

**environmentanalyst**

UK MARKET INTELLIGENCE SERVICE

**UK Environmental  
Consulting Market**

**SAMPLE REPORT**

**2019**

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This report was researched and edited by:

Liz Trew  
Editorial Director, Market Intelligence Service

Anya Hembrough  
Deputy Editor and Senior Analyst

Ross Griffiths  
Assistant Editor and Senior Analyst

Stuart Foxon  
Director

Thanks to the environmental consulting firms that have assisted us by responding to our surveys, participating in email/phone/face-to-face interviews and verifying/commenting on their company profiles.

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If you have any queries, comments or feedback, please contact:

Liz Trew

Email: [liz@environment-analyst.com](mailto:liz@environment-analyst.com)

Tel: 020 3603 2106

Environment Analyst Ltd  
Talbot House  
Market Street  
Shrewsbury  
SY1 1LG  
United Kingdom

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## 1.1 Environment Analyst

Environment Analyst (EA) is a publishing and business research organisation with a remit to track performance and opportunities within the environmental services sector, with a particular focus on the environmental consulting (EC) and the associated professional & technical support services market. Our two core products are:

### **Market Intelligence Service – Global**

### **Market Intelligence Service – UK**

These subscription services include many reports issued throughout the year, and around 60 competitor profiles. Additionally, they include environmental services business news (global and UK channels) and Market and Company Insight articles.

For more information, please visit [www.environment-analyst.com](http://www.environment-analyst.com).

*Environment Analyst* also provides a UK-focused Development + Infrastructure service. We also run conferences, awards and other events in the environmental services sector. For more information, please visit [www.environment-analyst.com/dis](http://www.environment-analyst.com/dis).

## 1.2 Report methodology and definitions

For details about the methodology and definitions used to compile this report and others in the UK Market Intelligence Service, please download the Definitions and Methodology (UK) document from the EA [website](http://www.environment-analyst.com).

Our research methodology allows for continuous adjustment of market totals and market forecasts in light of the revised company performance data, economic growth projections, and policy and other announcements impacting on the fortunes of the environmental consultancy sector.

## 1.3 Acknowledgements

We are very grateful to the environmental consultancy firms that have assisted us by completing our surveys, participating in email/phone/face-to-face interviews and verifying/commenting on their company profiles. Our thanks go to all who have helped.

## 1.4 Accessing other reports and profiles in the series

Subscribers to the EA's UK Market Intelligence Service can also download other reports in this series separately from the download page [[www.environment-analyst.com/uk-mis](http://www.environment-analyst.com/uk-mis)].

For details of how to access, please contact Faye Heslin-Jones at [ea.sales@environment-analyst.com](mailto:ea.sales@environment-analyst.com) or call (0)1743 818 008.

# AECOM



## CONTACTS

Web site	www.aecom.com
E-mail	peter.skinner@aecom.com
UK head office	Aldgate Tower, 2 Leman Street, London E1 8FA
Tel	020 7545 2000
Fax	020 7545 2099
Directors & key contacts	Andy Barker (Managing Director – environment and ground engineering, United Kingdom and Ireland); Stuart Coventry (Director – Growth, Environment and Ground Engineering Strategy EMEA & India)
Ownership	US parent AECOM Technology Corp listed on NYSE
Locations	Global (>120 countries)
Founded	1960 (AECOM launched as an independent company) [includes URS Corp – founded 1957 – from 2013/14 year of acquisition]

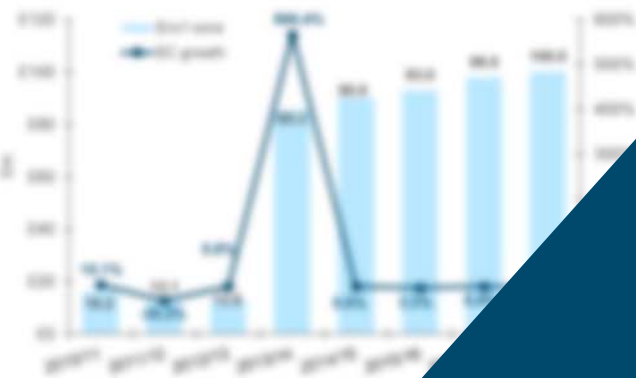
## UK VITAL STATISTICS

	2014/15	2015/16	2016/17	2017/18
Turnover, group*	£700.0m	£720.0m	£730.0m	£800.0m
Turnover, environmental services (inc. consulting)	£180.0m	£185.0m	£194.0m	£200.0m
Turnover, environmental consulting (as defined by EA)	£90.0m	£93.0m	£98.0m	£100.0m
Turnover 5-year growth, environmental consulting	512.7%	475.1%	709.9%	
Operating profit, (UK) group	na	na	na	
No of offices (environmental consulting)	35	35	35	
Staff, group (average for year, FTEs)*	7,500	7,400	7,200	
Staff, environmental services	1,800	1,850	1,900	
Staff, environmental consulting	925	950	975	
Turnover per head, environmental consulting	£97.3k	£97.9k		
No of contracts, environmental consulting	1,100	1,100		
Average contract value, environmental consulting	£81.9k	£84.9k		

## GLOBAL VITAL STATISTICS

Turnover, group	£13,803.4m	£13,700.0m		
Turnover, environmental consulting	£1,879.9m	£1,900.0m		
Staff, group	90,000			
Staff, environmental consulting	8,800			

## UK ENVIRONMENTAL CONSULTANCY REVENUES



## KEY REVENUE RATIOS

Geographic (group EC revenue)



# SAMPLE PROFILE

REGIONAL ANALYSIS

No. of EC offices

RECENT EC CLIENTS



BP, Uxman, DECC, DEFRA, DFID, EDF, Eni, E.ON, GE, HS2 Ltd, Olympic Park Legacy Company, National Grid, Network Rail, Novartis, Scottish Government, Scottish Water, Sellafield Ltd, Shell, Sustainable Energy Authority of Ireland, Syngenta, Teclon, Thames Water, TOTAL, Tuffin Oil, UTC, Yorkshire Water

SERVICES

Environmental offerings are focused within the DCS group. AECOM's core environmental consultancy is backed with broad range of environmental services in the UK - eg compliance assurance/certification, environmental health, HSE, training, planning, remediation, engineering contracting, sustainable building design, asset management, laboratory services, R&D, masterplanning, environmental economics

UK SERVICE AREA TURNOVER (£m)	2013/14	2014/15	2015/16	2016/17
Air quality	2.7	2.8	2.9	2.9
Climate change & energy	3.9	4.1	3.7	3.7
Contaminated site assessment/remediation	15.4	16.2	16.0	16.0
Ecological/wildlife services	9.8	10.4	11.6	11.6
Impact Assessment	20.3	22.0	25.4	25.4
Env. risk & due diligence	4.4	4.6	4.7	4.7
Env. management & compliance	3.7	3.9	3.9	3.9
Noise & vibration	2.6	2.8	2.8	2.8
Sustainability strategy & ESG	1.4	1.4	1.4	1.4
Waste management / circular economy	2.5	2.6	2.6	2.6
Water quality & resource management	5.3	5.6	5.6	5.6
Other services	3.4	3.4	3.4	3.4
<b>Total environmental consulting</b>	<b>£85.3</b>	<b>£85.3</b>	<b>£85.3</b>	<b>£85.3</b>
Other environmental services	104.8	104.8	104.8	104.8
<b>Total environmental services, inc. consulting</b>	<b>£190.1</b>	<b>£190.1</b>	<b>£190.1</b>	<b>£190.1</b>

ENVIRONMENT ANALYST SWOT

- S+ One of world's leading fully integrated land and EIA & sustainable development projects e.g. HS2 JV
- S+ Synergies for environmental health & power and transport), strong focus on and early
- W+ AECOM banner (when compared to some)
- W+ Whole estate in currently
- O+ Strategy in on nuclear
- O+ Focus on
- T+
- T+

**SAMPLE PROFILE**



**COMMENTARY**

AECOM is a Fortune 500 company and one of the largest global integrated consulting engineering and design firms, active in c120 countries. The company's DBFO (Design, Build, Finance, Operate) services have historically centred around four principal groups: design and consulting services (DCS); construction services (CS); management services (MS), which works with governments, and AECOM capital (ACAP) which invests in projects. Mid-2019 AECOM announces intention to spin out its 25,000-strong \$4bn MS segment. Environmental offerings are housed within DCS, which also includes architecture, cost consultancy, design, economics, energy, engineering, planning and program management technical services.

2014 saw globally transformational acquisition of NYSE-listed URS, Inc EC capabilities, instantly boosting UK EC revenue sevenfold. In UK, the merged enviro teams enjoyed an increase in environmental contracting (ecology, archaeology, noise/vibration, air quality) for major UK infrastructure projects. Recent service extensions since include: launch from UK operation of Environmental Economics business service to serve EMEA region; expansion of demolition/remediation of industrial sites to turnkey service in UK; development and publication by UK teams of a digital EIA; extension of 'Lump Sum Environment Contracting' to include both contaminated land and ecological habitat construction. In 2019 AECOM launched a large-scale testbed for natural capital, rewilding and digital technology techniques in Scotland, the world's first 'natural capital laboratory'.

Recent EC project wins include: environmental oversight and mitigation for A1 N Yorkshire motorway upgrade; EIA and permitting processes for Glyn Rhonwy pumped storage project, Llanberis; appointed Lot 2 partner for civils design and environmental services (CDES) as part of JV with Capita and INECO for H&I Phase 2b (exposure to H&I-related revenue totalling \$10m); ecology mitigation for Mersey Gateway Environmental Trust (\$1.5m); enviro services for Network Rail's Transpennine Rail Upgrade (\$1.5m); development of Manchester's clean air plan (with Arup); awarded a framework position on four year £400m Dourway decommissioning programme.

**CORPORATE DEVELOPMENTS/M&A**

1990	AECOM launches as an independent company, created through a spin-off employee-owned Technology (petroleum-refining business based in Kentucky, USA)
2001	Acquires Oscar Faber (including ECD Energy & Environmental), annual revenue c\$100m
2005	Acquires ED&W, ENSR International (US-based design & environmental consulting firm) (UK contaminated site assessment specialist)
2007	AECOM IPO on New York Stock Exchange
2010	Acquires Spanish multidiscipline design consultancy (c500 staff) from Parsons Brinckerhoff; Canadian energy infrastructure consultancy R&W with 2009 revenue of \$100m; Davis Langdon - a c2,800 global project management and cost consulting firm
2012	Acquires 180-strong Taiwanese enviroengineering consultancy
2012	Acquires 900-strong South African consulting and engineering firm; KPM, 600-strong Asian construction cost consultancy
2014	Acquires NYSE-listed firm URS Corp. for c\$4bn in cash and debt (inc. Hurl Construction acquisition) across 100 countries
2014	Acquires Madrid-based ACE International Consulting
2014	Acquires Hurl Construction Group, 700-strong construction cost consulting firm, operating in 9 US offices with 2013 revenue of \$100m
2014	Peter Skinner appointed EMEA managing director
2015	Announces launch of a contracting arm in the UK to support E 'in delivering construction services in a targeted manner within the UK construction market
2016	Appointed to lead new operations in the UK
2016	Appoints Al Harrum as chief executive
2017	Andy Barker appointed managing director
2018	FY17/18 sees 10.7% increase in revenue, driven by storm recovery work, housing EC activities, record high at \$1.5bn in revenue, reduction, etc. power plants, construction
2019	Launch of 'Natural Capital Laboratory' in Scotland
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**SAMPLE PROFILE**