Waste

The rate of sustained growth witnessed in recent years on the waste market declined considerably in 1998. The year was marked by a downturn in the industrial waste management markets brought on by a less favourable overall economic climate and major disruptions on the incineration market.

In 2000, forecasts are calling for a new increase in the rate of growth: the upswing in GDP growth should coincide with a recovery by the incineration market and continued growth in **selective collection.** This type of waste collection is expected to record growth of 14% in 1999 (with a 42% increase in the number of participants in multimaterial collection) and 9% in 2000.

One of the main developments that took place in 1998 was the impact of the April 28 directive on the **construction of UI0Ms** (Usines d'Incinération d'Ordures Ménagères) [household waste incineration plants], which declined by 33% over the year. By broadening the definition of ultimate waste and setting higher targets for selective collection, this directive led principal contractors to put off or even cancel their construction projects. This market is expected to rebound in 1999 (+ 14%) and especially in 2000 (+ 86%), because the contracts that had been put off will need to be executed, in addition to the regularly scheduled contracts for those years.

Another development that marked the year 1998: the **recovery** market was hit hard by the collapse of the world market for raw materials, mainly metals and plastics; the slumping prices for these materials had a domino effect on recovery products, which suffered a sharp decline in 1998 (- 16%) but are expected to rebound thanks to expected growth of 5% in the year 2000, although prices are unlikely to return to their previous levels.

Air

Air pollution control is without a doubt one of today's most dynamic market segments.

The market for **dust collectors and gas cleaning systems,** already rising by 10% in 1998, should show impressive growth in 1999 (+ 14%) and 2000 (+ 17%), thanks primarily to tougher regulations (European directive of March 1999 on VOCs, February 1999 ruling on the measurement of asbestos concentration in buildings, draft directive on S02, NOx and N1413 emissions...). It should also be pointed out that manufacturers in this market are showing a very dynamic attitude in their exports to Asia and North America (in 1998, exports to non-EU countries were up 55%).

As for air and gas **measuring and monitoring instruments**, while the ambient air measurement market (depending on local communities) declined in 1998 and is expected to stagnate in 1999, the emission measurement market (depending on industry) benefitted from the development of ISO standard 14000 and should enjoy steady growth in the years to come, with the introduction of stricter European standards (VOCs, dioxins...). Consequently, the overall potential for this instrumentation market remains high (+ 7% in 1999 and + 8% in 2000).

Noise pollution control

In a constant state of flux, noise pollution regulations and technical solutions have in recent years tended towards the development of methods to treat the problem at the source, such as **noise screens.** Up 8% in 1998, this market is expected to achieve growth of 10% in 1999 and 2000. The negative impact of the completion of major projects (such as the TGV Méditerranée [Mediterranean high-speed train]) should be largely offset by the dynamic replacement market and the new financial resources freed up in