



# Waste Management & Recycling

- NAICS 562 -

Statista Industry Report – USA

January 2020

# The U.S. Industry Report

Dear reader,

Find out more about the “Waste Management & Recycling” industry in our report focusing on key industry figures, such as financial numbers, companies, employment, and salaries.

With this report, we provide a comprehensive overview of the current state of the industry as well as a forecast for the upcoming years.

Gain insights into key trends in the “Waste Management & Recycling” industry to assess risks and opportunities regarding national and international business.

We wish you a valuable and informative reading experience.

*Reinhold, Volker, Oliver, Ingrid,*

*Reinhold, Luana & Aike*

## Executive summary

- Industry revenue to increase by 2.4% p.a. from 2018 to 2023
- Value added by this industry grew by 6.4% in 2018, while the GDP grew by 5.4%
- Waste Management, Inc. registered the largest revenue in 2018
- The number of establishments increased by 3.2% in 2016
- The number of employees increased by 2.6% p.a. from 2010 to 2018
- The annual mean wage increased by 3.3% in 2018

# Agenda

## 01 Introduction

- Key figures and SWOT analysis
- Industry definition

## 02 Financial numbers

- Revenue
- Value added

## 03 Companies

- Top companies
- Business demographics

## 04 Employees and salaries

- Employment and unemployment
- Wages
- Degrees

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- Data description and methods
- Authors



# INTRODUCTION

- Key figures
- SWOT analysis
- Industry definition

# Waste Management & Recycling

Key figures



Revenue

**US\$102.2bn**

Total value  
in 2019<sup>1</sup>

**+2.8%**

Growth  
2018–2019

**+2.4%**

CAGR<sup>2</sup>  
2018–2023



Companies

**17,945**

Number of firms  
in 2016

**2,176**

Number of establishment  
births<sup>3</sup> in 2016

**1,552**

Number of establishment  
deaths<sup>3</sup> in 2016



Employees

**438 thousand**

Number of employees<sup>4</sup>  
in 2018

**US\$49,380**

Annual mean wage<sup>5</sup>  
in 2018

**42.5h**

Average weekly hours worked<sup>6</sup>  
in 2018

1: Statista estimate 2: CAGR: Compound Annual Growth Rate / average growth rate per year 3: With paid employees 4: Average of non-seasonally adjusted monthly values 5: Annual wages have been calculated by multiplying the "hourly mean wage" by 2,080 hours 6: Of all payroll employees

Source: [U.S. Census Bureau](#), [U.S. Bureau of Labor Statistics](#), Statista 2019

# Waste Management & Recycling

## SWOT analysis

### Strengths

- Many disposal sites inside the U.S. have reached its limits within the last years, making recycling a top priority
- Landfill volumes have stopped growing as the U.S. gets more and more involved with the disposal of waste
- Over a period of the last 20 years companies have managed to reduce solid waste per dollar of revenue
- The population becomes more conscious about the environmental impact of waste and is willing to recycle more

### Weaknesses

- Scrap recycling facilities in the U.S. have not been modernized for over 20 years now and need much investments to meet high expectations
- Lack of nationwide uniform regulations for scrap and recycling obstruct further developments and innovation
- Extending distances: Shutdown of disposal sites in communities lead to increasing transportation costs and arising garbage-related traffic

### Opportunities

- Since disposal quantities have reached a critical size, many parts of the U.S. are implementing “zero-waste programs” implying further investments into the recycling industry and new machines
- Legislation forces companies to track their waste creation in order to optimize the reporting towards the EPA. The intention of the lawmakers is making the process of waste tracking simpler and more efficient
- E-waste management will become crucial since its amount will likely have doubled until 2025

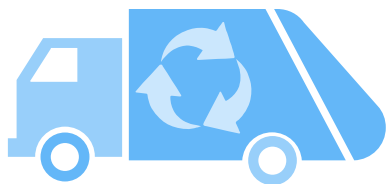
### Threats

- Low oil prices hinder the development to produce plastic containers out of recycled material, making it cheaper to use newly produced plastics
- U.S. being the leading e-waste generator is struggling with its recycling
- Ongoing innovations can threaten reliable companies that have been on the market for a long-term. Existing data and trends need to be used to keep up with a renewing sector
- Since the U.S. exports much of its waste, it loses the chance to create own know-how in recycling

# Industry definition

## Waste Management & Recycling – NAICS 562

- Industries in the Waste Management and Remediation Services subsector group establishments engaged in the collection, treatment, and disposal of waste materials. This includes establishments engaged in local hauling of waste materials; operating materials recovery facilities (i.e., those that sort recyclable materials from the trash stream); providing remediation services (i.e., those that provide for the cleanup of contaminated buildings, mine sites, soil, or ground water); and providing septic pumping and other miscellaneous waste management services.



## Subcategories included in this industry

- 56211 Waste Collection
  - 562111 Solid Waste Collection
  - 562112 Hazardous Waste Collection
  - 562119 Other Waste Collection
- 56221 Waste Treatment and Disposal
  - 562211 Hazardous Waste Treatment and Disposal
  - 562212 Solid Waste Landfill
  - 562213 Solid Waste Combustors and Incinerators
  - 562219 Other Non-hazardous Waste Treatment and Disposal
- 56291 Remediation Services
- 56292 Materials Recovery Facilities
- 56299 All Other Waste Management Services





# FINANCIAL NUMBERS

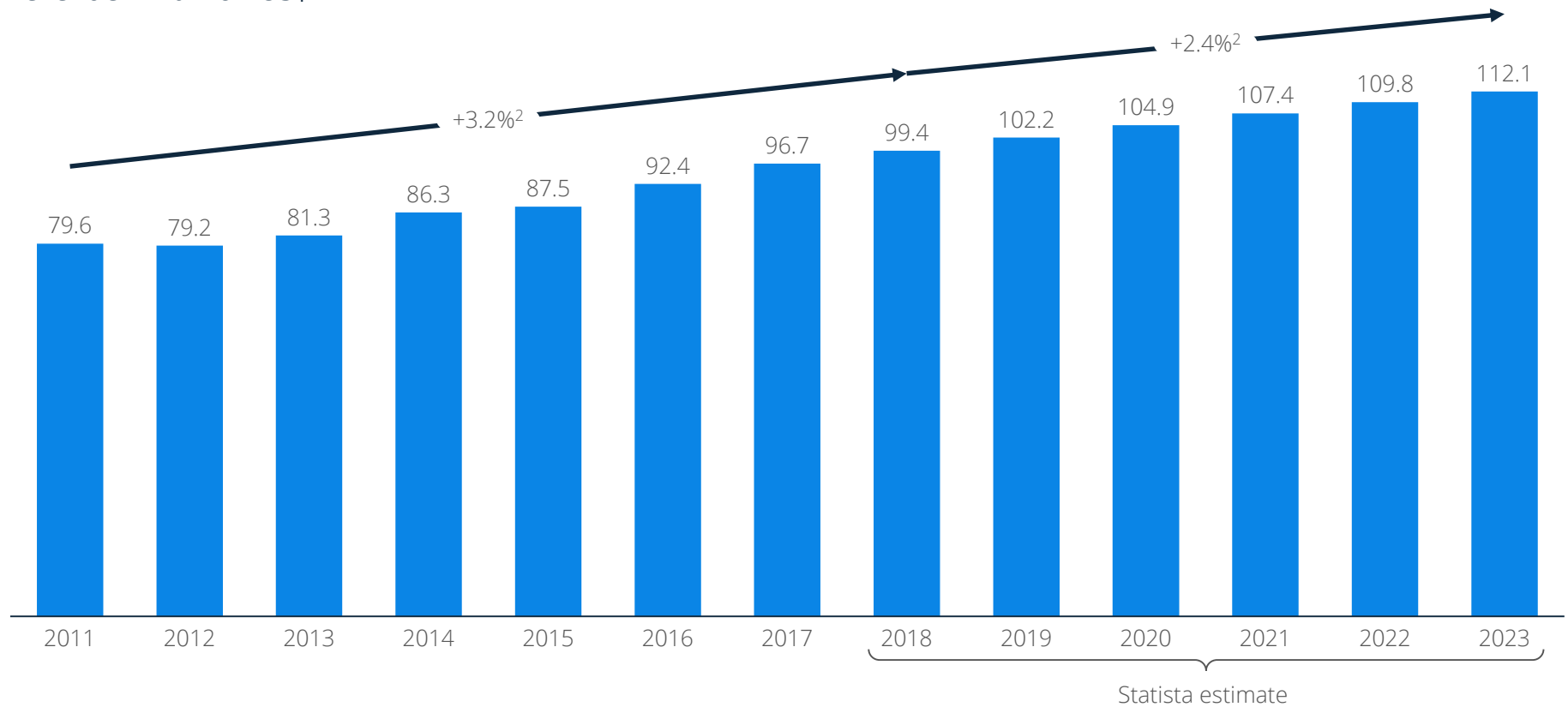
- Revenue
- GDP and value added
- Cost benchmark



# Industry revenue to increase by 2.4% p.a. from 2018 to 2023

Revenue: industry revenue

Revenue<sup>1</sup> in billion US\$



1: Includes revenue from all business activities whether or not payment was received. Revenue does not include sales and other taxes (including Hawaii's General Excise Tax) collected from customers and paid directly by the firm to a local, state, or federal tax agency 2: CAGR: Compound Annual Growth Rate / average growth rate per year  
Source: [U.S. Census Bureau](https://www.census.gov), Statista 2019

# With a revenue of US\$102.2 billion, this industry ranked 20th in 2019

Revenue: industry comparison

#	Industry	NAICS	Revenue in bnUS\$ <sup>1,2</sup>	Growth 2018-2019 <sup>2</sup>
1	Insurance carriers <sup>3</sup>	524	2,681.0	+3.2% ↑
2	Health care	621-623	2,487.7	+2.7% ↑
3	Banking and finance	521-523	2,070.7	+2.2% ↑
4	Professional, scientific, and technical services	54	1,936.7	+2.8% ↑
5	Administrative services <sup>4</sup>	561	895.8	+3.6% ↑
6	Telecommunications	517	610.4	-0.5% →
7	Real estate	531	493.3	+3.4% ↑
8	Publishing industries (except internet)	511	330.6	+1.9% ↑
9	Motion picture and sound recording industry <sup>5</sup>	512, 515	283.7	+2.2% ↑
10	Truck transportation	484	279.9	+1.6% ↑
11	Accommodation	721	275.1	+3.6% ↑
12	Air transportation	481	217.4	+1.9% ↑
13	Other info. services	519	203.2	+6.6% ↑
14	Social assistance	624	198.9	+3.1% ↑

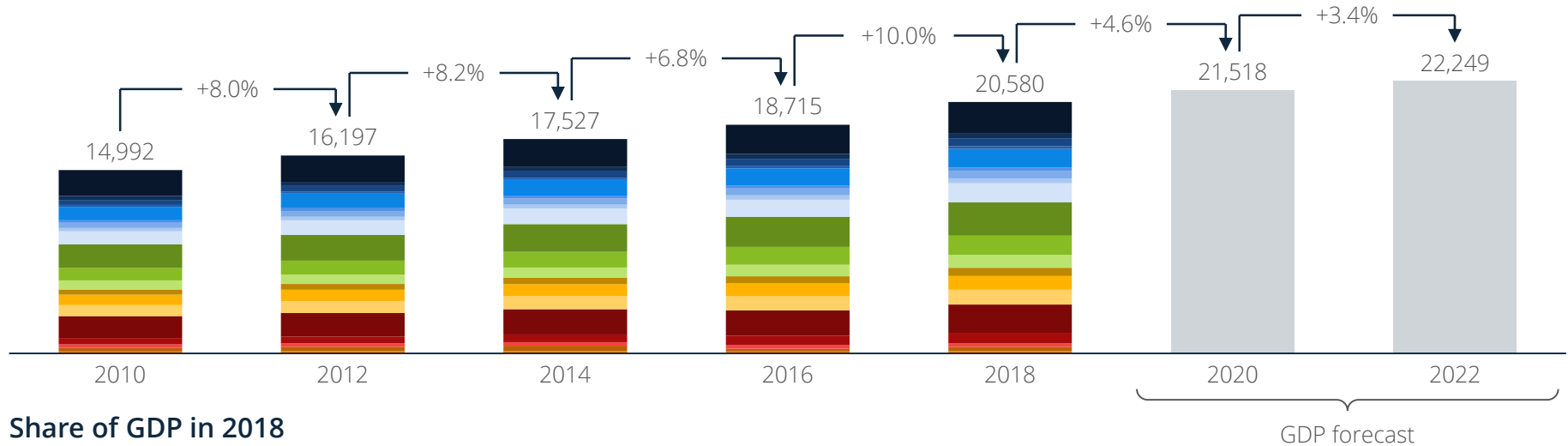
#	Industry	NAICS	Revenue in bnUS\$ <sup>1,2</sup>	Growth 2018-2019 <sup>2</sup>
15	Support activities for transportation	488	191.0	+2.1% ↑
16	Data processing and hosting <sup>6</sup>	518	170.5	+4.5% ↑
17	Rental and leasing serv.	532	167.1	+2.1% ↑
18	Amusement, gambling, and recreation industries	713	137.6	+2.8% ↑
19	Performing arts and spectator sports <sup>6</sup>	711	127.0	+3.5% ↑
<b>20</b>	<b>Waste management and remediation services</b>	<b>562</b>	<b>102.2</b>	<b>+2.8%</b> ↑
21	Couriers and messengers	492	94.1	+3.0% ↑
22	Educational services	61	71.8	+2.8% ↑
23	Pipeline transportation	486	49.2	+2.6% ↑
24	Lessors of nonfinancial intangible assets <sup>7</sup>	533	47.6	+3.4% ↑
25	Water transportation	483	41.5	-0.9% ↓
26	Transit and ground passenger transportation	485	38.7	+2.4% ↑
27	Warehousing and storage	493	36.6	+2.6% ↑
28	Museums, historical sites and similar institutions	712	18.0	+2.7% ↑

1: In 2019 2: Statista estimate 3: And related activities 4: And support services 5: And broadcastings 6: And related services 7: Except copyrighted works  
Source: [U.S. Census Bureau](https://www.census.gov), Statista 2019

# "Administrative and waste management services" contributed 3.1% to the GDP in 2018

GDP and value added (1/3)

## GDP<sup>1</sup> and contribution by sector<sup>2</sup> in billion US\$



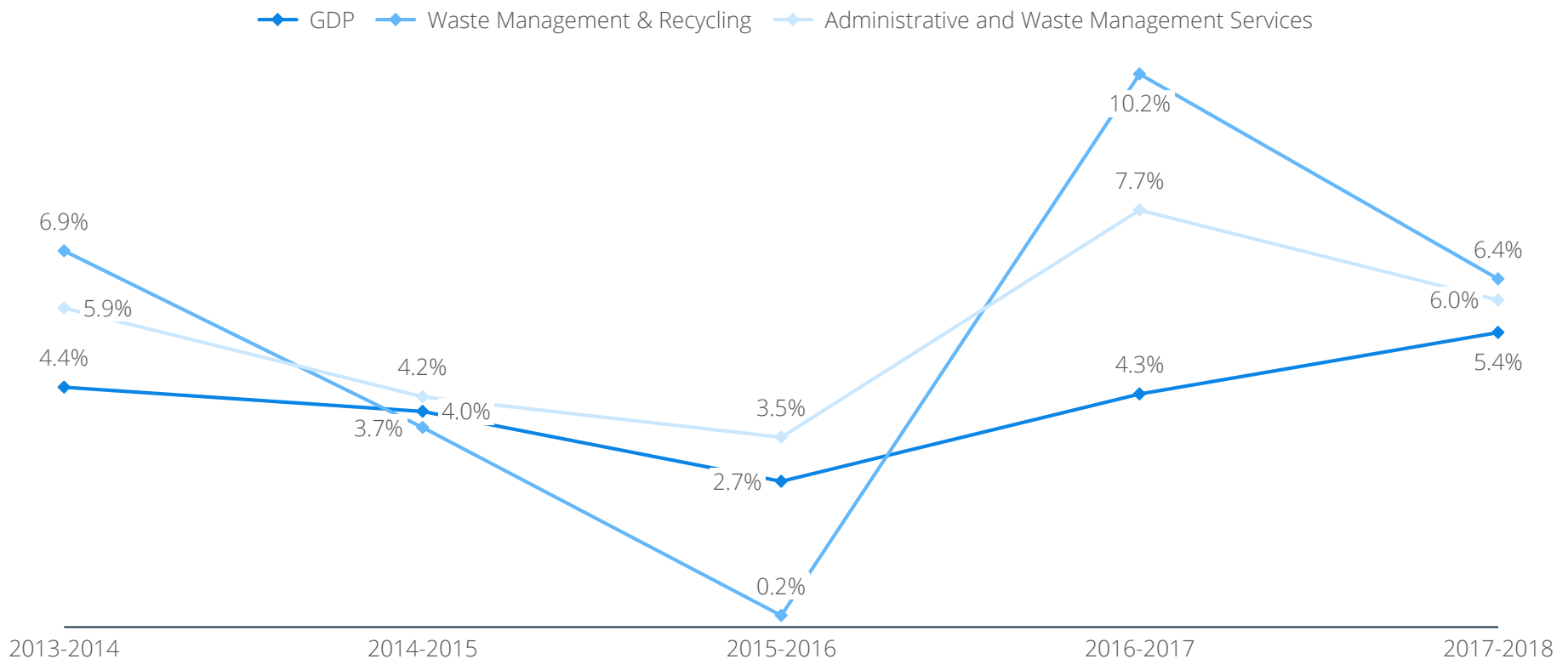
1: Gross domestic product in current dollars 2: Each industry's labor and capital added to its gross output and to the overall GDP of the United States; equals industry's gross output minus its intermediate inputs

Source: [Bureau of Economic Analysis](#), [International Monetary Fund](#), Statista 2019

# Value added by this industry grew by 6.4% in 2018, while the GDP grew by 5.4%

GDP and value added (2/3)

## Growth rate of GDP<sup>1</sup> and growth rate of value added<sup>2</sup>



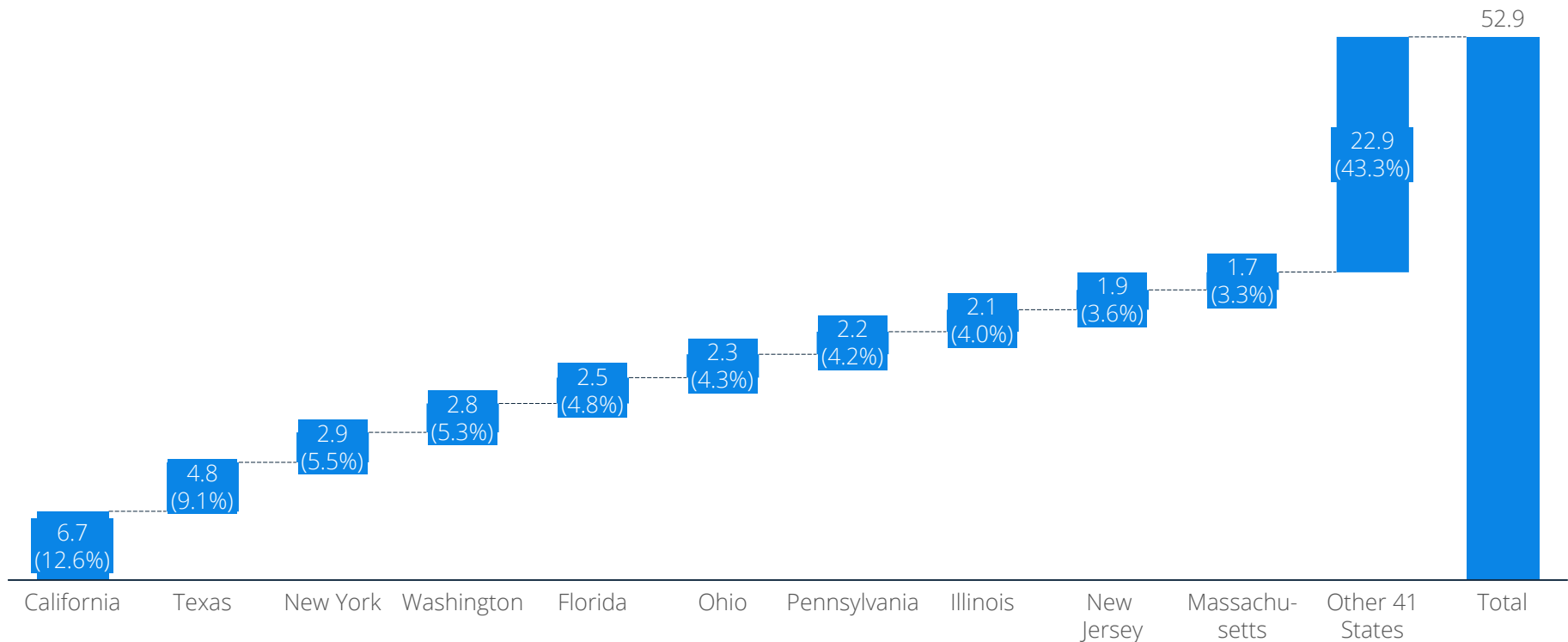
1: Gross domestic product in current dollars 2: Each industry's labor and capital added to its gross output and to the overall GDP of the United States; equals industry's gross output minus its intermediate inputs

Source: [Bureau of Economic Analysis](#), Statista 2019

# In 2017, California had the highest added value in this industry

GDP and value added (3/3)

## Top 10 states regarding value added<sup>1</sup> in billion US\$ in 2017



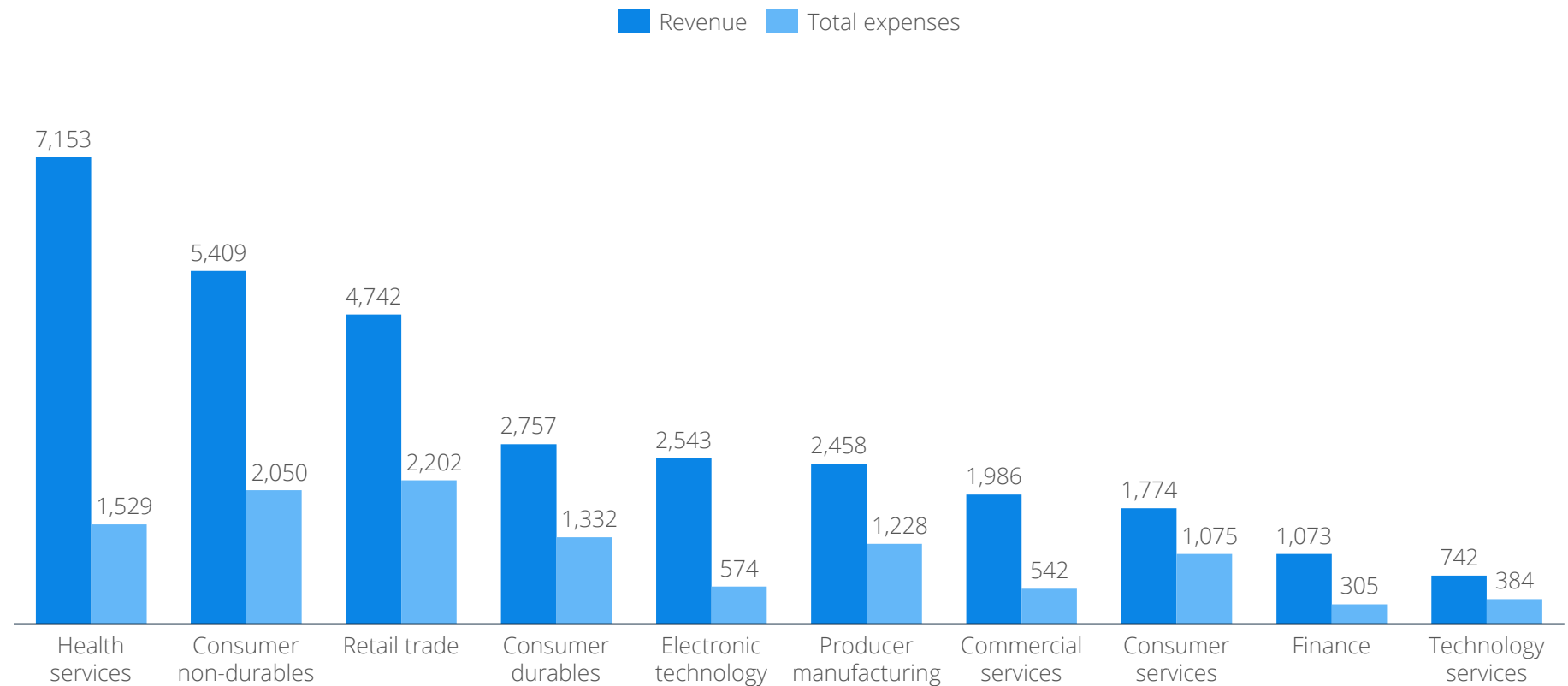
1: Each industry's labor and capital added to its gross output and to the overall GDP of the United States; equals industry's gross output minus its intermediate inputs

Source: [Bureau of Economic Analysis](#)

# The health service sector has the largest gap between revenue and expenses

Financial KPI and cost benchmark (1/2)

## Median of revenue and total expenses in million US\$ in 2018



Note: The industries shown on this slide are the aggregation of different industries. Please refer to the appendix to see in detail which industries are included

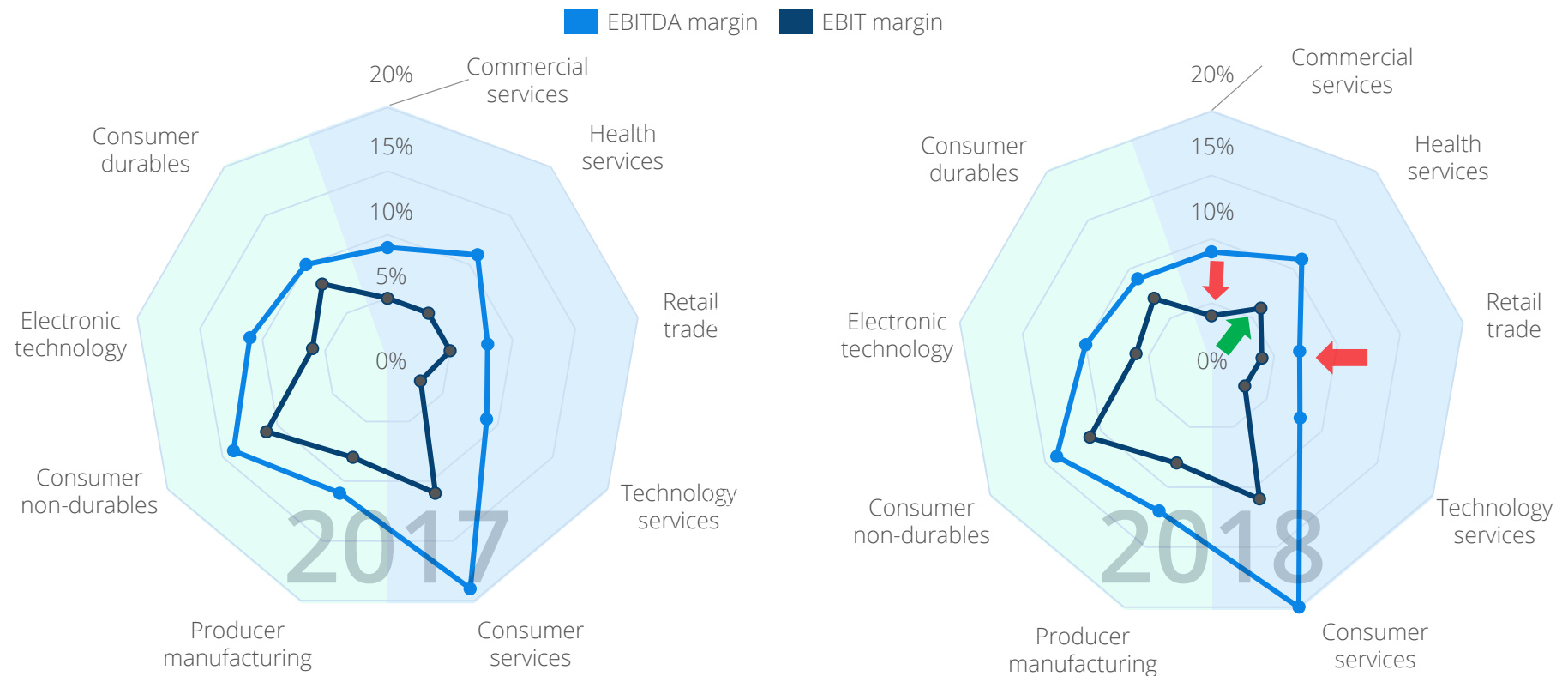
Source: Statista 2019



# Profitability decreases in retail trade and commercial services, while health services increase profits

Financial KPI and cost benchmark (2/2)

## Median EBIT and EBITDA margin



Note: The industries shown on this slide are the aggregation of different industries. Please refer to the appendix to see in detail which industries are included  
Source: Statista 2019



# COMPANIES

- Top companies
- Business demographics

# Waste Management, Inc. registered the largest revenue in 2018

Top companies



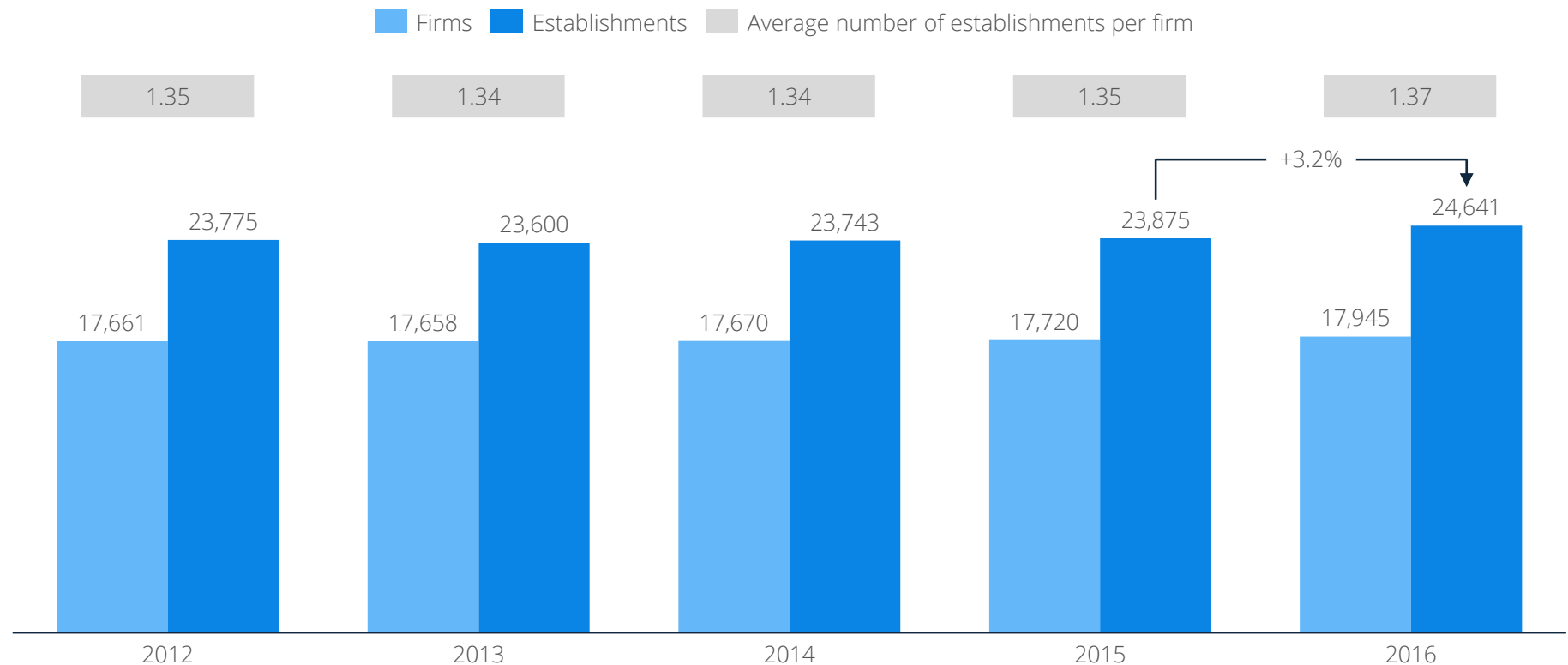
Rank	Company <sup>1</sup>	Total revenue in million US\$ in 2018	No. of employees in 2018	Listing ID
1	Waste Management, Inc.	14,914	43,700	WM (XNYS)
2	Republic Services, Inc.	10,040	36,000	RSG (XNYS)
3	Stericycle, Inc.	3,486	22,500	SRCL (XNAS)
4	Clean Harbors, Inc.	3,300	14,200	CLH (XNYS)
5	Covanta Holding Corp.	1,868	4,000	CVA (XNYS)
6	Advanced Disposal Services, Inc.	1,558	6,074	ADSW (XNYS)
7	Charah Solutions, Inc.	740	1,895	CHRA (XNYS)
8	Casella Waste Systems, Inc.	661	2,300	CWST (XNAS)
9	Heritage-Crystal Clean, Inc.	410	1,338	HCCI (XNAS)
10	NRC Group Holdings Corp.	360	1,564	NRCG (XASE)

1: Only stock-listed companies headquartered in the United States; the selection of companies is based on their major sources of revenue  
Source: [Market data](#) by Xignite 2019

# The number of establishments increased by 3.2% in 2016

Business demographics: firms and establishments (1/2)

## Total number of firms<sup>1</sup> and establishments<sup>2</sup> with paid employees over time



1: Business organization consisting of one or more domestic establishments in the same state and industry that were specified under common ownership or control 2: Single physical location at which business is conducted or services or industrial operations are performed

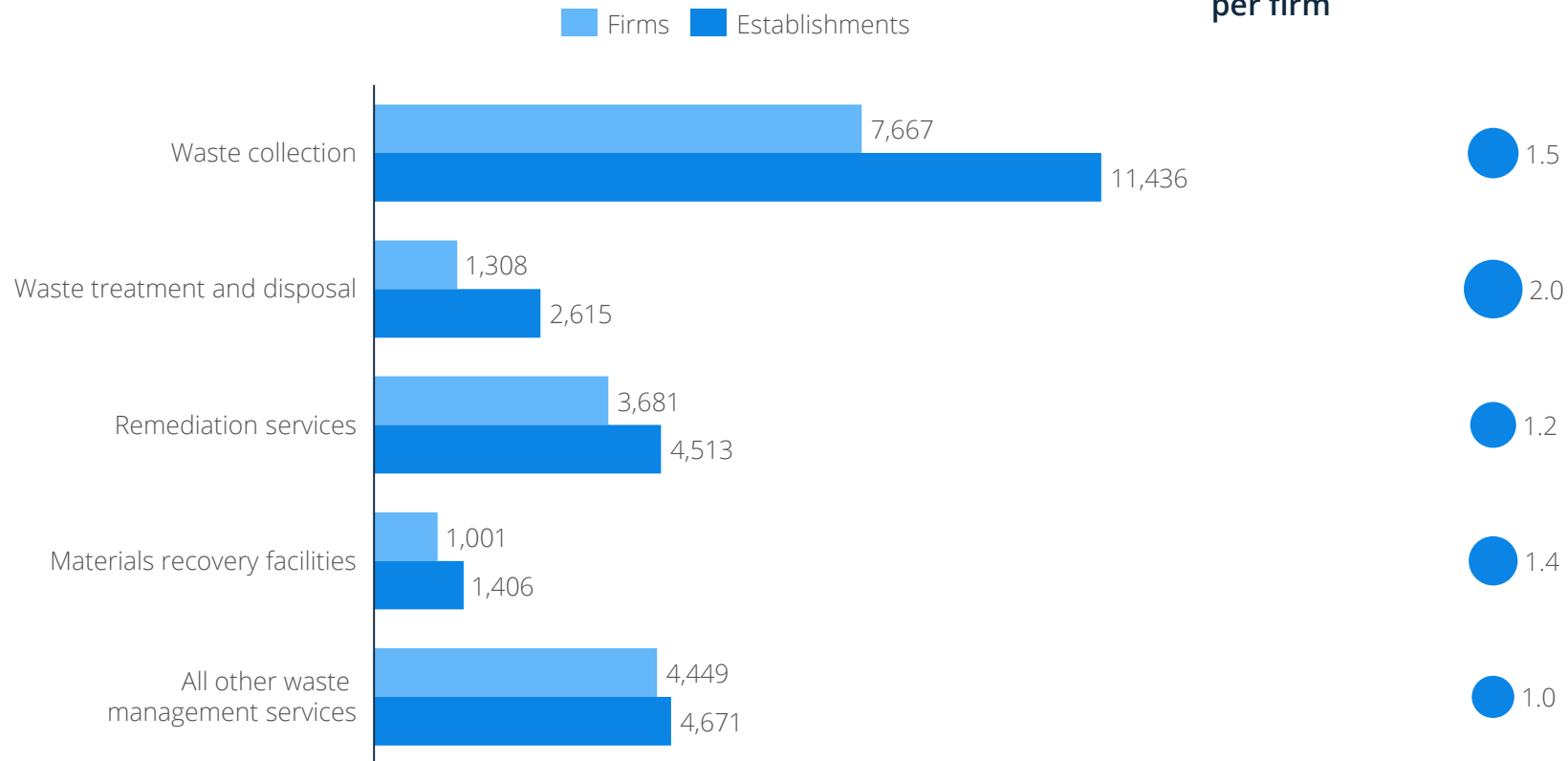
Source: [U.S. Census Bureau](https://www.census.gov)

# In 2016, 11,436 establishments were active in "Waste collection"

Business demographics: firms and establishments (2/2)

Total number of firms and establishments<sup>1</sup> by subcategory 2016

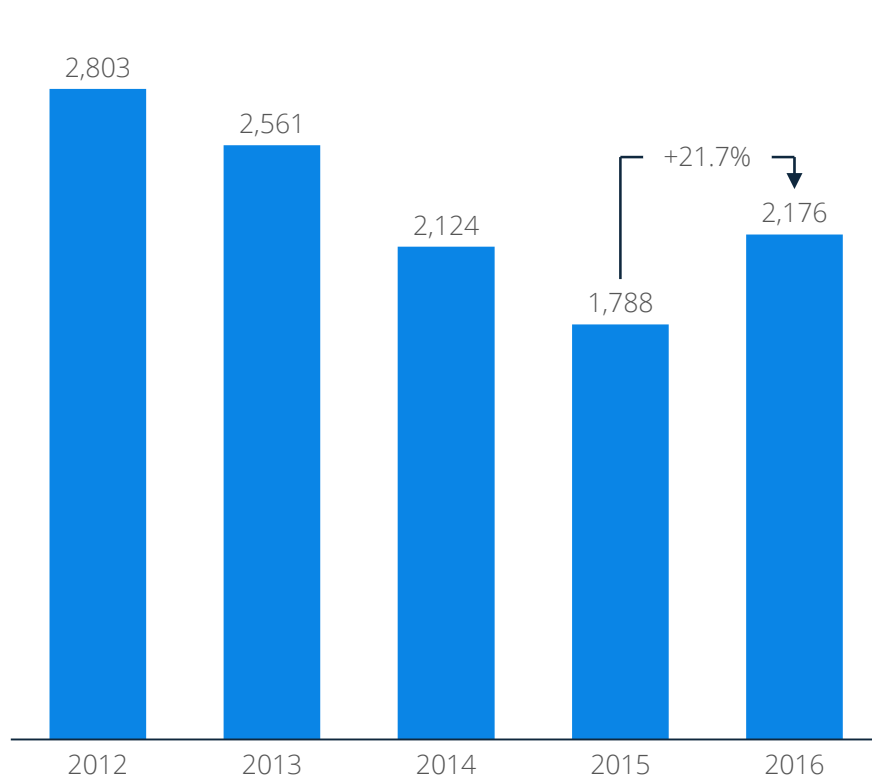
Average number of establishments per firm



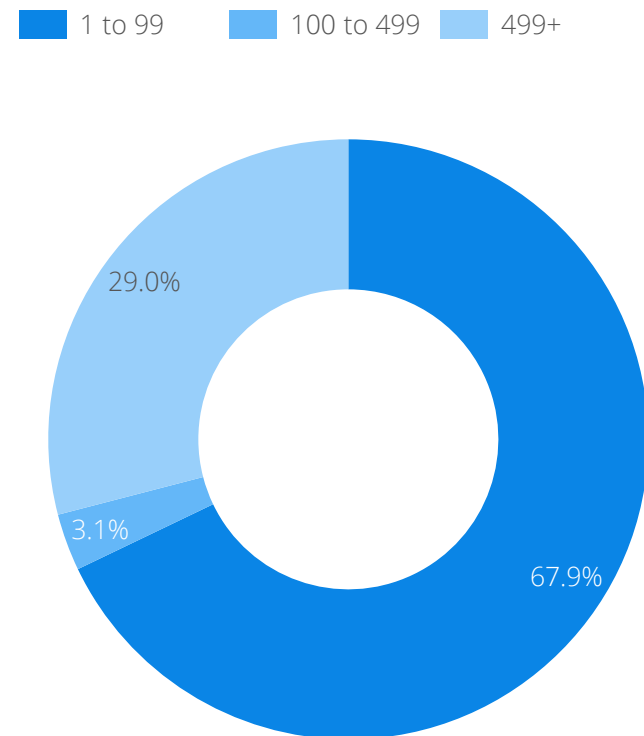
# The number of establishment births increased by 21.7% in 2016

Business demographics: establishment births

Number of establishment births<sup>1</sup>



Establishment births by enterprise size<sup>2</sup> in 2016



1: Zero employment in the first quarter of the initial year and positive employment in the first quarter of the subsequent year; covers establishments with paid employees 2: Determined by the summed employment of all associated establishments

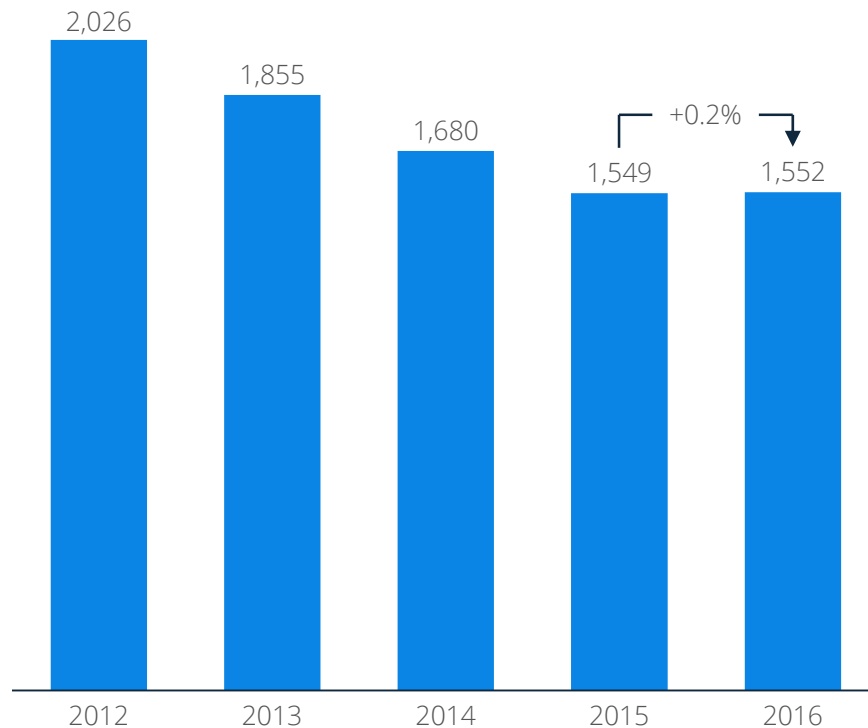
Source: [U.S. Census Bureau](https://www.census.gov)



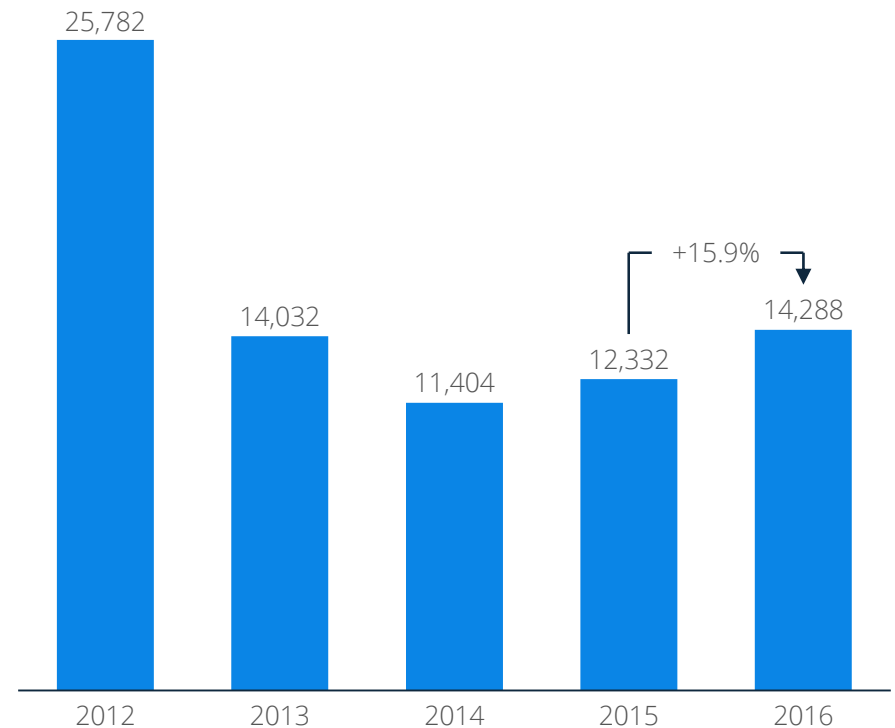
# The number of establishment deaths increased by 0.2% in 2016

Business demographics: establishment deaths

Number of establishment deaths<sup>1</sup>



Employment losses due to establishment deaths<sup>2</sup>



1: Positive employment in the first quarter of the initial year and zero employment in the first quarter of the subsequent year; covers establishments with paid employees 2: Decreased employment between the first quarter of 2015 and the first quarter of 2016

Source: [U.S. Census Bureau](https://www.census.gov)



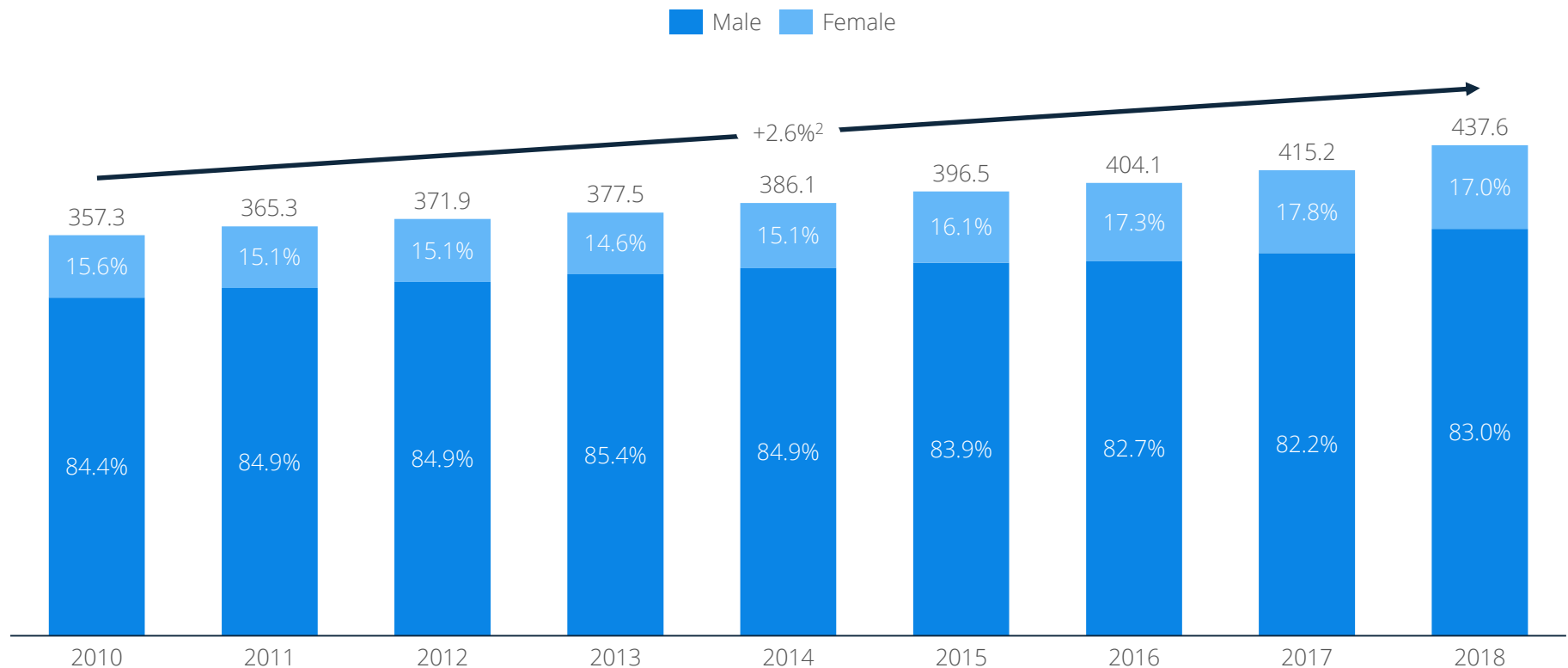
# **EMPLOYEES AND SALARIES**

- Employment
- Weekly hours worked
- Unemployment
- Wages
- Degrees

# The number of employees increased by 2.6% p.a. from 2010 to 2018

Employment: total employees

## Total number of employees<sup>1</sup> in thousand



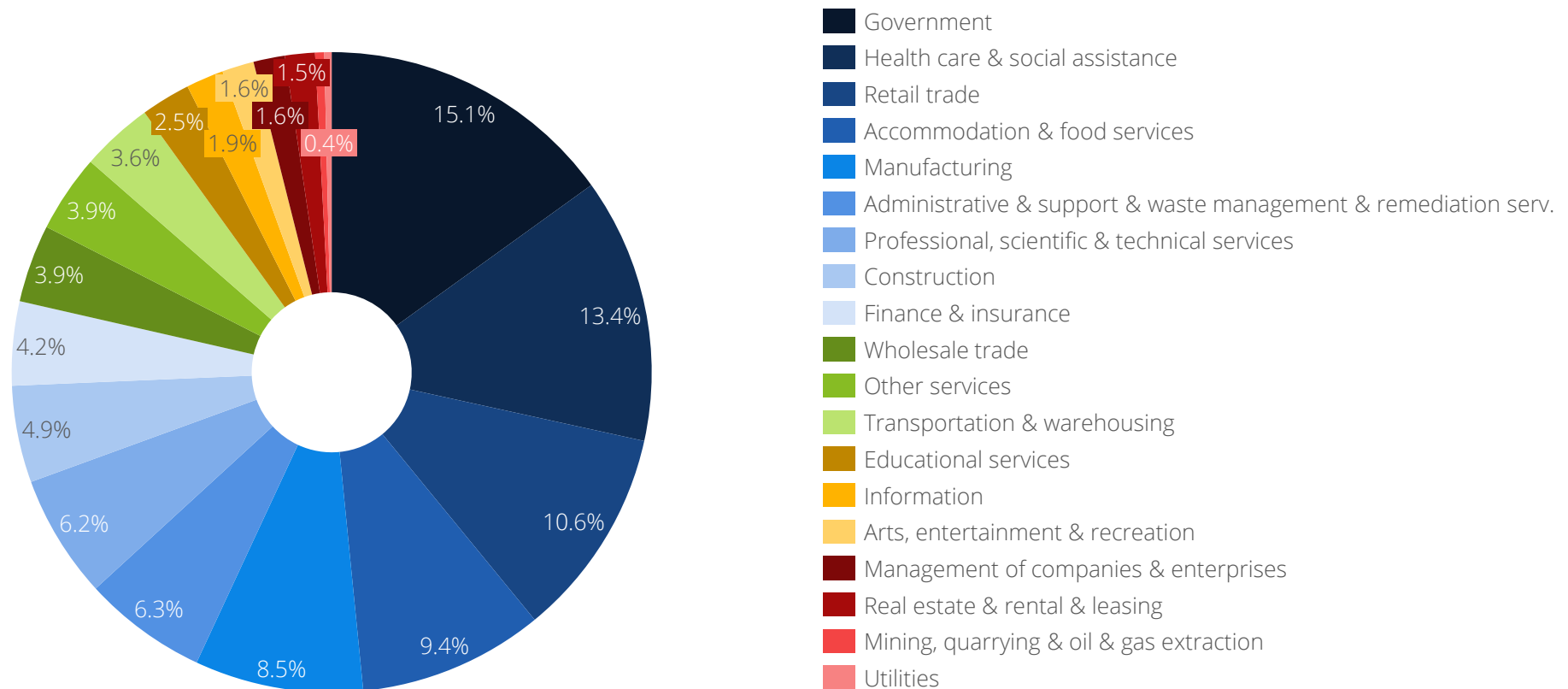
1: Average of non-seasonally adjusted monthly values, includes the total number of persons on establishment payrolls employed full- or part-time who received pay for any part of the pay period that includes the 12th day of a month 2: CAGR: Compound Annual Growth Rate / average growth rate per year

Source: [U.S. Bureau of Labor Statistics](https://www.bls.gov/)

# With a share of 6.3%, "Administrative & waste management" has the 6th highest share

Employment: sector distribution

## Share of employees<sup>1</sup> in 2018



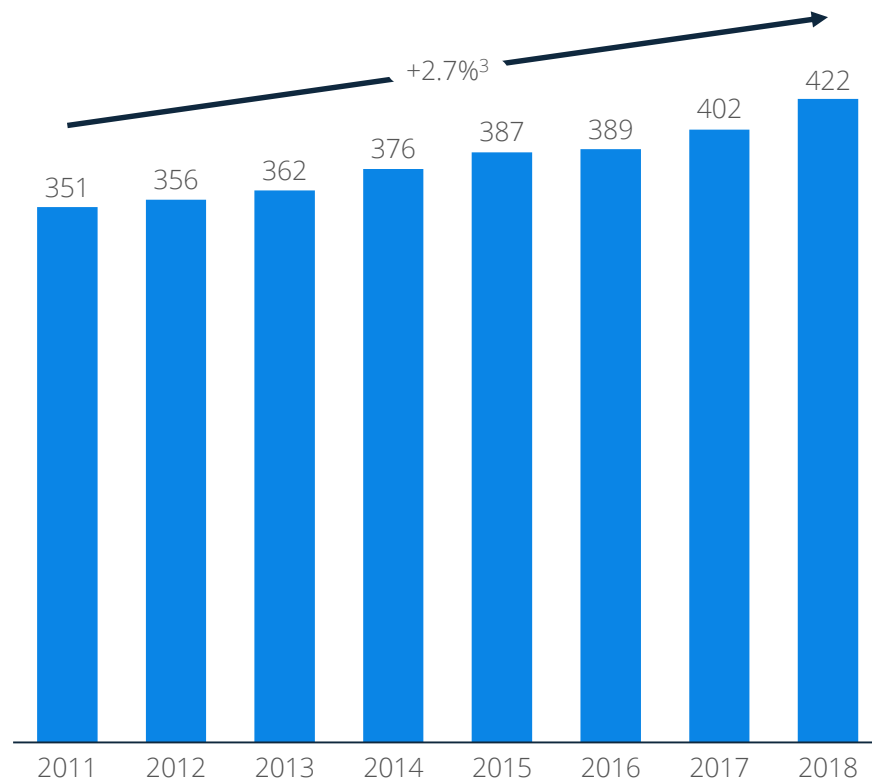
1: Average of non-seasonally adjusted monthly values, includes the total number of persons on establishment payrolls employed full- or part-time who received pay for any part of the pay period that includes the 12th day of a month

Source: [U.S. Bureau of Labor Statistics](https://www.bls.gov/)

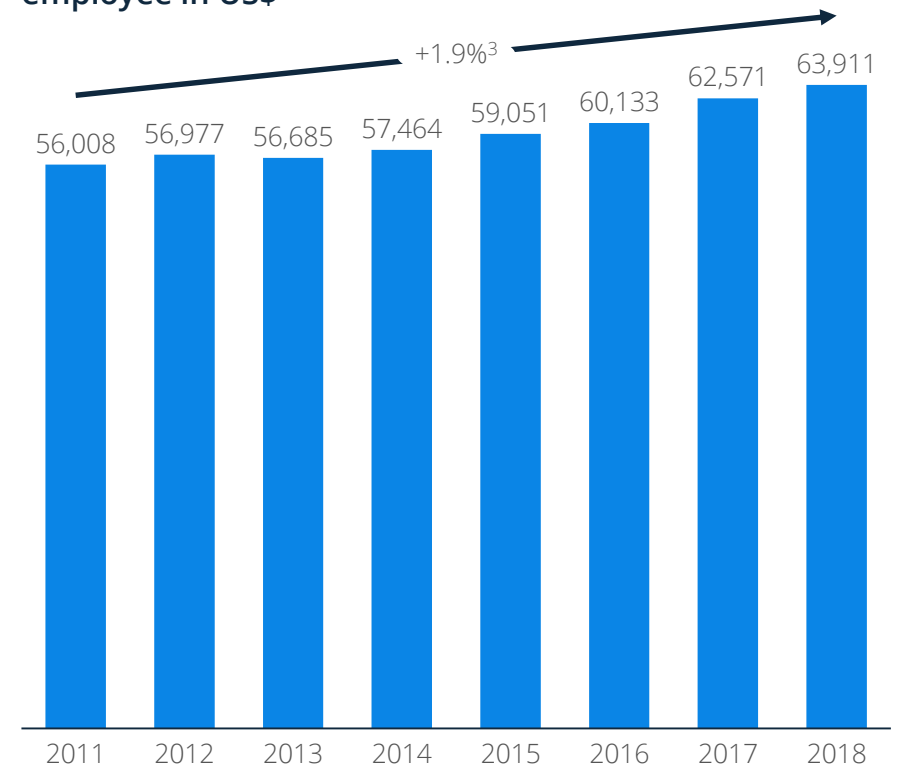
# The number of full-time employees increased by 2.7% p.a. from 2011 to 2018

Employment: full-time equivalents

Full-time equivalent employees<sup>1</sup> in thousand



Wage and salary accruals<sup>2</sup> per full-time equivalent employee in US\$



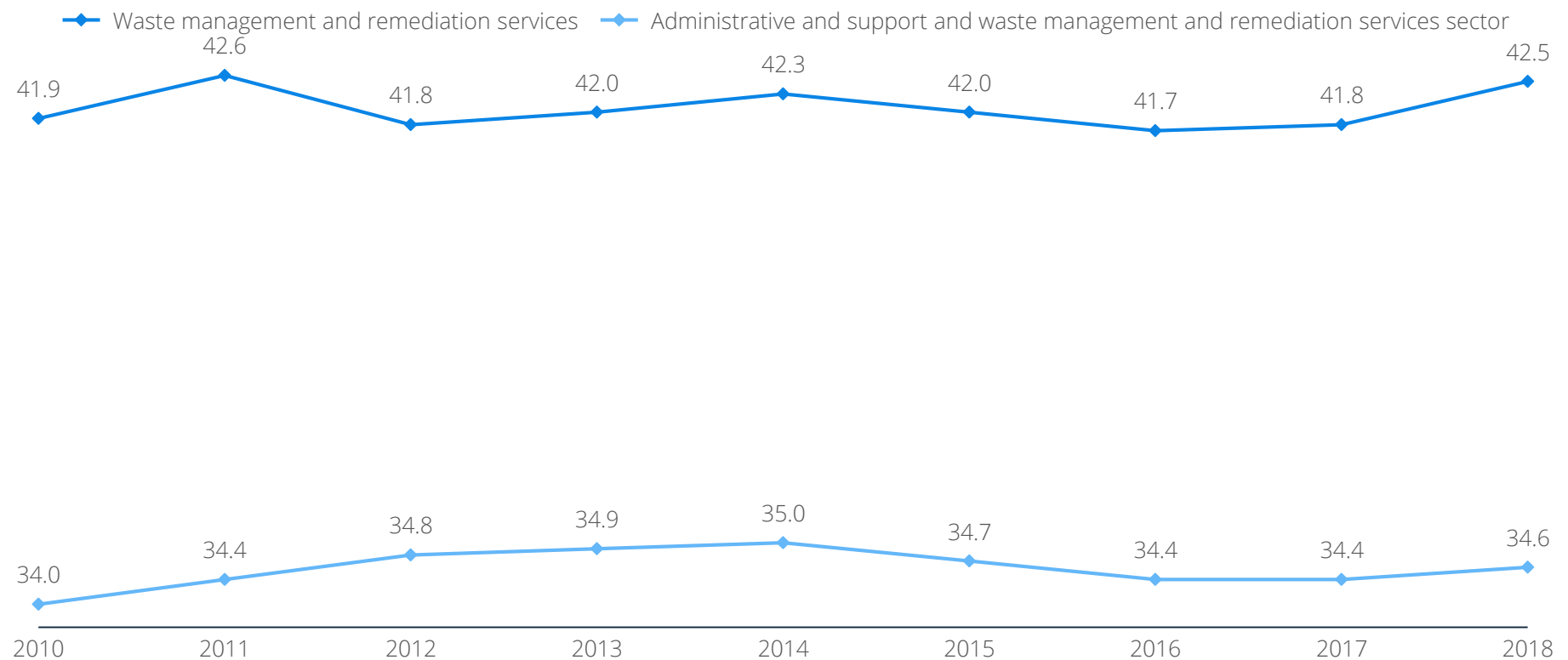
1: Product of the total number of employees and the ratio of average weekly hours per employee for all employees to average weekly hours per employee on full-time schedules 2: Monetary remuneration of employees 3: CAGR: Compound Annual Growth Rate / average growth rate per year

Source: [Bureau of Economic Analysis](#)

# Working hours in the industry were above the sector level in 2018

Weekly hours worked

## Average weekly working hours of all payroll employees





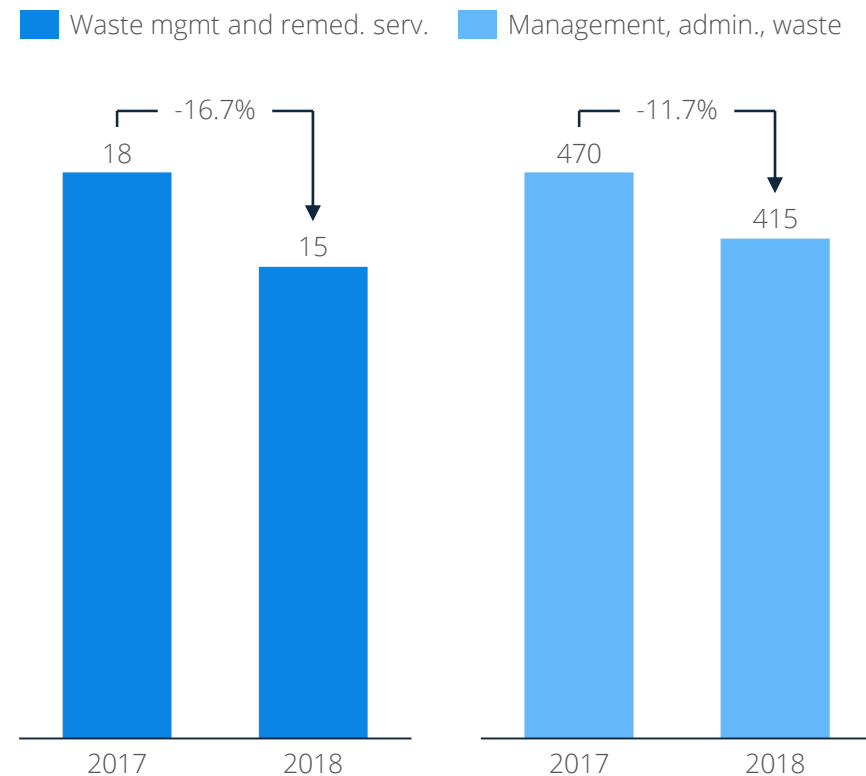
# The unemployment rates in the industry are lower than the sector rates

## Unemployment

### Unemployment rates<sup>1</sup>

	2016	2017	2018
<i>Waste management and remediation services</i>			
Total	4.8%	4.9%	4.1%
♂	5.4%	4.9%	4.8%
♀	3.4%	4.9%	2.3%
<i>Management, administrative, and waste sector</i>			
Total	8.6%	7.4%	6.7%
♂	8.5%	7.1%	6.6%
♀	8.8%	7.8%	6.8%

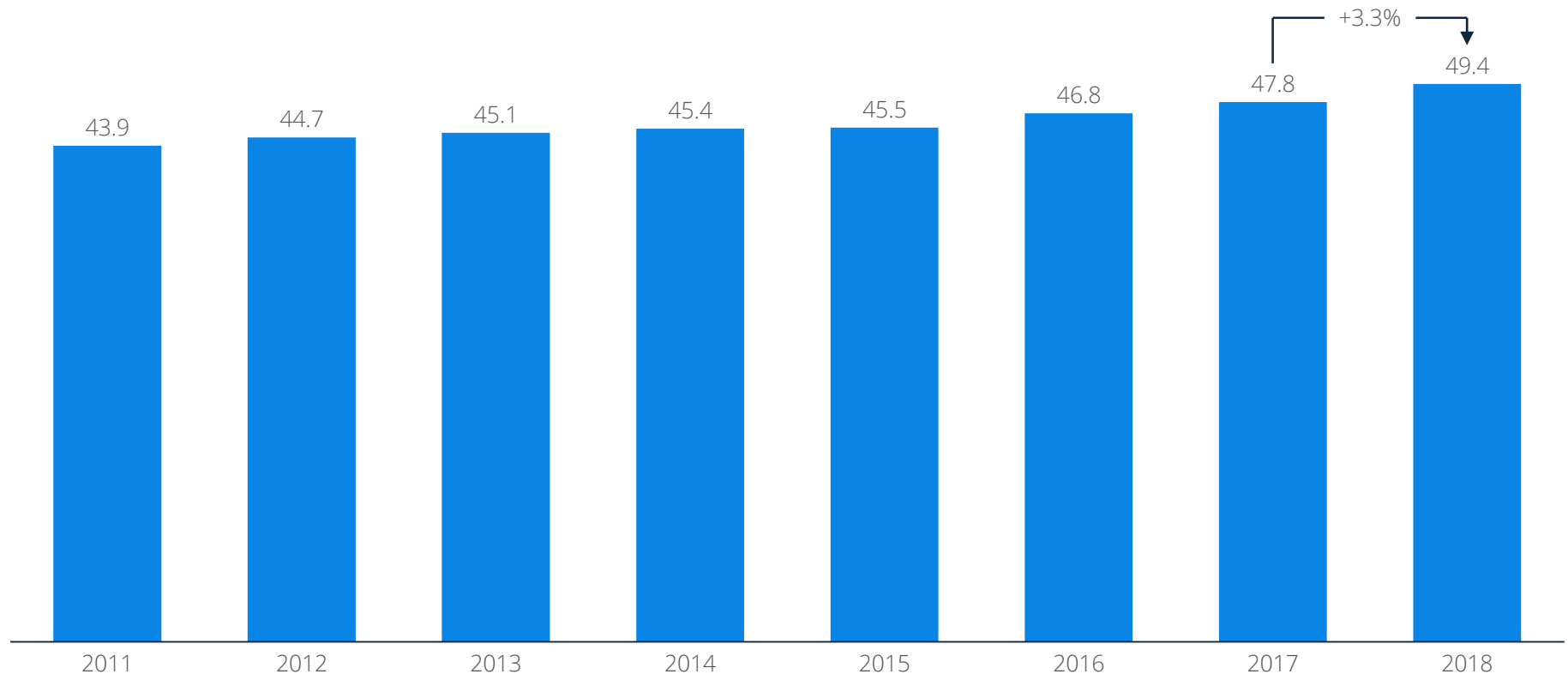
### Number of unemployed<sup>1</sup> people in thousand



# The annual mean wage increased by 3.3% in 2018

Wages (1/3)

Annual mean wage<sup>1</sup> in thousand US\$



1: Annual wages have been calculated by multiplying the "hourly mean wage" by 2,080 hours. They include base rate, cost-of-living allowances, guaranteed pay, hazardous duty pay, incentive pay, including commissions and production bonuses, and tips. Excluded from the wage data are back pay, jury duty pay, overtime pay, severance pay, shift differentials, nonproduction bonuses, and tuition reimbursements

Source: [U.S. Bureau of Labor Statistics](https://www.bls.gov/news.release/wage.pr.htm)

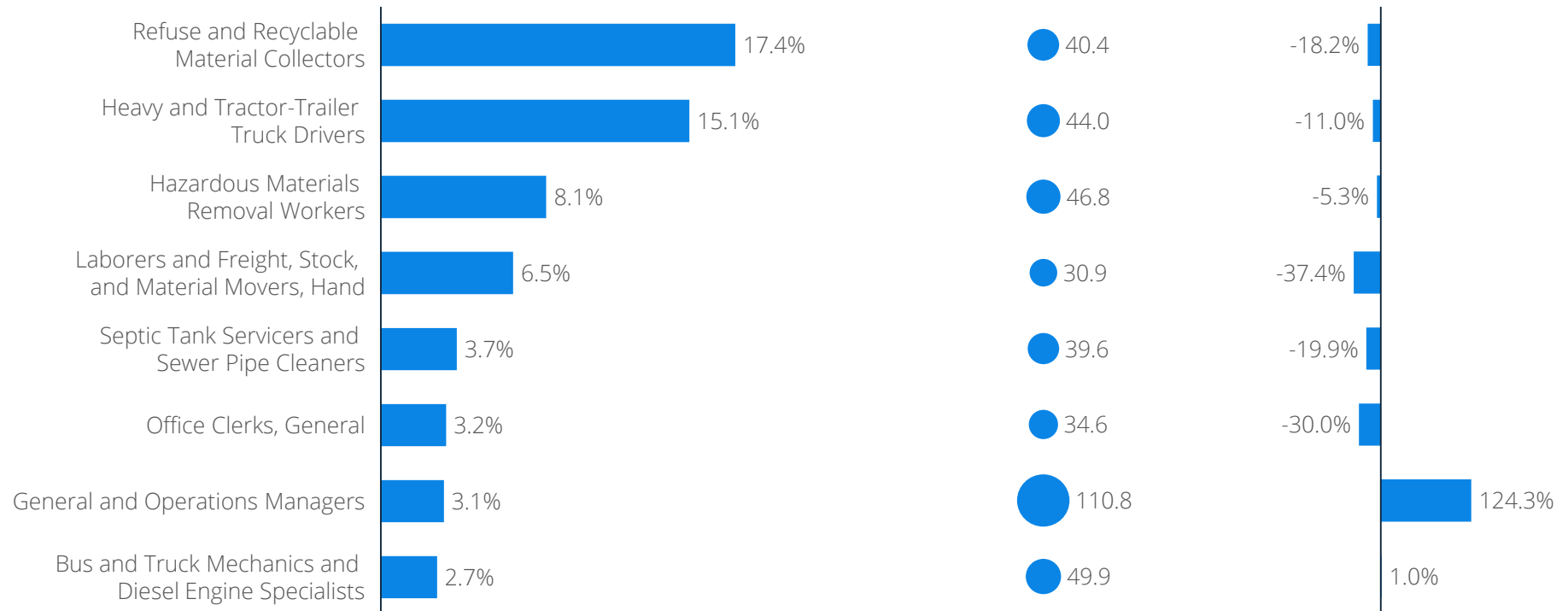
# "Refuse and Recyclable Material Collectors" are the largest occupation group

Wages (2/3)

## Occupations with the highest industry employment<sup>1</sup> in 2018

## Annual mean wage<sup>2</sup> in thousand US\$

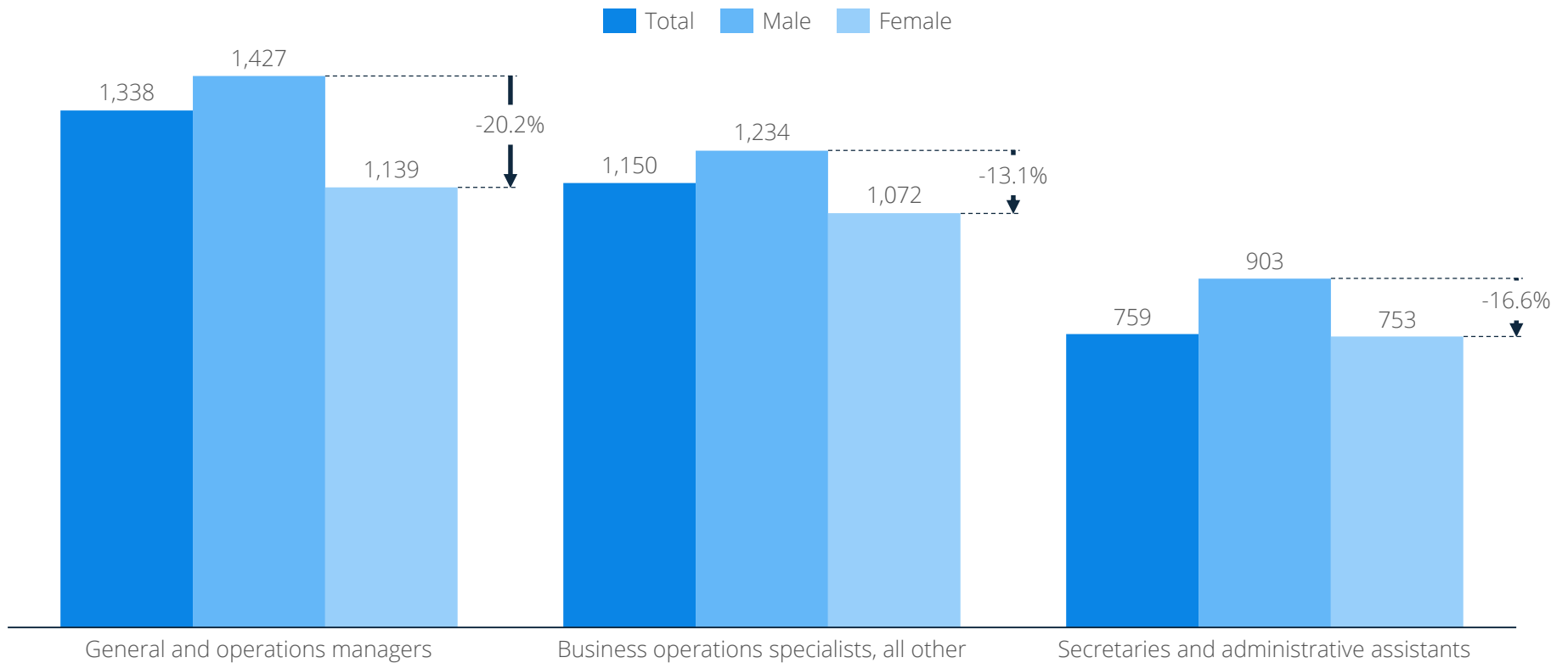
## Deviation from industry mean wage



# Female employees earn less than male employees

Wages (3/3)

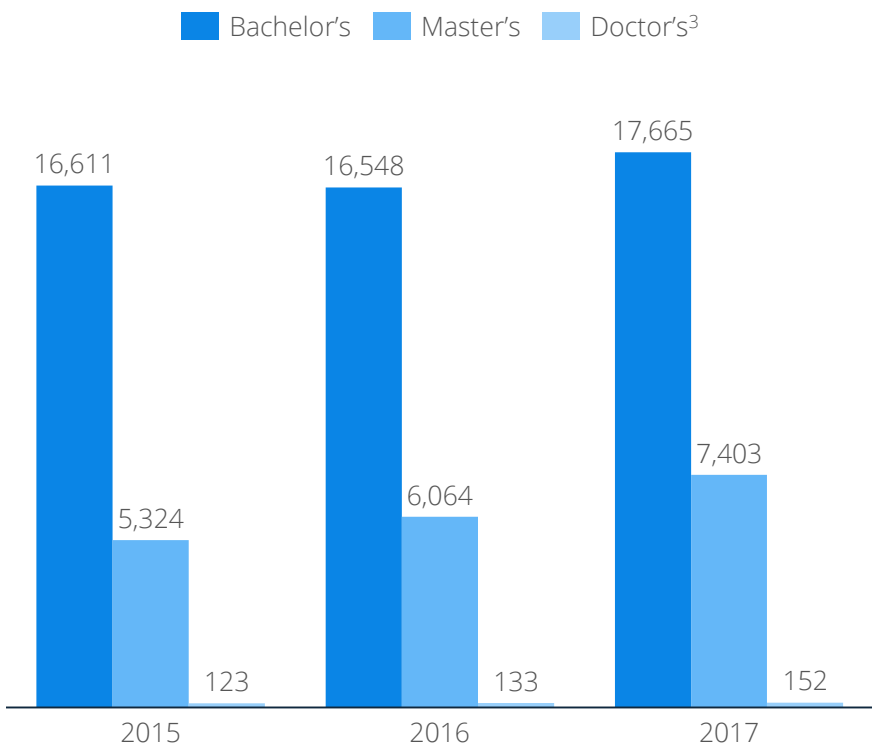
## Median weekly earnings<sup>1</sup> in US\$ in 2018



# 25,220 degrees were awarded in "Engineering technologies and engineering-related fields" in 2017

Degrees

Number of degrees<sup>1,2</sup> in "Engineering technologies and engineering-related fields"



Degrees<sup>1</sup> in "Engineering technologies and engineering-related fields" in 2017

	Total	♂	♀
Bachelor's	17,665	87%	13%
Master's	7,403	74%	26%
Doctor's <sup>3</sup>	152	68%	32%

Note: Degree holders in the above-mentioned field of study do not necessarily work in the industry  
1: Conferred by postsecondary institutions 2: Data refers to the school years 2014/2015, 2015/2016, and 2016/2017 3: Includes Ph.D., Ed.D., and comparable degrees at the doctoral level. Includes most degrees formerly classified as first-professional, such as M.D., D.D.S., and law degrees  
Source: [National Center for Education Statistics](#)



# APPENDIX

- Data description and methods
- Authors



# Methodology, classification and data used in this report

Data description and methods (1/2)

## Data sources

The Statista Industry Reports package and present quantitative data from many private and public sources of information. These sources include the U.S. Census Bureau, U.S. Bureau of Economic Analysis, U.S. Bureau of Labor Statistics, National Center for Education Statistics, National Science Foundation, U.S. Patent and Trademark Office), and Statista itself. The data sources are indicated in footnotes throughout the report.

## NAICS-Classification

The North American Industry Classification System (NAICS) was introduced by the statistical bureaus of Mexico, Canada, and the United States in 1997 to replace the Standard Industrial Classification (SIC) system. It is designed to align with the United Nations Statistical Office's International Standard Industrial Classification (ISIC) system. The initial two digits indicate the largest sector. The third digit indicates the subsector, while the fourth digit indicates the industry group. The classification system is modified every five years with the last three changes occurring in the years 2007, 2012, and 2017. Detailed information about the different classifications can be found on the homepage of the [U.S. Census Bureau](#)

## Forecasts and estimates

Certain diagrams within this Industry Report include estimates or forecast values for the years 2018 to 2023. Estimated values and their sources are indicated in footnotes throughout the report.

## Data indicator

NAICS-code  
XX

This box in the top right corner indicates that the slide data is either aggregated or from the industry that the report industry is included within.

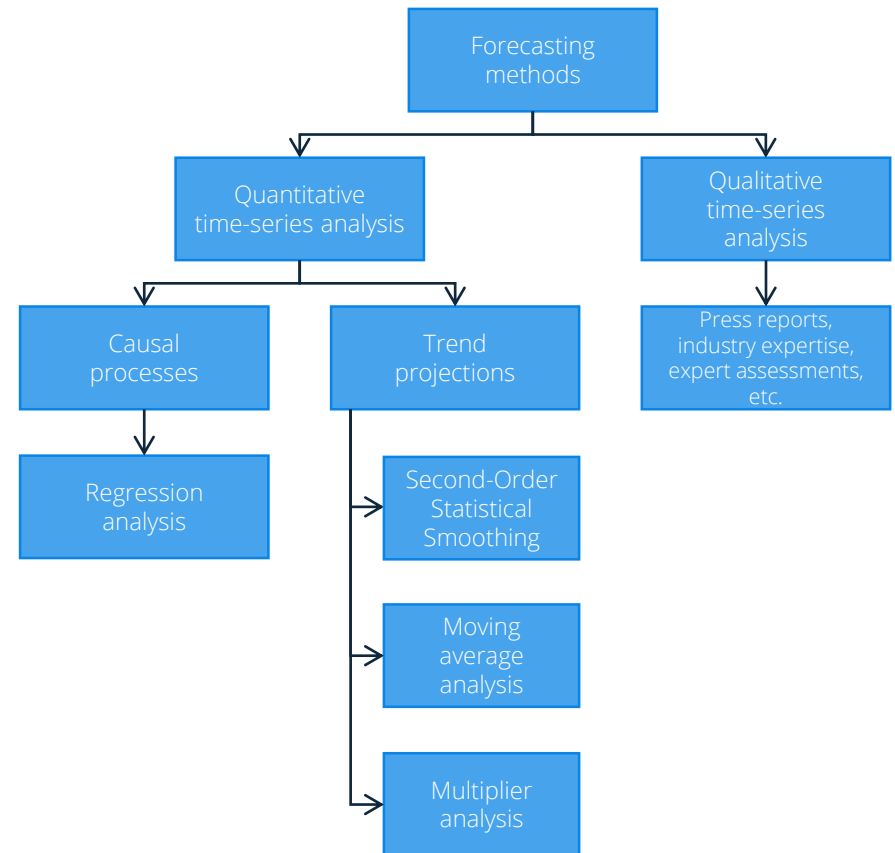
# About the forecasting methods

## Data description and methods (2/2)

Depending on the availability of data and the quality of the data time range, the following methods were used to prepare forecasts: trend analysis (moving average analysis, second-order statistical smoothing, and multiplier analysis), linear regressions, as well as subjective estimates. These estimates reflect years of industry expertise and vast know-how.

Industry-specific sales, revenue, and shipment calculations were made according to the relevant economic and business indicators, such as:

- The general macro-economic developments within the economy (gross domestic product)
- U.S. foreign trade developments (import and export numbers)
- The development of U.S. household disposable income numbers
- The development of U.S. domestic household consumption differentiated according to expenditures (such as, expenses related to foods, drinks, and transportation, as well as accommodation and restaurant expenses)



# Cost benchmark

## Industry definition (1/2)

**Electronic technology:** Computer and peripheral equipment manufacturing (3341), Communications equipment manufacturing (3342), Semiconductor and other electronic component manufacturing (3344), Electrical equipment manufacturing (3353), Other electrical equipment and component manufacturing (3359), Aerospace product and parts manufacturing (3364)

**Consumer non-durables:** Food manufacturing (311), Chemical manufacturing (325), Beverage manufacturing (3121), Tobacco manufacturing (3122), Apparel manufacturing / leather and allied product manufacturing (315/316)

**Producer manufacturing:** Machinery manufacturing (333), Electrical equipment, appliance, and component manufacturing (335), Metalworking machinery manufacturing (3335), Motor vehicle body and trailer manufacturing (3362), Motor vehicle parts manufacturing (3363), Office furniture (including fixtures) manufacturing (3372), Office supplies (except paper) manufacturing (3372), Building products, industrial conglomerates and miscellaneous manufacturing

**Consumer durables:** Electrical equipment, appliance, and component manufacturing (335), Furniture and related product manufacturing (337), Hardware manufacturing (3325), Motor vehicle manufacturing (3361), Motor vehicle parts manufacturing (3363), Miscellaneous manufacturing (339), Ship and boat building (336)

**Commercial services:** Advertising, public relations, and related services (5418), Employment services (5613), Business support services (5614), Administrative and support and waste management and remediation services (56)

**Technology services:** Data processing, hosting, and related services (518), Other information services (519), Software publishers (5112)

**Consumer services:** Information (51), Other services (except public administration) (81), Publishing industries (except internet) (511), Motion picture and sound recording industries (512), Broadcasting (except internet) (515), Broadcasting (except internet) (515), Food services and drinking places (722), Gambling industries (7132), Traveler accommodation (7211), Newspaper publishers (51111)

**Health services:** Ambulatory health care services (621), Insurance carriers (5241), Medical and diagnostic laboratories (6215), Hospitals (622), Nursing and residential care facilities (623)

# Cost benchmark

Industry definition (2/2)

**Retail trade:** Electronics and appliance stores (443), Building material and garden equipment and supplies dealers (444), Food and beverage stores (446), Health and personal care stores (446), Clothing and clothing accessories stores (448), General merchandise stores (452), Electronic shopping and mail-order houses (4541)

# Overview of the Industry Reports U.S. (1/3)



Agriculture, Forestry, Fishing  
& Hunting (NAICS 11)



Manufacturing: Printing  
(NAICS 323)



Manufacturing: Electrical Equipment  
& Supplies (NAICS 335)



Utilities  
(NAICS 22)



Manufacturing: Chemicals  
(NAICS 325)



Manufacturing: Automotive Industry  
(NAICS 3361-3363)



Construction  
(NAICS 23)



Manufacturing: Pharmaceuticals  
& Medicine (NAICS 3254)



Wholesale Trade  
(NAICS 42)



Manufacturing: Food  
(NAICS 311)



Manufacturing: Plastics & Rubber  
(NAICS 326)



Retail: Car Dealers  
(NAICS 441)



Manufacturing: Beverages  
(NAICS 3121)



Manufacturing: Machinery  
(NAICS 333)



Retail: Furniture  
(NAICS 442)



Manufacturing: Fashion & Textiles  
(NAICS 313-316)



Manufacturing: Computers &  
Electronics (NAICS 334)



Retail: Consumer Electronics  
(NAICS 443)

# Overview of the Industry Reports U.S. (2/3)



Retail: Building, Home & Garden  
(NAICS 444)



Transportation: Air  
(NAICS 481)



Motion Pictures, Music & Television  
(NAICS 512, 515)



Retail: Food & Beverages  
(NAICS 445)



Transportation: Rail  
(NAICS 482)



Telecommunications  
(NAICS 517)



Retail: Drugstores  
(NAICS 446)



Transportation: Water  
(NAICS 483)



Data Hosting & Computing  
(NAICS 518)



Retail: Gasoline Stations  
(NAICS 447)



Transportation: Trucks  
(NAICS 484)



Banking & Finance  
(NAICS 521-523, 525)



Retail: Fashion  
(NAICS 448)



Warehousing & Storage  
(NAICS 493)



Insurance  
(NAICS 524)



Retail: Sports, Hobbies, Books  
& Music (NAICS 451)



Publishing<sup>1</sup>  
(NAICS 511)



Real Estate  
(NAICS 531)

# Overview of the Industry Reports U.S. (3/3)



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(NAICS 532)



Health Care  
(NAICS 621-623)



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(NAICS 721)



Waste Management & Recycling  
(NAICS 562)



Amusement, Gambling & Leisure  
(NAICS 713)



Restaurants & Nightlife  
(NAICS 722)



Education  
(NAICS 61)

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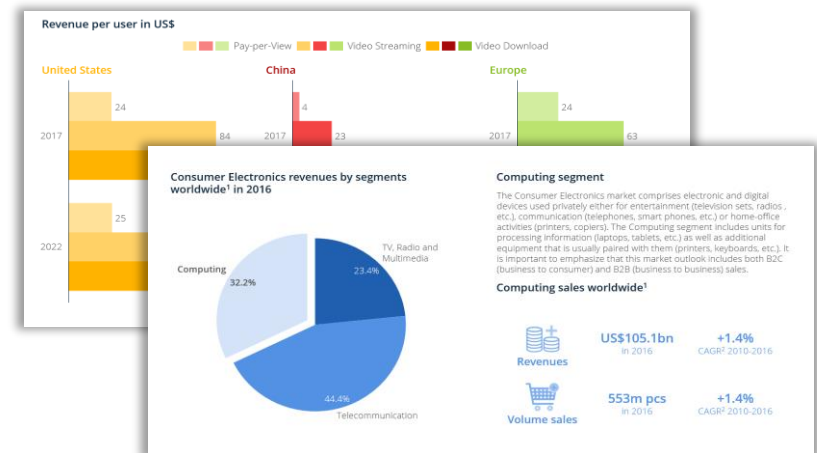
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