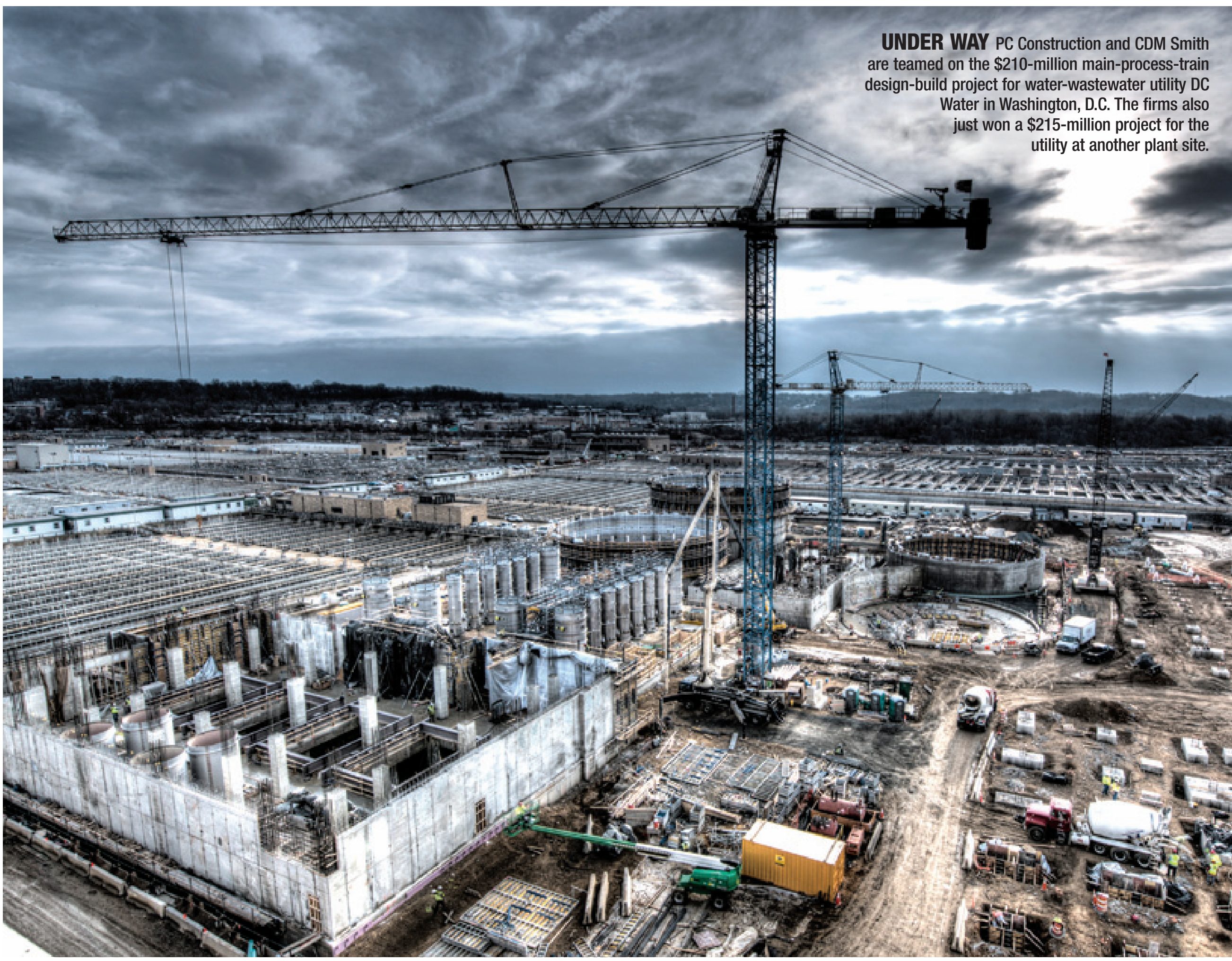
ENR

THE TOP 200

NUMBERS 45 & 16



UNDER WAY PC Construction and CDM Smith are teamed on the $210-million main-process-train design-build project for water-wastewater utility DC Water in Washington, D.C. The firms also just won a $215-million project for the utility at another plant site.

PHOTO COURTESY OF PC CONSTRUCTION

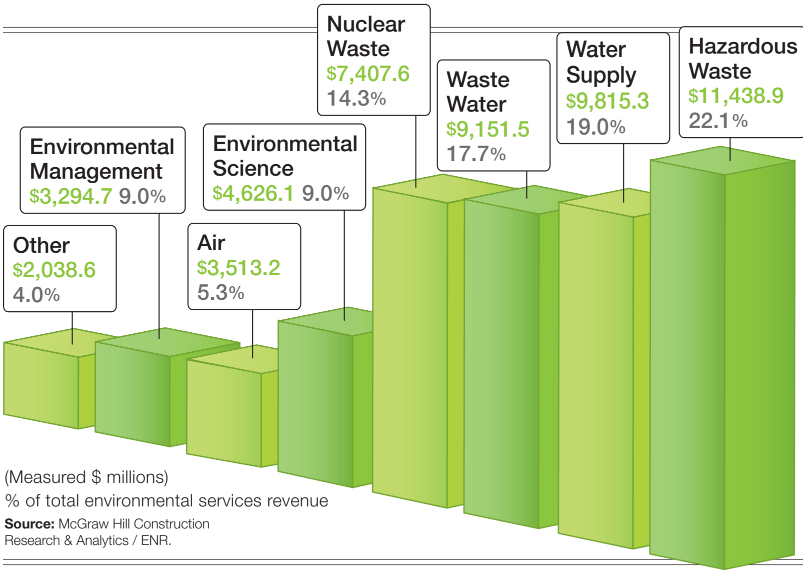
The Top 200 Environmental Firms

Firms Seek Expanded Horizons

Despite market uncertainties, list participants pushed, persevered and sought to prosper

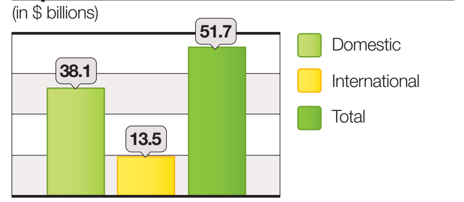
By Debra K. Rubin, Johanna Knapschaefer, Tony Illia and Bruce Buckley

Looking at Markets

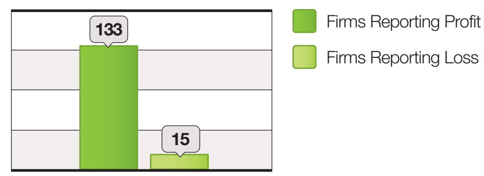


Top 200 Environmental Firm Revenue

(in $ billions)



Number of Firms Reporting Profitability Change



Comparing the Past Decade's Top 200 Firm Revenue

(in $ billions) **Source:** McGraw Hill Construction Research & Analytics / ENR.

In 2013, global market forces caught up with the Top 200 Environmental Firms, with total revenue in the surveyed categories unable to sustain the 5% gain that last year's participants reported. Domestic revenue could not withstand impacts from pubic-sector budget cutbacks, dropping 9%, to $38.1 billion. Exacerbated by the impacts of sequestration and other funding issues in 2012, the federal environmental market alone has dropped 21.5% in the past two years.

But the $51.7 billion in environmental-services revenue, off 4.5% from last year's total, still exceeds the 2011 figure of $51.3 billion. Since 2010, it has been buoyed by a 7.1% one-year rise in international work and a 19% boost in private-sector client work. An improving real estate market and expanding energy-sector projects already are generating new environmental work for a number of Top 200 firms. The latter helped make Canada a key Top 200 global market, now making up 37% of all non-U.S. revenue for participants. Last year's Superstorm Sandy has generated repair work for damaged East Coast environmental infrastructure but also is prompting public and private owners to build life-cycle management and climate-change adaptation into projects.

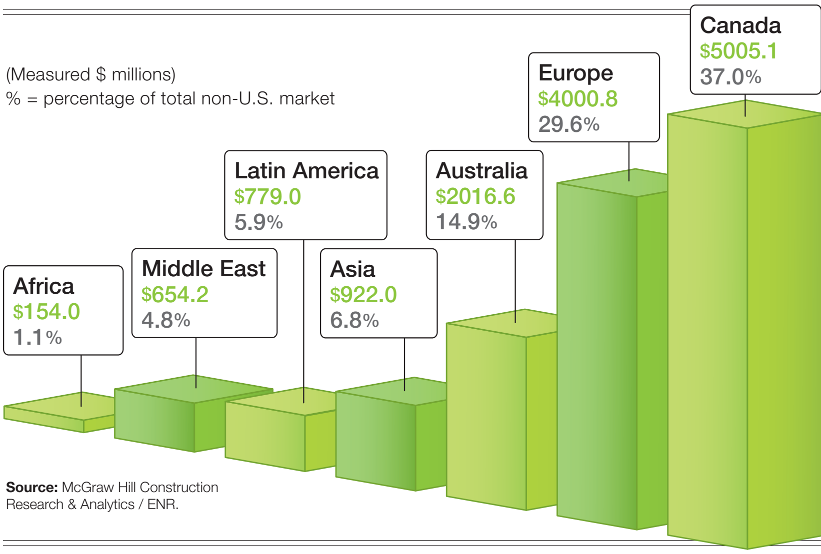
Revenue was off for a number of the largest Top 200 participants, but list leader CH2M Hill managed to grow its total to nearly $4.3 billion, up about 5% from last year. The firm's share of international environmental revenue jumped to 42%. Arcadis U.S., Tetra Tech and MWH Global also noted revenue gains in 2012. Clean Harbors Inc. broke into the Top 10, as did Golder Associates Corp., which rose seven spots with a $1.27-billion revenue total. Louis Berger and Weston Solutions both declined to participate this year, but newcomers landing in the top 100 include SNC-Lavalin and Degremont Technologies North America as well as water-wastewater-sector builders Gilbane Building Co., Shimmick Construction Co., Rice Lake Construction Group and T.A. Loving Co.

"Although people understand that the price of water is phenomenally low, the political process isn't willing to appropriate funds for what's needed."

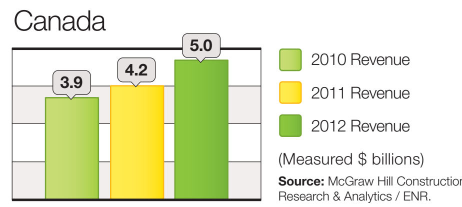
Stephen J. Hickox, CEO of CDM Smith

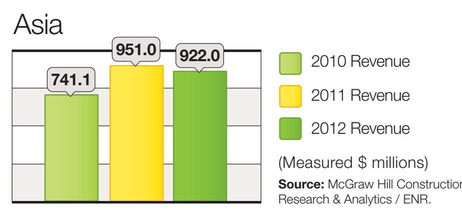
Top 200 firms in the reigniting private-sector market note broadened service offerings. Robert Glenn, vice president of Parsons Corp., says, "As the economic recovery continues, business expansion pressures will increase permitting and environmental-impact-study opportunities both in the U.S. and globally." Mike Smylie, regional commercial director for Environmental Resources Management (ERM), sees clients with new demands. "Companies understand reputational risk now more than ever before. They are more aware of the non-technical risk issues outside their control," he says. "It is driving more decisions than in the past and will continue to do so. We're offering services today that we didn't five years ago. Companies don't want to spend billions on an operation they can't sustain."

Looking at Global Regions



Regional Changes





Similarly, Locus Technologies, which provides cloud-based environmental data management, sees new business drivers. "There is more pressure on companies to organize and report their environmental data and information. Looking environmentally friendly is important to brand reputation, but now companies have to prove it with data that is defensible and validated," says CEO Neno Duplancic. He anticipates potential business in assisting firms to manage carbon emissions based on potential new rules from the Obama administration. "Reporting requirements are getting more stringent, and the spreadsheet-based approach simply does not cut it," says Duplancic.

The burgeoning real estate recovery is emerging as another market driver. "Developers and lenders may be willing to take on more environmental risk than in the past if the property value or other factors are enticing enough," says Holly Neber, president of AEI Consultants, a new list participant. "With the increase in property values and demand in core areas, the appetite for commencing or completing remediation projects appears to be increasing." Neber sees the firm's business shifting from pre-foreclosure site assessments to "consulting associated with new transactions."

Partner Engineering & Science also cites development activity in its growth last year. CEO Joe Derhake notes a trend of new or tighter regulation of "vapor intrusion," which involves volatile chemicals migrating from contaminated soil or groundwater into a building's interior space. While chemicals may be at low levels, he sees demand for more assessment and remediation services, particularly in "reopeners," or previously closed contaminated sites that officials want re-examined due to better knowledge of health risks. "The movement toward more human-health-based standards is one that consultants will have to stay on top of and educate clients about," he says.

4.5%
Total revenue decrease for 2013's Top 200.

7.0%
Increase in 2012 non-U.S. revenue.

27
Number of Top 200 firms that report being acquired in 2012.

For federal-sector clients, market drawdown and sequestration took a toll last year, with total Top 200 revenue down to $12.4 billion from $15 billion a year ago. Cape Environmental Management Inc. further anticipates a 10% to 12% downturn in its sector work this year, says company executive Juan A. Hernandez. Among its military clients, consolidation of cleanup sites is reducing opportunities as well as "the competitive advantage of being an incumbent," he says. Adds Steven E. Sullivan, CEO of Sullivan International Group, which reports 97% of revenue in the federal sector, "Resolution of sequestration or even a better understanding of how to manage in this new environment will help make 2014 and beyond better."

Bechtel Corp. sees steady environmental cleanup work in the federal sector, but Michael Graham, manager of U.S. environmental operations, says the

The Top Firms by Market Segment

HAZARDOUS WASTE
Top 20 Revenue: $7.76 Billion
Share of Total Sector Revenue: 67.8%

2013	2012		$ MIL.
1	2	CLEAN HARBORS INC.	1,059.3
2	3	ARCADIS U.S. INC.	737.7
3	4	CH2M HILL LTD.	704.5
4	6	URS CORP.	565.0
5	5	THE SHAW GROUP INC.	489.6
6	8	BECHTEL CORP.	477.8
7	1	VEOLIA ENVIR. NORTH AMERICA	468.1
8	9	AMEC PLC	430.7
9	21	LVI SERVICES INC.	323.9
10	7	AECOM TECHNOLOGY CORP.	321.2
11	10	SCIENCE APP. INT'L CORP. (SAIC)	316.3
12	11	PARSONS CORP.	301.2
13	12	CONESTOGA-ROVERS & ASSOCIATES	296.4
14	14	SEVENSON ENVIRON. SERVICES INC.	230.6
15	16	TETRA TECH INC.	217.7
16	15	ENVIR. RESOURCES MGMT INC. (ERM)	216.3
17	22	GOLDER ASSOCIATES CORP.	159.6
18	18	CDM SMITH	157.9
19	**	ECC	147.2
20	**	REMEDIAL CONSTRUCTION SVS. LP	137.0

WATER TREAT. / SUPPLY
Top 20 Revenue: $7.45 Billion
Share of Total Sector Revenue: 75.9%

2013	2012		$ MIL.
1	1	TETRA TECH INC.	1,330.5
2	2	CH2M HILL	1,018.1
3	3	MWH GLOBAL	583.1
4	6	AECOM TECHNOLOGY CORP.	532.8
5	8	BLACK & VEATCH	470.5
6	5	LAYNE CHRISTENSEN CO.	459.0
7	10	GARNEY HOLDING CO.	380.1
8	7	THE WALSH GROUP LTD.	328.3
9	11	VEOLIA ENVIR. NORTH AMERICA	323.7
10	13	CDM SMITH	306.7
11	9	ALBERICI CORP.	238.4
12	14	BECHTEL CORP.	217.2
13	12	SKANSKA USA INC.	194.0
14	15	HDR	190.5
15	16	PCL CONSTRUC. ENTERPRISES INC.	159.0
16	**	DEGREMONT TECH. NORTH AMERICA	150.0
17	**	WORLEYPARSONS LTD.	143.6
18	18	STANTEC INC.	142.1
19	17	URS CORP.	141.2
20	19	BARNARD CONSTRUCTION CO. INC.	137.0

WASTEWATER
Top 20 Revenue: $6.19 Billion
Share of Total Sector Revenue: 67.7%

2013	2012		$ MIL.
1	1	CH2M HILL	1,031.0
2	2	MWH GLOBAL	732.6
3	3	VEOLIA ENVIR. NORTH AMERICA	622.5
4	5	AEGION CORP.	425.4
5	4	AECOM TECHNOLOGY CORP.	385.7
6	8	BLACK & VEATCH	346.0
7	7	CDM SMITH	338.6
8	6	URS CORP.	282.5
9	9	KIEWIT CORP.	279.7
10	13	BECHTEL CORP.	260.6
11	11	LAYNE CHRISTENSEN CO.	214.5
12	12	ARCADIS U.S. INC.	175.7
13	14	PC CONSTRUCTION CO.	158.2
14	10	THE WALSH GROUP LTD.	154.5
15	18	BROWN AND CALDWELL	143.5
16	16	STANTEC INC.	142.1
17	15	SKANSKA USA INC.	138.0
18	**	BOWEN ENGINEERING CORP.	125.0
19	21	CLEAN HARBORS INC.	117.7
20	**	GARNEY HOLDING CO.	113.6

AIR POLLUTION
Top 10 Revenue: $2.55 Billion
Share of Total Sector Revenue: 72.7%

2013	2012		$ MIL.
1	3	THE BABCOCK & WILCOX CO.	600.5
2	1	URS CORP.	600.3
3	**	BLACK & VEATCH	299.8
4	2	BECHTEL CORP.	260.6
5	4	CH2M HILL LTD.	232
6	6	GOLDER ASSOCIATES CORP.	184.2
7	5	FLUOR CORP.	116.8
8	9	MWH GLOBAL	90.3
9	7	PARSONS CORP.	89.7
10	11	ENVIR. RESOURCES MGMT INC. (ERM)	77.8

NUCLEAR WASTE
Top 10 Revenue: $6.99 Billion
Share of Total Sector Revenue: 94.3%

2013	2012		$ MIL.
1	1	ENERGYSOLUTIONS INC.	1,808.5
2	2	URS CORP.	1,059.3
3	5	CH2M HILL	1,052.5
4	4	FLUOR CORP.	1,040.0
5	3	BECHTEL CORP.	825.4
6	6	BATTELLE MEMORIAL INSTITUTE	746.0
7	7	THE SHAW GROUP INC.	136.0
8	9	THE S.M. STOLLER CORP.	124.5
9	11	PERMA-FIX ENVIR. SERVICES	102.0
10	**	PARSONS CORP.	97.6

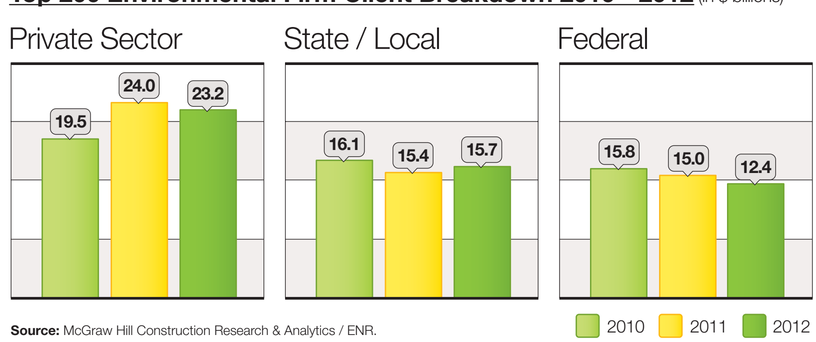
ENVIRON. MANAGEMENT
Top 10 Revenue: $1.95 Billion
Share of Total Sector Revenue: 59.3%

2013	2012		$ MIL.
1	1	TETRA TECH, INC.	372.5
2	5	GOLDER ASSOCIATES CORP.	356.1
3	2	ENVIR. RESOURCES MGMT INC. (ERM)	332.1
4	4	ANTEA GROUP	251.7
5	3	URS CORP.	247.2
6	6	THE SHAW GROUP INC.	99.3
7	10	SCIENCE APP. INT'L CORP. (SAIC)	90.5
8	7	VEOLIA ENVIR. NORTH AMERICA	74.7
9	**	MWH GLOBAL	66.6
10	**	CARDNO USA INC.	55.9

ENVIRONMENTAL SCIENCE
Top 10 Revenue: $3.07 Billion
Share of Total Sector Revenue: 66.3%

2013	2012		$ MIL.
1	1	URS CORP.	494.3
2	2	TETRA TECH INC.	474.1
3	3	GOLDER ASSOCIATES CORP.	429.8
4	4	HDR	338.4
5	6	CH2M HILL LTD.	257.8
6	7	AMEC PLC	252.7
7	5	CARDNO USA INC.	222.2
8	10	ENVIR. RESOURCES MGMT INC. (ERM)	213.6
9	9	AECOM TECHNOLOGY CORP.	195.1
10	8	STANTEC INC.	187.4

Top 200 Environmental Firm Client Breakdown 2010 - 2012 (in $ billions)



Source: McGraw Hill Construction Research & Analytics / ENR.

#136 **ENSAFE INC.,** up from No. 187 last year, announced in May that veteran executive Don Bradford succeeded co-founder Philip G. Coop as CEO.

The Top Firms by Type of Client

PRIVATE

Top 10 Revenue: $11.80 Billion
Share of Total Sector Revenue: 51.9%

2013	2012		$ MIL.
1	1	VEOLIA ENVIR. NORTH AMERICA	1,857.5
2	4	CH2M HILL	1,855.8
3	5	TETRA TECH INC.	1,378.8
4	2	URS CORP.	1,306.5
5	9	GOLDER ASSOCIATES CORP.	1,043.7
6	6	CLEAN HARBORS, INC.	1,000.5
7	7	BECHTEL CORP.	934.0
8	8	ENVIR. RESOURCES MGMT INC. (ERM)	862.5
9	10	ARCADIS U.S. INC.	808.0
10	**	BLACK & VEATCH	750.8

STATE / LOCAL

Top10 Revenue: $6.64 Billion
Share of Total Sector Revenue: 42.3%

2013	2012		$ MIL.
1	1	CH2M HILL	1,275.9
2	2	AECOM TECHNOLOGY CORP.	902.1
3	10	URS CORP.	847.4
4	4	CDM SMITH	650.8
5	6	MWH GLOBAL	631.9
6	3	VEOLIA ENVIR. NORTH AMERICA	622.5
7	5	THE WALSH GROUP LTD.	458.7
8	**	GARNEY HOLDING CO.	449.3
9	7	AEGION CORP.	424.1
10	11	BLACK & VEATCH	374.8

FEDERAL

Top 10 Revenue: $8.71 Billion
Share of Total Sector Revenue: 70.3%

2013	2012		$ MIL.
1	2	URS CORP.	1,377.1
2	1	BECHTEL CORP.	1,238.0
3	3	CH2M HILL LTD.	1,164.2
4	**	ENERGYSOLUTIONS INC.	1,085.1
5	4	FLUOR CORP.	1,040.0
6	6	BATTELLE MEMORIAL INSTITUTE	912.2
7	7	TETRA TECH INC.	798.3
8	8	SCIENCE APP. INT'L CORP. (SAIC)	494.1
9	5	THE SHAW GROUP INC.	382.9
10	11	PARSONS CORP.	222.9

The Top Firms by Type of Work

CONSTRUCT / REMEDIATION

Top 10 Revenue: $7.48 Billion
Share of Total Sector Revenue: 41.3%

2013	2012		$ MIL.
1	**	ENERGYSOLUTIONS INC.	1,718.1
2	1	BECHTEL CORP.	1,433.5
3	2	FLUOR CORP.	859.5
4	4	LAYNE CHRISTENSEN CO.	681.1
5	**	BLACK & VEATCH	655.0
6	9	MWH GLOBAL	454.3
7	8	KIEWIT CORP.	444.0
8	6	AEGION CORP.	428.4
9	10	CH2M HILL LTD.	416.7
10	7	SKANSKA USA INC.	386.5

ENGINEERING / DESIGN

Top 10 Revenue: $6.17 Billion
Share of Total Sector Revenue: 51.9%

2013	2012		$ MIL.
1	1	CH2M HILL LTD.	1,568.0
2	2	MWH GLOBAL	1,025.6
3	3	BECHTEL CORP.	629.9
4	4	AECOM TECHNOLOGY CORP.	577.9
5	5	URS CORP.	565.0
6	6	TETRA TECH INC.	508.0
7	8	BLACK & VEATCH	401.3
8	9	HDR	322.7
9	**	FLUOR CORP.	297.3
10	**	STANTEC INC.	271.3

CONSULTING / STUDIES

Top 10 Revenue: $7.54 Billion
Share of Total Sector Revenue: 43.5%

2013	2012		$ MIL.
1	1	TETRA TECH INC.	1,620.7
2	2	CH2M HILL LTD.	1,559.4
3	3	URS CORP.	1,271.1
4	5	GOLDER ASSOCIATES CORP.	650.8
5	4	ENVIR. RESOURCES MGMT INC.	649.8
6	7	AMEC PLC	501.5
7	8	AECOM TECHNOLOGY CORP.	374.7
8	6	AEGION CORP.	355.7
9	9	CARDNO USA INC.	278.1
10	10	STANTEC INC.	277.8

CM / PM

Top 10 Revenue: $4.08 Billion
Share of Total Sector Revenue: 65.6%

2013	2012		$ MIL.
1	1	URS CORP.	1,412.4
2	2	CH2M HILL LTD.	751.8
3	5	THE SHAW GROUP INC.	379.5
4	6	AECOM TECHNOLOGY CORP.	282.2
5	7	VEOLIA ENVIR. NORTH AMERICA	249.0
6	10	GOLDER ASSOCIATES CORP.	233.3
7	**	GARNEY HOLDING CO.	227.1
8	9	BATTELLE MEMORIAL INSTITUTE	214.5
9	**	MCCARTHY HOLDINGS INC.	184.0
10	**	CDM SMITH	150.6

sequester and ongoing budget battles are having an impact on schedules. "It's a really challenging time for our cleanup agreements because we won't be able to make all of the commitments that we currently have," he says.

Most critical of those commitments is meeting construction milestones and resolving technical issues on the $12.2-billion nuclear waste-vitrification plant at the U.S. Energy Dept.'s Hanford, Wash., complex, with which the firm has struggled. Accelerating the project is a key mission for new Energy Secretary Ernest Moniz. Firms in the nuclear-waste sector—such as Bechtel and The S.M. Stoller Corp., which last year won multi-year environmental operations contracts at Hanford and DOE's Pantex site in Texas—could see cleanup become a higher priority, with proposed legislation in Congress to move it out of the agency's nuclear-weapons management unit.

Designing and building water and wastewater facilities continued in 2012 to sustain many Top 200 firms, although Tom O'Donnell, vice president and district manager of PCL Construction Enterprises' water infrastructure group, is far from bullish. "We are seeing cities, municipalities and water districts continue to struggle to fund their capital improvement programs," he says. "As a result, many water-wastewater projects are being canceled, deferred or scaled back to accommodate budget shortfalls."

But Stephen J. Hickox, CEO of CDM Smith, sees improvement in the last year. "There are more pockets where things are growing, such as in Southern California, Texas and the mid-Atlantic," he says. CDM Smith is teamed with PC Construction on major new design-build projects for the District of Columbia Water and Sewer Authority in Washington, D.C. (see related story, p. 10). Hickox says the firm will, however, pass up entry into an already crowded field of competitors seeking contracts on a $1.6-billion man-

The Top 30 All-Environmental Firms

RANK 2013	RANK 2012	FIRM	REVENUE $ MIL.
1	1	VEOLIA ENVIR. NORTH AMERICA	2,490.0
2	2	ENERGYSOLUTIONS INC.	1,809.0
3	3	ENVIR. RESOURCES MGMT. INC. (ERM)	905.0
4	4	GARNEY HOLDING CO.	493.7
5	**	LVI SERVICES INC.	404.9
6	7	BROWN AND CALDWELL	299.0
7	6	ENVIRON HOLDINGS INC.	286.0
8	**	DEGREMONT TECH. NORTH AMERICA	250.0
9	8	SEVENSON ENVIR. SERVICES INC.	235.0
10	10	HAZEN AND SAWYER PC	160.4
11	9	ECOLOGY AND ENVIRONMENT INC.	155.4
12	12	SCS ENGINEERS	151.0
13	14	CAROLLO ENGINEERS INC.	148.5
14	22	REMEDIAL CONSTRUCTION SERVICES LP	137.0
15	17	PERMA-FIX ENVIRONMENTAL SERVICES	127.5
16	11	THE S.M. STOLLER CORP.	124.5
17	15	GROUNDWATER & ENVIR. SERVICES INC.	120.7
18	23	EA ENGIN. SCIENCE AND TECH. INC.	111.3
19	20	ULLIMAN SCHUTTE CONSTRUCTION LLC	108.0
20	**	APEX COS. LLC	101.2
21	19	J.R. FILANC CONSTRUCTION CO. INC.	93.6
22	21	ENVIRONMENTAL RESTORATION LLC	85.1
23	25	GREELEY AND HANSEN LLC	76.0
24	28	SWCA ENVIRONMENTAL CONSULTANTS	73.2
25	27	THE CADMUS GROUP INC.	71.0
26	**	C.H. NICKERSON & CO. INC.	70.1
27	30	USA ENVIRONMENT LP	70.0
28	26	ROUX ASSOCIATES INC.	68.0
29	29	WESTON & SAMPSON ENGINEERS INC.	67.2
30	**	ET ENVIRONMENTAL CORP. LLC	65.0

The Top 20 Firms Working in Non-U.S. Locations

RANK 2013	RANK 2012	FIRM	REVENUE $ MIL.
1	1	CH2M HILL	1,791.4
2	2	ENERGYSOLUTIONS INC.	1,266.0
3	3	TETRA TECH INC.	1,209.5
4	5	GOLDER ASSOCIATES CORP.	994.6
5	6	BECHTEL CORP.	890.5
6	7	MWH GLOBAL	713.3
7	4	AECOM TECHNOLOGY CORP.	685.9
8	8	URS CORP.	565,0
9	9	BLACK & VEATCH	510.9
10	10	CLEAN HARBORS INC.	506.1
11	11	ENVIRONMENTAL RESOURCES MANAGEMENT INC. (ERM)	504.1
12	12	VEOLIA ENVIRONMENT NORTH AMERICA	438.2
13	16	AMEC PLC	368.5
14	18	WORLEYPARSONS LTD.	333.1
15	14	ANTEA GROUP	298.5
16	15	STANTEC INC.	271.3
17	19	AEGION CORP.	164.5
18	**	WSP + GENIVAR	157.7
19	20	PARSONS BRINCKERHOFF	157.4
20	**	ARCADIS U.S. INC.	116.6

dated wastewater facility upgrade in Miami-Dade County, Fla. "The market is really tight and extremely competitive," says PC Construction CEO Kevin McCarthy. "I'm glad there's still work out there, but there's not enough to go around."

While he sees opportunity on the horizon, Mike Heitmann, CEO of Kansas City-based Garney Holding Co., says, "It's very tough out there, with a lot of downward pressure on pricing." He is optimistic that, with residential construction resuming in some regions, competition will thin out. The firm is building a $305-million pipeline extension for the North Texas Municipal Water District, the utility's first use of a construction manager-at-risk contract. Heitmann eyes future work in building desalination and brackish-water treatment systems in drought-stricken areas. In December, Garney also acquired Florida-based Encore Construction to provide an East Coast entree.

Even as "Sandy fatigue" sets in nearly 10 months after the damaging hurricane, officials are applying lessons learned. Noting 100 New Jersey wastewater plants that suffered "serious distress" from the Oct. 29, 2012, storm, state Dept. of Environmental Protection Commissioner Robert Martin told a July 19 conference sponsored by Parsons Brinckerhoff that "rebuilding with resiliency" is the new mantra. The state also is boosting attention to asset management, DEP water chief Michele Siekerka told attendees at the event, noting New Jersey's "poor track record."

"Developers and lenders may be willing to take on more environmental risk than in the past if the property value or other factors are enticing enough."

Holly Neber, President, AEI Consultants

Lyles Construction, which reports a 100% increase in backlog in the past 12 months, sees technology as a market game-changer. Anaerobic digestion is mainstream in Europe, with waste products used to generate power, says Senior Vice President Stan Simons. "We believe this will occur in the U.S. in the more densely populated areas first and, subsequently, throughout the country." He sees projects in renewable energy, increased wastewater-effluent quality and enhanced potable-water plant efficiency. Others see potential for environmental innovation in infrastructure through the use of the new Envision rating system, launched last year by three engineering groups and Harvard University. The Institute of Sustainable Infrastructure last month said the first project assessed using its criteria, a 141,000-sq-ft fish hatchery in Anchorage, features sophisticated technology that reduces by 95% conventional water and energy use.

Paul Demit, director of PB's North America water practice, sees potential for more public-private partnerships in the sector. "A lot of local governments are in the process of evaluating whether to proceed," he says. Cindy Wallis-Lage, president of Black & Veatch's global water business, says U.K. privatization has significantly boosted investment in water assets, with a corresponding improvement in water quality and performance. She admits the approach "is not without its critics" and may not fit all U.S. needs. But Wallis-Lage adds, "Many utilities will have to decide whether to explore new financing options on their terms or wait until they are forced to accept a less desirable arrangement to avoid default, bankruptcy or other negative financial or operational consequences."

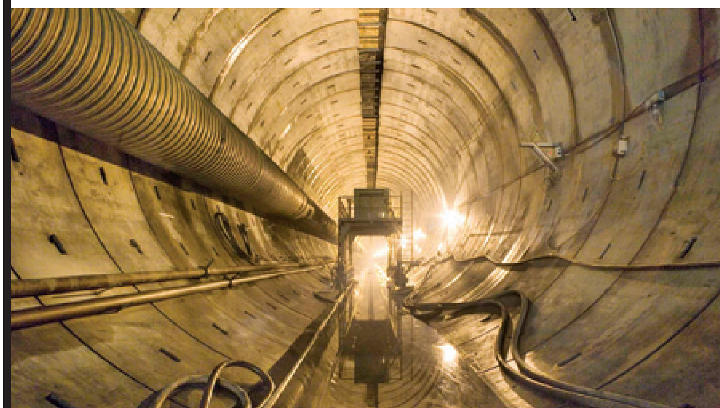
Despite public-sector cuts elsewhere in the U.K. and overall European-market weakness, British water infrastructure investment is up, says MWH Global. Even as some Top 200 firms rethink the size of their global footprints, both CH2M Hill and SNC-Lavalin have announced major U.K.-based staff expansions. While needs in developing countries also drew Top 200 firms, political risks remain a constant. "We see the recent unrest in Egypt continuing to restrain the environmental market there, which has been subdued since early 2011," says Tasman Graham, WorleyParsons' global environmental director. "But the country is going through a major positive transformation, and we anticipate a significant increase in activity in 2014."

The quest for new geographies, markets and growth will continue to push mergers and acquisitions in the environmental sector, one of the construction industry's most active. M&A market activity and company valuations reflect the current performance outlook, with environmental firms that work in the energy sector being highly sought after, says Andrej Avelini, managing director of EFCG, an industry financial consultant and broker. "I'd say 2013 will see a record number of deals in this sector," he says. ■

Data management by Andrea Pinyan, Mev Barton and Lanson Wong

Top 200 Newcomer Profile | By Johanna Knapschaefer

Gilbane Markets Going Green



Environmental markets remain a small revenue component for construction giant Gilbane Building Co., but mandates for upgraded and expanded infrastructure, such as in combined sewer overflow (CSO) control and military site cleanup, has attracted firm attention from work high up to that at ground level and below. Gilbane debuts on the Top 200 list at No. 53 after generating $161.3 million in environmental revenue; about half was in water and wastewater construction. In a joint venture with Jacobs Associates, the firm now is working as construction manager on the $450-million Narragansett Bay Commission CSO tunnel upgrade (above) in Providence, R.I., set to finish in 2015, and on the $253-million Anacostia River tunnel project. While Gilbane's environmental niche comprises just 5% of the firm's $3-billion revenue, "the water-wastewater market provides steadier growth than the vertical [building] market," says John Kaplin, water-wastewater leader.

Gilbane also moved into munitions cleanup and related federal environmental work for federal and military clients with the 2010 acquisition of Innovative Technical Solutions Inc., a Walnut Creek, Calif., specialty firm. Despite federal sequestration, defense ordnance cleanup will see modest growth around the U.S. and globally, says Michael C. Salmon, senior vice president of environmental operations for ITSI Gilbane Co. In South Korea, the firm is removing mines from military installations, and last month, it won a contract for chemical and radiological cleanup work on Treasure Island in San Francisco as the U.S. Navy prepares to transfer 169 acres of the former base for anticipated residential redevelopment. ■

How To Read the Top 200 List

Firms are ranked based on % of gross 2012 revenue for environmental services. Figures in $ millions; % figures are rounded and may not add up to 100. In cases of revenue ties, revenue displayed is rounded but firms are ranked based on exact numbers submitted. Others are footnoted. Firms with subsidiaries are indicated by (†). A list is on line at www.enr.com. Asterisks (**) note firms ranked for the first time. An alphabetical list of the Top 200 is on p. 51.

Hazardous/Solid Waste Chemical and industrial waste cleanup, management and/or disposal; asbestos and lead abatement; non-hazardous waste landfill and recycling facilities

Nuclear Waste Nuclear or radioactive materials remediation, storage or disposal.

Air Facility air-pollutant emissions; permitting and energy efficiency.

Water Municipal or industrial water-system supply and treatment.

Wastewater Treatment Municipal or industrial wastewater or stormwater sewers and treatment systems.

Environmental Management Compliance, due diligence, audits and environmental information technology.

Environmental Sciences Planning, EIS/EIRs, natural resources, wetlands, modeling

Other Environmental markets not included in the above category descriptions.

Clients: Work for these types of owners is shown as a % of environmental revenue.

Private Corporations, utilities or other.

Federal U.S. agencies, military services or foreign governments.

State/Local State, county or municipal government entities.

Type of Firms: Based on the largest % of environmental revenue in categories. below. Multiple listings appear if the largest % is evenly split between two or more categories or are within 5% of each other.

DES Engineering and/or design; **CSL** Consulting and/or studies; **CON** Construction, contracting and/or remediation; **CM-PM** Construction management and/or program management; **EQP** Equipment or device manufacture; **OPS** Contract operations; **R&D** Technology and/or research and development, **OTH** Services not already designated.

PHOTO CREDIT: GILBAND BUILDING CO.

The Top 200 List

RANK 2013	RANK 2012	FIRM	2012 ENVIRONMENTAL REVENUE TOTAL (IN $ MIL.)	% OF ALL FIRM REV.	% OF NON-U.S.	TYPE OF WORK LARGEST % OF ENV. REVENUE	MARKETS (% OF ENVIRONMENTAL REVENUE) HAZARDOUS WASTE	NUCLEAR WASTE	AIR	WATER	WASTEWATER TRMT.	ENV. MANAGEMENT	ENV. SCIENCE	OTHER	CLIENTS (% OF ENV. REV.) PRIVATE	FEDERAL	STATE / LOCAL
1	1	**CH2M HILL LTD.,** Englewood, Colo.†	4,295.9	61	42	DES-CSL	16	25	5	24	24	0	6	0	43	27	30
2	2	**URS CORP.,** New York, N.Y.†	3,531.0	32	16	CM-PM/CSL	16	30	17	4	8	7	14	4	37	39	24
3	3	**VEOLIA ENVIRONMENT NORTH AMERICA,** Chicago, Ill.†	2,490.0	100	18	OTH-OPS	19	0	0	13	25	3	0	40	75	0	25
4	5	**TETRA TECH INC.,** Pasadena, Calif.†	2,419.0	90	50	CSL	9	0	1	55	0	15	20	0	57	33	10
5	4	**BECHTEL CORP.,** San Francisco, Calif.†	2,172.0	6	41	CON	22	38	12	10	12	0	0	6	43	57	0
6	6	**ENERGYSOLUTIONS INC.,** Salt Lake City, Utah	1,808.5	100	70	CON	0	100	0	0	0	0	0	0	30	60	1
7	7	**AECOM TECHNOLOGY CORP.,** New York, N.Y.	1,501.0	18	46	DES	21	0	2	36	26	3	13	0	30	10	60
8	9	**MWH GLOBAL,** Broomfield, Colo.†	1,480.0	96	48	DES	0	0	6	39	50	5	1	0	50	8	43
9	16	**GOLDER ASSOCIATES CORP.,** Mississauga, Ontario, Canada†	1,227.9	87	81	DES	13	1	15	5	2	29	35	0	85	5	10
10	11	**CLEAN HARBORS INC.,** Norwell, Mass.	1,177.0	54	43	OTH	90	0	0	0	10	0	0	0	85	5	10
11	12	**ARCADIS U.S. INC.,** Highlands Ranch, Colo.†	1,171.0	77	10	CON/CSL	63	0	2	11	15	2	7	0	69	7	24
12	10	**FLUOR CORP.,** Irving, Texas	1,156.9	4	9	CON	0	90	10	0	0	0	0	0	10	90	0
13	18	**BLACK & VEATCH,** Overland Park, Kan.†	1,153.3	35	44	DES/CON	2	0	26	41	30	1	0	0	65	2	33
14	17	**AMEC PLC,** London, England, U.K.	957.1	14	39	CSL	45	1	2	2	1	4	26	19	70	16	14
15	14	**BATTELLE MEMORIAL INSTITUTE,** Columbus, Ohio	949.2	18	0	R&D/CON	5	79	0	0	1	1	14	0	3	96	1
16	15	**CDM SMITH,** Cambridge, Mass.†	912.7	75	12	DES	17	1	5	34	37	2	4	0	9	20	71
17	19	**ENVIRON. RESOURCES MANAGEMENT INC. (ERM),** London, England, U.K.†	905.0	100	56	CSL	24	0	9	0	2	37	24	5	95	4	1
18	8	**THE SHAW GROUP INC.,** Baton Rouge, La.†[1]	834.1	14	9	CON	59	16	7	1	1	12	5	0	42	46	12
19	22	**HDR,** Omaha, Neb.†	787.1	45	5	DES	17	0	0	24	14	2	43	0	36	25	39
20	20	**PARSONS CORP.,** Pasadena, Calif.†	712.1	21	12	DES/CON	42	14	13	1	9	3	18	0	31	31	38
21	21	**LAYNE CHRISTENSEN CO.,** Mission Woods, Kan.†	681.1	63	5	CON	1	0	0	67	32	0	0	0	35	10	55
22	24	**STANTEC INC.,** Edmonton, Alberta, Canada†	646.1	34	42	CSL/DES	20	0	4	22	22	3	29	0	56	4	40
23	25	**SCIENCE APPLICATIONS INTERNATIONAL CORP. (SAIC),** McLean, Va.†	623.9	6	2	CSL	51	3	9	3	1	15	18	0	16	79	5
24	31	**THE BABCOCK & WILCOX CO.,** Charlotte, N.C.†	600.5	18	12	EQP	0	0	100	0	0	0	0	0	95	0	5
25	30	**GARNEY HOLDING CO.,** Kansas City, Mo.†[2]	493.7	100	0	CON	0	0	0	77	23	0	0	0	9	0	91
26	23	**THE WALSH GROUP LTD.,** Chicago, Ill.†	482.8	12	0	CON	0	0	0	68	32	0	0	0	0	5	95
27	13	**KIEWIT CORP.,** Omaha, Neb.†	444.0	4	0	CON	12	0	0	25	63	0	0	0	11	10	79
28	26	**AEGION CORP.,** St. Louis, Mo.†	428.4	42	38	CON	0	0	0	1	99	0	0	0	0	1	99
29	49	**LVI SERVICES INC.,** New York, N.Y.	404.9	100	15	CON	80	20	0	0	0	0	0	0	65	25	10
30	32	**CARDNO USA INC.,** Portland, Ore. †	404.8	62	4	CSL	23	0	0	7	2	14	55	0	67	14	19
31	33	**ANTEA GROUP,** Gouda, The Netherlands†	386.6	17	77	CSL	17	0	2	7	2	65	2	5	64	11	25
32	27	**SKANSKA USA INC.,** East Elmhurst, N.Y.†	386.5	7	0	CON	7	0	7	50	36	0	0	0	17	0	83
33	39	**WORLEYPARSONS LTD.,** North Sydney, New South Wales, Australia	386.0	5	86	DES/CSL	31	0	0	37	0	0	32	0	76	1	24
34	35	**ICF INTERNATIONAL,** Fairfax, Va. [3]	381.4	41	0	CSL	0	0	0	0	0	0	0	10	0	0	0
35	36	**CONESTOGA-ROVERS & ASSOCIATES,** Niagara Falls, N.Y.	380.0	82	28	CSL	78	1	3	2	3	11	2	0	94	1	5
36	29	**ALBERICI CORP.,** St. Louis, Mo.†	322.1	31	19	CON	0	0	23	74	3	0	0	0	23	0	77
37	41	**BROWN AND CALDWELL,** Walnut Creek, Calif.	299.0	100	0	DES/CSL	27	0	0	20	48	5	0	0	30	2	68
38	**	**SNC-LAVALIN INC.,** Montreal, Quebec, Canada†	296.5	4	100	CSL	22	0	5	19	0	6	8	39	59	15	26
39	40	**ENVIRON HOLDINGS INC.,** Arlington, Va.†	285.8	100	33	CSL	30	0	16	0	6	17	12	19	93	5	2
40	**	**DEGREMONT TECHNOLOGIES NORTH AMERICA,** Richmond, Va.	250.0	100	15	EQP	0	0	0	60	40	0	0	0	20	0	80
41	38	**PARSONS BRINCKERHOFF,** New York, N.Y.†	238.4	10	66	DES	0	0	0	42	0	15	43	0	28	2	70
42	42	**SEVENSON ENVIRONMENTAL SERVICES INC.,** Niagara Falls, N.Y.†	234.9	100	0	CON	98	0	0	0	0	0	0	2	60	37	3
43	45	**TRC COS. INC.,** Lowell, Mass.	231.0	55	0	CON/CM-PM/CSL	54	0	15	2	0	15	14	0	77	2	21
44	47	**BOWEN ENGINEERING CORP.,** Indianapolis, Ind.	218.2	98	0	CON	2	5	32	5	57	0	0	0	80	11	9
45	46	**PC CONSTRUCTION CO.,** South Burlington, Vt.	198.3	52	0	CON	0	0	0	20	80	0	0	0	0	0	100
46	50	**GEOSYNTEC CONSULTANTS INC.,** Atlanta, Ga.†	194.1	93	20	CSL	56	14	4	5	12	5	4	0	72	10	19
47	66	**LAKESHORE TOLTEST CORP.,** Detroit, Mich.†	192.0	36	32	CM-PM	15	0	1	22	16	0	0	46	35	57	9
48	43	**PCL CONSTRUCTION ENTERPRISES INC.,** Denver, Colo.†	191.6	3	16	CON	1	0	0	83	16	0	0	0	2	5	93
49	69	**BARNARD CONSTRUCTION CO. INC.,** Bozeman, Mont.†	186.2	77	0	CON	0	0	26	74	0	0	0	0	40	10	50
50	63	**MCCARTHY HOLDINGS INC.,** St. Louis, Mo.†	184.0	6	0	CON	0	0	0	47	53	0	0	0	0	0	100

FOOTNOTES: 1 COMPANY WAS ACQUIRED BY CB&I IN EARLY 2013 BUT IS REPORTING ITS OWN REVENUE FOR 2012. 2 REVENUE TOTAL DOES NOT INCLUDE THAT OF ENCORE CONSTRUCTION, ACQUIRED IN DECEMBER 2012; ENCORE IS RANKED AT NO. 120. 3 FIRM DECLINES TO DISCLOSE ENVIRONMENTAL SERVICES REVENUE MARKET BREAKOUTS.

#9 GOLDER ASSOCIATES CORP. crossed the billion-dollar threshold as did Black & Veatch (No. 13), rising five and seven list places, respectively.

RANK 2013	RANK 2012	FIRM	2012 ENVIRONMENTAL REVENUE: TOTAL (IN $ MIL.)	% OF ALL FIRM REV.	% OF NON-U.S.	TYPE OF WORK: LARGEST % OF ENV. REVENUE	MARKETS (% OF ENVIRONMENTAL REVENUE): HAZARDOUS WASTE	NUCLEAR WASTE	AIR	WATER	WASTEWATER TRMT.	ENV. MANAGEMENT	ENV. SCIENCE	OTHER	CLIENTS (% OF ENV. REV.): PRIVATE	FEDERAL	STATE / LOCAL
51	59	**WSP + GENIVAR,** Montreal, Quebec, Canada †[4]	181.9	9	87	CSL/CON	38	0	8	2	2	24	18	7	70	10	20
52	51	**WHARTON-SMITH INC.,** Lake Monroe, Fla.	164.8	80	0	CON	0	0	0	34	66	0	0	0	5	0	95
53	**	**GILBANE BUILDING CO.,** Providence, R.I.†	162.1	5	25	CM-PM	0	0	0	27	28	45	0	0	0	90	10
54	54	**BURNS & MCDONNELL,** Kansas City, Mo.	162.1	10	3	DES	29	0	25	14	16	2	14	0	60	25	15
55	91	**ECC,** Burlingame, Calif.†	161.3	22	26	CON	91	5	2	2	0	0	0	0	0	87	13
56	80	**AMERICAN INFRASTRUCTURE,** Worcester, Pa.†	161.2	28	0	CON	0	0	0	46	54	0	0	0	20	0	80
57	52	**HAZEN AND SAWYER P.C.,** New York, N.Y.	160.4	100	3	DES	0	0	0	30	70	0	0	0	1	1	98
58	58	**O'BRIEN & GERE,** Syracuse, N.Y.†	157.1	80	1	CSL	42	0	6	7	35	10	1	0	70	4	2
59	48	**ECOLOGY AND ENVIRONMENT INC.,** Lancaster, N.Y.†	155.4	100	39	CSL	22	1	2	2	3	6	42	23	37	45	19
60	57	**SCS ENGINEERS,** Long Beach, Calif.†	151.0	100	3	CSL	78	0	0	0	0	22	0	0	56	9	3
61	64	**KLEINFELDER,** San Diego, Calif.	149.2	45	3	CSL	51	4	6	10	3	17	9	0	44	6	50
62	60	**CAROLLO ENGINEERS INC.,** Walnut Creek, Calif.	148.5	100	0	DES	0	0	0	45	55	0	0	0	3	1	96
63	**	**SHIMMICK CONSTRUCTION CO. INC.,** Oakland, Calif.†	138.4	45	0	CON	0	0	0	80	20	0	0	0	0	10	90
64	82	**REMEDIAL CONSTRUCTION SERVICES LP,** Houston, Texas†	137.0	100	17	CON	100	0	0	0	0	0	0	0	100	0	0
65	72	**PERMA-FIX ENVIRONMENTAL SERVICES,** Atlanta, Ga.†	127.5	100	4	CON	15	80	0	0	0	5	0	0	20	78	2
66	53	**THE S.M. STOLLER CORP.,** Broomfield, Colo.	124.5	100	0	OPS	0	100	0	0	0	0	0	0	1	98	1
67	61	**MICHAEL BAKER CORP.,** Moon Township, Pa.†	123.0	21	0	CSL	0	0	0	55	11	16	18	0	5	85	10
68	83	**TERRACON CONSULTANTS INC.,** Olathe, Kan.†	122.5	31	0	CSL	69	0	1	1	4	21	4	0	83	3	14
69	65	**GROUNDWATER & ENVIRONMENTAL SERVICES INC.,** Neptune, N.J.	120.7	100	5	CSL	50	0	2	15	5	25	3	0	90	2	8
70	70	**BRASFIELD & GORRIE, LLC,** Birmingham, Ala.	117.8	6	0	CON	0	0	0	20	80	0	0	0	0	10	90
71	71	**HATCH MOTT MACDONALD,** Iselin, N.J.†	117.8	24	29	DES	7	0	2	35	46	3	5	3	30	2	69
72	81	**WOODARD & CURRAN INC.,** Portland, Maine	115.1	91	0	DES	15	0	1	24	36	24	0	0	56	0	44
73	84	**EA ENGINEERING, SCIENCE AND TECHNOLOGY INC.,** Hunt Valley, Md.	111.3	100	0	DES/CSL	55	0	2	1	7	12	23	0	11	75	14
74	78	**ULLIMAN SCHUTTE CONSTRUCTION LLC,** Miamisburg, Ohio†	108.0	100	0	CON	0	0	0	20	80	0	0	0	0	1	99
75	44	**LOS ALAMOS TECHNICAL ASSOCIATES INC.,** Albuquerque, N.M.†	104.5	89	0	CON	28	71	0	0	0	0	0	0	3	97	0
76	74	**GANNETT FLEMING INC.,** Harrisburg, Pa.†	101.6	35	3	DES	27	0	0	48	19	4	2	0	38	14	48
77	99	**APEX COS. LLC,** Rockville, Md.†	101.2	100	0	CON	38	0	4	3	25	22	8	0	90	3	7
78	**	**RICE LAKE CONSTRUCTION GROUP,** Deerwood, Minn.	100.0	81	0	CON	0	0	0	50	50	0	0	0	25	50	25
79	87	**THE CONTI GROUP,** Edison, N.J.	98.4	28	0	CON	54	0	0	46	0	0	0	0	14	47	38
80	85	**CROWDER CONSTRUCTION CO.,** Charlotte, N.C.	93.8	42	0	CON	0	0	0	46	54	0	0	0	0	0	100
81	77	**J.R. FILANC CONSTRUCTION CO., INC,** Escondido, Calif.	93.6	100	0	CON	0	0	0	18	82	0	0	0	1	23	77
82	76	**CLEAN EARTH INC.,** Hatboro, Pa.†	87.3	79	0	CON	25	0	0	0	0	58	0	17	73	17	10
83	79	**ENVIRONMENTAL RESTORATION LLC,** St. Louis, Mo.	85.1	100	0	CON	100	0	0	0	0	0	0	0	25	75	0
84	**	**T.A. LOVING CO.,** Goldsboro, N.C.	84.0	50	0	CON	0	0	0	30	70	0	0	0	0	20	80
85	68	**PEPPER CONSTRUCTION GROUP,** Chicago, Ill.†	82.5	8	0	CON	2	0	0	49	49	0	0	0	2	0	98
86	73	**LYLES CONSTRUCTION GROUP,** Fresno, Calif.	80.8	62	0	CON	0	0	0	64	36	0	0	0	23	0	77
87	112	**ENVIRONMENTAL QUALITY MANAGEMENT INC.,** Cincinnati, Ohio	79.5	99	0	CON	70	0	10	2	6	10	2	0	15	80	5
88	97	**BUREAU VERITAS,** Fort Lauderdale, Fla.	78.9	19	0	CSL	20	0	2	5	3	70	0	0	91	3	6
89	89	**NCM,** Brea, Calif.†	78.3	37	0	CON	99	0	0	0	1	0	0	0	70	5	25
90	90	**ATKINS NORTH AMERICA,** Tampa, Fla.	77.6	15	0	DES	2	7	2	64	5	7	5	9	34	26	40
91	102	**CROSSLAND HEAVY CONTRACTORS INC.,** Columbus, Kan.	77.3	95	0	OPS	0	0	0	25	75	0	0	0	0	0	100
92	96	**HALEY & ALDRICH INC.,** Burlington, Mass.	76.7	70	0	CSL	74	2	3	3	3	5	5	5	96	0	4
93	94	**GREELEY AND HANSEN LLC,** Chicago, Ill.†	75.9	100	0	DES/CSL	10	0	0	7	83	0	0	0	1	1	98
94	105	**SWCA ENVIRONMENTAL CONSULTANTS,** Phoenix, Ariz.	73.2	100	0	CSL	0	0	2	10	0	40	48	0	72	10	18
95	100	**GZA GEOENVIRONMENTAL INC.,** Norwood, Mass.†	72.0	69	0	CSL	26	2	5	1	3	23	37	3	91	2	7
96	104	**THE CADMUS GROUP INC.,** Waltham, Mass.	70.7	100	5	CSL	1	0	73	17	5	2	2	0	55	35	10
97	114	**C.H. NICKERSON & CO. INC.,** Torrington, Conn.	70.1	100	0	CON	0	0	0	50	50	0	0	0	0	0	100
98	111	**USA ENVIRONMENT LP,** Houston, Texas†	70.0	100	0	CON	75	10	0	0	0	5	10	0	85	10	5
99	101	**KENNEDY/JENKS CONSULTANTS INC.,** San Francisco, Calif.	69.8	87	0	DES	0	0	0	45	40	8	7	0	38	2	60
100	115	**ANCHOR QEA LLC,** Seattle, Wash.	68.2	95	0	DES/CSL	5	0	0	1	3	5	20	66[5]	63	12	25

FOOTNOTES: 4 NEW COMPANY NAME AS A RESULT OF 2012 ACQUISITION OF WSP GROUP PLC BY GENIVAR INC. 5 IN MARKET CATEGORY 'OTHER' FIRM REPORTS THIS REVENUE IN SEDIMENT REMEDIATION WORK.

#38 **SNC-LAVALIN INC.** is the highest-ranked Top 200 newcomer, with 39% of revenue in "geoenvironmental" work such as mine-tailings management.

RANK 2013	RANK 2012	FIRM	2012 ENVIRONMENTAL REVENUE: TOTAL (IN $ MIL.)	% OF ALL FIRM REV.	% OF NON-U.S.	TYPE OF WORK: LARGEST % OF ENV. REVENUE	MARKETS (% OF ENVIRONMENTAL REVENUE): HAZARDOUS WASTE	NUCLEAR WASTE	AIR	WATER	WASTEWATER TRMT.	ENV. MANAGEMENT	ENV. SCIENCE	OTHER	CLIENTS (% OF ENV. REV.): PRIVATE	FEDERAL	STATE / LOCAL
101	98	**ROUX ASSOCIATES INC.,** Islandia, N.Y.	67.9	100	1	CSL	55	0	5	0	5	5	5	25	97	0	3
102	103	**MAX FOOTE CONSTRUCTION CO. INC.,** Mandeville, La.	67.6	88	0	CON	0	0	0	36	65	0	0	0	0	0	100
103	109	**WESTON & SAMPSON ENGINEERS INC.,** Peabody, Mass.†	67.2	100	0	DES	10	0	2	35	43	6	4	0	16	1	83
104	106	**PORTAGE INC.,** Idaho Falls, Idaho†	65.8	95	0	DES	0	100	0	0	0	0	0	0	0	100	0
105	**	**MEB GENERAL CONTRACTORS INC.,** Chesapeake, Va.	65.0	38	0	CON	0	0	0	30	70	0	0	0	3	0	97
106	131	**ET ENVIRONMENTAL CORP., LLC,** Atlanta, Ga.	64.9	100	0	CM-PM	95	0	0	0	0	0	5	0	95	0	5
107	108	**HYDROGEOLOGIC INC.,** Reston, Va.	61.5	95	2	CON	82	0	1	0	0	1	2	14	0	98	2
108	138	**TRAYLOR BROS. INC.,** Evansville, Ind.	61.2	16	0	CON	0	0	0	7	93	0	0	0	0	0	10
109	125	**TRIHYDRO CORP.,** Laramie, Wyo.	59.4	90	0	CSL[6]	50	0	10	7	10	10	8	5	84	10	6
110	110	**JUDY CONSTRUCTION CO.,** Cynthiana, Ky.	59.0	94	0	CON	0	0	0	58	42	0	0	0	0	0	100
111	88	**NORTH WIND GROUP,** Idaho Falls, Idaho†	58.6	67	0	CSL	75	6	1	0	0	12	5	0	8	85	7
112	127	**TRINITY CONSULTANTS,** Dallas, Texas	57.2	97	2	CSL	0	0	96	0	0	4	0	0	99	1	1
113	134	**CIVIL & ENVIRONMENTAL CONSULTANTS INC.,** Pittsburgh, Pa.	56.9	71	0	DES/CSL	42	0	9	4	18	14	13	0	92	0	8
114	129	**COMANCO ENVIRONMENTAL CORP.,** Plant City, Fla.	56.0	100	0	CON	97	0	0	3	0	0	0	0	54	0	46
115	**	**J.C.I. HOLDINGS INC.,** Quincy, Mass.†	56.0	21	0	CON	98	2	0	0	0	0	0	0	100	0	0
116	126	**MERRICK & CO.,** Greenwood Village, Colo.	54.3	47	10	DES	0	91	6	0	0	0	3	0	0	80	20
117	128	**LANGAN ENGINEERING & ENVIRONMENTAL SERVICES,** Elmwood Park, N.J.	54.0	40	0	DES/CSL	50	0	1	1	5	23	20	0	98	1	1
118	119	**ENVIRONMENTAL SCIENCE ASSOCIATES,** San Francisco, Calif.	54.0	100	0	CSL	0	0	1	0	0	4	95	0	40	4	56
119	86	**VERSAR INC,** Springfield, Va.†	53.9	45	0	DES	40	0	2	0	0	35	23	0	1	91	8
120	93	**ENCORE CONSTRUCTION CO. LLC,** Winter Garden, Fla.[7]	52.7	100	0	CON	0	0	0	9	91	0	0	0	24	0	76
121	117	**BARR ENGINEERING CO.,** Edina, Minn.†	52.6	45	2	CSL	24	0	33	4	5	16	18	1	91	0	9
122	135	**EBI CONSULTING,** Burlington, Mass.	51.8	100	0	CSL	0	0	0	0	0	96	4	0	100	0	0
123	122	**EAGLE CONTRACTING LP,** Fort Worth, Texas	51.8	100	0	CON	0	0	0	27	73	0	0	0	0	0	100
124	118	**TERRA CONTRACTING, LLC,** Kalamazoo, Mich.	51.8	100	0	CON	92	2	0	0	6	0	0	0	0	0	100
125	120	**W. ROGERS CO.,** Lexington, Ky.	50.9	100	0	CON	0	0	0	41	59	0	0	0	17	0	83
126	121	**SOVEREIGN CONSULTING INC.,** Robbinsville, N.J.	50.0	100	0	CON/CSL	70	0	1	1	3	17	8	0	68	31	1
127	143	**J.F. AHERN CO.,** Fond du Lac, Wis.	49.8	24	0	CON	0	0	5	15	80	0	0	0	10	5	85
128	123	**HEPACO LLC,** Charlotte, N.C.†	48.1	100	0	OTH/CON	98	0	0	0	2	0	0	0	99	0	1
129	141	**ENERCON SERVICES INC.,** Kennesaw, Ga.	47.7	22	1	CSL	7	20	15	2	1	30	19	6	90	3	7
130	116	**ENGINEERING/REMEDIATION RESOURCES GROUP (ERRG),** Martinez, Calif.	47.2	95	0	CON	88	0	0	0	7	5	0	0	22	58	20
131	95	**HNTB,** Kansas City, Mo.	46.5	5	0	DES	0	0	0	59	34	0	8	0	5	14	82
132	75	**SLAYDEN CONSTRUCTION GROUP INC.,** Stayton, Ore.	45.0	64	0	CON	0	0	0	2	20	0	0	77[8]	28	51	22
133	**	**SULLIVAN INTERNATIONAL GROUP INC.,** San Diego, Calif.	45.0	93	3	CON	60	0	5	0	0	20	5	10	3	97	0
134	146	**DUDEK,** Encinitas, Calif.†	44.7	100	0	CSL	10	0	0	15	15	0	60	0	50	0	50
135	130	**BUILDING CRAFTS INC.,** Wilder, Ky.	44.7	100	0	CON	0	0	0	30	70	0	0	0	11	0	89
136	187	**ENSAFE INC.,** Memphis, Tenn.†[9]	43.7	100	3	CM-PM/CSL	21	0	4	0	2	60	3	11	80	8	12
137	140	**GAI CONSULTANTS INC.,** Pittsburgh, Pa.[9]	43.7	47	0	CSL	6	0	0	10	8	1	75	0	89	1	11
138	**	**PRECISION ENVIRONMENTAL CO.,** Independence, Ohio†	43.6	94	0	CON	85	0	0	0	0	0	0	15	70	12	18
139	142	**GSE CONSTRUCTION CO.,** Livermore, Calif.	41.8	85	0	CON	0	0	0	26	75	0	0	0	11	0	89
140	155	**AKRF INC.,** New York, N.Y.	40.7	100	0	CSL	10	0	5	5	7	5	68	0	45	0	55
141	132	**CHARTER ENVIRONMENTAL INC.,** Boston, Mass.	40.0	100	0	CON	50	0	0	0	0	0	10	40	40	50	10
142	113	**SHOOK CONSTRUCTION CO.,** Dayton, Ohio	40.0	26	0	CON	0	0	0	20	80	0	0	0	5	0	95
143	144	**WHITMAN, REQUARDT AND ASSOCIATES, LLP,** Baltimore, Md.	39.4	38	0	DES	0	0	0	33	51	0	16	0	0	0	100
144	133	**DEWBERRY,** Fairfax, Va.	39.4	12	0	DES	5	0	1	35	49	4	6	0	8	25	67
145	145	**S&ME INC.,** Raleigh, N.C.	39.2	33	0	DES	42	0	2	0	17	29	10	0	80	5	15
146	157	**EFFECTIVE ENVIRONMENTAL INC.,** Mesquite, Texas	39.2	100	0	OTH[10]	96	2	0	0	2	0	0	0	80	2	18
147	124	**POSILLICO ENVIRONMENTAL INC.,** Farmingdale, N.Y.	39.1	100	0	CON	90	0	0	0	10	0	0	0	80	0	20
148	147	**IREX CONTRACTING GROUP,** Lancaster, Pa. †	38.6	19	4	CON	87	0	0	0	0	13	0	0	99	1	0
149	188	**SUKUT CONSTRUCTION INC.,** Santa Ana, Calif.	38.2	21	0	CON	100	0	0	0	0	0	0	0	60	0	40
150	161	**MILLER ENVIRONMENTAL INC.,** Orange, Calif.	38.0	100	0	CON	100	0	0	0	0	0	0	0	40	2	58

FOOTNOTES: 6 FIRM ALSO REPORTS THAT 60% OF REVENUE IS SPLIT EVENLY AMONG CATEGORIES DES, CON AND CM-PM. 7 FIRM WAS ACQUIRED BY GARNEY HOLDING CO. IN 2012 BUT REVENUE REPORTED HERE IS NOT INCLUDED. 8 FIRM NOTES OTHER REVENUE IN DAMS AND FISHERIES 9 REVENUE REPORTED BY ENSAFE INC. AND GAI CONSULTANTS IS THE SAME; RANKING IS ALPHABETICAL. 10 FIRM REPORTS MAJOR ACTIVITY IS WASTE DISTRIBUTION.

#183 **PARTNER ENGINEERING & SCIENCE INC.,** a newcomer to the list, acquired The Birdsall Group in June after that firm's bankruptcy filing.

RANK 2013	RANK 2012	FIRM	2012 ENVIRONMENTAL REVENUE TOTAL (IN $ MIL.)	% OF ALL FIRM REV.	% OF NON-U.S.	TYPE OF WORK LARGEST % OF ENV. REVENUE	MARKETS (% OF ENVIRONMENTAL REVENUE) HAZARDOUS WASTE	NUCLEAR WASTE	AIR	WATER	WASTEWATER TRMT.	ENV. MANAGEMENT	ENV. SCIENCE	OTHER	CLIENTS (% OF ENV. REV.) PRIVATE	FEDERAL	STATE / LOCAL
151	154	**TURNER SPECIALTY SERVICES LLC,** Baton Rouge, La.	38.0	42	0	OPS	30	1	0	10	59	0	0	0	95	0	5
152	151	**KCI TECHNOLOGIES INC.,** Sparks, Md.†	37.7	26	0	DES	7	0	0	16	35	0	42	0	20	10	70
153	139	**CAPE ENVIRONMENTAL MANAGEMENT INC.,** Norcross, Ga.	37.7	34	0	CON	91	6	0	0	3	0	0	0	19	81	0
154	156	**CREAMER ENVIRONMENTAL INC.,** Hackensack, N.J.	37.0	100	0	CON	100	0	0	0	0	0	0	0	82	0	18
155	153	**GEI CONSULTANTS INC.,** Woburn, Mass.†	36.7	39	1	CSL	65	0	2	0	1	20	6	6	92	1	7
156	163	**ESG OPERATIONS INC.,** Macon, Ga.	36.6	100	0	OPS	5	0	0	40	55	0	0	0	2	0	98
157	148	**ENVIRONMENTAL CONSULTING & TECHNOLOGY INC.,** Gainesville, Fla.	35.8	100	0	CON	51	0	4	13	2	19	10	1	54	0	46
158	164	**BURGESS & NIPLE INC.,** Columbus, Ohio	35.7	48	0	CSL	2	0	1	33	53	11	0	0	20	0	80
159	175	**GEO-SOLUTIONS INC.,** New Kensington, Pa.†	35.0	100	5	CON	100	0	0	0	0	0	0	0	92	4	4
160	186	**BAY WEST INC.,** St. Paul, Minn.	34.7	99	0	CON	93	0	0	0	2	5	0	0	13	75	12
161	152	**PROFESSIONAL SERVICE INDUSTRIES INC. (PSI),** Oakbrook Terrace, Ill.	34.5	16	0	CSL	0	0	0	1	2	89	8	0	75	0	25
162	172	**SAGE ENVIRONMENTAL CONSULTING LLP,** Austin, Texas	33.6	100	1	CSL	4	0	59	0	1	31	5	0	100	0	0
163	160	**OP-TECH ENVIRONMENTAL SERVICES INC.,** East Syracuse, N.Y.	33.0	100	0	CON	70	0	0	20	10	0	0	0	80	5	15
164	171	**DVIRKA AND BARTILUCCI CONSULTING ENGINEERS,** Woodbury, N.Y.	32.8	94	0	DES	21	0	0	6	73	0	0	0	5	0	95
165	149	**PARAMETRIX INC.,** Auburn, Wash.	32.5	54	0	CSL	17	0	0	22	13	0	48	0	27	14	59
166	137	**GLACIER CONSTRUCTION CO. INC.,** Greenwood Village, Colo.	32.0	100	0	CON	0	0	0	43	57	0	0	0	29	8	63
167	169	**PENNONI ASSOCIATES,** Philadelphia, Pa.†	31.2	25	0	DES/CSL	40	0	5	5	17	8	25	0	70	5	25
168	158	**WADE TRIM GROUP,** Detroit, Mich.†	30.3	71	0	DES	0	0	0	11	80	0	9	0	27	1	72
169	168	**NORMANDEAU ASSOCIATES INC.,** Bedford, N.H.	30.2	100	1	CSL	0	0	0	0	0	0	100	0	88	11	2
170	173	**TIGHE & BOND INC.,** Westfield, Mass.	29.9	72	0	DES/CSL	20	0	0	19	28	7	26	0	37	0	63
171	**	**STANLEY CONSULTANTS,** Muscatine, Iowa	29.5	17	34	DES	0	0	10	9	81	0	0	0	5	35	60
172	167	**STRAND ASSOCIATES INC.,** Madison, Wis.	29.2	49	0	DES	0	0	0	18	74	8	0	0	17	0	84
173	179	**CHESTER ENGINEERS INC.,** Moon Township, Pa.	28.1	98	0	DES	0	0	1	31	45	8	3	12	34	0	66
174	178	**H2M GROUP/HOLZMACHER, MCLENDON & MURRELL PC,** Melville, N.Y.†	27.8	70	0	DES	28	0	1	42	14	14	1	0	29	1	70
175	184	**FUSS AND O'NEILL INC.,** Manchester, Conn.†	27.0	52	3	DES	30	0	7	5	30	20	8	0	45	3	52
176	177	**LEGGETTE, BRASHEARS & GRAHAM INC.,** Shelton, Conn.	26.1	100	1	CON/CSL	55	0	0	17	3	21	4	0	87	0	13
177	181	**VANASSE HANGEN BRUSTLIN INC. (VHB),** Watertown, Mass.	26.0	17	0	CSL	10	0	4	0	6	30	50	0	40	15	45
178	180	**STV GROUP INC.,** New York, N.Y.†	25.4	7	0	CSL	30	0	10	0	10	25	25	0	17	1	82
179	162	**RMC WATER AND ENVIRONMENT,** Walnut Creek, Calif.	25.0	100	0	CSL	0	0	0	68	23	0	9	0	0	2	98
180	193	**LOCUS TECHNOLOGIES,** Mountain View, Calif.	24.6	100	10	R&D	10	10	10	5	5	0	0	60[11]	80	20	0
181	183	**WRIGHT-PIERCE,** Topsham, Maine	24.6	97	1	CON	1	0	0	22	72	2	2	1	8	0	92
182	166	**SLETTEN CONSTRUCTION,** Great Falls, Mont.†	24.2	15	0	CON	0	0	0	0	100	0	0	0	0	0	100
183	**	**PARTNER ENGINEERING & SCIENCE INC.,** Torrance, Calif.	23.7	57	1	CSL	5	0	0	0	0	95	0	0	97	3	0
184	170	**STAAB CONSTRUCTION CORP.,** Marshfield, Wisc.	23.7	100	0	CON	0	0	0	22	78	0	0	0	7	0	93
185	200	**AMERICAN CONTRACTING AND ENVIRONMENTAL SERVICES INC.,** Laurel, Md.	23.2	96	0	CON	0	0	0	0	100	0	0	0	0	100	0
186	165	**CHAMBERS GROUP INC.,** Santa Ana, Calif.	23.0	100	0	CSL	0	0	0	0	0	91	9	0	92	1	7
187	159	**EARTH CONSULTING GROUP, INC,** Marietta, Ga.†	23.0	100	14	CSL	55	0	1	0	2	22	5	15	93	1	6
188	191	**RJN GROUP INC.,** Wheaton, Ill.	23.0	99	0	DES	0	0	0	4	96	0	0	0	3	0	97
189	**	**WENCK ASSOCIATES INC.,** Maple Plain, Minn.	22.5	83	10	CSL	5	2	25	5	25	25	13	0	60	10	30
190	197	**MIDWEST SERVICE GROUP,** St. Peters, Mo.	22.4	100	0	CON	100	0	0	0	0	0	0	0	50	25	25
191	62	**CASEY INDUSTRIAL INC.,** Westminster, Colo.	21.1	35	0	CON	0	0	67	0	11	0	0	22	99	0	1
192	190	**ECS LTD.,** Chantilly, Va.	20.8	17	0	CSL	30	0	0	0	0	60	10	0	90	5	5
193	199	**GRESHAM, SMITH AND PARTNERS,** Nashville, Tenn.	20.6	18	0	DES	0	0	0	18	68	8	7	0	10	0	90
194	**	**AEI CONSULTANTS,** Walnut Creek, Calif.	20.5	74	1	CSL	5	0	1	5	1	70	1	18	78	2	20
195	194	**NEYER, TISEO AND HINDO LTD.,** Detroit, Mich.	20.0	71	0	DES	12	0	8	1	69	10	0	0	56	1	43
196	198	**JONES, EDMUNDS & ASSOCIATES INC.,** Gainesville, Fla.†	19.2	74	0	DES	19	0	0	13	63	2	3	0	12	14	74
197	195	**MCKIM & CREED INC.,** Raleigh, N.C.	19.1	40	0	DES	0	0	0	21	62	0	0	17	8	1	91
198	**	**JOHNSTON CONSTRUCTION CO.,** Dover, Pa.	18.3	100	0	CON	1	0	0	10	89	0	0	0	24	1	75
199	**	**SKELLY AND LOY INC.,** Harrisburg, Pa.†	18.2	100	0	CON/CSL	25	0	0	2	13	17	44	0	27	3	71
200	**	**SPRAY SYSTEMS OF ARIZONA INC.,** Tempe, Ariz.	17.9	100	0	CM-PM	90	0	0	10	0	0	0	0	65	10	25

FOOTNOTES: 11 FIRM REPORTS REVENUE % RELATED TO INFORMATION TECHNOLOGY ACTIVITIES.

Where to find the Top 200

A

FIRM	RANK
AECOM Technology Corp.	7
Aegion Corp.	28
AEI Consultants	194
AKRF Inc.	140
Alberici Corp.	36
AMEC plc	14
American Contracting and Env. Services Inc.	185
American Infrastructure	56
Anchor QEA LLC	100
Antea Group	31
Apex Cos. LLC	77
ARCADIS U.S. Inc.	11
Atkins North America	90

B

FIRM	RANK
The Babcock & Wilcox Co.	24
Barnard Construction Co. Inc.	49
Barr Engineering Co.	121
Battelle Memorial Institute	15
Bay West Inc.	160
Bechtel Corp.	5
Black & Veatch	13
Bowen Engineering Corp.	44
Brasfield & Gorrie LLC	70
Brown and Caldwell	37
Building Crafts Inc.	135
Bureau Veritas	88
Burgess & Niple Inc.	158
Burns & McDonnell	54

C

FIRM	RANK
C.H. Nickerson & Co. Inc.	97
The Cadmus Group Inc.	96
Cape Environmental Management Inc.	153
Cardno USA Inc.	30
Carollo Engineers Inc.	62
Casey Industrial Inc.	191
CDM Smith	16
CH2M Hill Ltd.	1
Chambers Group Inc.	186
Charter Environmental. Inc	141
Chester Engineers Inc.	173
Civil & Environmental Consultants Inc.	113
Clean Earth Inc.	82
Clean Harbors Inc.	10
COMANCO Environmental Corp.	114
Conestoga-Rovers & Associates	35
The Conti Group	79
Creamer Environmental Inc.	154
Crossland Heavy Contractors Inc.	91
Crowder Construction Co.	80

D

FIRM	RANK
Degremont Technologies North America	40
Dewberry	144
Dudek	134
Dvirka And Bartilucci Consulting Engineers	164

E

FIRM	RANK
EA Engineering, Science, and Technology Inc.	73
Eagle Contracting LP	123
Earth Consulting Group, Inc	187
EBI Consulting	122
ECC	55
ecology and environment inc.	59
ECS Ltd.	192
Effective Environmental Inc.	145
Encore Construction Co. LLC	120
Enercon Services Inc.	129
EnergySolutions Inc.	6
Engineering/Remediation Resources Group (ERRG)	130
EnSafe Inc.	136
ENVIRON Holdings Inc.	39
Environmental Consulting & Technology Inc.	157
Environmental Quality Management Inc.	87
Environmental Resources Management Inc.	17
Environmental Restoration LLC	83
Environmental Science Associates	118
ESG Operations Inc.	156
ET Environmental Corp. LLC	106

F

FIRM	RANK
Fluor Corp.	12
Fuss and O'Neill Inc.	175

G

FIRM	RANK
GAI Consultants Inc.	137
Gannett Fleming Inc.	76
Garney Holding Co.	25
GEI Consultants Inc.	155
Geo-Solutions Inc.	159
Geosyntec Consultants Inc.	46
Gilbane Building Co.	53
Glacier Construction Co. Inc.	166
Golder Associates Corp.	9
Greeley and Hansen LLC	93
Gresham, Smith and Partners	193
Groundwater & Environmental Services Inc.	69
GSE Construction Co.	139
GZA GeoEnvironmental Inc.	95

H

FIRM	RANK
Haley & Aldrich Inc.	92
Hatch Mott MacDonald	71
Hazen and Sawyer, P.C.	57
HDR	19
HEPACO LLC	128
HNTB	131
H2M Group/Holzmacher, McLendon & Murrell PC	174
HydroGeoLogic Inc.	107

I

FIRM	RANK
ICF International	34
Irex Contracting Group	148

J

FIRM	RANK
J.F. Ahern Co.	127
J.C.I. Holdings Inc.	115
J.R. Filanc Construction Co. Inc.	81
Johnston Construction Co.	198
Jones, Edmunds & Associates Inc.	196
Judy Construction Co.	110

K

FIRM	RANK
KCI Technologies Inc.	152
Kennedy/Jenks Consultants Inc.	99
Kiewit Corp.	27
Kleinfelder	61

L

FIRM	RANK
Lakeshore TolTest Corp.	47
Langan Engineering & Environmental Services	117
Layne Christensen Co.	21
Leggette, Brashears & Graham Inc.	176
Locus Technologies	180
Los Alamos Technical Associates Inc.	75
LVI Services Inc.	29
Lyles Construction Group	86

M

FIRM	RANK
Max Foote Construction Co. Inc.	102
McCarthy Holdings Inc.	50
McKim & Creed Inc.	197
MEB General Contractors Inc.	105
Merrick & Co.	116
Michael Baker Corp.	67
Midwest Service Group	190
Miller Environmental Inc.	150
MWH Global	8

N

FIRM	RANK
NCM	89
Neyer, Tiseo and Hindo Ltd.	195
Normandeau Associates Inc.	169
North Wind Group	111

O

FIRM	RANK
O'Brien & Gere	58
OP-TECH Environmental Services Inc.	163

P

FIRM	RANK
Parametrix Inc.	165
Parsons Brinckerhoff	41
Parsons Corp.	20
Partner Engineering & Science Inc.	183
PC Construction Co.	45
PCL Construction Enterprises Inc.	48
Pennoni Associates	167
Pepper Construction Group	85
Perma-Fix Environmental Services	65
Portage Inc.	104
Posillico Environmental Inc.	147
Precision Environmental Co.	138
Professional Service Industries Inc. (PSI)	161

R

FIRM	RANK
Remedial Construction Services, LP	64
Rice Lake Construction Group	78
RJN Group Inc.	188
RMC Water and Environment	179
Roux Associates Inc.	101

S

FIRM	RANK
S&ME Inc.	146
The S.M. Stoller Corp.	66
Sage Environmental Consulting LLP	162
Science Applications International Corp. (SAIC)	23
SCS Engineers	60
Sevenson Environmental Services Inc	42
The Shaw Group Inc.	18
Shimmick Construction Co. Inc.	63
Shook Construction Co.	142
Skanska USA Inc.	32
Skelly and Loy Inc.	199
Slayden Construction Group Inc.	132
Sletten Construction	182
SNC-Lavalin Inc.	38
Sovereign Consulting Inc.	126
Spray Systems of Arizona Inc.	200
Staab Construction Corp.	184
Stanley Consultants	171
Stantec Inc.	22
Strand Associates Inc.	172
STV Group Inc.	178
Sukut Construction Inc.	149
Sullivan International Group Inc.	133
SWCA Environmental Consultants	94

T

FIRM	RANK
T.A. Loving Co.	84
Terra Contracting LLC	124
Terracon Consultants Inc.	68
Tetra Tech Inc.	4
Tighe & Bond Inc.	170
Traylor Bros. Inc.	108
TRC Cos. Inc.	43
Trihydro Corp.	109
Trinity Consultants	112
Turner Specialty Services LLC	151

U

FIRM	RANK
Ulliman Schutte Construction LLC	74
URS Corp.	2
USA Environment LP	98

V

FIRM	RANK
Vanasse Hangen Brustlin Inc. (VHB)	177
Veolia Environment North America	3
Versar Inc.	119

W

FIRM	RANK
W. Rogers Co.	125
Wade Trim Group	168
The Walsh Group Ltd.	26
Wenck Associates Inc.	189
Weston & Sampson Engineers Inc.	103
Wharton-Smith Inc.	52
Whitman, Requardt and Associates LLP	143
Woodard & Curran Inc.	72
WorleyParsons Ltd.	33
Wright-Pierce	181
WSP + GENIVAR	51