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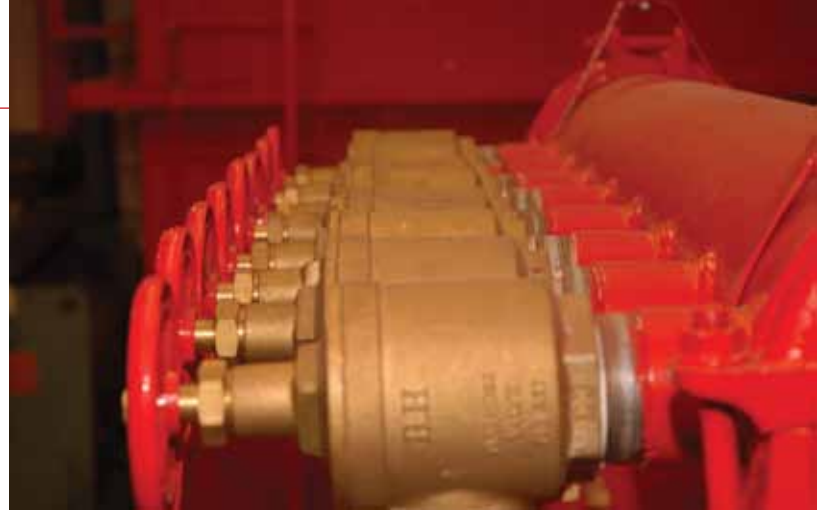
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# TREADING



Photos: EMCOR Group



# WATER

Most commercial/ industrial/institutional markets are either slightly up or slightly down as the market is unable to gain any traction

BY ROBERT P. MADER  
OF CONTRACTOR'S STAFF

IT SEEMS LIKE the only things going up these days are prices for gasoline and copper. The CII construction market is treading water. Adding up the revenue for all of the Giants for which we could get numbers, the Giants had 2009 revenues of \$22.539 billion. For 2010, the total was \$23.573 billion. But that doesn't tell the story. This year we were able to ferret out numbers for APi Group Inc.,

New Brighton, Minn., which is a holding company for 32 contracting firms. Once we subtract APi's nearly \$1.36 billion in revenue, the 2010 total drops to \$21.446 billion, down 4.85% from the previous year.

Data reported by FMI, the construction industry consultants, tells the same story.

"The highly cyclical lodging, office and commercial segments took the largest hit in 2010 along with manufacturing construction, which had remained

strong mostly due to refinery work," FMI reports in its 2011 U.S. Markets Construction Overview. "Manufacturing is expected to lose another 19% in 2011, while the drop in lodging, office and commercial will be less severe, in the 1% to 5% range in 2011. Water and wastewater, heavily dependent on public funding, will eke out another 3% in 2011 after a 3% gain in 2010."

(FMI's excellent 2011 U.S. Markets Construction Overview, which additionally reviews megatrends such as the

recovery of the capital markets, BIM, green construction, succession planning, and energy, is available from FMI for \$135 at [www.fminet.com/resources](http://www.fminet.com/resources).)

"The economy definitely seems subdued in 2011," says Lisa McFate, marketing manager of Midstate Mechanical, Phoenix, a \$56.6 million HVAC contractor.

### 2010's progress has stalled

Last year's non-residential construction recovery has stalled. Anirban Basu,

## Contractor's Top 10 Companies Geographically

Northeast			Midwest			South and Southeast			West		
Rank	Company/Location	\$ Millions	Rank	Company/Location	\$ Millions	Rank	Company/Location	\$ Millions	Rank	Company/Location	\$ Millions
1	EMCOR Group, Norwalk, Conn.	\$2,370.00	2	Johnson Controls, Building Efficiency Div., N. American Service, Milwaukee	\$2,127.00	4	Comfort Systems USA, Houston	\$1,108.28	7	ACCO Engineered Systems, Glendale, Calif.	\$525.00
12	Limbach Facility Services LLC, Pittsburgh	\$300.00	3	APi Group Inc., New Brighton, Minn.	\$1,358.34	5	Service Experts Div. of Lennox Industries, Dallas	\$590.30	8	Southland Industries, Irvine, Calif.	\$445.00
14	The State Group, Mississauga, Ont.	\$265.00	10	Roto-Rooter, Cincinnati	\$354.74	6	ARS/Rescue Rooter, Memphis	\$527.00	9	McKinstry Co., Seattle	\$397.00
26	W.E. Bowers, Beltsville, Md.	\$196.50	13	Nooter Construction, St. Louis	\$289.80	11	TDIndustries, Dallas	\$324.00	17	Harder Mechanical Contractors Inc., Portland, Ore.	\$249.00
39	Greenstar Services Corp., New York	\$145.60	16	John E. Green, Highland Park, Mich.	\$250.00	15	Hardy Corp., Birmingham, Ala.	\$260.00	18	Kinetics Systems Inc., Fremont, Calif.	\$238.40
40	Fresh Meadow Mechanical, Fresh Meadows, N.Y.	\$144.87	19	MMC Corp., Overland Park, Kan.	\$233.50	21	McKenney's Inc. Mechanical Contractors & Engineers, Atlanta	\$220.00	28	Critchfield Mechanical Inc., Menlo Park, Calif.	\$190.82
45	Worth & Co., Pipersville, Pa.	\$139.30	20	Murphy Co. Mechanical Contractors & Engineers, St. Louis	\$224.15	22	ColonialWebb Contractors, Richmond, Va.	\$209.50	34	RK Mechanical, Denver	\$164.90
46	Sauer Inc., Pittsburgh	\$139.00	23	Sterling Boiler & Mechanical Inc., Evansville, Ind.	\$201.50	27	Clockwork Home Services, Sarasota, Fla.	\$194.50	36	JH Kelly, Longview, Wash.	\$157.29
47	The Par Group, Lynbrook, N.Y.	\$138.96	24	Waldinger Corp., Des Moines	\$201.00	30	Brandt Engineering Co., Dallas	\$177.60	37	Apollo Sheet Metal, Kennewick, Wash.	\$150.00
49	John W. Danforth, Tonowanda, N.Y.	\$136.05	25	J.F. Ahern, Fond Du Lac, Wis.	\$199.22	38	Coastal Mechanical, Melbourne, Fla.	\$149.44	42	Performance Mechanical, Pittsburg, Calif.	\$140.00

# Contractor's Top 100 *Who They Are...*



Photo: Harris Companies

Rank	Company	Revenue \$ Millions	% Change	Rank	Company	Revenue \$ Millions	% Change
1	EMCOR Group	\$2,370.00	-8.14%	51	John W. Danforth	\$136.05	0.03%
2	Johnson Controls, Building Efficiency Div., N. American Service	\$2,127.00	1.9%	52	Murray Co.	\$136.00	-4.89%
3	APi Group Inc.	\$1,358.34	NA	53	Titan Contracting & Leasing/The Horn Cos.	\$135.50	22.62%
4	Comfort Systems USA	\$1,108.28	-1.8%	54	Hooper Corp.	\$135.44	NA
5	Service Experts Div. of Lennox Industries	\$590.30	10.25%	55	CorVal Group	\$130.00	Even
6	ARS/Rescue Rooter	\$527.00	-0.19%	56	Egan Cos. Inc.	\$124.47	125.08%
7	ACCO Engineered Systems	\$525.00	-0.19%	57	Fire & Life Safety America	\$123.00	-27.65%
8	Southland Industries	\$445.00	-5.63%	58	J.C. Cannistraro	\$121.00	NA
9	McKinstry Co.	\$397.00	0.51%	59	Elkhorn Construction	\$120.30	-36.69%
10	Roto-Rooter	\$354.74	5.61%	60	Sanders Bros. Inc.	\$119.00	-8.46%
11	TDIndustries	\$324.00	8.28%	61	McCarl's Inc.	\$117.19	-10.54%
12	Limbach Facility Services LLC	\$300.00	1.35%	62	Roth Bros. Inc.	\$114.00	NA
13	Nooter Construction	\$289.80	-23.71%	63	CECO Environmental	\$113.90	-18.05%
14	The State Group	\$265.00	-1.82%	64	John J. Kirilin	\$113.20	Even
15	Hardy Corp.	\$260.00	-2.18%	65	Therma Corp.	\$112.70	-1.14%
16	John E. Green	\$250.00	19.05%	66	Reedy Industries Inc.	\$110.00	NA
17	Harder Mechanical Contractors Inc.	\$249.00	-0.80%	67	Southern Air Inc.	\$110.00	NA
18	Kinetics Systems Inc.	\$238.40	-28.41%	68	Pierce Associates	\$105.00	-8.14%
19	MMC Corp.	\$233.50	8.60%	69	Scheck Industries Inc.	\$104.50	NA
20	Murphy Co. Mechanical Contractors & Engineers	\$224.15	-3.76%	70	Starcon International	\$103.00	-33.97%
21	McKenney's Inc. Mechanical Contractors & Engineers	\$220.00	-4.68%	71	Lee Co.	\$102.00	27.97%
22	ColonialWebb Contractors	\$209.50	-4.64%	71	VSC Fire & Security	\$99.55	-31.59%
23	Sterling Boiler & Mechanical Inc.	\$201.50	-44.03%	73	Joule Industrial Contractors	\$98.60	-0.05%
24	Waldinger Corp.	\$201.00	NA	74	Shapiro & Duncan	\$95.21	3.38%
25	J.F. Ahern	\$199.22	1.18%	75	Yearout Mechanical	\$93.82	NA
26	W.E. Bowers	\$196.50	3.69%	76	M.B. Haynes Corp.	\$93.32	NA
27	Hill Mechanical Group	\$195.33	1.21%	77	Foley Co.	\$93.10	-5.55%
28	Clockwork Home Services	\$194.50	22.71%	78	Letsos Co.	\$91.72	-11.47%
29	Critchfield Mechanical Inc.	\$190.82	88.00%	79	Hermanson Co. LLP	\$90.79	-7.36%
30	John E. Green Co.	\$189.50	-9.76%	80	Dorvin D. Leis Co. Inc.	\$90.03	16.68%
31	Brandt Engineering Co.	\$177.60	-22.58%	81	Grunau Co.	\$87.00	-15.29%
32	Harris Cos.	\$176.00	Even	82	Herman Goldner Co.	\$86.44	3.55%
33	P1 Group	\$173.61	-12.85%	83	CCI Mechanical Inc.	\$85.80	53.76%
34	U.S. Engineering Co.	\$173.00	-14.34%	84	Harry Grodsky & Co. Inc.	\$81.43	NA
35	Metropolitan Mechanical Contractors Inc.	\$165.91	27.62%	85	A.O. Reed & Co.	\$81.00	-27.35%
36	RK Mechanical	\$164.90	Even	86	Corrigan Co. Mechanical Contractors	\$80.00	-11.12%
37	Midwest Mechanical Contractors	\$157.40	NA	87	Pacific Rim Mechanical Contractors	\$77.57	NA
38	JH Kelly	\$157.29	-35.85%	88	Lawman Heating & Cooling Inc.	\$77.41	NA
39	Apollo Sheet Metal	\$150.00	NA	89	Shoffner Kalthoff	\$76.36	NA
40	Coastal Mechanical	\$149.44	10.12%	90	KSW Inc.	\$76.29	-17.99%
41	Greenstar Services Corp.	\$145.60	NA	91	Charles E. Jarrell Contracting Inc.	\$75.50	-12.72%
42	Fresh Meadow Mechanical	\$144.87	11.44%	92	AZCO Inc.	\$72.80	-13.85%
43	Ivey Mechanical Co. LLC	\$140.00	-28.21%	93	McKamish Inc.	\$72.50	-19.44%
44	Performance Mechanical	\$140.00	NA	94	Interstate Plumbing & Air Conditioning	\$71.58	NA
45	University Mechanical Contractors Inc.	\$140.00	55.55%	95	MLN Co.	\$71.00	-12.35%
46	Bahnson Holdings Inc.	\$139.88	7.35%	96	Environmental Air Systems	\$70.00	-6.67%
47	Worth & Co.	\$139.30	19.83%	97	S3H Inc.	\$70.00	NA
48	Sauer Inc.	\$139.00	-15.35%	98	Entech Sales & Service	\$69.46	NA
49	The Par Group	\$138.96	NA	99	Mechanical Systems & Services Inc.	\$68.00	NA
50	Mechanical Inc.	\$136.08	27.39%	100	The Farfield Co.	\$66.70	NA

chief economist for Associated Builders & Contractors, noted that while private non-residential construction spending has been increasing for the past three months, it is still 10.2% lower from March 2010. Total non-residential construction spending — which includes both privately and publicly financed

construction — was \$531.1 billion on a seasonally adjusted annual rate in March, up 0.9% from the previous month, but 6.1% lower than the same time last year.

“I think, in general, things are marginally better,” says Anthony J. Guzzi, president and CEO of EMCOR Group.

“That would be the broad picture.”

Commercial/industrial/institutional demand plunged 30% in 2009, Guzzi notes.

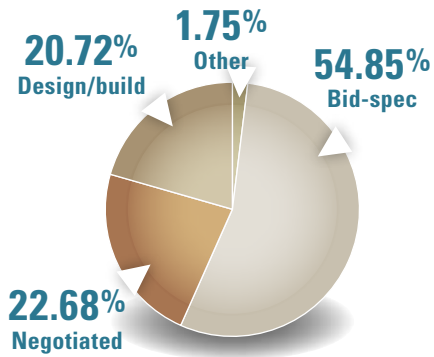
“Clearly, if you go back to 2009, up to the middle of the year that was scary; demand was dropping precipitously,” Guzzi says. “But we have had a



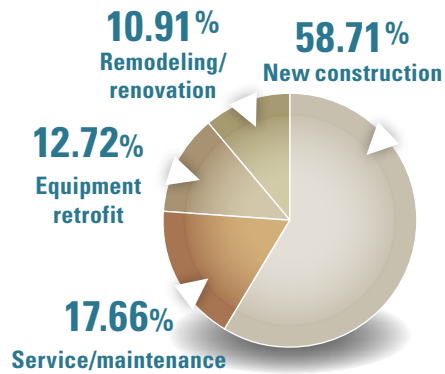
A welder at Schoeneck's Milwaukee facility.

Photo: J.F. Ahern

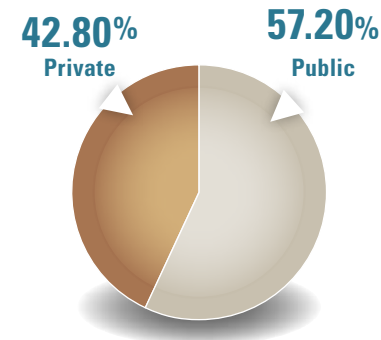
How They Get Work



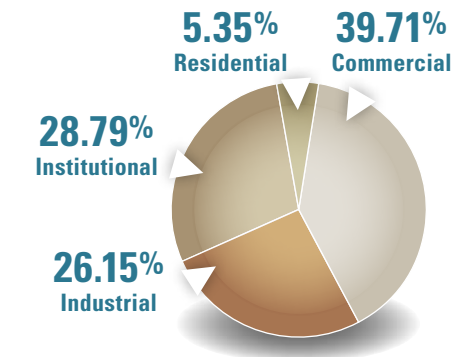
Markets Served



Public vs. Private



Where They Do It



SOURCE: CONTRACTOR MAGAZINE BOOK OF GIANTS SURVEY

stable backlog for a year now.”

EMCOR, which is publically traded, is giving the investor community the same guidance in 2011 that it gave in 2010 — higher revenues but lower margins.

EMCOR is also blessed with a solid balance sheet that has allowed it to buy contractors. It purchased Harry Pepper & Associates, Jacksonville, Fla., an engineering contractor with a lot of water/wastewater and civil experience that has gotten EMCOR involved in what is, essentially, re-watering of the Everglades. It also bought Bahnson Holdings, Winston-Salem, N.C., which gave EMCOR improved capabilities to do government work.

A challenging year

“Cautiously optimistic seems to be the tone thus far in 2011,” says McFate from Midstate Mechanical. “While we are beginning to see a few positive signs, the reality is that 2011 will continue to be a challenging year for many. The economy has started to recover, but recovery is slow and recovery in some market segments in the Greater Phoenix area will continue to be painfully slow.

“Funding issues, budget cuts, cancelled and delayed projects with multiple contractors all pursuing at razor thin margins is still the reality,” McFate says. “Rising fuel and material costs —specifically metals — also imperils

the industry’s ability to make a comeback.”

She did find some bright spots in the southwestern economy.

“School construction continues to be one of the stronger markets along with healthcare, federal [work], and data centers,” says McFate. “Energy opportunities are also on the rise. Arizona is finally becoming a real contender in the solar industry with numerous solar projects in the works. Industrial is on the rise to support the solar industry with a number of large manufacturers relocating in Arizona.”

Bill Caldwell, president of Waldrop Mechanical Services, a \$28.1 million contractor from Spartanburg, S.C., predicts, “We expect 2011 to be flat for us compared to 2010. We were fortunate and enjoyed a 15% growth in revenue between 2009 and 2010. Residential was outstanding for us in 2010 as we focus on the equipment replacement market and not new construction. We are expecting growth in 2011 in our service business specifically in the commercial/industrial sector.”



Photo: Harris Companies

What They Do

SOURCE: CONTRACTOR MAGAZINE BOOK OF GIANTS SURVEY

(Dollars in Millions)

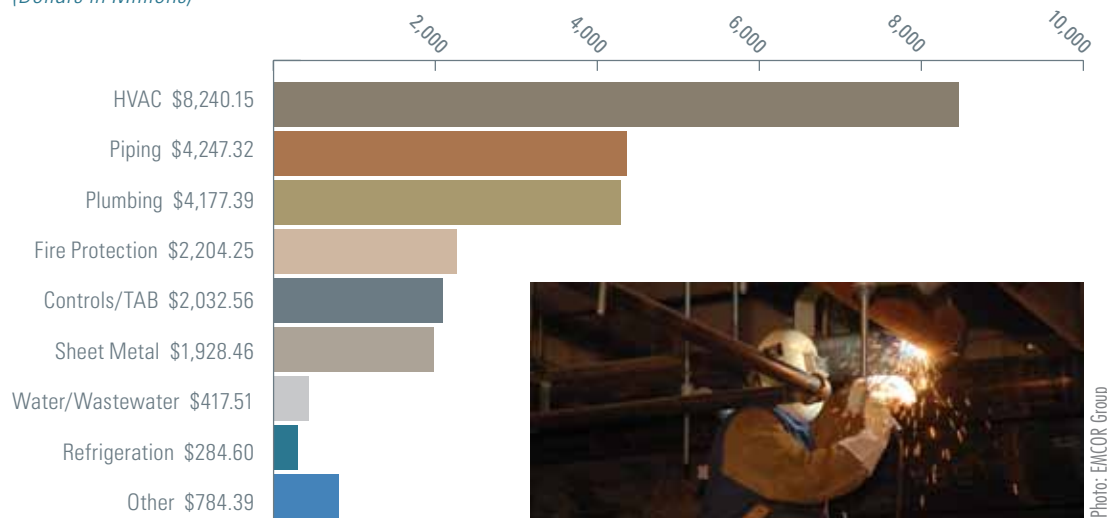


Photo: EMCOR Group

For information circle XXX

Contractor's Top 10 Companies by Type of Work

Denny Terrell, executive vice president of Ivey Mechanical Co. LLC, Kosciusko, Miss., says his firm is faced with unqualified competition bidding work with which it's unfamiliar.

"Although several markets, like healthcare, have loosened somewhat, there are many contractors pursuing this work that have never been in these markets," Terrell says. "So not only is it a challenge to compete against competition who are bidding work at cost, we are also dealing with general contractors and subs who are moving into markets such as healthcare with no healthcare experience. This ultimately is driving pricing even further down

**'Funding issues, budget cuts, cancelled and delayed projects with multiple contractors all pursuing at razor thin margins is still the reality.'**

due to not fully understanding scope or complexity of work. We will continue to work closely with the core group of customers that we have been associated with for years and continue to operate with less volume until recovery begins to take off hopefully sometime in 2012. Fortunately, we do have several locations that have not missed a beat through this recession and have covered several others that have been greatly affected."

Ivey is also carefully watching material price escalation. The firm is working to improve its processes in order to best position itself to take full advantage of the recovery when it begins.

More stable markets

"Overall things are better," Guzzi says. "We have a stable backlog and more stable markets, although there is not a robust demand for private work. Industrial is better than commercial and commercial is better than hospitality in terms of private money."

Some sectors had a pretty good start for the year, he notes. Refinery maintenance had a good start where it had not for the last 24 months. Spending on office buildings and the like is up slightly, but it's still depressed.

"On the larger projects, say \$20 million and above," Guzzi says, "there's not as much competition as there is on

Fire Protection

Rank	Company/Location	\$ Millions
3	APi Group Inc., New Brighton, Minn.	\$1,358.34
1	EMCOR Group, Norwalk, Conn.	\$284.40
56	Fire & Life Safety America, Richmond, Va.	\$123.00
71	VSC Fire & Security, Ashland, Va.	\$99.50
8	Southland Industries, Irvine, Calif.	\$89.00
25	J.F. Ahern, Fond Du Lac, Wis.	\$67.74
47	The Par Group, Lynbrook, N.Y.	\$46.32
52	Hooper Corp., Madison, Wis.	\$33.86
29	John E. Green, Highland Park, Mich.	\$25.00
81	Grunau Co., Oak Creek, Wis.	\$22.62

HVAC

Rank	Company/Location	\$ Millions
2	Johnson Controls, Building Efficiency Div., N. American Service, Milwaukee	\$1,063.50
1	EMCOR Group, Norwalk, Conn.	\$924.30
4	Comfort Systems USA, Houston	\$842.29
5	Service Experts Div. of Lennox Industries, Dallas	\$590.30
6	ARS/Rescue Rooter, Memphis	\$263.50
7	ACCO Engineered Systems, Glendale, Calif.	\$262.50
11	TDIndustries, Dallas	\$162.00
40	Fresh Meadow Mechanical, Fresh Meadows, N.Y.	\$130.38
30	Brandt Engineering Co., Dallas	\$115.44
48	Mechanical Inc., Freeport, Ill.	\$106.24

Piping

Rank	Company/Location	\$ Millions
1	EMCOR Group, Norwalk, Conn.	\$237.00
13	Nooter Construction, St. Louis	\$231.84
15	Hardy Corp., Birmingham, Ala.	\$208.00
23	Sterling Boiler & Mechanical Inc., Evansville, Ind.	\$201.50
42	Performance Mechanical, Pittsburg, Calif.	\$133.00
20	Murphy Co. Mechanical Contractors & Engineers, St. Louis	\$112.08
73	Joule Industrial Contractors, Gibbstown, N.J.	\$98.60
58	Elkhorn Construction, Evanston, Wv.	\$96.24
32	U.S. Engineering Co., Kansas City, Mo.	\$93.42
70	Starcon International, Manhattan, Ill.	\$92.70

Plumbing

Rank	Company/Location	\$ Millions
1	EMCOR Group, Norwalk, Conn.	\$521.40
10	Roto-Rooter, Cincinnati	\$304.33
6	ARS/Rescue Rooter, Memphis	\$263.50
4	Comfort Systems USA, Houston	\$177.33
11	TDIndustries, Dallas	\$97.20
8	Southland Industries, Irvine, Calif.	\$89.00
21	McKenney's Inc. Mechanical Contractors & Engineers, Atlanta	\$88.00
18	Kinetics Systems Inc., Fremont, Calif.	\$79.46
36	JH Kelly, Longview, Wash.	\$78.65
22	ColonialWebb Contractors, Richmond, Va.	\$73.33

Sheet Metal

Rank	Company/Location	\$ Millions
1	EMCOR Group, Norwalk, Conn.	\$165.90
62	CECO Environmental, Cincinnati	\$113.90
9	McKinstry Co., Seattle	\$89.50
24	Waldinger Corp., Des Moines	\$66.93
27	Hill Mechanical Group, Franklin Park, Ill.	\$66.41
14	The State Group, Mississauga, Ont.	\$66.25
7	ACCO Engineered Systems, Glendale, Calif.	\$65.63
12	Limbach Facility Services LLC, Pittsburgh	\$60.00
37	Apollo Sheet Metal, Kennewick, Wash.	\$60.00
32	Harris Cos., St. Paul, Minn.	\$52.80

Water/Wastewater

Rank	Company/Location	\$ Millions
1	EMCOR Group, Norwalk, Conn.	\$142.20
77	Foley Co., Kansas City, Mo.	\$55.86
25	J.F. Ahern, Fond Du Lac, Wis.	\$35.86
49	John W. Danforth, Tonowanda, N.Y.	\$27.21
50	Murray Co., Gardena, Calif.	\$27.20
39	Greenstar Services Corp., New York	\$25.20
53	CorVal Group, St. Paul, Minn.	\$19.50
60	McCarl's Inc., Pittsburgh	\$17.58
43	University Mechanical Contractors Inc., Mukilteo, Wash.	\$14.00
75	Yearout Mechanical, Albuquerque	\$13.40



Contractors work on a commercial project.



The mechanical room at Columbia St. Mary's Hospital, Milwaukee.

Photo: Harris Companies

Photo: J.F. Ahern

Giants Breakdown

Rank	Company/Location	Revenue	HVAC	Piping	Plumbing	Sheet Metal	Refrigeration	Controls	Fire Protection	Wastewater	Other	
1	1	EMCOR Group, Norwalk, Conn.	\$2,370.00	\$924.30	\$237.00	\$521.40	\$165.90	\$94.80	\$0.00	\$284.40	\$142.20	\$0.00
2	2	Johnson Controls, Building Efficiency Div., N. American Service, Milwaukee	\$2,127.00	\$1,063.50	\$0.00	\$0.00	\$0.00	\$0.00	\$1,063.50	\$0.00	\$0.00	\$0.00
3		APi Group Inc., New Brighton, Minn.	\$1,358.34	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,358.34	\$0.00	\$0.00
4	3	Comfort Systems USA, Houston	\$1,108.28	\$842.29	\$0.00	\$177.33	\$0.00	\$0.00	\$44.33	\$0.00	\$0.00	\$44.33
5	4	Service Experts Div. of Lennox Industries, Dallas	\$590.30	\$590.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	5	ARS/Rescue Rooter, Memphis	\$527.00	\$263.50	\$0.00	\$263.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	6	ACCO Engineered Systems, Glendale, Calif.	\$525.00	\$262.50	\$65.63	\$65.63	\$65.63	\$0.00	\$65.63	\$0.00	\$0.00	\$0.00
8	7	Southland Industries, Irvine, Calif.	\$445.00	\$0.00	\$89.00	\$89.00	\$0.00	\$0.00	\$89.00	\$89.00	\$0.00	\$0.00
9	8	McKinstry Co., Seattle	\$397.00	\$89.50	\$89.50	\$39.70	\$89.50	\$0.00	\$89.50	\$0.00	\$0.00	\$0.00
10	12	Roto-Rooter, Cincinnati	\$354.74	\$4.18	\$0.00	\$304.33	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23.28
11	14	TDIndustries, Dallas	\$324.00	\$162.00	\$48.60	\$97.20	\$3.25	\$3.24	\$3.24	\$3.24	\$3.24	\$0.00
12	15	Limbach Facility Services LLC, Pittsburgh	\$300.00	\$60.00	\$60.00	\$60.00	\$60.00	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00
13	10	Nooter Construction, St. Louis	\$289.80	\$0.00	\$231.84	\$0.00	\$0.00	\$0.00	\$57.96	\$0.00	\$0.00	\$0.00
14	16	The State Group, Mississauga, Ont.	\$265.00	\$66.25	\$66.25	\$66.25	\$66.25	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	17	Hardy Corp., Birmingham, Ala.	\$260.00	\$2.60	\$208.00	\$5.20	\$0.00	\$0.00	\$2.60	\$0.00	\$0.00	\$26.00
16	25	John E. Green, Highland Park, Mich	\$250.00	\$75.00	\$75.00	\$62.50	\$0.00	\$0.00	\$0.00	\$25.00	\$12.50	\$0.00
17	18	Harder Mechanical Contractors Inc., Portland, Ore.	\$249.00	\$49.80	\$49.80	\$49.80	\$49.80	\$0.00	\$49.80	\$0.00	\$0.00	\$0.00
18	13	Kinetics Systems Inc., Fremont, Calif.	\$238.40	\$79.46	\$79.47	\$79.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	9	MMC Corp., Overland Park, Kan.	\$233.50	\$46.70	\$46.70	\$46.70	\$46.70	\$0.00	\$46.70	\$0.00	\$0.00	\$0.00
20	20	Murphy Co. Mechanical Contractors & Engineers, St. Louis	\$224.15	\$40.34	\$112.08	\$26.90	\$31.38	\$6.73	\$0.00	\$0.00	\$0.00	\$0.00
21	21	McKenney's Inc. Mechanical Contractors & Engineers, Atlanta	\$220.00	\$88.00	\$0.00	\$88.00	\$44.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	23	ColonialWebb Contractors, Richmond, Va.	\$209.50	\$62.85	\$62.85	\$73.33	\$0.00	\$10.48	\$0.00	\$0.00	\$0.00	\$0.00
23	11	Sterling Boiler & Mechanical Inc., Evansville, Ind.	\$201.50	\$0.00	\$201.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24		Waldinger Corp., Des Moines	\$201.00	\$66.93	\$22.31	\$22.31	\$66.93	\$0.00	\$11.16	\$0.00	\$0.00	\$11.16
25	28	J.F. Ahern, Fond Du Lac, Wis.	\$199.22	\$29.88	\$9.96	\$13.95	\$15.94	\$0.00	\$1.99	\$67.74	\$35.86	\$27.89
26	31	W.E. Bowers, Beltsville, Md.	\$196.50	\$65.50	\$65.50	\$65.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
27	29	Hill Mechanical Group, Franklin Park, Ill.	\$195.33	\$70.32	\$39.07	\$11.72	\$66.41	\$1.95	\$1.95	\$0.00	\$0.00	\$3.91
28	36	Clockwork Home Services, Sarasota, Fla.	\$194.50	\$68.08	\$0.00	\$68.08	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$58.35
29	59	Critchfield Mechanical Inc., Menlo Park, Calif.	\$190.82	\$57.25	\$38.16	\$57.25	\$38.16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
30	25	John E. Green Co., Highland Park, Mich.	\$189.50	\$37.90	\$37.90	\$37.90	\$37.90	\$0.00	\$37.90	\$0.00	\$0.00	\$0.00
31	22	Brandt Engineering Co., Dallas	\$177.60	\$115.44	\$17.76	\$44.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
32	32	Harris Cos., St. Paul, Minn.	\$176.00	\$47.52	\$79.20	\$52.80	\$52.80	\$0.00	\$14.08	\$0.00	\$8.80	\$8.80
33	27	P1 Group, Lenexa, Kan.	\$173.61	\$34.72	\$34.72	\$34.72	\$34.72	\$0.00	\$34.72	\$0.00	\$0.00	\$0.00
34	26	U.S. Engineering Co., Kansas City, Mo.	\$173.00	\$19.03	\$93.42	\$41.52	\$17.30	\$1.73	\$0.00	\$0.00	\$0.00	\$0.00
35	47	Metropolitan Mechanical Contractors Inc., Eden Prairie, Minn.	\$165.91	\$49.77	\$49.77	\$49.77	\$0.00	\$8.30	\$8.30	\$0.00	\$0.00	\$8.30
36	34	RK Mechanical, Denver	\$164.90	\$51.12	\$29.68	\$46.17	\$31.33	\$6.60	\$0.00	\$0.00	\$0.00	\$0.00
37		Midwest Mechanical, Kansas City, Mo.	\$157.40	\$15.74	\$62.96	\$62.96	\$15.74	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
38	19	JH Kelly, Longview, Wash.	\$157.29	\$0.00	\$78.65	\$78.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
39		Apollo Sheet Metal, Kennewick, Wash.	\$150.00	\$60.00	\$15.00	\$15.00	\$60.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
40	42	Coastal Mechanical, Melbourne, Fla.	\$149.44	\$43.34	\$23.91	\$17.93	\$19.43	\$4.48	\$4.48	\$0.00	\$0.00	\$35.87
41		Greenstar Services Corp., New York	\$145.60	\$25.20	\$25.20	\$25.20	\$25.20	\$0.00	\$0.00	\$0.00	\$25.20	\$0.00
42	46	Fresh Meadow Mechanical, Fresh Meadows, N.Y.	\$144.87	\$130.38	\$0.00	\$14.49	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
43	28	Ivey Mechanical Co. LLC, Kosciusko, Miss.	\$140.00	\$56.00	\$28.00	\$28.00	\$21.00	\$0.00	\$7.00	\$0.00	\$0.00	\$0.00
44		Performance Mechanical, Pittsburg, Calif.	\$140.00	\$7.00	\$133.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
45	69	University Mechanical, Mukilteo, Wash.	\$140.00	\$0.00	\$56.00	\$49.00	\$0.00	\$0.00	\$0.00	\$0.00	\$14.00	\$21.00
46	44	Bahnson Holdings Inc., Winston-Salem, N.C.	\$139.88	\$69.94	\$0.00	\$69.94	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
47	49	Worth & Co., Pipersville, Pa.	\$139.30	\$0.00	\$69.65	\$69.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
48	35	Sauer Inc., Pittsburgh	\$139.00	\$48.65	\$27.80	\$46.29	\$9.73	\$0.00	\$6.95	\$0.00	\$0.00	\$27.80
49		The Par Group, Lynbrook, N.Y.	\$138.96	\$0.00	\$46.32	\$46.32	\$0.00	\$0.00	\$0.00	\$46.32	\$0.00	\$0.00
50	55	Mechanical Inc., Freeport, Ill.	\$136.08	\$106.24	\$11.30	\$12.25	\$0.00	\$0.00	\$1.36	\$0.00	\$5.04	\$0.00



Photo: Horris Companies

the smaller stuff, but you better have a way to add value, to be part of the solution," such as using BIM for the design work or showing the owner and GC how to speed up the schedule.

FMI Corp., in its 2011 U.S. Markets Construction Overview is forecasting that sewage and waste-disposal construction will remain at a historically high level. The market has more than doubled in size over the last decade from \$10.1 billion in 1999 to \$26.9 billion in 2010. Slow, steady growth will push the market to reach \$33.7 billion in 2015. Continued growth will be spurred by necessity, as old systems fail at higher rates.

FMI also predicts that water-supply construction will see slow and steady growth after a drop of 7% in 2009. It has grown from \$7.6 billion in 1999 to \$15.5 billion in 2010. It will grow to \$21.8 billion in 2015. The aging water supply systems and occasional headlines about dramatic pipeline failures and flooding, along with EPA consent decrees, will eventually spur increases in construction levels.

The CII sector is still struggling from the lack of private money and the fact that the recession was deep and wide, affecting all markets and regions.

"Clearly in Las Vegas, we'll finish The Cosmopolitan and other than retrofit work there will be nothing there for a while," Guzzi says. "Energy efficiency work has been keeping us alive in some places. New York City has had a tough couple of years but we will see some activity there by the end of the year. Washington continues to be strong. In Florida we have some project work but hospital-ity work is gone. Texas continues to

# Giants Breakdown

Rank	Company/Location	Revenue	HVAC	Piping	Plumbing	Sheet Metal	Refrigeration	Controls	Fire Protection	Wastewater	Other
51	41 John W. Danforth, Tonowanda, N.Y.	\$136.05	\$34.01	\$28.60	\$18.02	\$18.02	\$4.10	\$1.38	\$0.00	\$27.21	\$0.00
52	39 Murray Co., Gardena, Calif.	\$136.00	\$27.20	\$27.20	\$27.20	\$13.60	\$0.00	\$13.60	\$0.00	\$27.20	\$0.00
53	54 Titan Contracting & Leasing/The Horn Cos., Owensboro, Ky.	\$135.50	\$13.55	\$20.32	\$20.32	\$0.00	\$0.00	\$6.78	\$0.00	\$6.78	\$67.75
54	Hooper Corp., Madison, Wis.	\$135.44	\$33.86	\$0.00	\$33.86	\$0.00	\$0.00	\$0.00	\$33.86	\$0.00	\$33.86
55	45 CorVal Group, St. Paul, Minn.	\$130.00	\$13.00	\$26.00	\$13.00	\$13.00	\$6.50	\$2.60	\$3.90	\$19.50	\$32.50
56	93 Egan Cos. Inc., Brooklyn Park, Minn.	\$124.47	\$31.12	\$31.12	\$31.12	\$31.12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
57	33 Fire & Life Safety America, Richmond, Va.	\$123.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$123.00	\$0.00	\$0.00
58	J.C. Cannistraro, Watertown, Mass.	\$121.00	\$40.33	\$0.00	\$40.33	\$0.00	\$0.00	\$40.33	\$0.00	\$0.00	\$0.00
59	30 Elkhorn Construction, Evanston, Wv.	\$120.30	\$0.00	\$96.24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$24.06
60	48 Sanders Bros. Inc., Gaffney, S.C.	\$119.00	\$47.60	\$23.80	\$0.00	\$23.80	\$0.00	\$11.90	\$0.00	\$0.00	\$11.90
61	43 McCarl's Inc., Pittsburgh	\$117.19	\$3.52	\$84.38	\$0.00	\$0.00	\$0.00	\$5.86	\$0.00	17.58	\$5.86
62	Roth Bros. Inc., Youngstown, Ohio	\$114.00	\$38.00	\$0.00	\$0.00	\$38.00	\$0.00	\$38.00	\$0.00	\$0.00	\$0.00
63	40 CECO Environmental, Cincinnati	\$113.90	\$0.00	\$0.00	\$0.00	\$113.90	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
64	52 John J. Kirlin, Rockville, Md.	\$113.20	\$28.30	\$28.30	\$28.30	\$28.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
65	51 Therma Corp., San Jose, Calif.	\$112.70	\$18.78	\$56.35	\$0.00	\$18.78	\$0.00	\$18.78	\$0.00	\$0.00	\$0.00
66	Reedy Industries Inc., Glenview, Ill.	\$110.00	\$55.00	\$0.00	\$11.00	\$0.00	\$44.00	\$0.00	\$0.00	\$0.00	\$0.00
67	Southern Air Inc., Lynchburg, Va.	\$110.00	\$22.00	\$22.00	\$22.00	\$22.00	\$0.00	\$0.00	\$11.00	\$11.00	\$0.00
68	50 Pierce Associates, Alexandria, Va.	\$105.00	\$34.65	\$0.00	\$34.65	\$34.65	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
69	Scheck Industries Inc., Countryside, Ill.	\$104.50	\$26.13	\$26.13	\$26.13	\$26.13	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
70	37 Starcon International, Manhattan, Ill.	\$103.00	\$0.00	\$92.70	\$10.30	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
71	78 Lee Co., Franklin, Tenn.	\$102.00	\$40.08	\$10.20	\$30.60	\$10.20	\$10.20	\$0.00	\$0.00	\$0.00	\$0.00
71	38 VSC Fire & Security, Ashland, Va.	\$99.55	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$99.50	\$0.00	\$0.00
73	60 Joule Industrial Contractors, Gibbstown, N.J.	\$98.60	\$0.00	\$98.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
74	66 Shapiro & Duncan, Rockville, Md.	\$95.21	\$42.85	\$0.00	\$28.56	\$9.52	\$0.00	\$4.76	\$0.00	\$0.00	\$0.00
75	Yearout Mechanical, Albuquerque, N.M.	\$93.82	\$13.40	\$13.40	\$13.40	\$13.40	\$0.00	\$13.40	\$0.00	\$13.40	\$13.40
76	M.B. Haynes Corp., Asheville, N.C.	\$93.32	\$23.33	\$0.00	\$23.33	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$46.66
77	61 Foley Co., Kansas City, Mo.	\$93.10	\$18.62	\$23.28	\$13.97	\$0.00	\$0.00	\$0.00	\$0.00	\$55.86	\$0.00
78	56 Letsos Co., Houston	\$91.72	\$77.05	\$1.83	\$6.42	\$6.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
79	63 Hermanson Co. LLP, Kent, Wash.	\$90.79	\$30.26	\$30.26	\$0.00	\$30.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
80	79 Dorvin D. Leis Co. Inc., Kahului, Hawaii	\$90.03	\$13.51	\$20.71	\$39.61	\$2.70	\$3.60	\$0.90	\$9.00	\$0.00	\$0.00
81	57 Grunau Co., Oak Creek, Wis.	\$87.00	\$26.10	\$10.44	\$13.05	\$8.70	\$1.74	\$2.61	\$22.62	\$1.74	\$0.00
82	73 Herman Goldner Co., Philadelphia	\$86.44	\$17.29	\$17.29	\$17.29	\$17.29	\$0.00	\$8.64	\$0.00	\$8.64	\$0.00
83	92 CCI Mechanical Inc., Salt Lake City, Utah	\$85.80	\$42.90	\$17.16	\$21.45	\$0.00	\$0.00	\$8.58	\$0.00	\$0.00	\$0.00
84	Harry Grodsky & Co. Inc., Springfield, Mass.	\$81.43	\$8.14	\$57.00	\$4.07	\$0.00	\$0.00	\$4.07	\$0.00	\$8.14	\$0.00
85	53 A.O. Reed & Co., San Diego	\$81.00	\$26.97	\$26.97	\$27.54	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
86	67 Corrigan Co. Mechanical Contractors, St. Louis	\$80.00	\$20.00	\$20.00	\$20.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
87	Pacific Rim Mechanical Contractors, San Diego	\$77.57	\$38.79	\$38.79	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
88	Lawman Heating & Cooling Inc., Sackets Harbor, N.Y.	\$77.41	\$38.71	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$38.71
89	Shoffner Kalthoff, Knoxville, Tenn.	\$76.36	\$16.80	\$10.69	\$18.33	\$10.69	\$6.11	\$0.00	\$0.00	\$0.00	\$13.75
90	65 KSW Inc., Long Island City, N.Y.	\$76.29	\$76.29	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
91	71 Charles E. Jarrell Contracting Inc., Earth City, Mo.	\$75.50	\$37.75	\$37.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
92	72 AZCO, Appleton, Wis.	\$72.80	\$0.00	\$17.47	\$0.00	\$3.64	\$0.00	\$0.00	\$0.00	\$0.00	\$51.69
93	68 McKamish Inc., Pittsburgh	\$72.50	\$7.25	\$11.60	\$10.15	\$21.75	\$0.00	\$10.88	\$0.00	\$0.00	\$10.88
94	Interstate Plumbing & Air Conditioning, Las Vegas	\$71.58	\$35.79	\$0.00	\$35.79	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
95	74 MLN Co., Houston	\$71.00	\$49.70	\$0.00	\$17.75	\$3.55	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
96	82 Environmental Air Systems, Greensboro, N.C.	\$70.00	\$35.00	\$17.50	\$17.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
97	S3H Inc., Las Vegas	\$70.00	\$23.33	\$0.00	\$23.33	\$23.33	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
98	Entech Sales & Service, Dallas	\$69.46	\$23.15	\$0.00	\$0.00	\$0.00	\$0.00	\$23.15	\$0.00	\$0.00	\$23.15
99	Mechanical Systems & Services Inc., Charlotte, N.C.	\$68.00	\$17.00	\$0.00	\$0.00	\$0.00	\$0.00	\$17.00	\$17.00	\$0.00	\$17.00
100	The Farfield Co., Lititz, Pa.	\$66.70	\$16.68	\$33.35	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$16.68



Photo: EMCOR Group

be ok as is the whole Southwest region there. Chicago is middling.”

One region that is definitely better is Northern California, especially Silicon Valley, where EMCOR is getting data center work. Data centers are spread geographically around the country but Northern California, in particular, is doing well.

For now, EMCOR is focusing on things that it can control, such as job execution and productivity.

“We have streamlined our operations and taken out \$120 million of SG&A [selling, general and administrative expense] over the last couple of years, and the majority of that is not coming back” he says. “We can operate from a much lower cost base. I don’t think anyone will ever forget how fast demand can drop.”

Then there are the things that nobody can control. Guzzi would like to see a nice hot summer. He thinks too many owners have had their equipment run to failure so EMCOR would like to have a hot summer in order to help them fix those things.

“We’d like to see more lending,” he notes. “\$4 gas is a worry. In 2008 we were able to pass on those costs; we’ll have to see in 2011. Commodity costs in general are a problem. We’ve got to hope that it doesn’t dampen construction by making projects too expensive again.”

If Guzzi had an audience with President Obama, this is what he would tell him.

“For us to get healthy, we hope Washington gets after the deficit because it puts a chill on the economy,” he says. “Some of the tax issues have to be solved. We have to end uncertainty over regulations. Cap and trade died in Congress so now they’re trying to do it through regulation with the EPA. And we have got to get unemployment under control. If it’s over 8%, it’s hard to have a broad-based commercial recovery.” **C**