Waste Management & Remediation Services

US Industry Study with Forecasts for **2015 & 2020**

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The Freedonia Group
767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

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INDUSTRY STRUCTURE

Gains will be driven by improved economic activity, increasing amount of waste generated, stricter environmental regulations and increasing adoption of recycling programs.

US demand to grow 4.4% annually through 2015

Waste management and remediation revenues are projected to advance 4.4 percent annually to more than $100 billion in 2015. Growth in revenues will result from increasing population and projected economic expansion, which will spur new business formation, renewed construction activity and improved activity across the broader economy, all of which will lead to an increase in the amount of waste generated. Stricter environmental regulations and increasing adoption of recycling programs will also lead to growth in revenues, particularly in remediation and material recovery services. Moderating influences will include “zero waste” and other source reduction initiatives.

Waste collection to remain dominant service

Waste collection, which accounted for 58 percent of revenues in 2010, will continue to be the largest contributor to industry revenues, reflecting increasing waste generation volumes and rising fuel and labor costs. The vast majority of this waste is generated by individuals and is collected by either government employees or third party contractors. The shift to the latter will continue, as government entities continue to privatize government functions, including waste collection. Waste collection revenues will increase 4.1 percent annually to $58.5 billion in 2015.

US Waste Management & Remediation Services Demand

($81.9 billion, 2010)

Remediation revenues are forecast to increase 5.9 percent annually to $19.2 billion in 2015. Revenue growth will be spurred by increasingly strict environmental regulations governing the remediation of industrial “brownfields,” as well as continued removal or encapsulation of such toxic substances as lead paint, asbestos and mold in both residential and nonresidential structures. In addition, the clean-up of sites contaminated with radioactive waste, military installations which are contaminated with munitions and toxic chemicals, and remediation following natural disasters and other emergencies will also contribute to revenue growth. Remediation services accounted for 18 percent of industry revenues in 2010.

Material recovery, other services to grow fastest

Material recovery and other waste management services are projected to expand 7.3 percent annually to $4.7 billion in 2015. Revenue growth will result from increasing adoption of recycling programs and the expansion of material recovery services into materials other than traditional recycled materials. Many waste service providers are looking for ways to create new revenue streams, such as the composting of organic wastes like yard trimmings, wood and paper waste and food scraps to create biofuels, compost and mulch.

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Sample Text, Table & Chart

TABLE III-3

WASTE COLLECTION SERVICES DEMAND BY WASTE TYPE (million dollars)

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil $)					00
$ services/000$ GDP					04
Waste Collection Services					50
Nonhazardous Waste:					50
Waste Collection					00
Recyclable Collection & Other					50
Hazardous Waste:					50
Collection					60
Transportation					90
Other					50
% waste collection					.3
Waste Management & Remediation					300

SAMPLE TABLE

MARKETS

Government

Waste management and remediation revenues generated ment markets are projected to ... lly t billion in 2015. Revenue gai ... g po household formation, new bu ... h in economy and rising fuel and ... asse to consumers. The most rapi ... e po remediation and material reco ... coll treatment and disposal service ...

SAMPLE TEXT

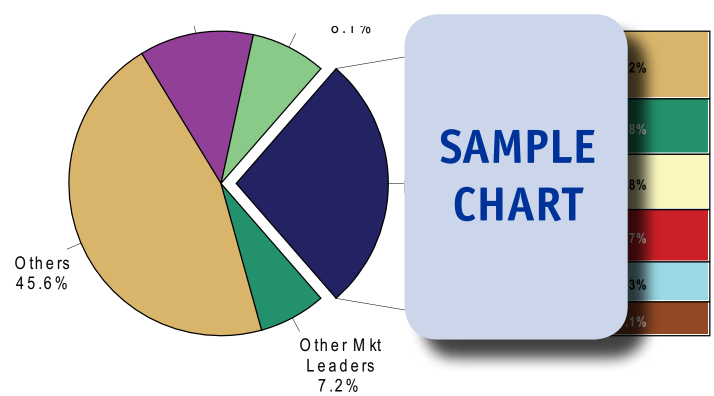
This market includes local, state and federal governmen ers and encompasses services related to a government's own generation of waste and to services arranged through a government unit on behalf of other waste-generating parties (e.g., municipal garbage collection for residences within a particular jurisdiction). Government demand for waste management and remediation services includes the value of services provided directly by government units, using public employees and government-owned equipment, as well as the value of services purchased from third party contractors who then perform such services on behalf of a government unit.

The expense of maintaining in-house waste management services can be significant, resulting in an increasing percentage of government demand being met by third party firms. Efficiency and economies of scale are key variables in this decision process for local and ments. Furthermore, the complexity and cost of meeting reg guidelines is also shifted from municipalities and other gove ties to third party providers. Most of the government market (over two-thirds of revenues in 2010) is handled by third par providers, not internal operations.

121 Copyright 2011

CHART VI-1

PRIVATE WASTE MANAGEMENT & REMEDIATION SERVICES MARKET SHARE, 2010 ($73.3 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE V-9

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

Item	2000	2005	2010	2015	2020
West Population (millions)					
$ services/capita					
West Waste Management & Remedia					
By Subregion:					
Mountain					
Pacific					
By Service Type:					
Waste Collection					
Waste Treatment & Disposal					
Remediation					
Material Recovery & Other					
% West					
Waste Management & Remediation	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Stericycle Incorporated
28161 North Keith Drive
Lake Forest, IL 60045
847-367-5910
http://www.stericycle.com

Revenue
Employ

Key Ser ... and other waste collection, t ... vices

Ste ... nagement and related s ... lexico, the United Kingdom, ... Argentina. The Company operates via two geographical segments: United States and Foreign Countries.

SAMPLE PROFILE

The Company participates in the US waste management and remediation services industry through the United States segment, which generated revenues of $1.1 billion in 2010. The segment primarily encompasses Stericycle's domestic regulated medical waste management services and domestic returns management services for pharmaceutical waste. As of year-end 2010, the Company served 485,000 customers worldwide, including 13,000 large-quantity generators such as hospitals, blood banks and pharmaceutical manufacturers; and over 472,000 small-quantity generators, which encompass outpatient clinics, medical and dental offices, long-term and sub-acute care facilities, veterinary offices, municipalities and retail pharmacies. Specifically, for large-quantity generators of regulated waste, the Company provides BIO SYSTEMS sharps management services to reduce the risk of needle sticks; infection control products and services; and regulated returns

252

"Waste management and remediation services revenues in the Pacific subregion are projected to increase 4.3 percent per year to $17.4 billion in 2015. Advances will be supported by solid growth rates for population and economic activity. The Pacific market was ranked first in the nation in terms of per capita spending on these services in 2010, indicating a level of market maturity. Nevertheless, opportunities for revenue growth will ..."

--Section V, pg. 179

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Other Studies

Geosynthetics

This study analyzes the US geosynthetics industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., geotextiles, geomembranes, geogrids, geonets, clay liners, preformed), market (e.g., construction, transportation infrastructure, landfills, liquid containment) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2744 .... April 2011 .... $4900

Consumer Water Purification & Air Cleaning Systems

US demand for consumer water purification and air cleaning systems will rise 5.2 percent per year through 2014. Conventional filters will remain the dominant water purification system, while higher-value reverse osmosis and distillation systems grow the fastest. Electrostatic cleaners will lead gains in the air segment. This study analyzes the $1.3 billion US consumer water purification and air cleaning system industry, with forecasts for 2014 and 2019 by technology, product and regional market. It also evaluates company market share and profiles industry players.

#2720 .... March 2011................... $5100

World Security Services

The global market for private contract security services is forecast to advance 7.4 percent per year through 2014. The strongest market gains will be posted in developing parts of Asia, Eastern Europe, Africa and the Middle East where security markets are relatively underdeveloped. The US will remain the largest single consumer. This study analyzes the $153 billion world security service industry, with forecasts for 2014 and 2019 by service type, market, world region and for 27 countries. It also evaluates company market share and profiles industry participants.

#2711 .... March 2011................... $6100

Private Security Services

US sales of private contractual security services will rise 4.9 percent yearly through 2014. Guarding and alarm monitoring will remain the largest segments while pre-employment screening, systems integration and management, and consulting will grow the fastest. The residential market will outpace nonresidential uses. This study analyzes the $49.8 billion US private security service industry, with forecasts for 2014 and 2019 by type, market and US region. It also evaluates company market share and profiles industry players.

#2675 .... November 2010 .... $4900

Commercial & Residential Cleaning Services

Revenues for contract commercial and residential cleaning services are forecast to advance 4.5 percent yearly through 2013. Exterior building cleaning will be one of the fastest growing services, while interior cleaning remains dominant. Residential and institutional buildings will see the biggest market gains. This study analyzes the $53.6 billion US commercial and residential cleaning service industry, with forecasts for 2013 and 2018 by service, market and US region. It also evaluates company market share and profiles industry players.

#2581 ....January 2010 .... $4700

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