

SECTORAL CONTEXT

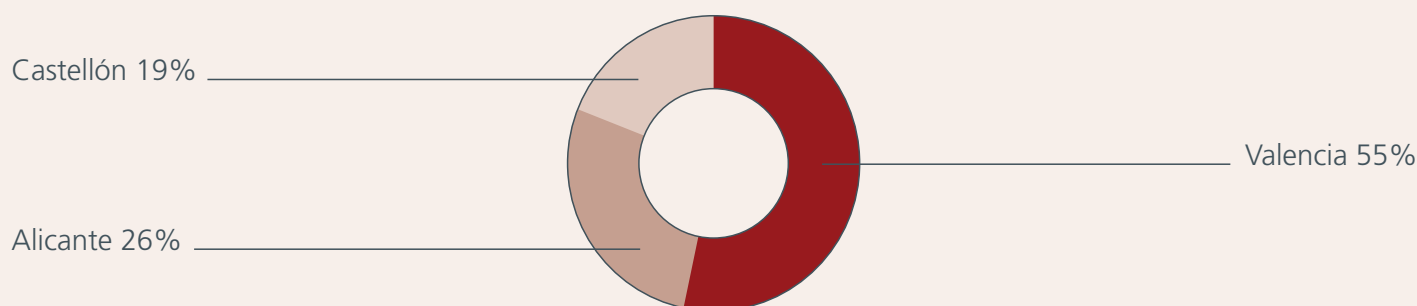
The volume of business generated by the management of treatment plants and disposal of urban solid waste reached 1,325 million euros in 2008, representing an increase of 7.7% compared to last year.

The sector of waste collection and treatment is the largest inside the environment sector, and employs 108,000 people.

The development in business creation is positive, in a sector that has not yet reached maturity.

In the sector's corporate structure highlights the position of major national construction groups, which operate alongside with public or mixed companies and other urban services enterprises.

GRAPHIC DISTRIBUTION OF THE WASTE MANAGEMENT COMPANIES, VALENCIAN COMMUNITY, 2011 (%)



SWOT

THREATS	OPPORTUNITIES
<ul style="list-style-type: none"> Deficiencies in the normative framework Lack of market maturity Competition of large groups 	<ul style="list-style-type: none"> Normative framework regulator Spanish environmental market below the European Union average Program for incentivate market
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Have a contract with public agency Upcoming demand Faithful demand 	<ul style="list-style-type: none"> Enterprise's size and dimension The price Immature market High investment for change in supply

COMPETITIVE ANALYSIS IN VALENCIAN COMMUNITY

There are 2372 operators in Valencian Community with required administrative authorization for waste management, distributed mainly in the provinces of Valencia and Alicante.

The majority of operators (42%) of non-hazardous waste are dedicated to its the collection and transport. The 31% only to transport's activities. Just 12% are engaged in valuation activities (11%) or elimination (1%).

18,846 people are employed in the management and treatment of waste in the Valencian Community, representing 34.7% of total employment in the Community's Environment sector.

The most common legal form of these businesses are limited liability company, which represents more than 52%, following a 17% of autonomous, and public limited liability companies with 13%.

In Valencia has increased year by year the amount of materials collected.

COMPETITIVE ANALYSIS IN VALENCIAN COMMUNITY

The model of urban waste management is established in the “Plan Integral de residuos de la Comunitat Valenciana” and is based on municipalities's grouping in areas to manage their waste in an integrated way and the sufficiently respect of adjoining regions.

Regarding industrial wastes, Castellón, top producing province, but in the province of Valencia concentrates most of the infrastructure for its management, followed by Alicante.

WHAT PRODUCTS CAN I OFFER TO MY CLIENT?

BASIC PRODUCTS	COMPLEMENTARY SERVICES
Collection and transport of non-hazardous waste Management: recovery, recycling, neutralization, or controlled release Recycling of all kinds of residues	Management of industrial and special waste Advice on ISO 14000, ISO TS, licenses and environmental authorizations, declarations of waste, etc.

BASIC CHARACTERISTICS OF THIS KIND OF COMPANIES

CNAE2009/SIC	Group 38-38.2 (Treatment and waste disposal) / 49.53, 50.93
Legal status	Limited liability company
Location	Near waste generating areas
Personnel and organizational structure	Personnel with technical skills for analysis and treatment waste's process and unqualified personnel to handle it
Installations	Warehouse to store waste and trucks; immobilized for its treatment
Clients	Enterprises, offices and municipalities
Product portfolio	Collection, transport and classification of the waste
Promotional tools	Commercial visits

RECOMMENDATIONS

You must meet certain requirements to be registered in the Register of the Valencian Community managers and be able to operate in this sector.

For your investments, use the leasing method.

The approximate margins working with this sector are between 15 and 20% of production and collection costs, depending on your type of activity.

The professional profile of the people working in the waste-related activities are varied, ranging from people with no technical training (physical collection of waste) to higher-level graduates.

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