

As was the case last year, the D&Ri100 paints a mixed picture of the state of health of the demolition industry around the globe. LINDSAY GALE reports

Swings and

The headline figure from this year's **D&Ri100** listing would suggest that the demolition sector has seen a solid recovery from the nadir of the downturn, with the total revenues generated by the 100 companies in this year's report falling just short of the record total for 2007 (US\$4,781.5

million) by just US\$88 million, at US\$4,693.5 million. So a good time for all then?

No, such appearances are deceptive. When analysed, the data paints a very different regional picture. The 30 North American companies on the list contribute US\$1,955.8 million to the combined total, while

the 62 European contractors featuring added US\$2,371.4 million in earnings. Taking a simple average, that is US\$65.2 million per North American company against US\$38.2 for their European counterparts. And a number of the leading North American contractors indicate substantial growth in earnings (in

Sourcing the data

This year we devoted considerable resources in trying to encourage contractors around the world to supply basic financial data concerning their activities during 2011. Where we were unable to obtain information from companies themselves, independent financial reporting services were consulted to obtain information. No estimates were used in the compilation of the **D&Ri100**.

We have endeavoured to ensure the accuracy of the figures used in the creation of the **D&Ri100** ranking of the world's top demolition companies but KHL can accept no liability for any errors or inaccuracies relating to the individual turnover figures contained in this report.

I would like to encourage all companies that receive future requests for data for the **D&Ri100** to respond, as the greater the level of response from contractors around the world, the more accurate and comprehensive future listings will be.

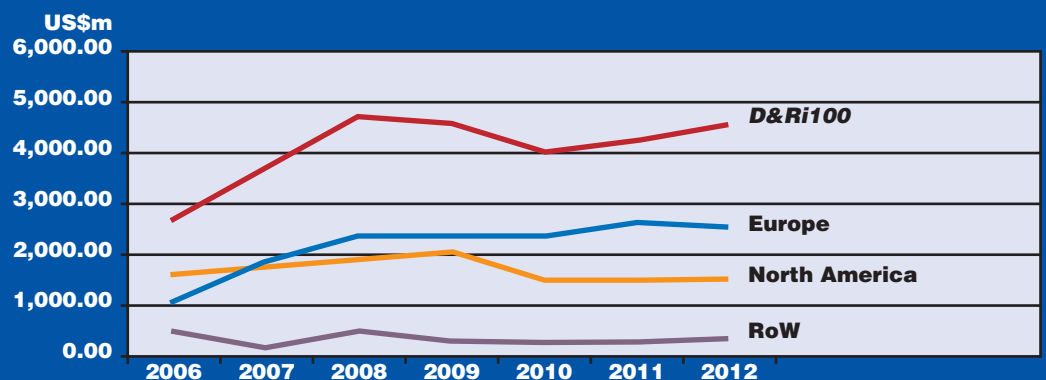
Currency conversion

Data that was supplied to *D&Ri* in currencies other than the US Dollar have been converted using the relevant exchange rates as of 1st May 2011.

Position	12 (11)	Company name	Location	Turnover US\$	
				2010	2011
1	(1)	LVI Services Inc	NY, USA	265.4	250.4
2	(19)	Quantum Murray LLP	Ontario, CANADA	62.3	225.9
3	(2)	NCM Group	WA, USA	203.8	222.1
4	(5)	Brandenburg Industrial Services Co	IL, USA	133.0	180.0
5	(13)	D H Griffin Wrecking Co Inc	NC, USA	76.6	148.4
6	(14)	McMahon Services Australia Group	Dry Creek, AUSTRALIA	73.9	143.7
7	(4)	Keltbray	London, UK	178.8	140.0
8	(15)	AF Decom AS	Oslo, Norway	68.7	135.0
9	(98)	Penhall International Corp	CA, USA	10.6	129.9
10	(31)	NASDI Inc	MA, USA	44.6	116.9
11	(12)	Erith Group	Erith, UK	79.8	106.5
12	(57)	CMA Corporation	Sydney, Australia	24.7	89.9
13	(7)	Beelen Sloopwerken BV	Nunspeet, NETHERLANDS	93.6	87.5
14	(6)	McGee Group	London, UK	101.6	84.0
15	(8)	General Smontaggi SPA	Mosezzo, ITALY	90.0	77.0
16	(10)	Detecsa	Madrid, SPAIN	81.6	76.4
17	(11)	EDS Group Holdings Ltd	Sheffield, UK	81.4	74.2
18	(17)	PSG-International A.S	Zin, CZECH REPUBLIC	67.8	72.3
19	(22)	Aclagro NV	Ghent, BELGIUM	60.0	68.5
20	(16)	Somi Impianti SRL	San Valentino, ITALY	68.0	67.6
21	(120)	Cherry Demolition	TX, USA	4.4	63.3
22	(20)	Cleveland Wrecking Company	CA, USA	60.9	60.6
23	(18)	Priestly Demolition Inc	Ontario, CANADA	64.8	60.0
23	(21)	Demco Inc	NY, USA	60.6	60.0
25	(3)	Eurovia Beton GmbH	Berlin, GERMANY	200.9	52.0

D&Ri100 Year on year

	2006	2007	2008	2009	2010	2011	2012
D&Ri100	2,701.60	3,688.80	4,781.20	4,625.40	4,069.40	4,257.40	4,693.50
North America	1,571.60	1,733.80	1,912.50	2,030.60	1,439.00	1,444.10	1,955.8
Europe	1,082.40	1,844.40	2,390.10	2,377.50	2,391.30	2,633.20	2,371.4
RoW	486.00	110.60	478.60	217.30	228.90	255.40	366.6



roundabouts

one instance almost four-fold), whereas the leading European contractors, with very few exceptions, report a further fall in earnings during the last year. Overall, the European share of the pie fell by a further 10% against the corresponding number for 2010, so the well-documented economic challenges facing this region are

obviously still being experienced by European contractors. With massive reductions in government spending almost universal across Europe and the near total collapse of the residential construction industries in many of the countries in the region, times have certainly been tough. The figures themselves almost

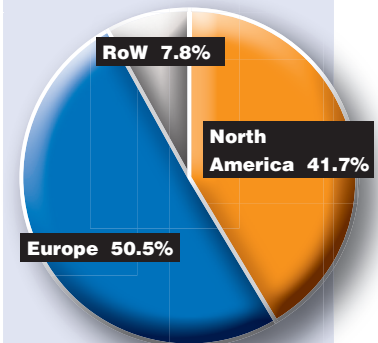
indicate a double dip recession has occurred in the region. The European industry almost flat-lined during 2008 and 2009, with a slight recovery indicated in 2010 but in 2011 earnings fell back to the 2008 level.

For the first time in several years, the Top 5 is a purely North American affair (although

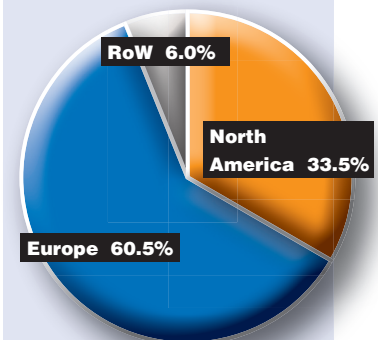
Position 12 (11)	Company name	Location	Turnover US\$	
			2010	2011
26 (25)	Max Wild	Berkheim, GERMANY	57.3	51.9
27 (26)	Cardem Demolition	Bischheim, FRANCE	53.9	50.5
28 (28)	Manafort Brothers Incorporated	CT, USA	49.7	49.1
29 (29)	B Trinkl GmbH	Munich, Germany	49.5	48.3
30 (30)	Watanabe Demolition Industry Co. Ltd	Tokyo, JAPAN	44.7	48.2
31 (33)	Prangenberg & Zaum GmbH	Dusseldorf, GERMANY	42.8	46.4
32 (41)	DDM Demontage B.V.	De Meern, NETHERLANDS	39.5	45.0
33 (38)	Bierlein Companies Inc	MI, USA	39.7	44.8
34 (24)	Freimuth Abbruch & Recycling GmbH	Bulkau, Germany	57.4	43.8
35 (96)	Hughes & Salvidge (Ports) Ltd	Portsmouth, UK	11.2	41.2
36 (48)	DSM Group	Birmingham, UK	30.1	40.5
37 (53)	Brown & Mason Ltd	London, UK	26.0	36.5
37 (54)	John F Hunt Demolition Ltd	Grays, UK	25.4	36.5
39 (32)	Agat Oao	Krasnoyarsk, Russia	43.8	35.8
40 (22)	F.illi Baraldi	Modena, Italy	60.0	35.0
41 (58)	Avenir Deconstruction	Descartes, FRANCE	23.0	32.9
42 (43)	Despe spa	Bergarno, ITALY	34.6	32.8
43 (39)	North American Dismantling Co	MI, USA	39.6	32.7
44 (9)	Cuddy Group	Neath, UK	83.7	31.2
45 (44)	Aem-Lipetsk Ooo	Terbuny, Russia	34.3	30.6
46 (79)	Lee Group Ltd	Gravesend, UK	14.7	29.1
47 (39)	TVF Altwert GmbH	Berlin, Germany	39.6	28.8
48 (46)	Vlasman Holding BV	Alphen aan den Ryn, NETHERLANDS	33.9	28.5
48 (67)	Coleman Company Ltd	Birmingham, UK	20.2	28.5
50 (42)	Occamat	Noyant La Gravoyere, FRANCE	35.5	28.0
50 (68)	Potts & Callahan, Inc	MD, USA	19.5	28.0
50 (97)	Adamo Demolition	MI, USA	10.9	28.0
53 (47)	GL-Abbruch	Esslingen, GERMANY	31.4	27.8
54 NEW	Testa Corp	MA, USA		27.6
55 (61)	Anhui Wantong Post Co Lyd	Anhui, China	22.3	26.5
56 (52)	Cambria Contracting Inc	NY, USA	28.2	26.1
57 (59)	Louisiana Chemical Dismantling	LA, USA	22.9	25.2
58 (78)	O'Rourke Wrecking Company	OH, USA	14.8	24.4
59 (54)	Squibb Group	Barking, UK	26.1	24.2
60 (68)	Robinson & Birdsell Ltd	Wetherby, UK	19.5	24.1
61 (45)	Chupas & Morrao	Trancose, PORTUGAL	34.1	24.0
62 (70)	Cross Environmental Services	FL, USA	18.7	22.8
62 NEW	Wooldridge Ecotec Ltd	Bagshot, UK		22.8
64 NEW	Fabio Bruno Contrucoes LTDA	Rio de Janeiro, BRAZIL		22.6
65 (51)	Van Vliet Sloopwerken	Utrecht, NETHERLANDS	29.8	21.7
66 (63)	Sungdo Construction	Seoul, KOREA (South)	21.5	21.4
67 (72)	Syd Bishop & Sons (Demolition) Ltd	Orpington, UK	17.3	21.2
68 (65)	Technical Demolition Services	Liverpool, UK	21.2	21.0
69 (76)	J H Laarakkers BV	Sambeek, NETHERLANDS	15.3	20.8
70 (73)	John Stacey & Sons	Tadley, UK	16.2	20.2
70 (35)	Bohuslav Mrozek	Bystrice, CZECH REPUBLIC	42.0	20.2
72 NEW	Envirocon Inc	MT, USA		19.8
73 (82)	Wring Group Demolition	Bristol, UK	14.3	19.6
74 (56)	Ferrari	Wittlesheim, FRANCE	25.0	19.4
75 (87)	Cantillon Ltd	London, UK	13.0	19.2

Regional breakdown of the **D&Ri100**

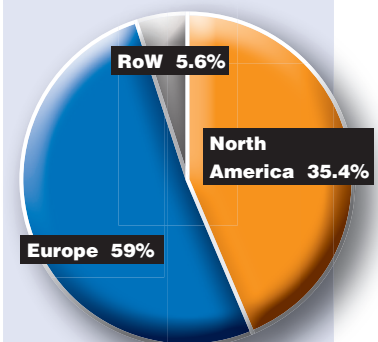
2012 total revenue
US\$4,693.5 million



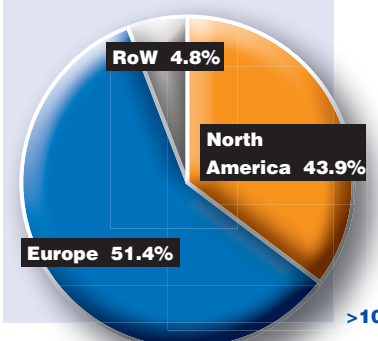
2011 total revenue
US\$4,257.4 million



2010 total revenue
US\$4,069.40 million



2009 total revenue
US\$4,625.40 million



>10

the 11-20 slots are all occupied by contractors from outside this region), with McMahon Services from Australia leading the chasing pack from the first time.

The North American industry clearly hit its downturn during 2009, with the **D&Ri100** total revenues for that region falling more than 20%. It then bumped along the bottom over the course of 2010, but anecdotal evidence has suggested in recent months that a recovery is underway, albeit a slow one. The numbers certainly seem to bear this out, with the North American share of the 2012 total rising by almost 30% on last year's corresponding number. Indeed, this increase has more than compensated for the relatively poor performance of the European region.

Despite the above, of note is the fact that almost twice as many contractors report revenues in excess of US\$100 million in 2011 against the corresponding list last year, with 11 companies reporting results of this magnitude or greater against the six on the 2011 **D&Ri100**.

Position	12 (11)	Company name	Location	Turnover US\$	
				2010	2011
76	(50)	Abbruchunternehmen Landwehr GmbH	Clarholz, GERMANY	29.9	18.6
77	(66)	Armac Demolition	Birmingham, UK	20.7	18.2
78	(34)	Durr Heavy Construction	LA, USA	42.6	17.6
79	(87)	Rivners AB	Skogas, SWEDEN	13.0	17.2
80	NEW	M & M Contracting of Texas	TX, USA		17.0
81	(75)	Central Demolition Ltd	Bonnybridge, UK	15.4	16.9
82	NEW	Break Thru Enterprises Inc	IL, USA		16.4
82	(132)	Expanded Demolition Ltd	Dartford, UK	2.5	16.4
84	(85)	Urayama Komuten, KK	Yokohama, JAPAN	13.3	16.1
85	(77)	Aman Environmental Construction Inc	CA, USA	15.2	15.4
86	(83)	Clifford Devlin	London, UK	14.0	15.0
86	(60)	CM Cantieri Moderni Srl	Cantu Co, ITALY	22.8	15.0
88	(86)	Marto	Mitry Mory, FRANCE	13.2	14.7
89	(63)	National Wrecking Company	IL, USA	21.5	14.6
90	(36)	777 Demolition Ltd	London, UK	40.5	14.5
91	(81)	R Baker & Son Industrial Services	NJ, USA	14.4	14.2
92	(89)	Cawarden Group	Derby, UK	12.4	14.0
92	(81)	TE Scudder Ltd	Wembley, UK	35.4	14.0
94	(93)	Connell Bros Ltd	Manchester, UK	11.5	12.5
95	(62)	Midwest Steel Company Inc.	TX, USA	21.7	11.8
96	(100)	Fortune Interior Dismantling	NJ, USA	10.4	11.7
97	(70)	Keanes Ltd	London, UK	18.7	11.6
98	(90)	Prodemo	Epinay-sur-Seine, FRANCE	11.8	11.1
99	(91)	Dore & Associates	MI, USA	11.7	10.9
100	(109)	Bernie Leen & Sons	Geelong, Australia	7.0	10.8
				4693.5	14%

Turnover performance on previous year: Up Static Down New entry

Demolition companies just outside the **D&Ri100**

Position	12 (11)	Company name	Location	Turnover US\$	
				2010	2011
101	(98)	Concrete Cutting & Breaking Co	MI, USA	10.6	10.3
102	(101)	Hegarty Demolition	Dublin, IRELAND	10.0	9.9
103	(104)	DSD Demolition	Septemes-les-Valons, France	8.9	9.8
104	(103)	Jean Harzheim GmbH & Co Kg	Koln, GERMANY	9.0	9.4
105	(108)	CRS Demolition	KY, USA	7.2	8.8
105	(101)	Richard Liesegang GmbH	Hurth, GERMANY	10.0	8.8
107	(83)	Delair Cfd	Yvrac, FRANCE	14.0	8.6
108	(105)	Pena Grading & Demolition	CA, USA	8.6	8.0
109	(106)	Coronado Wrecking & Salvage Co. In	NM, USA	7.6	7.3
110	(80)	Eurco d.d Vinkovci	Vinkovci, CROATIA	14.6	7.0
111	(122)	Puramex OY	Espoo, Finland	4.3	6.5
111	(109)	J Bryan (Victoria) Ltd	Widnes, UK	7.0	6.5
113	(115)	Maylarch	Eynsham, UK	5.6	6.4
114	(111)	A&S Betondemontage	Lehrte, GERMANY	6.7	6.0
115	(107)	Two Rivers Demolition Inc	CA, USA	7.3	5.7
116	(113)	Ritter & Paratore Contracting Inc	NY, USA	6.4	5.0
116	(91)	Hältagarna Borreteknik Sweden	Bromma, SWEDEN	11.7	5.0
118	(123)	NKR Demolition Group	Horsens, Denmark	4.2	4.8
119	(116)	Gateway Demolition Corp	NY, USA	5.0	4.5
120	(116)	Titan Wrecking	NY, USA	5.0	4.3
121	NEW	DRC Emergency Services	AL, USA		3.9
122	(119)	Bonaria et Fils	Esch sur Alzette, Luxembourg	4.8	3.9
123	(120)	L A Moore	Wells, UK	4.4	3.5
124	(126)	Central Environmental Services	FL, USA	3.8	3.2
125	(123)	Dallas Contracting	TX, USA	4.2	3.0
126	(130)	City Demolition Contractors Birmingham Ltd	Birmingham, UK	3.0	2.9
126	(125)	Aalco Wrecking Co Inc	MO, USA	4.1	2.9
128	(118)	Universal Wrecking Corp	NJ, USA	4.9	2.8
128	(129)	Bianchi Industrial Services, LLC	NY, USA	3.1	2.0

Turnover performance on previous year: Up Static Down New entry

At this point, I have to add the usual caveat concerning the data. Where companies have not supplied data themselves, independent financial reporting services are used to obtain the figures – we never include an estimate of earnings for companies, no matter how well informed. This has obvious pitfalls, however, as evidenced by the return of Penhall to the top 10 spot – last year, the only number we could obtain resulted in this company falling to 98 on the list despite its obvious scale of operation. Texas-based Cherry is another that suffered from this factor last year, when it fell to 120 on the list. This year it is back to its rightful position in the top quarter of the listing.

Another issue that further complicates matters is that it is often impossible to separate out earnings from non-demolition related activities, such as groundworks, that many companies carry out from the totals we gather, something that should be borne in mind when looking at the data.

As a result of our not making use of estimates, there are also a few mid-sized contractors missing from this year's list because we have been unable to obtain even basic figures for them, and

they have declined to share their financial data with us (a common issue with privately owned companies). Thus the absence of Robinette, Nagaisangyou, CA de Groot and Demosten, to name just four, should not necessarily be taken to mean that their performance has been so affected by economic conditions as to result in them falling below the **D&Ri100** threshold, which this year stands at US\$10.8 million (the corresponding number last year was US\$10.4 million).

The star performer in 2011 in North America, according to this year's **D&Ri100**, is Canadian outfit Quantum Murray who has jumped from 19th last year to second place with a 361% increase in reported revenue and NASDI with a 262% increase.

In Europe, star performers are a rarer commodity, given the economic conditions pertaining to this region of the world, but of note are the performances of AF Decom (+196%), Lee Group (+198%) and Erith (+133%), bucking the trend somewhat, given that the majority of European contractors indicate a downturn in revenue as discussed above.

Of course, direct comparisons

The leading 25 demolition companies in North America

Position	12 (11)	Company name	Location	Turnover US\$	
				2010	2011
1	(1)	LVI Services Inc	NY, USA	265.4	250.4
2	(19)	Quantum Murray LLP	Ontario, CANADA	62.3	225.9
3	(2)	NCM Group	WA, USA	203.8	222.1
4	(5)	Brandenburg Industrial Services Co	IL, USA	133.0	180.0
5	(13)	D H Griffin Wrecking Co Inc	NC, USA	76.6	148.4
9	(98)	Penhall International Corp	CA, USA	10.6	129.9
10	(31)	NASDI Inc	MA, USA	44.6	116.9
21	(120)	Cherry Demolition	TX, USA	4.4	63.3
22	(20)	Cleveland Wrecking Company	CA, USA	60.9	60.6
23	(18)	Priestly Demolition Inc	Ontario, CANADA	64.8	60.0
23	(21)	Demco Inc	NY, USA	60.6	60.0
28	(28)	Manafort Brothers Incorporated	CT, USA	49.7	49.1
33	(38)	Bierlein Companies Inc	MI, USA	39.7	44.8
43	(39)	North American Dismantling Co	MI, USA	39.6	32.7
50	(68)	Potts & Callahan, Inc	MD, USA	19.5	28.0
50	(97)	Adamo Demolition	MI, USA	10.9	28.0
54	(56)	Testa Corp	MA, USA		27.6
56	(52)	Cambria Contracting Inc	NY, USA	28.2	26.1
57	(59)	Louisiana Chemical Dismantling	LA, USA	22.9	25.2
58	(78)	O'Rourke Wrecking Company	OH, USA	14.8	24.4
62	(70)	Cross Environmental Services	FL, USA	18.7	22.8
72	NEW	Envirocon Inc	MT, USA		19.8
78	(34)	Durr Heavy Construction	LA, USA	42.6	17.6
80	NEW	M & M Contracting of Texas	TX, USA		17.0
82	NEW	Break Thru Enterprises Inc	IL, USA		16.4
				1,273.6	1,897

Turnover performance on previous year: ↑ Up ○ Static ↓ Down ● New entry

The leading 25 demolition companies in Europe

Position	12 (11)	Company name	Location	Turnover US\$	
				2010	2011
7	(4)	Keltbray	London, UK	178.8	140.0
8	(15)	AF Decom AS	Oslo, Norway	68.7	135.0
11	(12)	Erith Group	Erith, UK	79.8	106.5
13	(7)	Beelen Sloopwerken BV	Nunspeet, NETHERLANDS	93.6	87.5
14	(6)	McGee Group	London, UK	101.6	84.0
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16	(10)	Detecsa	Madrid, SPAIN	81.6	76.4
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18	(17)	PSG-International A.S	Zin, CZECH REPUBLIC	67.8	72.3
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20	(16)	Somi Impianti SRL	San Valentino, ITALY	68.0	67.6
25	(3)	Eurovia Beton GmbH	Berlin, GERMANY	200.9	52.0
26	(25)	Max Wild	Berkheim, GERMANY	57.3	51.9
27	(26)	Cardem Demolition	Bischheim, FRANCE	53.9	50.5
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31	(33)	Prangenberg & Zaum GmbH	Dusseldorf, GERMANY	42.8	46.4
32	(41)	DDM Demontage B.V.	De Meern, NETHERLANDS	39.5	45.0
34	(24)	Freimuth Abbruch & Recycling GmbH	Bulkau, Germany	57.4	43.8
35	(96)	Hughes & Salvidge (Ports) Ltd	Portsmouth, UK	11.2	41.2
36	(48)	DSM Group	Birmingham, UK	30.1	40.5
37	(53)	Brown & Mason Ltd	London, UK	26.0	36.5
37	(54)	John F Hunt Demolition Ltd	Grays, UK	25.4	36.5
39	(32)	Agat Oao	Krasnoyarsk, Russia	43.8	35.8
40	(22)	F.illi Baraldi	Modena, Italy	60.0	35.0
41	(58)	Avenir Deconstruction	Descartes, FRANCE	23.0	32.9
				1692.1	1585.3

Turnover performance on previous year: ↑ Up ○ Static ↓ Down ● New entry

with previous years' data is complicated by the fact that non-US company data is converted into US\$ at the exchange rate current at the time of going to press, and this naturally can and does vary substantially over time – four years ago, the rate for UK pounds sterling was almost £1: US\$2 whereas the rate used for this **D&Ri100** was £1: US\$1.63. In addition, the data sourced for each company gives the total turnover (sales) value during the year, with no indication of gross or net profit levels.

d&ri

Not included?

If your company does not appear in the **D&Ri100** listing and you believe that it should be included in future reports, please contact the editor, Lindsay Gale at: lindsay.gale@khl.com or by post to the address below.
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