DETRITUS A SITE SERVICES COMPANY

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The Coverage Problem in Site Services

What 106,671 delivered orders show about why site services fail on distributed construction and facilities work, and what actually closes the gap.

Prepared by Detritus LLC · All figures derived from Detritus operational records · Clients de-identified

EXECUTIVE SUMMARY

Coverage, not price, is the binding constraint

And it cannot be solved by owning more trucks.

Construction and facilities work has moved to geography that no equipment fleet can economically serve. The site services industry has responded by selling harder on price, which addresses the wrong variable. This paper sets out the evidence for a different conclusion, drawn from 106,671 delivered orders.

89%
of order volume falls outside the top 25 cities

4.1
average orders per year in those markets

62%
of large programs need 3+ providers

11
providers on a single site, at peak

The argument in five points

1. **Demand is geographically atomized.** In 2025 we delivered orders in 5,910 cities. The top 25 accounted for 10.8% of volume. The remaining 5,885 markets averaged 4.1 orders each.
2. **Fleet economics cannot follow that demand.** Pre-positioning assets against four orders a year in a given market does not return its cost of capital. This is why coverage gaps exist and why they persist.
3. **Single-provider fulfillment fails at scale.** Across programs over $50,000, 62% required three or more distinct providers for sanitation alone. The median was four. The maximum observed on one site was eleven.
4. **Two demand curves share one market.** Sub-$5,000 orders were 96.6% of transactions and 47.7% of revenue in 2025. Programs over $50,000 were 0.2% of transactions and 32.2% of revenue. They demand opposite operating models.
5. **The solution is a records layer above the fleet.** Coverage, rate, insurance, and service history held centrally lets work be placed with whichever provider can actually serve it, without the buyer absorbing the complexity.

Who this is for. Procurement and program leaders at EPC and heavy civil contractors, enterprise facilities organizations, and public agencies evaluating how to structure site services across a distributed footprint. Section 6 is a practical evaluation framework.

SECTION 1

Demand has atomized faster than supply has followed

Utility-scale renewables, transmission, data centers, and national facilities programs share a trait that older construction did not: the work happens where the land, the interconnect, or the store is, not where the vendors are. A solar build sits in a county chosen for irradiance and transmission access. A retail portfolio has locations in towns nobody would build a service yard to reach.

Our own delivery record shows how thin this gets. In 2025 we delivered site orders in 5,910 distinct cities. Concentration is far lower than most people assume.

Market tier	Cities	Orders	Share of volume	Avg orders per city
Top 25 cities	25	2,946	10.8%	118
All other markets	5,885	24,378	89.2%	4.1
Total, 2025	5,910	27,324	100%	4.6

Derived from Detritus order records, calendar year 2025.

> Nearly nine out of ten orders happen in markets that generate roughly four orders a year. No fleet is built for that.

Why this is a structural problem, not an execution problem

A regional provider sizes its fleet, yard, and routes against predictable local demand. Four orders a year does not justify a truck, a driver, or the inventory sitting idle between them. The provider is behaving rationally by declining to serve that market, or by pricing it as an exception when asked.

The buyer experiences this as a coverage gap and usually interprets it as a vendor quality problem. It is not. It is the correct output of the fleet model applied to atomized demand. Changing vendors does not change the arithmetic.

SECTION 2

Single-provider fulfillment breaks at program scale

The coverage problem compounds when a single site is large. Peak crew counts on a utility-scale build can exceed what any one regional provider can service at the required frequency, even in a market where that provider is otherwise strong. Inventory and route capacity, not willingness, is the limit.

We examined every program in our record billing more than $50,000 and counted the distinct providers required for portable sanitation alone, excluding waste, water, and other lines.

Providers required on one program	Share of programs over $50K
1 to 2 providers	38%
3 to 4 providers	29%
5 to 7 providers	25%
8 or more providers	8%

Sample of 60 programs over $50,000. Median 4 providers, maximum 11 observed on a single site. Sanitation only.

62% of large programs required three or more providers. A buyer who contracts one provider for a program of this size is, in most cases, contracting for a shortfall that will surface at peak.

The three ways this fails in practice

- **Silent under-service.** The provider accepts the whole scope, then services on its own capacity rather than the agreed frequency. The gap appears as complaints from the field, not as a contract breach.
- **Serial re-sourcing.** The buyer discovers the shortfall and sources a second and third provider mid-program, each with its own rate negotiation, insurance review, and invoice.
- **Concentration risk.** Where one provider does carry the whole load, a single commercial dispute or equipment failure degrades the entire site. We have seen a provider raise its own receivables directly with a client site and threaten a service hold on active work.

> The question is not whether you need multiple providers. It is whether that complexity sits with you or with someone else.

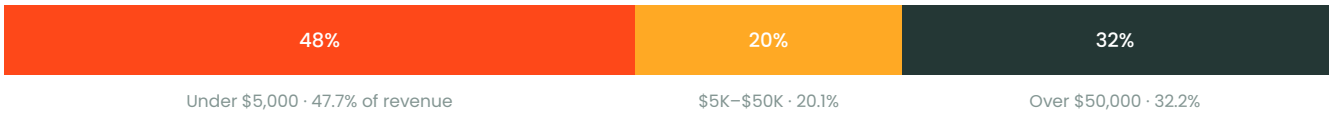
SECTION 3

Two demand curves share one market

Site services is usually discussed as one category. Our transaction record shows two distinct businesses with opposite operating requirements, and most vendors are built for only one.

Order band	Share of orders	Share of revenue	Average order	What it demands
Under $5,000	96.6%	47.7%	$856	Response time, density, self-service
$5,000 to $50,000	3.1%	20.1%	$11,094	Coordination, scheduling
Over $50,000	0.2%	32.2%	$236,564	Coverage, duration, program management

Detritus order records, calendar year 2025.



Under $5,000 · 47.7% of revenue
$5K–$50K · 20.1%
Over $50,000 · 32.2%

Both curves grew at almost the same rate between 2022 and 2025: 36% compound annual growth in the sub-$5,000 band, 34% in the over-$50,000 band. Neither is a legacy business being displaced by the other.

Why this matters to a buyer

A vendor optimized for thousands of small, fast orders is unlikely to hold an eighteen-month program in a thin-supply county. A vendor built for long placements rarely holds a service-level commitment across four hundred locations. Both are honest specializations.

If your organization has both profiles, and most enterprises do, then either you run two vendor programs or you engage a party whose coverage and records sit above the fleet and can serve both. That is the practical case for the operating model described next.

SECTION 4

What a records layer is, and what it requires

The alternative to a bigger fleet is not a broker with a phone list. It is a maintained record of who can actually serve a given location, at what price, with what insurance, and with what service history. Four functions run on that record.

Stage	What it requires	What it produces
Source	Coverage radius, rate card, insurance status, and service history held for every provider ever paid, not a directory of who exists	A site in an unfamiliar county is a lookup, not a research project
Price	Paid transaction history at city level, plus a defensible method where no local history exists	Rates that hold, because they were derived from what was actually paid
Dispatch	Unit-level records for delivery, service cycle, swap, tonnage, and removal, with scheduled frequency per unit rather than per provider	A provider running behind degrades one unit, not the site. Exceptions surface before the client calls
Bill	Every provider charge reconciled to a specific unit, delivery, or swap before it reaches a client invoice	One consolidated invoice at account rates, with the detail retained behind it

> The asset is not the equipment. It is the record of who can serve where, kept current by transacting.

Why it compounds

Each order adds to the record. A provider paid once in a market becomes a known quantity for the next requirement there, with a rate, a radius, and a performance history attached. Coverage in a thin market is therefore a function of having transacted there before, which is why the model strengthens with volume and cannot be replicated quickly.

Our record currently holds 7,720 provider accounts. In 2025 alone, work was placed with more than 2,400 distinct portable sanitation providers and more than 1,200 distinct waste providers.

SECTION 5

Evidence from the delivery record

Three programs are documented in detail in accompanying past performance profiles. Each was selected because it isolates a different failure mode described above.

Program	Region	Period	Scale	What it isolates
A	N. New England	Apr 2025 – Aug 2026	423 sanitation, 159 waste placements; 9 providers	Coverage assembled where no single provider was sufficient, plus seven service lines on one agreement
B	Midwest	May 2025 – Aug 2026	573 sanitation placements; 11 providers; ~1,800 tons aggregate	Density beyond single-provider capacity, and unrelated service categories on one agreement
C	Gulf Coast	Aug 2024 – Jun 2026	594 waste, 223 sanitation placements; 22 months	Cost governance over a long program: 41 reconciliation actions worked to completion

The pattern across all three

- Peak demand exceeded single-provider capacity in every case. Provider counts of 9, 11, and 6 were required for sanitation alone.
- Scope expanded mid-program in every case, and in each case was absorbed onto the existing agreement rather than returned to the client to source.
- Provider-side commercial problems occurred in every case and were resolved without interrupting site service.
- Deployment scaled by factors of four to twenty-two within a single program without a new sourcing cycle.

Client names, exact site locations, provider names, and contract values are withheld. Program values, exact figures, and reference contacts are available to a qualified party under mutual non-disclosure agreement and with client consent.

SECTION 6

How to evaluate a site services partner

If the analysis above is right, the standard evaluation criteria are mis-weighted. Unit price is easy to compare and rarely the variable that determines whether a program succeeds. These nine questions test the things that do.

Coverage

1. In how many distinct cities did you deliver work last year? A count, not a claim of national coverage.
2. For a site in a county you have not served, what is your process and what is your typical time to a firm price?
3. How many distinct providers did your largest single site require, and how was service frequency maintained across them?

Accountability

4. When a scheduled service is missed, how do you find out? If the answer is that the customer calls, there is no exception detection.
5. Who owns an open exception through to resolution, and is that person named to us?
6. What happens to a provider's record after a service failure? Absent a performance record, nothing changes.

Commercial control

7. When a provider raises a surcharge mid-program, does it appear on our invoice automatically or as a decision presented to us?
8. How is each provider charge tied to a specific delivery, service, or removal before it reaches our invoice?
9. If a provider has a receivables dispute with you, what protects our site from a service hold?

Answers to look for	A specific city count, a named process with a stated turnaround, an honest provider count above one, exception detection that does not depend on the customer, a named owner, a maintained provider performance record, surcharges surfaced as decisions, charge-level reconciliation, and a clear answer on provider-dispute insulation.

METHODOLOGY AND SOURCES

How every figure in this paper was derived

All figures are drawn from Detritus operational records rather than industry estimates or third-party research. Queries were run against the production system in August 2026.

Figure	Derivation
106,671 delivered orders	Count of all order records with recorded billing, inception through August 2026
5,910 cities, 27,324 orders (2025)	Distinct city values and order count for calendar year 2025
10.8% / 89.2% market split	Top 25 cities by 2025 order count summed against total 2025 order count
4.1 average orders per city	2025 orders outside the top 25 cities divided by 5,885 remaining cities
Provider counts per program	Distinct providers on sanitation unit records, sampled across 60 programs billing over $50,000
Order band shares	2025 orders and billing grouped into bands under $5,000, $5,000 to $50,000, and over $50,000
36% / 34% growth rates	Compound annual growth in billed volume by band, 2022 to 2025
7,720 provider accounts	Count of provider-type accounts on record
Program figures in Section 5	Unit placement counts, provider counts, and date ranges from service records for each program

Definitions and limitations

- **Placement** means a unit record created against a program. A unit swapped or relocated generates a new placement record. Placements are not peak simultaneous units on site.
- **Provider counts** in Section 2 cover portable sanitation only. Including waste, water, and other service lines would raise them.
- **2026 figures** are excluded from year-over-year comparisons because billing lags on active programs.
- Market concentration is measured by order count rather than dollar value. Weighting by value concentrates volume further into large-program markets.

About Detritus

Detritus LLC is a site services company founded in 2018 and headquartered in Savannah, Georgia. We source, price, dispatch, and bill portable sanitation, waste, water, fencing, power, storage, and temporary site infrastructure for EPC and heavy civil contractors, enterprise facilities organizations, and public agencies. We operate in all 50 states and the District of Columbia through a network of more than 7,000 vetted providers. Single-location work is served through our brand sites, including Dumpster Rental Dogs and Porta Potty Dogs.

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