



# Top 30 UK M&E Contractors

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# Contents

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**01** Introduction

**04** Top 30 UK M&E Contractors Table

**05** Brief Industry Commentary

**09** Accompanying Notes



The M&E contracting industry is unique and diverse and maintains its status as a key component within most construction projects. Building services design and technology has evolved considerably over the years, yet generally the principles have remained constant – the fundamentals of MEP are Comfort and Life Safety.

I have been in the M&E industry for 17 years and for the past 12 years I have founded and run a 25-strong Chartered M&E Quantity Surveying business. This has allowed me to have a varied exposure to multiple sectors as the business has represented 75 different developers, main contractors, M&E contractors, MEP consultants and specialist sub-contractors in that period.

Back in 2007 a survey was conducted to establish the Top 30 UK M&E contractors by turnover. This list was dominated by multi-disciplinary contractors who were strong in both the M&E and FM industries. I decided to conduct an up-to-date comprehensive report in to the current Top 30 UK M&E contractors and present my findings herein.

The Top 30 back in 2007 made for interesting reading.

NG Bailey led the table and internal MEP delivery contractors Balfour Kilpatrick and Skanska Rashleigh Weatherfoil were major players, particularly in London.

Some familiar faces who are still trading as major contractors also occupied the Top 30, such as;

Michael J Lonsdale, T Clarke, Imtech and Briggs & Forrester.

RANKING			CONTRACTOR	TURNOVER £000			DISCIPLINE
2019	2018	2007		2019	2018	2007	
1	1	1	NG Bailey	555,700	481,000	466,721	M&E, FM
-	-	2	Dalkia	-	-	428,311	M&E, Energy Management
-	-	3	Emcor Group	-	-	378,699	M&E, FM
3	3	4	Skanska Rashleigh Weatherfoil	377,230	366,890	325,468	M&E, FM
-	-	5	Balfour Kilpatrick	-	-	316,100	M&E
-	-	6	Southern Electric Contracting	-	-	306,151	M&E, FM
-	-	7	Haden Young	-	-	288,999	M&E
-	-	8	Mitie Engineering Services	-	-	281,600	M&E, FM
17	12	9	Crown House	86,530	111,400	211,873	M&E
-	-	10	Withdrawn from Table	-	-	206,079	-
4	4	11	T Clarke	326,800	311,200	193,845	M&E
-	-	12	Interserve Specialist Services	-	-	190,200	M&E, Security, FM
2	2	13	Imtech Technical Services	470,000	397,000	179,051	M&E, FM
-	-	14	GSH	-	-	157,401	M&E, FM, Energy Management
-	-	15	Integral UK	-	-	147,531	FM
-	-	16	Staveley Engineering Services	-	-	146,522	M&E, FM
-	-	17	Inviron	-	-	119,750	M&E, FM, Marine Services
5	6	18	Briggs & Forrester	262,160	222,350	114,333	M&E, FM
-	-	19	Forth Holdings	-	-	104,006	M&E, FM, Data Services
13	10	20	Gratte Brothers	121,790	150,290	102,664	M&E, FM
8	8	21	Michael J Lonsdale	180,170	173,250	99,985	M&E, Environmental Services
7	7	22	Shepherd Engineering Services	197,720	213,980	88,849	M&E, FM
9	9	23	Dodd Group	158,790	154,120	75,881	M&E, FM
-	-	24	EIC	-	-	72,828	M&E
-	-	25	Thermal Transfer	-	-	67,015	M&E
-	-	26	Mears	-	-	61,181	M&E
-	-	27	Environmental Property Services	-	-	59,624	M&E, FM
-	-	28	Norstead M&E Engineering	-	-	51,394	M&E
-	-	29	Nomenca	-	-	45,312	M&E
-	-	30	Derry Building Services	-	-	40,849	M&E

Sector Total **5,328,222**

RANKING			CONTRACTOR	TURNOVER £000			DISCIPLINE
2019	2018	2007		2019	2018	2007	
1	1	1	NG Bailey	555,700	481,000	653,409	M&E, FM
-	-	2	Dalkia	-	-	599,635	M&E, Energy Management
-	-	3	Emcor Group	-	-	530,179	M&E, FM
3	3	4	Skanska Rashleigh Weatherfoil	377,230	366,890	455,655	M&E, FM
-	-	5	Balfour Kilpatrick	-	-	442,540	M&E
-	-	6	Southern Electric Contracting	-	-	428,611	M&E, FM
-	-	7	Haden Young	-	-	404,599	M&E
-	-	8	Mitie Engineering Services	-	-	394,240	M&E, FM
17	12	9	Crown House	86,530	111,400	296,622	M&E
-	-	10	Withdrew from Table	-	-	288,511	-
4	4	11	T Clarke	326,800	311,200	271,383	M&E
-	-	12	Interserve Specialist Services	-	-	266,280	M&E, Security, FM
2	2	13	Imtech Technical Services	470,000	397,000	250,671	M&E, FM
-	-	14	GSH	-	-	220,361	M&E, FM, Energy Management
-	-	15	Integral UK	-	-	206,543	FM
-	-	16	Staveley Engineering Services	-	-	205,131	M&E, FM
-	-	17	Inviron	-	-	167,650	M&E, FM, Marine Services
5	6	18	Briggs & Forrester	262,160	222,350	160,066	M&E, FM
-	-	19	Forth Holdings	-	-	145,608	M&E, FM, Data Services
13	10	20	Gratte Brothers	121,790	150,290	143,730	M&E, FM
8	8	21	Michael J Lonsdale	180,170	173,250	139,979	M&E, Environmental Services
7	7	22	Shepherd Engineering Services	197,720	213,980	124,389	M&E, FM
9	9	23	Dodd Group	158,790	154,120	106,233	M&E, FM
-	-	24	EIC	-	-	101,959	M&E
-	-	25	Thermal Transfer	-	-	93,821	M&E
-	-	26	Mears	-	-	85,653	M&E
-	-	27	Environmental Property Services	-	-	83,474	M&E, FM
-	-	28	Norstead M&E Engineering	-	-	71,952	M&E
-	-	29	Nomenca	-	-	63,437	M&E
-	-	30	Derry Building Services	-	-	57,189	M&E

Sector Total 7,459,511

This table represents the Top 30 back in 2007, but it has been adjusted to reflect inflation at an average of 2.8% over the past 13 years. This gives us current day figures to make the table more relative.

This is my 2020 Top 30 UK M&E

Contractors table by turnover.

The previous table had a significantly higher turnover between the Top 30, however, a large portion of the previous turnover was attributed to FM. The aim of the 2020 table is to incorporate contractors who predominantly work in construction and not FM.

20 newcomers have been welcomed in to the Top 30, replacing the likes of EIC, Mears, Emcor and Dalkia.

Independent contractors including Dodd Group, Michael J Lonsdale, Vital Energi, Essex Services Group, Designer Group, HE Simm and Phoenix have more than doubled their turnover in the past 13 years.

RANKING				TURNOVER £000			DISCIPLINE
2019	2018	2007	CONTRACTOR	2019	2018	2007	
1	1	1	NG Bailey	555,700	481,000	466,721	M&E, IT, FM
2	2	13	Imtech	470,000	397,000	179,051	M&E, FM
3	3	4	Skanska Rashleigh Weatherfoil	377,230	366,890	325,468	M&E
4	4	11	T Clarke	326,800	311,200	193,845	M&E, FM
5	6	18	Briggs & Forrester	262,160	222,350	114,333	M&E, FM
6	5	NEW	SPIE	229,040	241,760	-	M&E, FM
7	7	22	SES	197,720	213,980	88,849	M&E
8	8	21	Michael J Lonsdale	180,170	173,250	99,985	M&E
9	9	23	Dodd Group	158,790	154,120	75,881	M&E, FM
10	13	NEW	Vital Energi	134,160	107,660	-	M&E, Energy Management
11	14	NEW	Essex Services Group	126,200	106,600	-	M&E
12	11	NEW	Phoenix	124,890	119,770	-	M&E
13	10	20	Gratte Brothers	121,790	150,290	102,664	M&E, Security, FM
14	18	NEW	Dornan Engineering	107,700	72,660	-	M&E
15	17	NEW	Designer Group	103,000	72,970	-	M&E
16	15	NEW	HE Simm	99,731	75,176	-	M&E
17	12	9	Crown House	86,530	111,400	211,873	M&E
18	19	NEW	Cilantro	82,000	66,602	-	M&E
19	22	NEW	Borough Engineering	80,300	53,900	-	M&E
20	23	NEW	Bancroft	77,650	53,870	-	M&E
21	20	NEW	LJJ	66,810	59,470	-	M&E
22	28	NEW	Sudlows	64,530	36,060	-	M&E, IT, FM
23	24	NEW	Gloster MEP	63,214	48,236	-	M&E
24	21	NEW	Halsion	58,457	58,331	-	M&E
25	25	NEW	Haydon ME	56,390	43,530	-	M&E
26	16	NEW	JCA Engineering	55,650	74,480	-	M&E, FM
27	26	NEW	J S Wright	54,670	42,100	-	M&E
28	29	NEW	Woodford Heating	43,590	34,010	-	M&E, FM
29	31	NEW	PIP	43,250	31,570	-	M&E
30	37	NEW	Ark M&E	42,880	18,330	-	M&E

Sector Total 4,451,002 3,998,565



# What has changed in 13 years?

Weekend Journal: The New Pranksters

## THE WALL STREET JOURNAL

FRIDAY, SEPTEMBER 12, 2008 - VOL. CCLII NO. 62

### What's News—

#### Business & Finance

Lehman was actively shopping itself to potential buyers that include Bank of America, a day after it announced moves to patch up its massive real-estate-related losses. The Fed and Treasury have been working with Lehman to help resolve the bank's troubles, including talking to potential suitors. Lehman's shares dropped 42%. **A1, A14**

■ **Troubles at Lehman** and other financial firms have policy makers struggling with what steps to take next. **A1**

■ **Lehman employees**, including top executives, have now lost an estimated \$20 billion or more in paper wealth. **C1**

■ **Wallops** said it has enough liquidity and capital to ride out the banking crisis, as it sought to reassure investors. **C1**

■ **Underwriters** sold \$225 million of Clear Channel bonds, well below the level the banks had hoped to offload. **C2**

■ **The Dow industrials** rose 364.79 points, or 1.5%, to 11,413.71.

#### World-Wide

■ **Texas residents** braced for the arrival of Hurricane Ike. Officials in Houston and nearby counties began ordering evacuations of low-lying coastal areas. The storm was expected to pick up strength and speed over the Gulf of Mexico before making landfall before dawn Saturday just south of Houston. Forecasters expect Ike to be a Category 3 hurricane with winds that could top 100 mph. **A3**

■ **Ike's projected path** puts its strongest winds and rains on a crash course with the area's refineries and chemical plants.

■ **The nation** marked the seventh anniversary of the Sept. 11 attacks with tributes and a visit to the World Trade Center site by McCain and Obama.

■ **The U.S.** has deployed commandos inside Pakistan without permission and expanded airstrikes as it steps up its battle with Islamic militants there. **A13**

■ **Militants** killed two U.S. Marines in Afghanistan, making

## Lehman Races to Find a Buyer

Bank of America Is Said to Be in Preliminary Talks; U.S. Plays Matchmaking Role

The investment bank Lehman Brothers Holdings Inc. spent Thursday energetically shopping itself to potential buyers—among them Bank of America Corp.—just a day after insisting it had found a way to patch up its massive real-estate-related losses.

Given the firm's deep financial troubles, a deal of any sort is far from certain, according to people familiar with the situation. In addition, prospective buyers, which also could include Barclays PLC, would likely want the U.S. government to help shield them from future losses from any such transaction, these people said, as happened in March, when Bear Stearns Cos. was forced into a deal to be acquired by J.P. Morgan Chase & Co. In

#### Spreading Impact

- **Lehman's woes** take heavy toll on executives and rank-and-file, who hold 25% of the firm's stock. **C1**
- **Washington Mutual** says it can ride out crisis. **C1**
- **Heard on the Street:** Vicious circle. **C12**

ter, federal officials currently aren't expected to structure a bailout along the lines of the Bear transaction or this past week-end's rescue of mortgage giants Fannie Mae and Freddie Mac.

Resolving the mess at Lehman could help stem a wave of pessimism that the U.S. financial system faces the prospect of much deeper turmoil because of bad loans and the weak economy. Late Thursday, Washington Mutual Inc. rushed out some details about its third-quarter results in hopes of ending a 34% slide in its stock price so far this week.

In better times, Lehman's Please turn to page A14

## Credit Crisis Strains Government's Options

By **JOHN HILSENKATH**, **DAVID ENRICH** AND **DEBRAK SOLOMON**

A year into a credit crisis that started with troubled mortgages to sketchy borrowers, the financial system is making some



Construction hasn't got a reputation for the most progressive industry, but in the last 13 years we have seen change to indicate that we are heading in the right direction. **Alex Wilmot**, Director of Halsion, has pointed to the Data revolution that has changed all industries, including construction. The progression of software has been incredible especially in the world of BIM, which is having a major positive impact on the M&E sector and continues to advance year on year. Whilst there has been a data revolution, Alex also states that "The welcomed focus of wellbeing of our staff within the industry both physically and mentally has also seen an encouraging move forward in recent years. The Covid-19 pandemic will most certainly see a rise in the need to keep the momentum of positive mental health at the forefront of our industry. Many staff, operatives and/or their family members will experience considerable stress and anxiety during this unprecedented situation and as an industry we need to be aware and supportive for everyone who may be suffering."

Perhaps in another 13 years we will look back and see this point as the moment compassion made it's way in to construction both as business-to-staff and business-to-business.



## Change in market appetite?

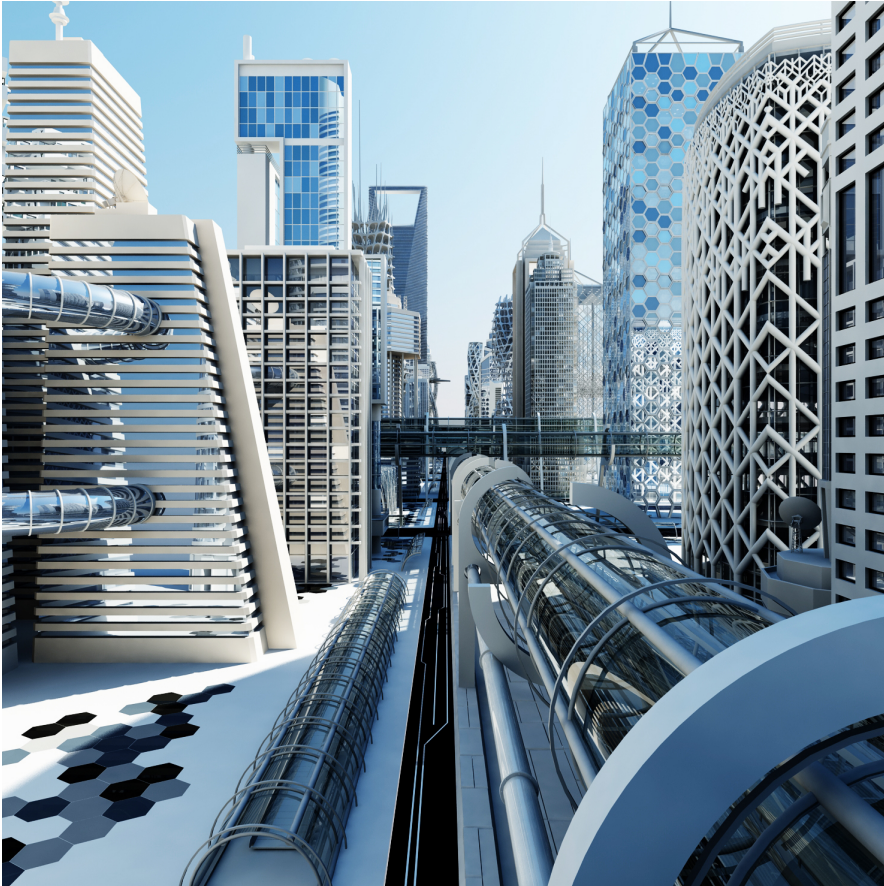


The tables show that there has been a clear shift in multi-national publicly-owned contractors being replaced by privately-owned London-centric contractors. **Nick Baish, Managing Director of Designer Group**, feels that this could be because *"The demands on M&E contractors have changed over the last 10 years and clients expect more agility and responsiveness that most public companies cannot meet."* A 10.2% increase in turnover from 2018 to 2019 represents steady growth, but it remains to be seen if this level of growth will be maintained in 2020.

There are a considerable amount of new entrants in the Top 30 table. The residential sector has provided a significant amount of this turnover and this can, in part, be pinned on the explosion in London of high-rise residential projects, which were almost non-existent 13 years prior. Nick Baish points out that *"Back in 2007 there was a drive by most contractors to secure turnover on public sector frameworks, such as the Building Schools for Future Programme and Hospital PFI/PPP contracts."* These frameworks were previously dominated by larger contractors, but they were phased out a number of years ago.



## What does the future look like?



Procurement routes have become somewhat of a pendulum over the last 15 years swinging from single stage D&B to two-stage traditional. Nick Baish agrees that *"The market over the next few years will move back to a client-led approach of single stage D&B to reflect the sentiment that it will no longer be a contractors market."* This could lead to more market share being taken by contractors who have more risk appetite.

There is also an expectation that data centres, infrastructure and mid-market/PRS/affordable housing residential units will lead the way in the medium-term. All of the contractors within the current Top 30 are already strong within at least one of the aforementioned sectors, but may yet diversify over the next few years to limit exposure to any one market.

**Martin McEvoy, Managing Director of Imtech**, explains that *"Construction is an industry where we are the first to be affected by a recession and the last to come out of one. This means that investment is generally curtailed in a recession. Offsite manufacturing, innovative products and new assembly techniques in particular have come a long way in the past 13 years, but not as far as it could have and with the current climate there will be an opportunity to modernise the industry further - companies need to be brave."*

## What does the future look like (cont...)?



It is imperative to maintain a steady flow of investment within building services as we are at the forefront of decarbonising buildings in the modern age. Martin McEvoy also believes that *“This will lead to many more M&E contractors evolving into energy and environmental sectors and will make the industry an exciting place to work particularly for younger people.”*

The current climate will have a long-lasting impact on every industry. Within construction we will have no choice but to become more lean, think differently, work differently and Martin McEvoy has no doubt that this will lead to *“Innovation not just in offsite manufacturing, but innovation in products and innovation in how we work on site.”*

As for the year 2033, it's difficult to predict exactly what the M&E industry will look like, work like, who will still be around, who will make up the Top 30. Will we see more use of robotics, will we see more software implemented to reduce the human workload? It's irrelevant what we predict; we should be spending more time creating the future rather than allowing the perception of the future to dictate what we do in the present.

## **Accompanying Notes**

This list is indicative, it is not exhaustive or definitive and is the opinion of Gokhan Hassan, who compiled the data.

The data has been compiled from a mixture of accounts provided directly by contractors and financial information available publicly.

The contractors identified are those whose core services are within the M&E construction installation sector, some of whom also offer FM services.

Contractors who are predominantly FM or Utilities are not included in the table, notably; Integral UK, Arthur McKay and SSE.



## GHCS

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