

Cautious optimism

In the first **dsri100** global contractors listing since the Covid pandemic took hold, the expected battering of the industry has failed to materialise as the resilience of contractors came to the fore.



dsri 100

Three hundred and seventy-nine million US dollars. That was the difference between the value of this year's **dsri100** global list of demolition contractors by turnover and the one published 12 months ago. At a growth rate of more than 5%, the final total of US\$6.8 billion would be impressive at any time. Coming after the challenges of the Covid-19 pandemic, it is remarkable. Indeed, in the first weeks of Coronavirus, as it was known then, the thought that the demolition industry might not even have 100 companies left to form a complete list was difficult

to shake off.

But before we get carried away or over-optimistic, it is worth remembering that because of the time lag in filing accounts, some of these figures are estimates, others are from financial year ends that either predated the second quarter of 2020 or lessened its impact. It is likely that we will not be able to conduct a proper analysis of Covid's legacy until the **dsri100** of 2022, or even later.

POSITIONS 1 TO 10

The leading companies in the list accounted for just over \$2.7 billion, or 40.2% of total revenues.

dsri 100 THE WORLD'S LARGEST DEMOLITION CONTRACTORS

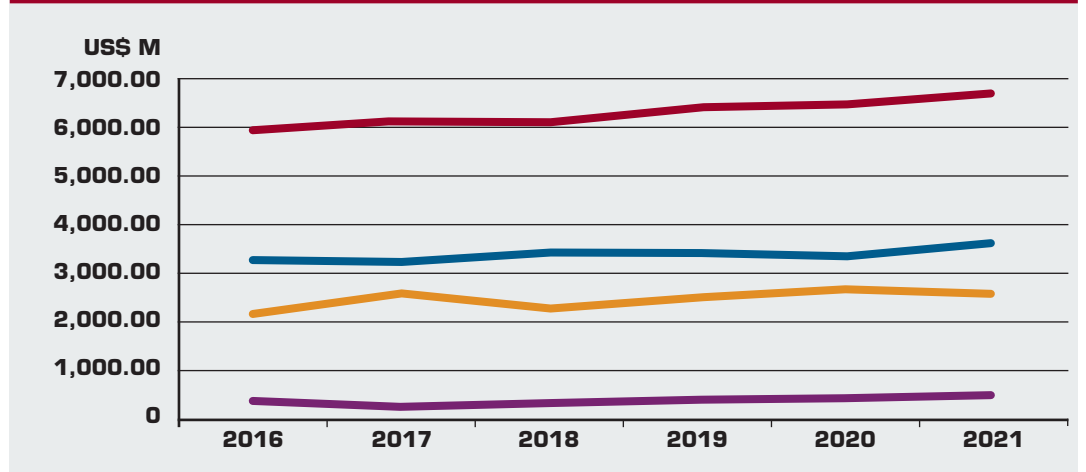
POSITION		COMPANY NAME	LOCATION	COUNTRY	TURNOVER (US\$ M) 2019	TURNOVER (US\$ M) 2020
1	1	North Star	New York	UNITED STATES	573.20	620.90
2	2	Keltbray	Esher	UNITED KINGDOM	EST 360.00	450.00
3	4	Erith Contractors	Erith	UNITED KINGDOM	268.28	297.00
4	3	Brandenburg Industrial Service Co	Chicago	UNITED STATES	271.00	253.10
5	5	Hagedorn Unternehmensgruppe	Gütersloh	GERMANY	167.24	EST 218.00
6	8	Penhall	Anaheim	UNITED STATES	EST 150.00	EST 207.00
7	13	Beelen Sloopwerken	Harderwijk	NETHERLANDS	EST 120.00	EST 190.00
8	9	Freimuth Abbruch und Recycling	Bülkau	GERMANY	EST 145.00	EST 178.00
9	6	DH Griffin Wrecking Co	Greensboro	UNITED STATES	155.00	EST 170.00
10	10	AF Gruppen	Oslo	NORWAY	132.47	EST 150.00
11	7	McGee Group	Wembley	UNITED KINGDOM	EST 153.97	143.09
12	12	Delete Group	Helsinki	FINLAND	120.46	142.50
13	18	Select Demo Services	Salem	UNITED STATES	90.00	135.00
14	15	Cardem	Bischheim	FRANCE	110.74	132.24
15	11	Wanty SA	Binche	BELGIUM	EST 130.00	EST 130.00

Demolition in progress for d&ri100 new entrant Van Vliet of the Netherlands



d&ri 100 YEAR ON YEAR

	2016	2017	2018	2019	2020	2021
d&ri100	5,875.64	6,150.76	6,120.63	6,410.23	6,417.35	6,796.20
Europe	3,319.45	3,264.38	3,422.41	3,398.59	3,329.49	3,752.17
North America	2,186.86	2,563.44	2,322.40	2,622.44	2,694.71	2,607.70
Rest of World	369.33	322.94	375.82	389.20	393.15	436.33



This compares to \$2.4 billion and 37% a year ago. All the top 10 achieved revenues of at least \$150 million, whereas last year's benchmark was \$136.1 million.

For four of the top five – North Star, Keltbray, Erith Contractors (who climbed a place above US contractor Brandenburg Industrial Service Company into third) and Germany's Hagedorn

Unternehmensgruppe – there were healthy increases. In total, their revenues were up by \$217 million, over half of the year-on-year increase achieved across the board. Not surprisingly, North Star also occupied top spot in the top 10 increases in turnover measured by money as opposed to percentage points, an extra \$48 million to make it the only

company to push its total through the \$600 million barrier, and indeed the only one with turnover above half a billion dollars.

Geographically, the top 10 featured six companies from Europe and four from North America. This proved remarkably consistent with the global spread across the list in general. Europe finished with 54 contractors

represented – up from 50 last year – while North America fell from 40 to 35. The rest of the world, though not represented in the top 10, enjoyed a net gain of one entrant to the list to provide the remaining 11 companies.

POSITIONS 11 TO 20

As in 2020, this is the part of the list where we find our first

>20

POSITION	COMPANY NAME	LOCATION	COUNTRY	TURNOVER (US\$ M) 2019	TURNOVER (US\$ M) 2020
21 ⁽²⁰⁾	Max Wild	Berkheim	GERMANY	118.00	126.54
17 ¹⁹	McMahon Services	Dry Creek	AUSTRALIA	88.80	98.55
18 ²⁷	Ferraro Group	Neunkirchen	GERMANY	68.90	97.66
19 ¹⁶	Manafort Brothers	Plainville	UNITED STATES	EST 99.00	EST 96.00
20 ¹⁷	Bierlein Companies	Midland	UNITED STATES	90.65	83.47
21 ²⁶	Independence Excavating	Independence	UNITED STATES	EST 69.60	80.00
22 ²¹	Delsan AIM	Montréal	CANADA	80.47	77.52
23 NEW	Eiffage Demolition	Velizy-Villacoublay	FRANCE		75.24
24 ³⁸	John F Hunt	Grays	UNITED KINGDOM	50.16	68.42
25 ²⁸	Deconstruct UK	London	UNITED KINGDOM	68.53	67.37
26 NEW	Wahl Group	Remagen	GERMANY		59.85
27 ²⁵	Murray Demolition	Etobicoke	CANADA	EST 70.00	EST 59.28
28 ³⁶	Scudder Demolition	London	UNITED KINGDOM	53.90	53.90
29 ³⁴	Thompsons of Prudhoe	Prudhoe	UNITED KINGDOM	56.34	52.66
30 ³⁹	R Collard	Hook	UNITED KINGDOM	48.48	52.47

YOU CRUSHED IT!

CONGRATULATIONS ON THIS MILESTONE:

A PLACE IN THE D&RI 100



POSITION				TURNOVER (US\$ M)	TURNOVER (US\$ M)
21	(20)	COMPANY NAME	LOCATION	2019	2020
31	20	Envirocon	Boston	EST 82.00	52.28
32	33	Veit	Rogers	56.70	51.32
33	=68	Nabekai Corporation	Tokyo	28.00	EST 51.00
34	40	Despe	Torre de Roveri	46.33	50.50
35	32	PP O'Connor	Manchester	57.39	49.96
36	NEW	Crushmash	Moscow		49.80
=37	=43	ARC Abatement	Waco	44.00	49.00
=37	30	MCM Management Corporation	Sylvan Lake	EST 61.00	EST 49.00
39	45	F&R Industriedemontage und Abbruch	Neukirchen	43.69	46.31
40	41	Squibb Group	Stanford le Hope	45.83	45.85
41	46	Moß Abbruch Erdbau Recycling	Lingen	43.56	45.06
42	35	DSM Demolition	Birmingham	56.29	44.29
43	=43	Takayama Kogyo	Tokyo	44.00	EST 44.00
44	29	Priestly Demolition	King, Ontario	EST 62.00	EST 41.04
=45	48	Adamo Group	Detroit	42.00	EST 41.00

company from outside Europe or North America, and once again it was McMahon Services of Australia. This year, McMahon climbed two places to 17th to become the highest placed

contractor whose revenue in millions of US dollars did not start with three digits.

This section contained two notable performances on either side of the Atlantic. The fast-

growing US contractor Select Demo Services posted an increase of \$45 million to climb from 18th to 13th, while Germany's Ferraro Group grew its turnover by almost \$30 million to take Select

Demo's place in 18th, having been 27th a year ago.

Elsewhere, Cardem of France saw its revenues grow by \$20 million-plus, prompting a rise of a single place from 15th to 14th.

Between them, the companies in 11th to 20th places added around \$1.2 billion to their counterparts in the top 10, giving the **dsri 100** a cumulative value of \$3.9 billion at this point, compared to \$3.4 billion in 2020.

Bierlein Companies, with \$83.5 million turnover, was the cut off point for a place in the top 20, \$1.5 million greater than 12 months ago.

TOP 20 COMPANIES IN NORTH AMERICA

POSITION				TURNOVER (US\$ M)
21	(20)	COMPANY NAME	COUNTRY	2020
1	1	North Star	UNITED STATES	620.90
2	2	Brandenburg Industrial Service Co	UNITED STATES	253.10
3	4	Penhall	UNITED STATES	EST 207.00
4	3	DH Griffin Wrecking Co	UNITED STATES	EST 170.00
5	7	Select Demo Services	UNITED STATES	135.00
6	5	Manafort Brothers	UNITED STATES	EST 96.00
7	6	Bierlein Companies	UNITED STATES	83.47
8	12	Independence Excavating	UNITED STATES	80.00
9	9	Delsan AIM	CANADA	77.52
10	11	Murray Demolition	CANADA	EST 59.28
11	8	Envirocon	CANADA	52.28
12	15	Veit	UNITED STATES	51.32
13=	14	MCM Management Corporation	CANADA	EST 49.00
13=	17	ARC Abatement	UNITED STATES	49.00
15	13	Priestly Demolition	CANADA	41.04
16	18	Adamo Group	UNITED STATES	EST 41.00
17	19	Precision Demolition	UNITED STATES	41.00
18	10	Ferma Corporation	UNITED STATES	EST 40.00
18	14	O'Rourke Wrecking Company	UNITED STATES	35.30
20	NEW	National Wrecking Company	UNITED STATES	35.00
				2217.21



"20 years of passion and innovation"



2001 → → →

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2021

POSITION		COMPANY NAME	LOCATION	COUNTRY	TURNOVER (US\$ M) 2019	TURNOVER (US\$ M) 2020
21	⁽²⁰⁾					
=45	49	Precision Demolition	Lewisville	UNITED STATES	EST 41.00	41.00
47	22	Ferma Corporation	Mountain View	UNITED STATES	EST 74.00	EST 40.00
48	51	G Tscherning	Hedehusene	DENMARK	EST 39.00	EST 39.00
49	47	Avenir Deconstruction	Artigues	FRANCE	EST 43.00	38.00
=50	=57	Marutone Apex	Tokyo	JAPAN	34.00	37.00
=50	53	Matsuda City Development	Fukuoka	JAPAN	37.00	37.00
52	61	Occamat	Noyant	FRANCE	32.77	36.48
53	60	O'Rourke Wrecking Company	Cincinnati	UNITED STATES	33.00	35.30
=54	NEW	Milburn	Bellwood	UNITED STATES		35.00
=54	=88	National Wrecking Company	Chicago	UNITED STATES	EST 22.00	35.00
56	=57	Prangenberg & Zaum	Dusseldorf	GERMANY	EST 34.00	34.20
57	50	North American Dismantling Corp	Lapeer	UNITED STATES	40.00	34.00
58	54	Dem-Master	Bathgate	UNITED KINGDOM	36.23	32.66
=59	62	Demex	Chicoutimi	CANADA	31.57	32.00
=59	NEW	Mrozek	Bystrice	CZECH REPUBLIC		32.00

POSITIONS 21 TO 50

This section encompassed companies from Independence Excavating of the US – in 21st, with a turnover of an even \$80 million – to two Japanese companies, Marutone Apex and Matsuda City Development, who shared 50th place with \$37 million each.

This is where the dsri 100 starts to get congested. To find a company turning over half of Independence Excavating's \$80 million, you must follow the list down to 47th. By contrast in the top 10, Erith Contractors was less than half of North Star's total, but

they were separated by just two places.

There were three new entries in this section, reflecting strong performances across Europe, while a large increase in turnover

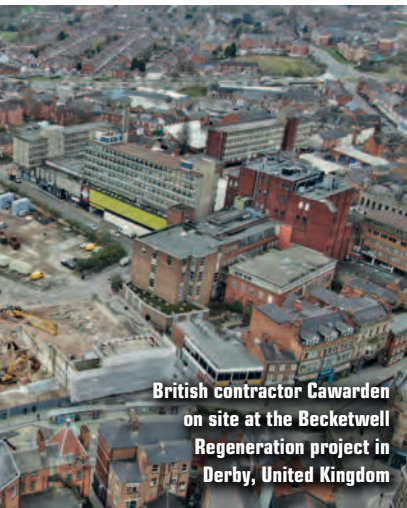
also propelled Japan's Nabekai Corporation into the top half of the list.

Altogether the top 50 was worth \$5.5 billion in round figures, with positions 21 to 50

adding \$1.5 billion, compared to \$1.67 billion in 2020, the first negative annual comparison so far. To maintain a like for like comparison between the yearly totals, Matsuda City Development >22

TOP 20 COMPANIES IN EUROPE

POSITION		COMPANY NAME	COUNTRY	TURNOVER (US\$ M) 2020
21	⁽²⁰⁾			
1	1	Keltbray	UNITED KINGDOM	EST 450.00
2	2	Erith Contractors	UNITED KINGDOM	297.00
3	3	Hagedorn Unternehmensgruppe	GERMANY	EST 218.00
4	9	Beelen Sloopwerken	NETHERLANDS	EST 190.00
5	5	Freimuth Abbruch und Recycling	GERMANY	EST 178.00
6	6	AF Gruppen	NORWAY	EST 150.00
7	6	McGee Group	UNITED KINGDOM	143.09
8	8	Delete Group	FINLAND	142.50
9	11	Cardem	FRANCE	132.24
10	7	Wanty SA	BELGIUM	EST 130.00
11	10	Max Wild	GERMANY	126.54
12	13	Ferraro Group	GERMANY	97.66
13	NEW	Eiffage Demolition	FRANCE	75.24
14	NEW	John F Hunt	UNITED KINGDOM	68.42
15	14	Deconstruct UK	UNITED KINGDOM	67.37
16	NEW	Wahl Group	GERMANY	59.85
17	19	Scudder Demolition	UNITED KINGDOM	53.90
18	17	Thompsons of Prudhoe	UNITED KINGDOM	52.66
19	NEW	R Collard	UNITED KINGDOM	52.47
20	NEW	Despe	ITALY	50.50
				2735.44



British contractor Cawarden on site at the Becketwell Regeneration project in Derby, United Kingdom



POSITION		COMPANY NAME	LOCATION	COUNTRY	TURNOVER (US\$ M) 2019	TURNOVER (US\$ M) 2020
21	⁽²⁰⁾					
=59	55	Central Environmental Inc	Anchorage	UNITED STATES	35.90	32.00
62	37	Cantillon	Watford	UNITED KINGDOM	52.46	31.52
63	59	AWR Abbruch	Urmitz	GERMANY	33.90	30.78
64	65	DDM	De Meern	NETHERLANDS	29.98	29.55
65	66	John Stacey & Sons	Tadley	UNITED KINGDOM	29.25	29.25
66	67	City Circle	Kew East	AUSTRALIA	29.00	29.00
67	NEW	Van Vliet Demolition	Gorinchem	NETHERLANDS		28.50
68	64	Hughes and Salvidge	Portsmouth	UNITED KINGDOM	30.32	27.51
=69	71	Plannerer	Pullenreuth	GERMANY	26.90	EST 27.00
=69	80	American Demolition Corporation	Elgin	UNITED STATES	24.00	EST 27.00
=69	42	Interior Specialists Inc	White Marsh	UNITED STATES	EST 45.00	EST 27.00
=69	=76	Sabre Demolition	Warners	UNITED STATES	25.00	27.00
=73	92	Euro Demolition	Uttoxeter	UNITED KINGDOM	20.70	EST 26.79
=73	73	Syd Bishop	Orpington	UNITED KINGDOM	25.49	26.79
75	63	Pacific Blasting & Demolition	Burnaby	CANADA	31.12	26.49

has been counted as 51st in this calculation, even though its actual position was joint 50th.

Excluding the three new entries, more than half the companies in this section suffered a drop in revenues from the previous **d&ri**100 figure.

POSITIONS 51 TO 75

In the third quartile, the bunching becomes bigger still, with under \$10 million separating Occamat of France in 52nd place from Canada's Pacific Blasting and Demolition in 75th. Three new entries, including Europeans Mrozek (Czech Republic) and Van Vliet Demolition (Netherlands) were among those occupying the spaces in between.

The biggest mover was US contractor National Wrecking

Company, which climbed 34 places on the back of a \$13 million turnover increase.

One place above it was another American company, O'Rourke, whose more modest revenue growth of \$2.3 billion was enough to move it seven places up the list.

By now, revenues for the top 75 companies equalled \$6.2 billion, or around 90% of the total >24



TOP 10 PERCENTAGE REVENUE INCREASE

POSITION	COMPANY NAME	COUNTRY	PERCENTAGE INCREASE
1	Select Demo Services	UNITED STATES	50.00
2	Ferraro Group	GERMANY	41.74
3	John F Hunt	UNITED KINGDOM	36.40
4	Cardem	FRANCE	19.41
5	Delete Group	FINLAND	18.30
6	Ambigroup	PORTUGAL	18.20
7	Occamat	FRANCE	11.32
8	McMahon Services	AUSTRALIA	10.98
9	Erith Contractors	UNITED KINGDOM	10.71
10	Despe	ITALY	9.00

Excludes new entries and estimated totals

TOP 10 INCREASE IN TURNOVER US\$M

POSITION	COMPANY NAME	COUNTRY	TURNOVER INCREASE (US\$ M)
1	North Star	UNITED STATES	47.70
2	Select Demo Services	UNITED STATES	45.00
3	Ferraro Group	GERMANY	28.76
4	Erith Contractors	UNITED KINGDOM	28.72
5	Delete Group	FINLAND	22.04
6	Cardem	FRANCE	21.50
7	John F Hunt	UNITED KINGDOM	15.96
8	McMahon Services	AUSTRALIA	14.69
9	Max Wild	GERMANY	13.91
10	ARC Abatement	UNITED STATES	5.00

Excludes new entries and estimated totals



O'Rourke Wrecking featured in the top 20 North American companies again this year

POSITION		COMPANY NAME	LOCATION	COUNTRY	TURNOVER (US\$ M) 2019	TURNOVER (US\$ M) 2020
21	(20)					
76	87	Ambigroup	Arranho	PORTUGAL	22.09	26.11
77	56	Nasdi	Woburn	UNITED STATES	EST 35.00	EST 26.00
78	=76	Cawarden Group	Derby	UNITED KINGDOM	EST 25.00	25.40
79	52	MGL Demolition	Durham	UNITED KINGDOM	37.60	25.39
80	NEW	Coleman & Company	Birmingham	UNITED KINGDOM		25.27
81	23	Liberty Industrial	Glebe	AUSTRALIA	71.56	24.09
82	NEW	Industrial Demolition Services	Yarraville	AUSTRALIA		24.00
83	NEW	Clifford Devlin	Grays	UNITED KINGDOM		23.97
84	71	City Demolition	Birmingham	UNITED KINGDOM	25.66	23.58
85	90	KDC Contractors	Manchester	UNITED KINGDOM	21.77	23.52
86	NEW	Sungdo Construction	Seoul	SOUTH KOREA		23.14
= 87	72	American Wrecking	South El Monte	UNITED STATES	25.50	23.00
= 87	=76	Homrich Wrecking	Carleton	UNITED STATES	EST 25.00	EST 23.00



Deconstruct
UK's Castlewood House project in central London

for the **dsri100**. In 2020, the equivalent figure was \$5.9 billion, or 91.5%.

POSITIONS 76 TO 100

The final section always provides the highest number of new entries, or in some cases re-entries, and this year did not disappoint, with a total of nine from countries as diverse as Australia, France, Russia and South Korea.

But it was a company already in the list who headed the final quarter, Ambigroup of Portugal rising from 87th to 76th after adding more than \$4 million to its previous revenue.

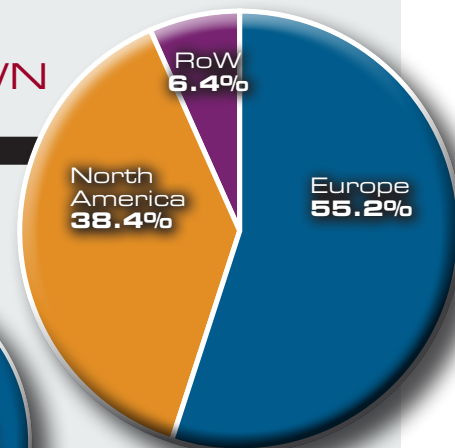
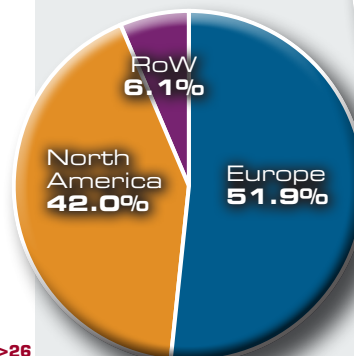
As with the group between 51st and 75th, this is a congested part of the table with under \$9

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REGIONAL BREAKDOWN

2021

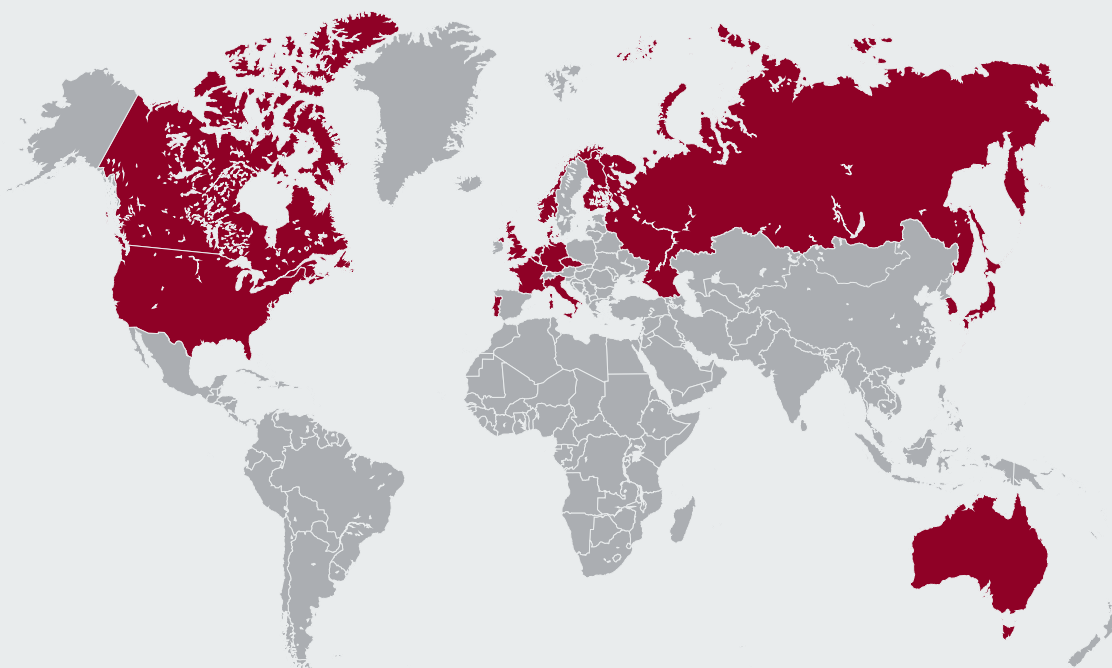
Total Revenue
US\$M 6,796.20



2020

Total Revenue
US\$M 6,417.35

THE GLOBAL SPREAD



Australia	5
Belgium	1
Canada	5
Czech Republic	1
Denmark	1
Finland	1
France	6
Germany	10
Italy	2
Japan	5
Netherlands	3
Norway	1
Portugal	1
Russia	3
South Korea	1
United Kingdom	24
United States	30

POSITION		COMPANY NAME	LOCATION	COUNTRY	TURNOVER (US\$ M) 2019	TURNOVER (US\$ M) 2020
89	NEW	Desamiantage France Demolition	Gemenos	FRANCE		22.80
90	=95	Uchimura Kogyo	Tokyo	JAPAN	EST 19.00	22.00
91	=83	Dickens Quality Demolition	Phoenix	UNITED STATES	EST 23.00	EST 21.00
92	NEW	Fratelli Omini	Novate Milanese	ITALY		20.52
93	NEW	Demex	Yatala	AUSTRALIA		20.44
94	24	Brown and Mason	Dartford	UNITED KINGDOM	71.07	20.31
95	=93	Berg Corporation	Baltimore	UNITED STATES	20.00	EST 20.00
96	91	Pece of Mind	Orlando	UNITED STATES	EST 21.00	EST 19.00
97	=83	Bordeaux Demolition	Merignac	FRANCE	23.00	18.90
98	NEW	Likvidator	Lipetsk	RUSSIA		18.14
99	99	Robinette Demolition	Villa Park	UNITED STATES	EST 18.00	EST 18.00
100	NEW	Volgaspetsstroy	Nizhny Novgorod	RUSSIA		17.63

million dollars separating the respective ends of the list.

Between them, positions 76 to 100 contributed more than half a billion dollars to the **d&ri100** total, a similar situation to 2020.

The “seat at the table” figure, for the company in 100th place on the list, rose to \$17.6 million, whereas last year \$17 million was enough to be included.

THE REGIONAL TOP TWENTIES

Despite the prominence of North Star in the overall list, the increase in the combined revenues of North America’s top 20 was a

relatively modest \$22 million. With the top 20 accounting for \$2.2 billion, North Star provided more than a quarter of the total.

Europe by contrast enjoyed top 20 revenue growth of more than \$360 million, to top \$2.7 billion, helped by big increases in its leading contractors.

In the top 10 lists of companies increasing their revenues, Select Demo Services recorded the

highest percentage increase (50%), whereas the 2020 equivalent was 68.2%.

In monetary terms, North Star was highest for the second consecutive year, but with \$47.7 million more revenue against the previous year’s \$80.6 million. Perhaps a note of caution is a good place to end on. But will we see a delayed Covid reaction in 2022, or does \$7 billion beckon? ■

Extra information

Many of the companies featured in the **d&ri100** have supplied videos and/or photographs of projects they have been involved in. To see these, please visit www.khl.com

Currency conversion

Exchange rates used to convert domestic currencies to US dollars are from a rolling five-year average between 2016 and 2020.

Sourcing the data

D&Ri invites and welcomes all demolition contractors worldwide to supply turnover data for the **d&ri100** and the majority of the figures quoted are sourced by this method. Others are made up of reasonable estimates derived from company or financial websites or other online coverage of the demolition industry.

If you are not included

To receive an entry form for the **d&ri100** 2022, please contact steve.ducker@khl.com

NEW ENTRIES

POSITION	COMPANY NAME	COUNTRY	TURNOVER (US\$ M) 2020
23	Eiffage Demolition	FRANCE	75.24
26	Wahl Group	GERMANY	59.85
36	Crushmash	RUSSIA	49.80
=54	Milburn	UNITED STATES	35.00
=59	Mrozek	CZECH REPUBLIC	32.00
67	Van Vliet Demolition	NETHERLANDS	28.50
80	Coleman & Company	UNITED KINGDOM	25.27
82	Industrial Demolition Services	AUSTRALIA	24.00
83	Clifford Devlin	UNITED KINGDOM	23.97
86	Sungdo Construction	SOUTH KORA	23.14
89	Desamiantage France Demolition	FRANCE	22.80
92	Fratelli Omini	ITALY	20.52
93	Demex	AUSTRALIA	20.44
98	Likvidator	RUSSIA	18.14
100	Volgaspetsstroy	RUSSIA	17.63

