

A background image showing a stark contrast between a lush green field on the left and a parched, cracked, brown landscape on the right, under a dramatic, cloudy sky.

2023 Contaminated Land Industry Survey - Themes

Published by i2 Analytical

WHAT IS THE SURVEY AND WHY DID WE DO IT?

This industry survey was focused on the UK contaminated land testing industry and covered a range of subjects including;

- Industry expectations through 2023 and beyond
- Legislation/Regulatory changes
- Sustainability
- Testing Trends
- Required relationships with contract testing laboratories
- Market issues

Why have we commissioned this survey?

i2 Analytical commissioned this survey by way of understanding the current trends in the market to ensure that we as a business, continue to support our partners, and the industry at large.

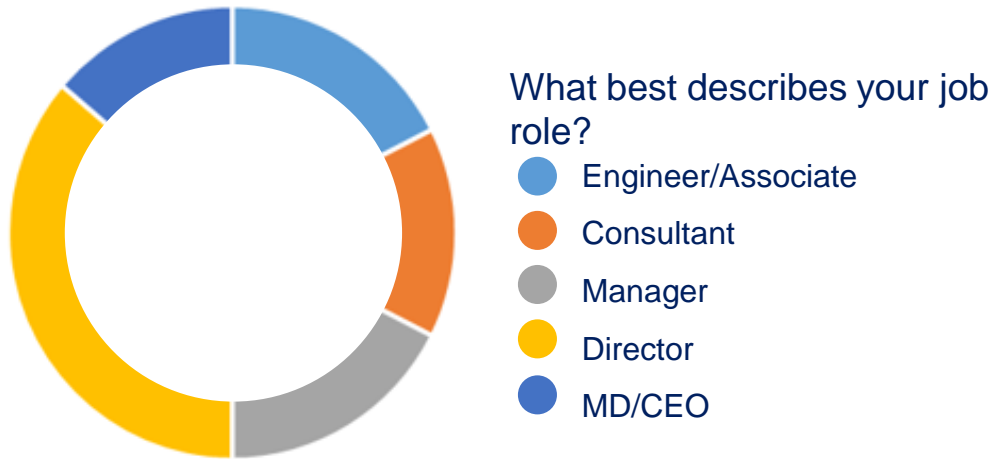
This was designed to be an independent survey and did not mention i2 Analytical in any of the questions.



RESPONSE UPTAKE

This survey was the first of its kind by i2, this was advertised through a range of media including website, social media and mailshot. This went out to both i2 customers and industry leaders who haven't worked with i2.

An overwhelming response was received with **over 250 survey responses**. The survey took around 25 minutes to complete. The survey response was mainly from the consultant and contractor marketplaces, this had a good range of coverage throughout the job types (from Junior to CEO).



ECONOMIC PRESSURES

From the survey it is clear the industry is struggling with wider economic pressures;

- Moderate growth for 2022 into 2023. 70% expected less than 10% growth in 23 and less than 10% growth in 22
- 60% of responses indicated they had increased rates to their customer by less than 10% despite high inflationary pressures
- 70% of responses identified the largest industry challenge for growth in 2023 was Economic Pressures
- The survey was conducted between Feb – May 2023, we suspect the market conditions may have changed again



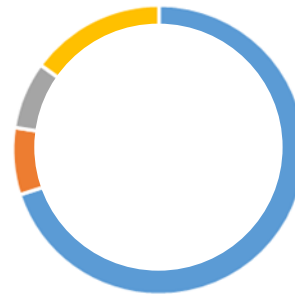
In 2022 what was your actual revenue growth levels?

- +20% Growth
- <5% Growth
- 10-20% Growth
- 5-10% Growth



What is your economic Outlook for 2023?

- +20% Revenue growth
- <5% Revenue growth
- 10-20% Revenue growth
- 5-10% Revenue growth



Did you increase your prices to your clients? If so by how much?

- 0-5% Price increase introduced
- 10-20% Price increase introduced
- 5-10% Price increase introduced
- No price increase applied



What do you view as industry challenges for growth in 2023?

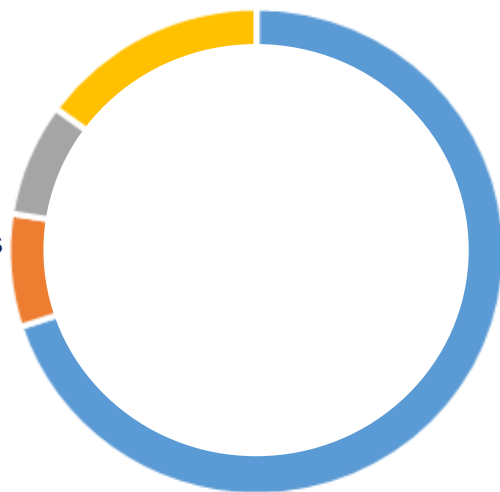
- Economic pressures
- Increased / slower approval requirements
- Net Zero
- Staffing

STAFFING

- As you can see from the data; Brexit, Covid 19 and Economic pressures have had a negative impact on staffing through the industry. This impact has been felt across Consultancies, Contractors, Laboratories and Regulators
- Lack of staffing resource has had an impact throughout the industry at all levels

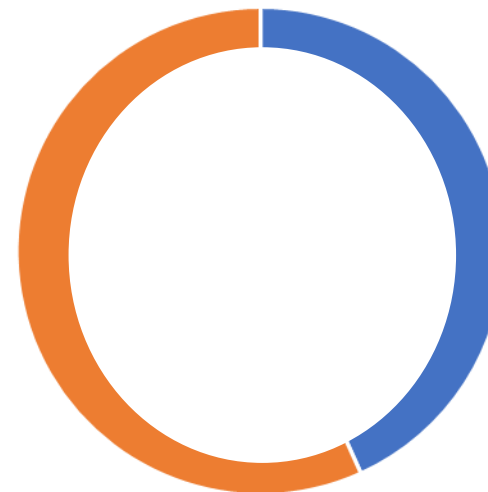
What do you view as industry challenges for growth in 2023?

- Economic pressures
- Increased / slower approval requirements
- Net Zero
- Staffing



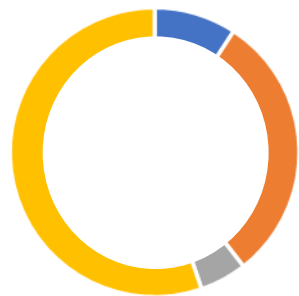
Has Brexit had a negative effect on your business ? If so, please detail how?

- Yes
- No

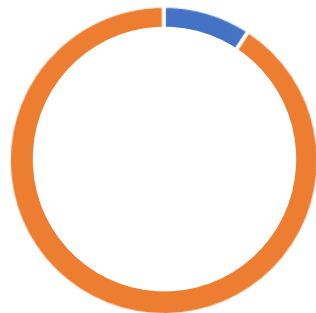


SUSTAINABILITY

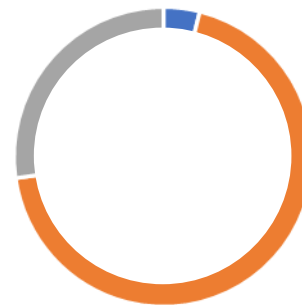
- 64% of responses indicated Climate Change would play a significant or crucial part in remediation design
- 90% of responses believed that regulators and designers would be forced to critically consider sustainability
- From the narrative within the survey responses, it is clear a significant increase in industry considering NetZero as a driver



What role will climate change play in remediation design?



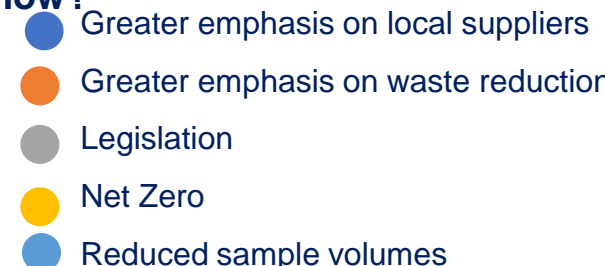
Do you think designers and regulators will be forced to critically consider sustainability?



How do you foresee regulatory input changing on the path to Net Zero?

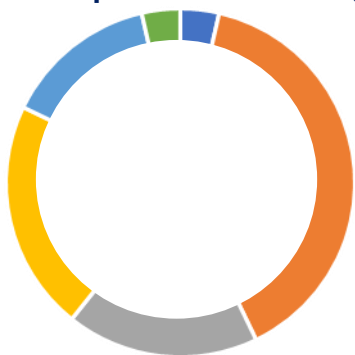


Will laboratory testing change on the path to Net Zero? If yes? How?



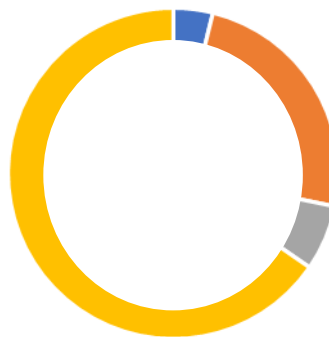
EMERGING CONTAMINANTS

- 70% believe POPS will play a significant or crucial role for lab testing in the future
- 72% believe that VOC, Vapour and Continuous Gas monitoring will play a significant or crucial role in the future and 70% believe that improved regulatory guidance is required
- 32% of respondents highlighted that On site technologies/Faster chemical testing methods will be required moving forward



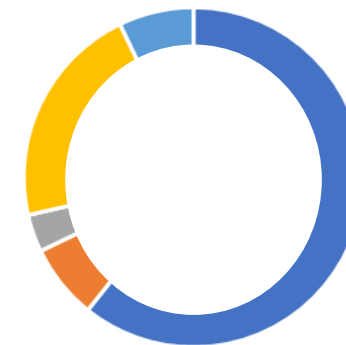
Will soil/water analysis change? If so, how?

- Digitisation
- Emerging contaminants
- Increased requirements
- Lower LODs
- Rapid turnaround / field testing
- Reduced sample size



What role will persistent organic pollutants play in lab testing in the future?

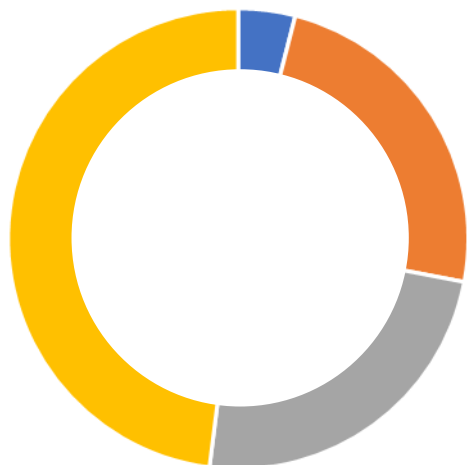
- Crucial
- Insignificant
- Negligible
- Significant



What are key future developments for laboratories over the next 3 years?

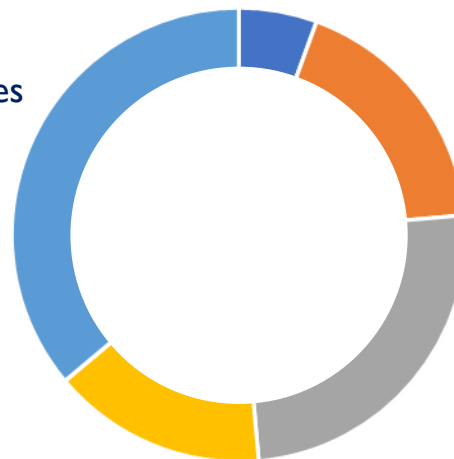
- Emerging contaminants
- VOC / vapor analysis
- Nutrient based analysis
- Rapid turnover capability
- Improved sustainability

TECHNOLOGY



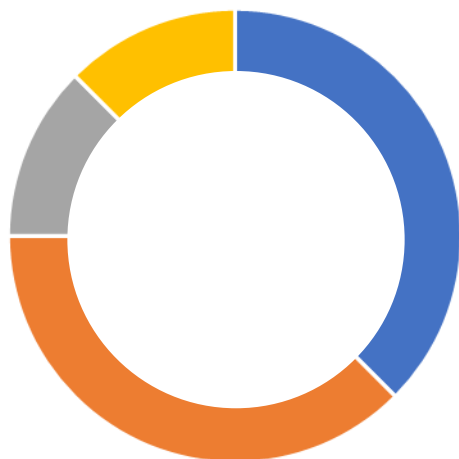
What role do you expect new technologies to play in contaminated land assessment?

- Crucial
- Insignificant
- Negligible
- Significant



Who will drive technology changes?

- All the above
- Clients
- Consultants
- Laboratories
- Regulators



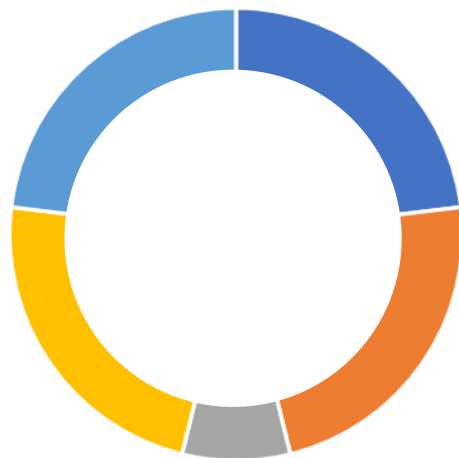
What technologies will be most relevant?

- AI
- Digital twins
- Drones
- Onsite based analysis techniques

- Artificial Intelligence
- Digital Twins
- Green innovation
- Digital technology
- Industry led

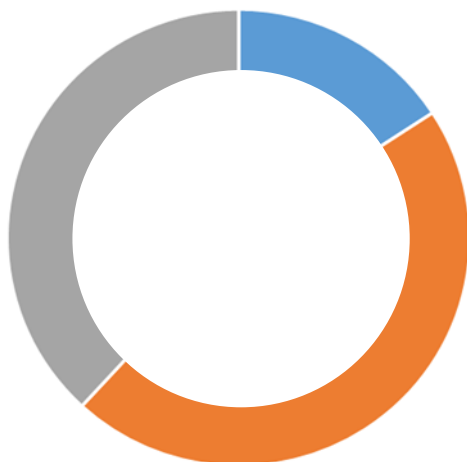
NEW AREAS OF LEGISLATION/ IMPROVED REGULATORY GUIDANCE

Are you concerned over the impact of any new pieces of industry legislation? If so which and why?



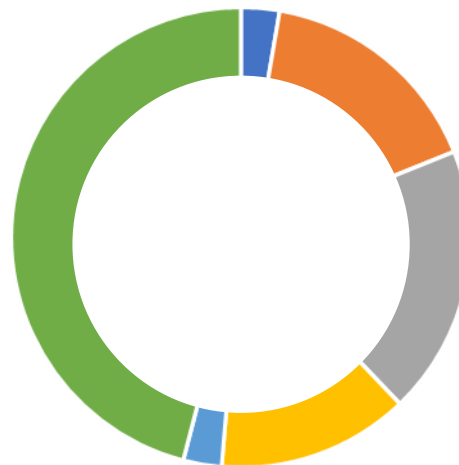
- Biodiversity net gain
- Brexit legislation
- Health and safety act
- Net Zero
- SEPA WAT-PS-10-01

How do you foresee regulatory intervention in the future?



- Less
- More
- Similar

What key regulatory changes do you anticipate over the next 3 years?



- Carbon costing
- Changes in legislation (BREXIT etc)
- Changes in legislation for waste
- Decreased enforcement
- Emerging contaminants
- Increased enforcement

The data highlighted key trends as;

- Sustainability
 - Biodiversity
 - Net Zero
- SEPA WAT-PS-10-01
- BREXIT

- 46% of responses expect a higher level of regulator intervention
- 45% expected increased enforcement to be the Key regulatory change over the next 3 years
- 35% of responses expect Changes in legislation over the next 3 years notably Brexit updates and Waste

5 TAKE HOME MESSAGES

From our perspective the key messages from the 2023 industry survey were;

- 1.** Economic pressures are suppressing the marketplace at <10% growth and the marketplace isn't effectively dealing with current inflationary pressures.
- 2.** Staffing across the subsets of contaminated land industry are proving challenging.
- 3.** Sustainability is a key market driver with greater focus expected.
- 4.** Emerging contaminants is a key market development and expect PFAS, POPs to play a wider role in the next 3 years.
- 5.** From the engagement rate we hope to develop the survey into an annual development trend analysis, please get involved.



Thank you for listening. We look forward to receiving feedback. Please pop by the i2 Exhibition stand

www.i2analytical.com