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Waste Management & Remediation Services

US Industry Study with Forecasts for **2012 & 2017**

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US Industry Study with Forecasts for ***2012 & 2017***

Table of Contents

Waste Management & Remediation Services

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List of Tables & Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

SERVICES

MARKETS

REGIONS

INDUSTRY STRUCTURE

Growing interest in recycling and composting will benefit waste management services, while ongoing concern over indoor air quality and environmental health will aid remediation sector.

US demand to grow 5.3% annually through 2012

Demand for waste management and remediation services in the US is forecast to increase 5.3 percent per year to $109 billion in 2012. Advances will be supported by the ongoing need to collect, transport, treat and dispose of all types of waste. The growing interest in recycling and composting will also benefit demand for waste management services. Ongoing concern over indoor air quality and environmental health will aid use of remediation services in buildings and nonbuilding sites. Price increases are expected to decelerate over the period, primarily because of moderating fuel costs. However, compliance with increasingly stringent government regulation will increase costs, offsetting lower fuel costs somewhat.

US Waste Management & Remediation Service Demand

($84.6 billion, 2007)

Waste collection to remain dominant segment

The waste collection segment will continue to represent the largest share of demand through 2012, bolstered by the growing interest in recycling, which will increase the collection of recyclable materials. The collection of recyclable materials is a higher value service than standard waste collection, aiding value growth going forward. Remediation and material recovery services are anticipated to provide the fastest growth in the industry. Remediation services will continue to benefit from the ongoing interest in public and environmental safety, as well as from redevelopment of "brownfields." Material recovery services will see strong growth due to the increasing interest in recycling in the US and the reuse of materials in the manufacturing market. Waste treatment and disposal services are projected to see the slowest gains through 2012, mainly because of market maturity. In addition, growing environmental and regulatory pressures will limit the amount of solid waste generated, restraining demand. Furthermore, the number of active municipal solid waste landfills is forecast to continue to decline, limiting market expansion. However, as existing landfills are closed, tipping fees are expected to increase, offsetting these negative factors.

Ongoing privatization to drive government market

Ongoing privatization of government waste management, the largest market for waste management and remediation services, will continue to generate growth opportunities for contract service providers. The residential market, the second largest segment, will benefit from gains in recyclable material collection and building remediation services (e.g., mold abatement and removal). The service industries and construction and demolition markets will see the fastest growth through 2012, driven by healthy advances for service income and construction activity.

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Sample Text, Table & Chart

TABLE V-6

NORTHEAST WASTE MANAGEMENT & REMEDIATION SERVICE DEMAND BY SUBREGION & SERVICE TYPE (million dollars)

Item	1997	2002	2007	2012	2017
Northeast Population (millions)					
$ services/capita					
Northeast Waste Mgmt & Remed					
By Subregion:					
New England					
Middle Atlantic					
By Service Type:					
Waste Collection					
Remediation Services					
Waste Treatment & Disposal					
Material Recovery & Other					
% Northeast					
Waste Management & Remediation	4				0

SAMPLE TABLE

MARKETS

Residential

The residential market, which accounted for one-quarter management and remediatio ... encon those residents to which ser ... l mun including private residential ... mplex residents outside of city bou ... local offer contract collection of r ... eaves portation and financial burd ... rs. Th of household hazardous waste ... of hor as general waste collection firms will not accept these in the r waste stream. Furthermore, remediation of a residence is mo to the homeowner to initiate and pay for.

SAMPLE TEXT

Waste collection represented the largest share of residen in 2007, with 70 percent. Through 2012, the residential mark projected to expand 5.9 percent per year to $19.4 billion. This off the pace of the 2002-2007 period which saw service prices increase, driven by strong growth in fuel costs for service providers which were passed along to the consumer. Gains will continue to be limited as many municipalities structure trash collection for residents in-house or through city contracts. However, the increasing interest in recycling will offer growth opportunities for service providers, as homeowners desire curb-side pickup for their recyclables.

The residential market for waste treatment and disposal was just over $4 billion in 2007. Through 2012, demand is anticipated to increase 3.4 percent per annum to $4.9 billion, a pace in line with the 2002 to 2007 period. Advances will be hampered by ongoing interest in recycling and composting, which limits the volume of waste collected, and therefore treated and disposed of. Moderating fuel costs will also limit value growth through 2012. However, ongoing interest in private residential communities, condominium associations and homeowner

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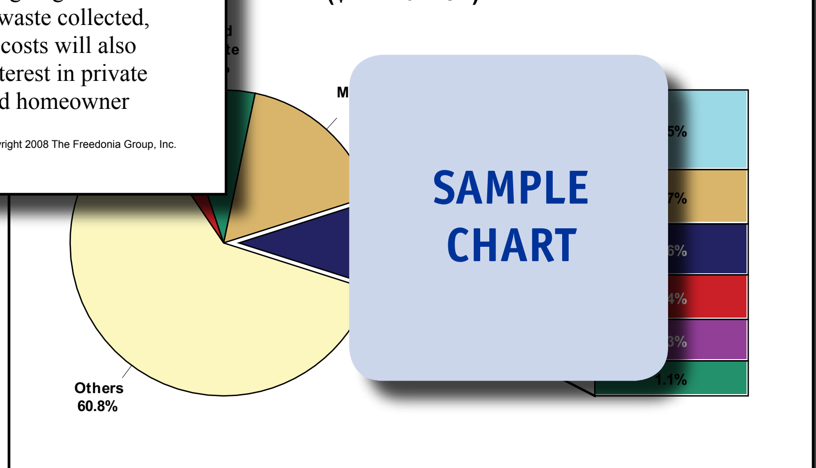
CHART VI-1

MANAGEMENT & REMEDIATION SERVICE MARKET SHARE, 2007 ($72.7 billion)*



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Sample Profile, Table & Forecast

TABLE III-3

WASTE COLLECTION SERVICE DEMAND BY WASTE TYPE (million dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil $)					
$ services/000$ GDP					
Waste Collection Services					
Nonhazardous Waste:					
Waste Collection					
Recyclable Collection & Other					
Hazardous Waste:					
Collection					
Transportation					
Other					
% waste collection					
Waste Management & Remediation					

SAMPLE TABLE

COMPANY PROFILES

SEACOR Holdings Incorporated
2200 Eller Drive
Fort Lauderdale, FL 33316
954-523-2200
http://www.se

Revenues: $
US Revenues
Employment:

Key Services ... management
and consultin

SAMPLE PROFILE

SEACOR Holdings operates marine and aviation assets that primarily serve the oil and gas industry. The Company also provides freight transportation services for bulk commodities on US inland waterways, and environmental services. SEACOR Holdings operates through six segments: Offshore Marine Services, Marine Transportation Services, Inland River Services, Aviation Services, Environmental Services and Other.

The Company is involved in the US waste management and remediation services industry through the Environmental Services segment, which generated revenues of $155 million in 2007. The Environmental Services segment operates through SEACOR Holdings' SEACOR Environmental Services (SES) Incorporated subsidiary, which is headquartered in Great River, New York. SES encompasses several businesses that provide emergency response and remediation services for oil, chemical, industrial and marine transportation customers. Additional services comprise waste management and consulting services. The company's worldwide operations include sites in the US, the United Kingdom, Turkey, Georgia, United Arab Emirates and Thailand.

222

"Through 2012, demand for material recovery and other waste management services is projected to increase 6.9 percent per annum to $5 billion, a deceleration from the 2002 to 2007 period but the fastest among the major service segments. Ongoing interest in recycling across all markets and reuse of materials in the manufacturing market will benefit demand for material recovery services, as well as the sale of these materials for remanufacturing ..."
--Section III, pg. 89

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Other Studies

Private Security Services

This study analyzes the US private security services industry. It presents historical demand data for 1997, 2002 and 2007 and forecasts for 2012 and 2017 by type (e.g., guarding, alarm monitoring, private investigation, armored transport, correctional facilities management, systems integration, consulting, pre-employment screening), end-use (nonresidential, residential), and region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles major players.

#2362 .... 07/2008..................... $4600

Commercial & Residential Cleaning Services

US commercial and residential cleaning service sales will grow 5.3% annually through 2011. Gains will be driven by the shift toward "do-it-for-me" cleaning services in the residential market, and by the outsourcing of noncore functions in the nonresidential market. This study analyzes the $48.4 billion US contract cleaning service industry, with historical data and forecasts for 2011 and 2016 presented by service, market and region. The study also evaluates company market share and profiles leading players.

#2191 .... 05/2007..................... $4400

Building Maintenance Services

US revenues for building maintenance services will rise 5.6% annually through 2011, aided by a shift away from "do-it-yourself" to "do-it-for-me" maintenance for businesses and households. The nonresidential market will grow the fastest while swimming pool and building systems services will lead gains by type. This study analyzes the $69.9 billion US building maintenance service industry to 2011 and 2016 by type, market and region. It also evaluates company market share and profiles industry competitors.

#2177 .... 04/2007..................... $4400

Air Pollution Control in China

Demand for air pollution control equipment in the world's leading emitter of sulfur dioxide and other air pollutants will grow 18% annually through 2010. Particulate removal equipment will remain the largest product category and grow the fastest. Manufacturing and utilities will stay the top markets. This study analyzes the ¥30 billion Chinese air pollution control industry for 2010 and 2015 by product, market and region. The study also evaluates company market share and profiles leading industry players.

#2163 .... 04/2007..................... $4900

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies will reach $7.6 billion in 2011 based on substantial growth in nonresidential construction and floor space. Manual cleaning products like wipes and automated floor cleaning equipment such as backpack vacuums will lead gains. Industrial buildings will outpace all other markets. This study analyzes the $6.5 billion US janitorial equipment and supplies industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2181 .... 03/2007..................... $4400

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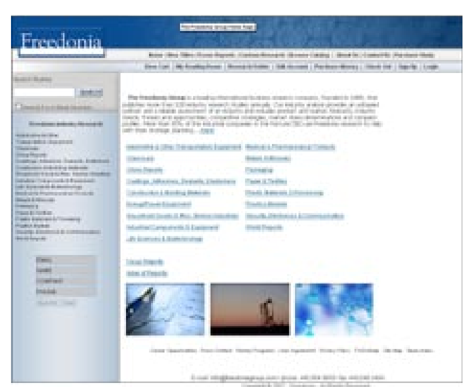

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