

HELP KEEP YOUR DRIVER SAFE

Minimize the potential for coronavirus.

1 Bag your trash



2 Recycling loose



3 Trash at curb the night before



4 Medical syringes contained in rigid container clearly marked



Operational Best Practices

Realities of operations

- Employees work in close proximity
- Common access, egress, break rooms
- Time clocks
- Safety meetings
- Start times
- Breaks
- Public transport
- Carpooling
- Multiple employees from same family
- Turnover



Operational Best Practices



THE EVOLVING TON COVID-19 EFFECT

COMMODITIES- CHANGES IN WASTE GENERATION 1990-2017

Evolution is fits and starts and changes fast with faster changes

- Consumers: Disposable paper demand- tissues, toweling, wipes, gowns, etc.
- Away from home activities curtailed, slower recovery
- Use of internet and home officing for meetings, purchases reports, and conferences
- Food preferences change

DECREASING PREVALENCE



INCREASING PREVALENCE



41:59

1:21:10



Volume Impacts- Long Term Uncertain

- Residential
 - Shelter-in-place orders happened largely in second half of March
 - More at home consumption, more 'spring' cleaning
 - 7% to more than 30% overall volume increases
- Commercial (small container)
 - Limited cancellations
 - Suspend service varied by segment
 - Hospitality, Restaurants, Education, Commercial Property amongst hardest hit
 - Grocery, big box, healthcare, Multi-family busier than ever
- Industrial (large container)
 - Limited suspensions in permanent business
 - Slow down on temporary hauls, but little impact to recycling volumes



19:08

1:21:10



LONG-TERM OBSERVATIONS

RECYCLING DURING THE PANDEMIC

- Operators have demonstrated ability to keep employees safe through pandemic
- Transmission through surface contact has not materialized
- Vast majority of all MRFs remained open during shelter in place orders
- Anticipate permanent change in consumer behaviors
- Recovery will be variable by segment
- Commodities and supply chain valued during disruptions- Critical to critical supplies
- Storm clouds- municipal budgets, cancelled mill capacity, economy



People



Operations



Customers



Communities



57:01

1:21:10

