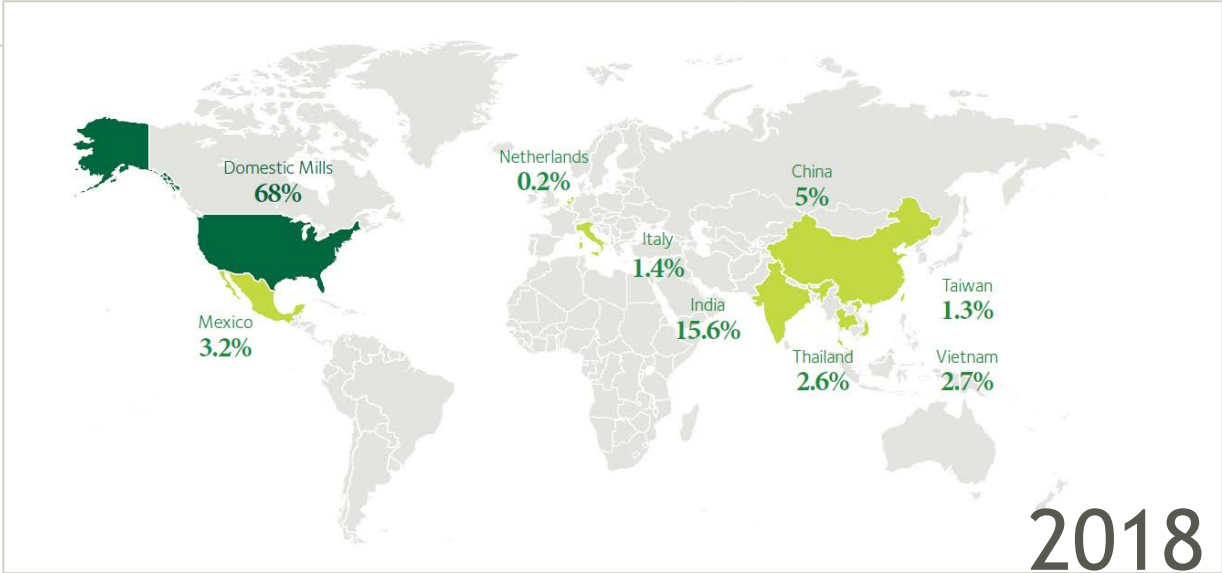
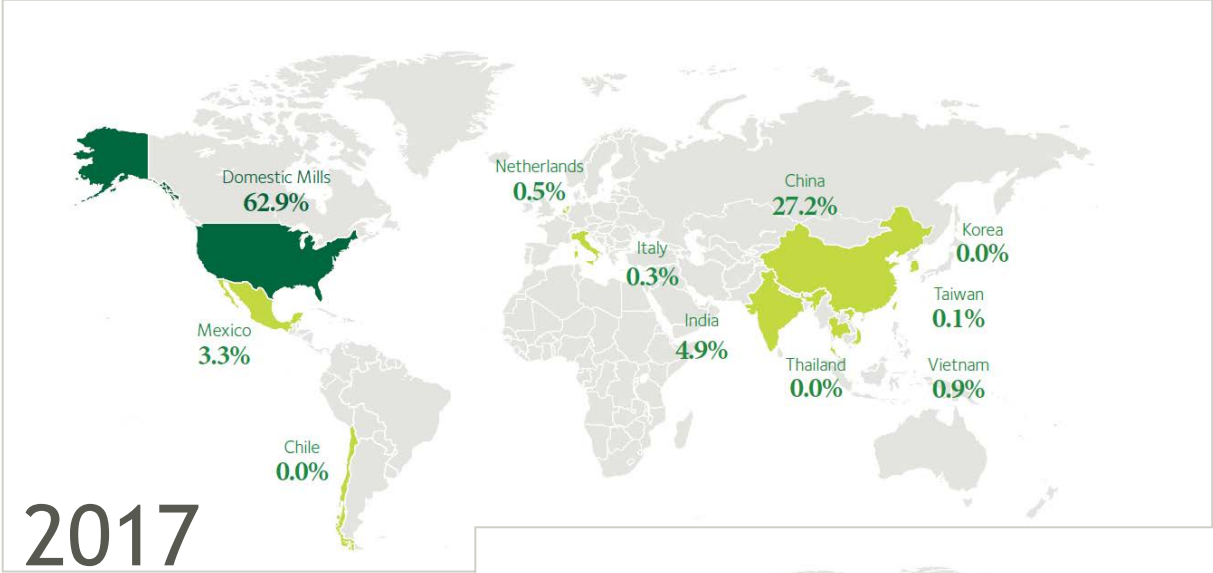
Top Ten U.S. Exports

2017 Top 100 Exports

(in TEU)



Commodities Changing Paths



How did we get here?

- Recycle, but no reduce or reuse

Collection > markets

Cost & convenience > quality control

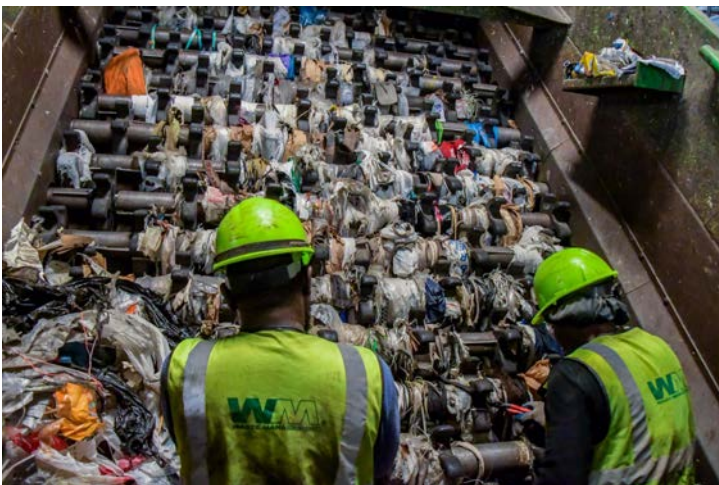
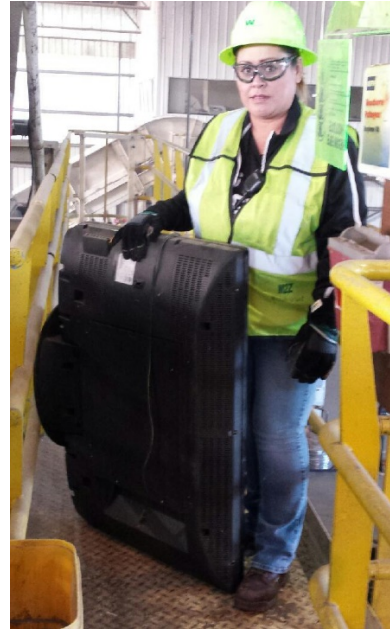
Focus on landfill avoidance

Measuring in tons = rewarding bad behavior

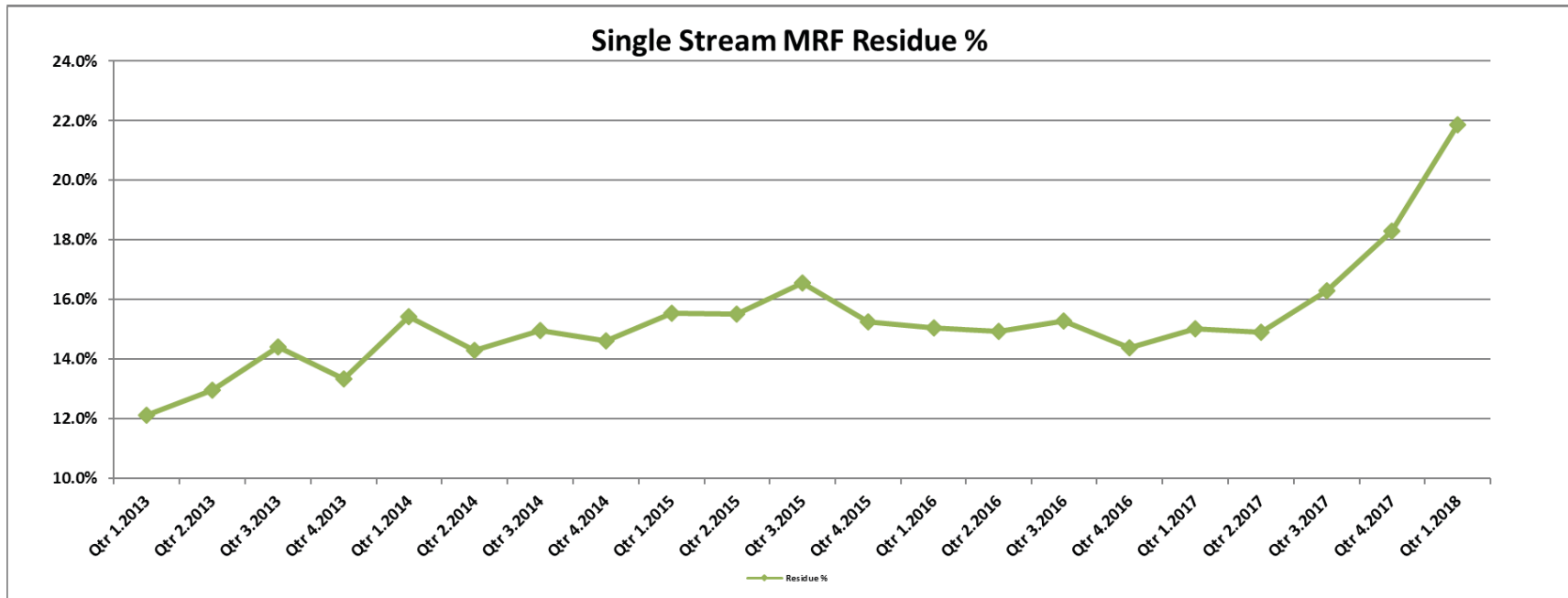
Wish-cycling

Persistent Contamination

Everything including the kitchen sink!



Re-defining Contamination



The Effect: Low Commodity Values

Reduced commodity demand

Increased quality requirements

Supply surplus

New shipping cost to end markets

Commodity Prices Plunge

Newspaper

Down \$50/ton

Mixed Paper

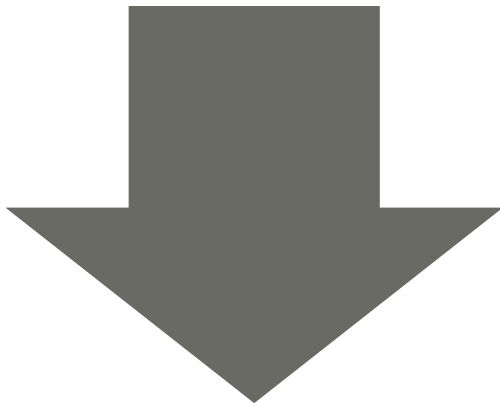
Down \$90/ton

Cardboard

Down \$60/ton



Recycling Program Review



Challenges

- Costs increasing, oversupply commodities
- Confusing packaging remains
- Quality requirements likely will remain



Positives

- Markets for paper will improve
- Domestic demand increasing
- We're wiser



Redefining Successful Waste Diversion

Reset Recycling Programs

WHY do we recycle?

WHAT should we recycle?

Why Do We Recycle?

- Creates secondary feedstocks for industry

Conserving virgin resources

Makes business sense

Your motivator here

What Should We Recycle?

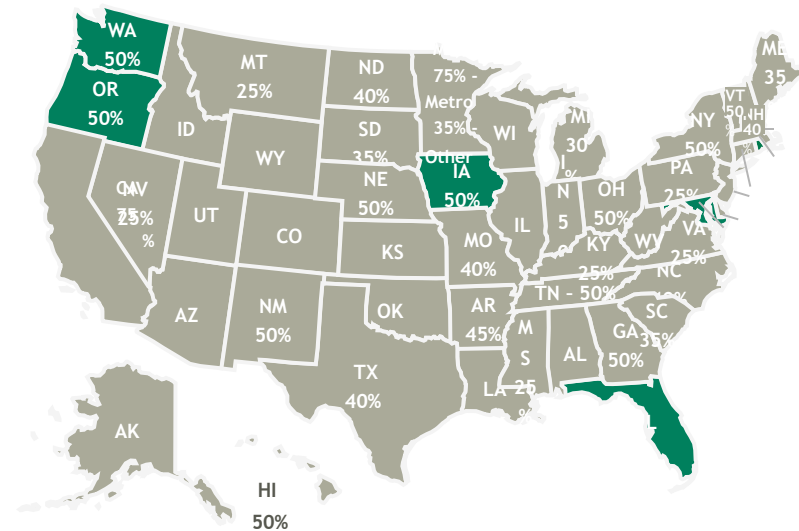
GHG Emissions Reductions Per Ton of Material Recycled
(in MtCO₂e)



Evolving, not starting from scratch.....

National discussions are focusing on metrics and measurement.

Several states are trying to determine how to best evolve their goals, recognizing their own priorities.



Lessons from the Field



How do we reduce
contamination?



What works?

Tagging options

Tagging
all HH

Target contaminators

Leave
tag

Not
servicing

Fees

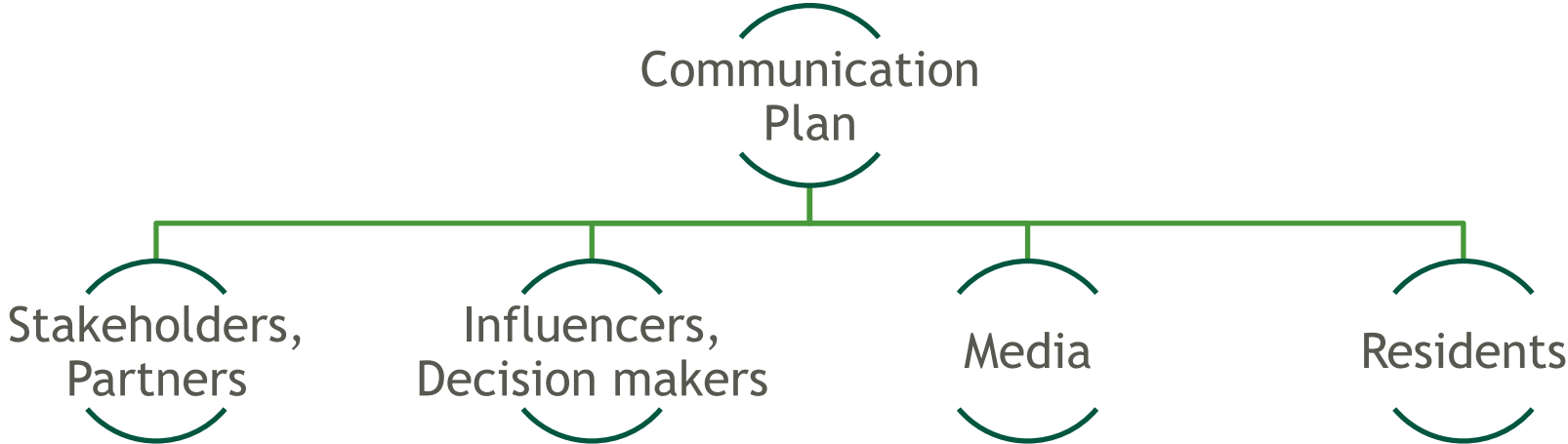
Take Away Messages

Direct message at contaminators

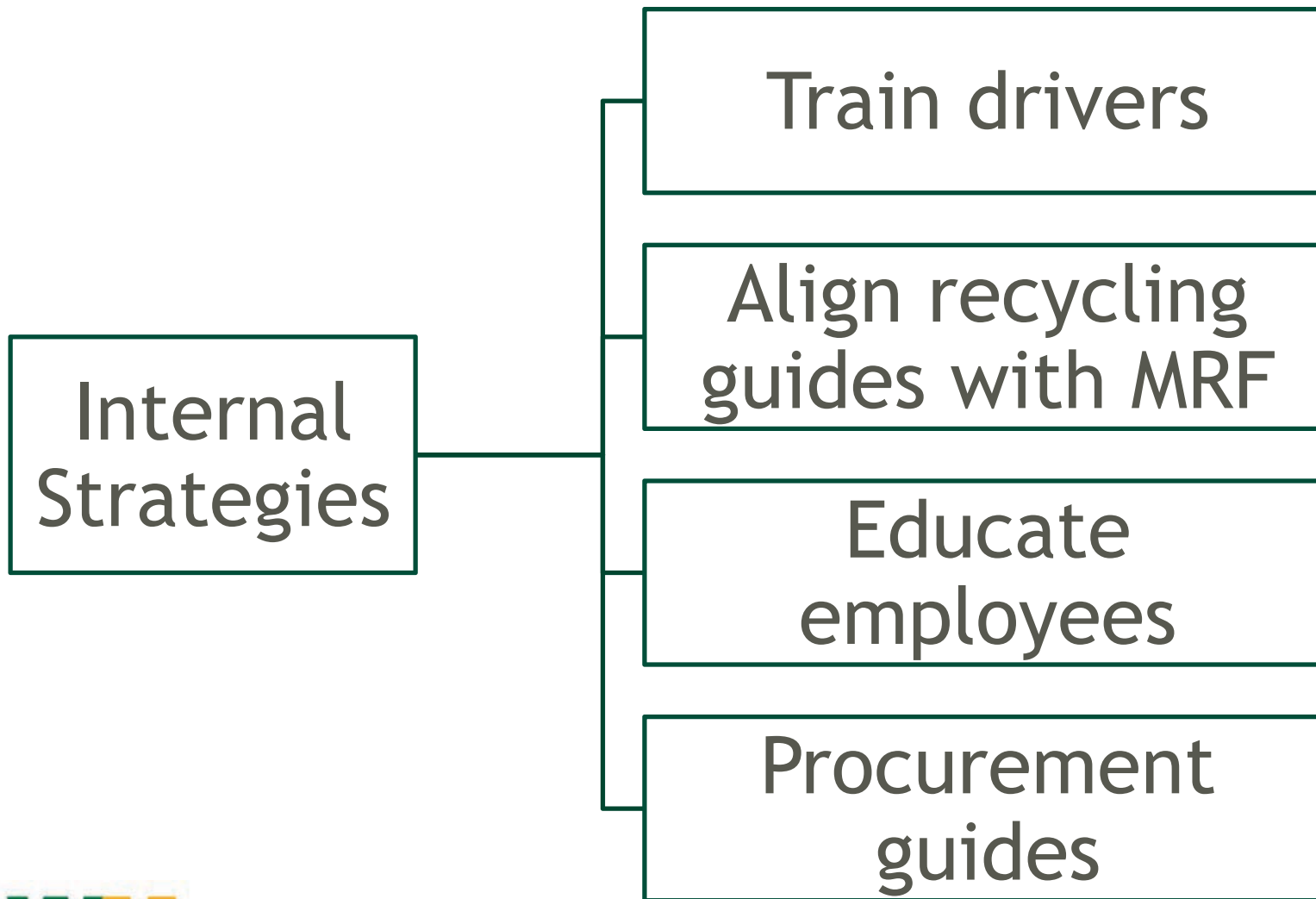
Inspector most effective

A majority of offenders will respond to tagging at the curb

Connect With All Audiences



Align, Activate Internal Resources



Building a Strategy for Your Community

Current Challenges



Available Resources



Audience Awareness



SMART Goals



Create Plan & Implement

Resources

Free Resources Available

RecycleOftenRecycleRight.com

The screenshot shows the homepage of the website. At the top left is the WASTE MANAGEMENT logo. To its right is a green arrow-shaped button with a recycling symbol and the text "RECYCLE OFTEN. RECYCLE RIGHT.". The navigation menu includes "Myths", "Resources", "Get Started", "Newsroom", and "Social". The main banner features a scenic landscape with mountains and a lake, with the text "RECYCLE OFTEN. RECYCLE RIGHT. SM" overlaid. Below the banner are three icons with corresponding instructions: a bottle/can/paper icon for "Recycle all my empty bottles, cans, and paper.", a "no food/liquids" icon for "Keep foods and liquids out of my recycling.", and a "no plastic bags" icon for "Keep plastic bags out of my recycling."

Free Marketing Tools

We Make It Simple



**RECYCLE OFTEN.
RECYCLE RIGHT.™**

RECYCLE OFTEN:

Metal Cans
Steel, tin & aluminum soda, vegetable, fruit & tuna cans

Plastic Bottles & Containers #1-5 & 7

Paper
Brown paper bags, non-confidential office paper, newspaper, magazines

Paper Cardboard, Dairy & Juice Containers

Flattened Cardboard & Paperboard

Glass Bottles & Jars

RECYCLE RIGHT:

Things you can do to ensure quality material is recycled:

DO NOT INCLUDE: Food waste, plastic bags, or polystyrene foam cups & containers

Paper and cardboard must be dry and free of food debris.
Paper food containers must be rinsed out, no caps.
Tissues, paper towels or other paper that has been in contact with food is not acceptable.
Make sure food contamination and caps are removed from cans and plastics and all containers are empty.
Separate plastic lids from plastic bottles (often made from different materials).
Keep medical waste (syringes, needles) out of recycling containers or place in safe disposal containers like Waste Management's MedWaste Tracker® box.

**RECYCLE OFTEN.
RECYCLE RIGHT.™**

WHY recycle?

- Plastic bottles**
can turn into clothing
- Aluminum cans**
can turn into new ones in 60 days
- Today's news**
can become a new cereal box

How to recycle:

- Recycle all bottles, cans and paper**
- Keep items clean and dry**
- No plastic bags**

© 2014 Waste Management, Inc. The Recycle Often, Recycle Right™ recycling program is available in select communities only. Please check with your local municipality on their acceptable materials and additional details of local programs, which may differ slightly.

**RECYCLE OFTEN.
RECYCLE RIGHT.™**

Always Recycle
Recicla Siempre

Empty Plastic Bottles & Containers
Botellas y Envases de Plásticos Vacío

Empty Glass Bottles & Jars
Botellas y Frascos de Vidrio Vacíos

Empty Food & Beverage Cans
Latas de Alimentos y Bebidas Vacías

Clean Paper
Papeles Limpios

Clean Cardboard & Paperboard
Cajas de Cartón y Cartulina Limpias

Do Not Put in Recycling Cart
No Deposite Basura en el Envase de Reciclaje

Food & Liquids
Comida y Líquidos

Plastic Bags & Film
Do not bag recyclables.
Bolsas de Plástico.
No pongas tus reciclables en bolsas de plástico.

Foam Cups & Containers
Vasos y Envases de Poliestireno

Clothes or Textiles
Ropa o Cobijas

Yard Waste
Residuos de Jardín

RecycleOftenRecycleRight.com



RecycleOftenRecycleRight.com

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[@WasteManagement](https://twitter.com/WasteManagement)



Remember:
When In Doubt, Throw It Out.



1 in 4 items placed in a recycling
cart is not recyclable!

Summary: The New Normal

Stringent contamination limits

Declining demand from China

Higher processing & transportation costs

Drive to develop new markets, infrastructure

Impacts all communities

Questions?

