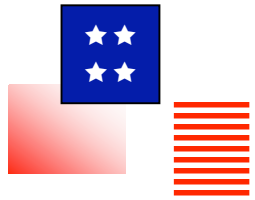


ENVIRONMENTAL BUSINESS JOURNAL®

Strategic Information for a Changing Industry



CLIMATE CHANGE BUSINESS JOURNAL™

Industry Overview & Data Report

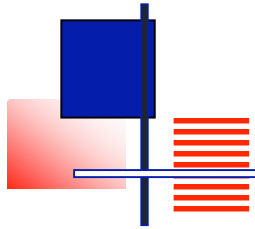
Grant Ferrier

Editor, Environmental Business Journal

Editor, Climate Change Business Journal

President, Environmental Business International, Inc.

Chairman, Environmental Industry Summit IX, March 9-11, 2011



Presentation Outline

Environmental Industry

2009 and 2010 Review

Outlook for 2011-2012

2011 EBJ Snapshot Survey Results

Focus on Environmental Consulting &
Engineering Segment

Global Environmental Markets

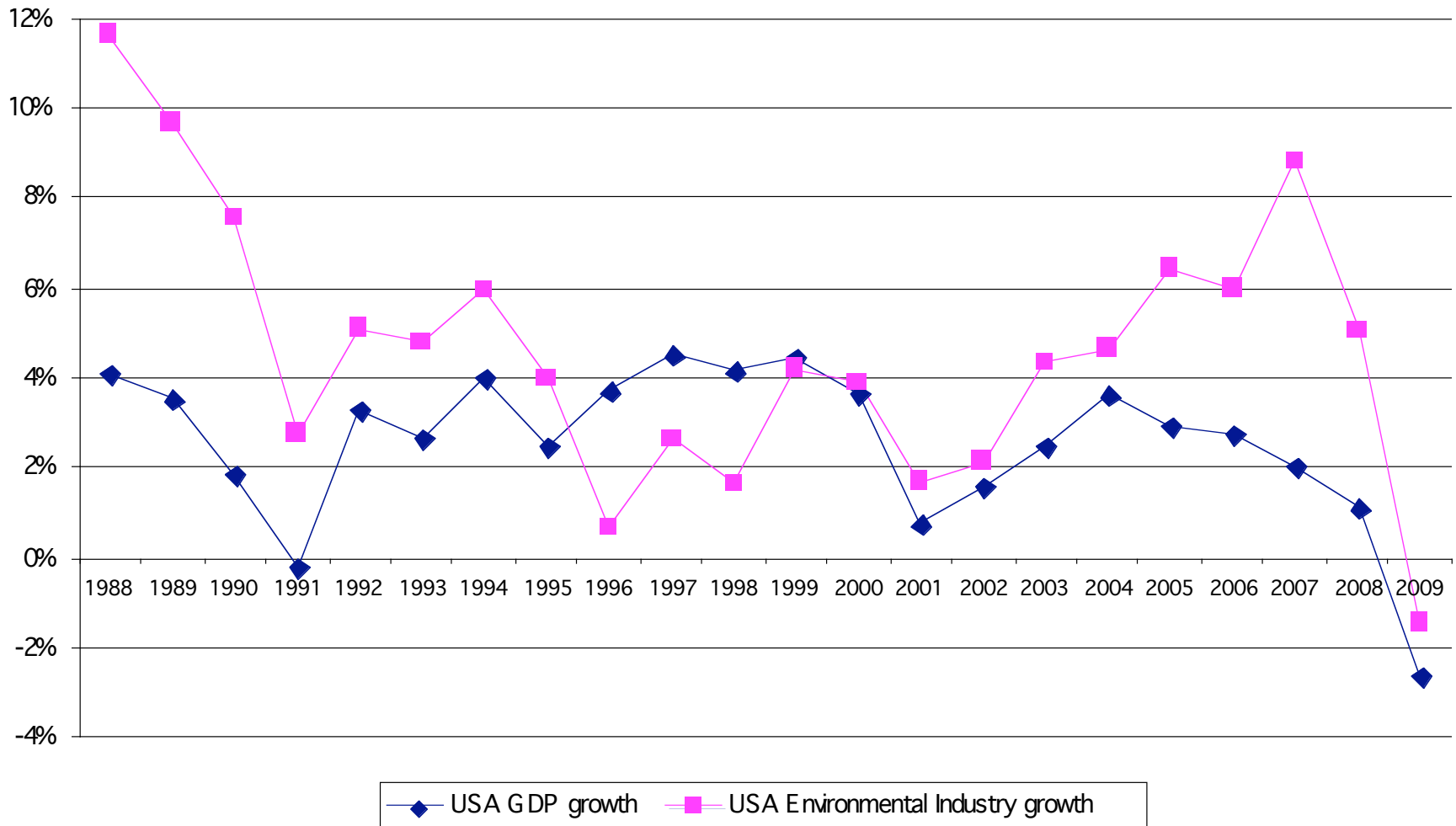
Climate Change Industry



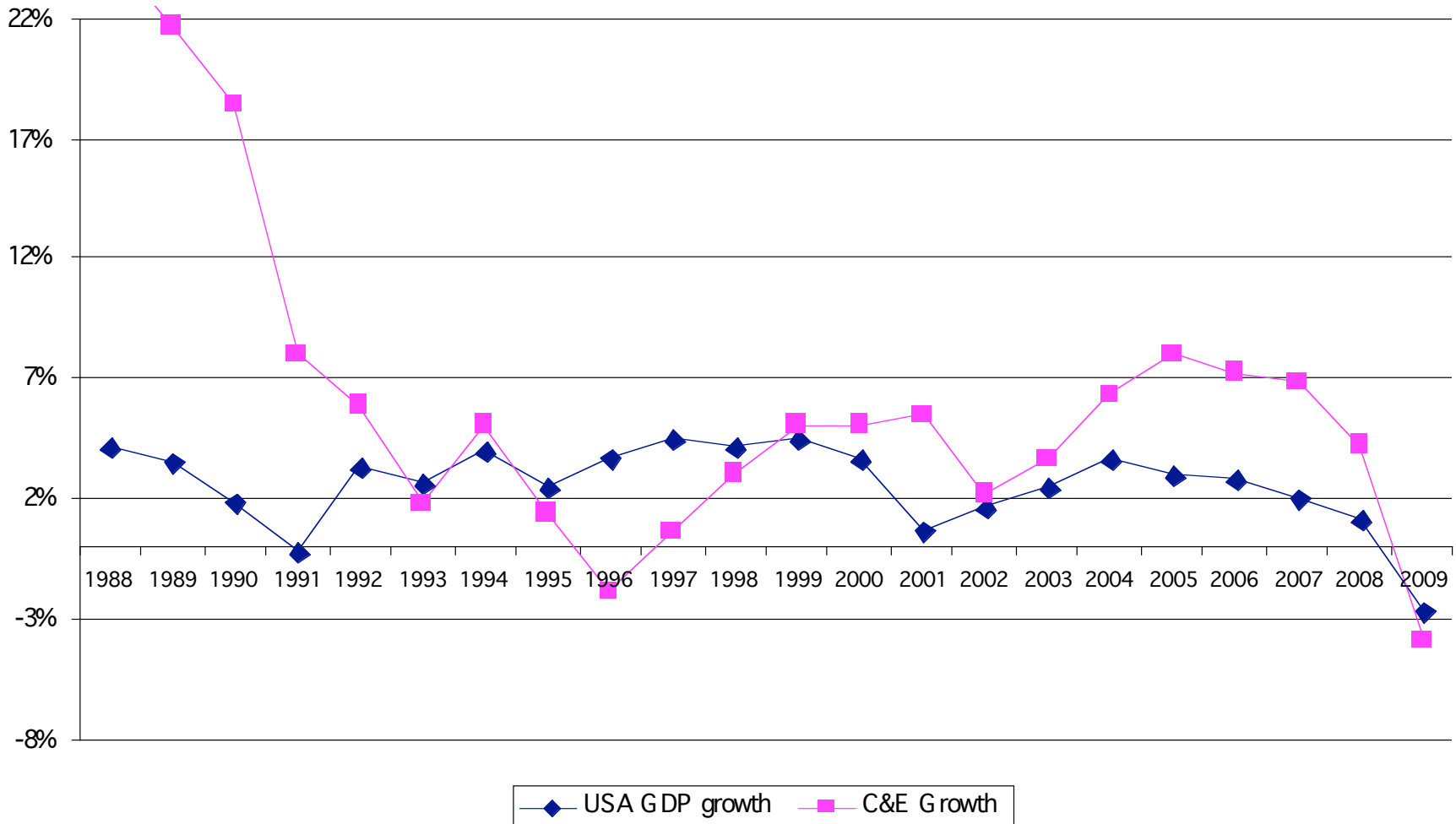
How Bad Was It: 2009 Environmental Industry

U.S. Revenues by Segment in \$bil	2008	2009	2009 Growth
Analytical Services	1.95	1.86	-4.6%
Wastewater Treatment Works	40.98	44.05	7.5%
Solid Waste Management	53.45	51.07	-4.4%
Hazardous Waste Management	9.18	8.64	-5.9%
Remediation/Industrial Svcs.	12.51	11.93	-4.7%
Consulting & Engineering	26.69	25.66	-3.9%
Water Equipment & Chemicals	28.52	26.62	-6.7%
Instruments & Info. Systems	5.34	5.21	-2.4%
Air Pollution Control Equipment	17.97	15.85	-11.8%
Waste Management Equipment	11.40	10.96	-3.9%
Process & Prevention Tech.	1.91	1.80	-5.8%
Water Utilities	39.22	40.59	3.5%
Resource Recovery	28.50	24.51	-14.0%
Clean Energy Systems & Power	31.45	35.84	14.0%
Totals:	309.1	304.6	-1.4%

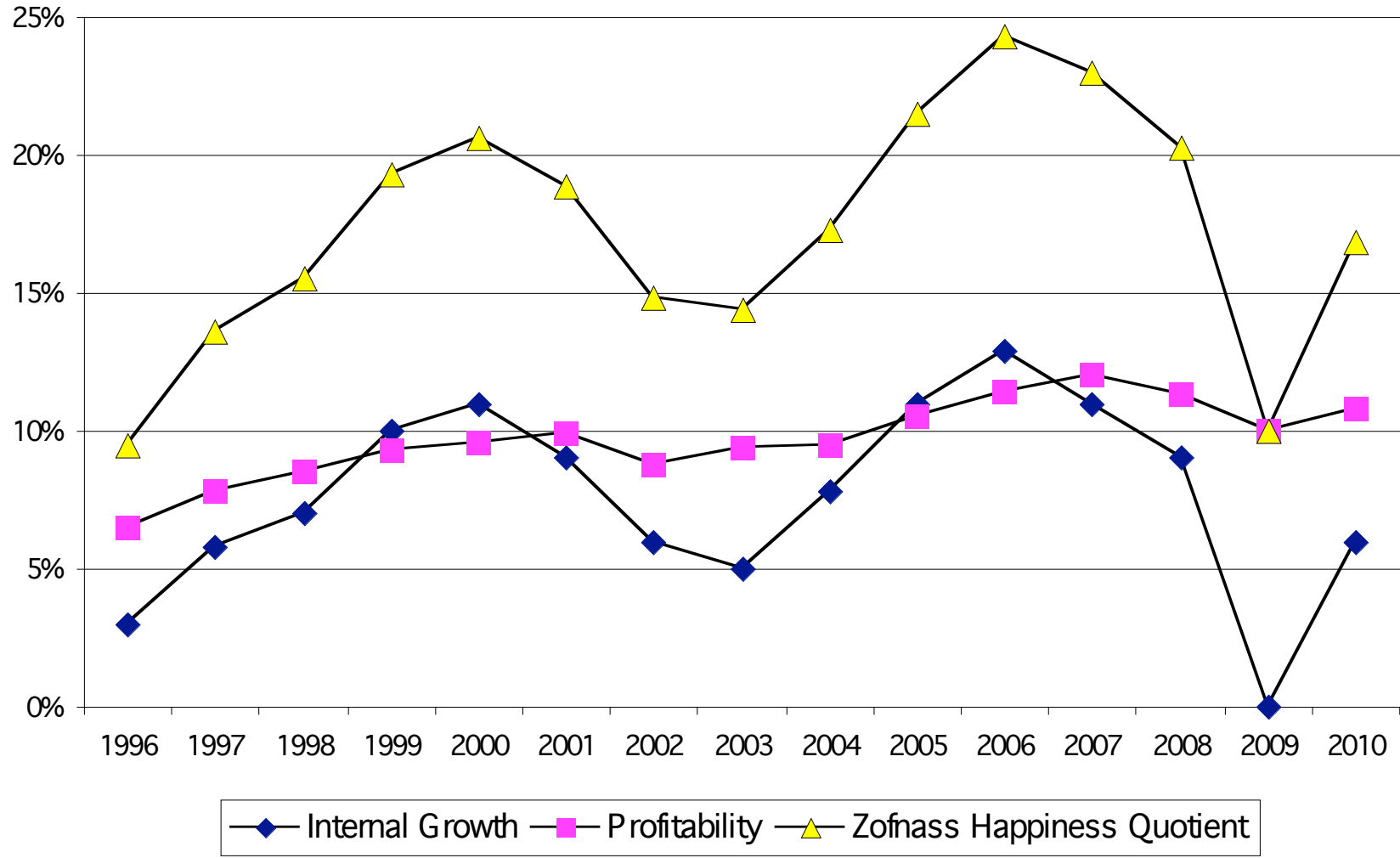
How Bad Was It: EI vs. US GDP Growth



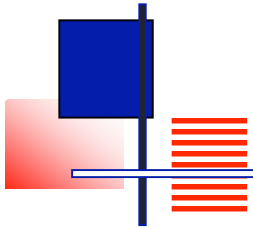
How Bad Was It: C&E vs. US GDP Growth



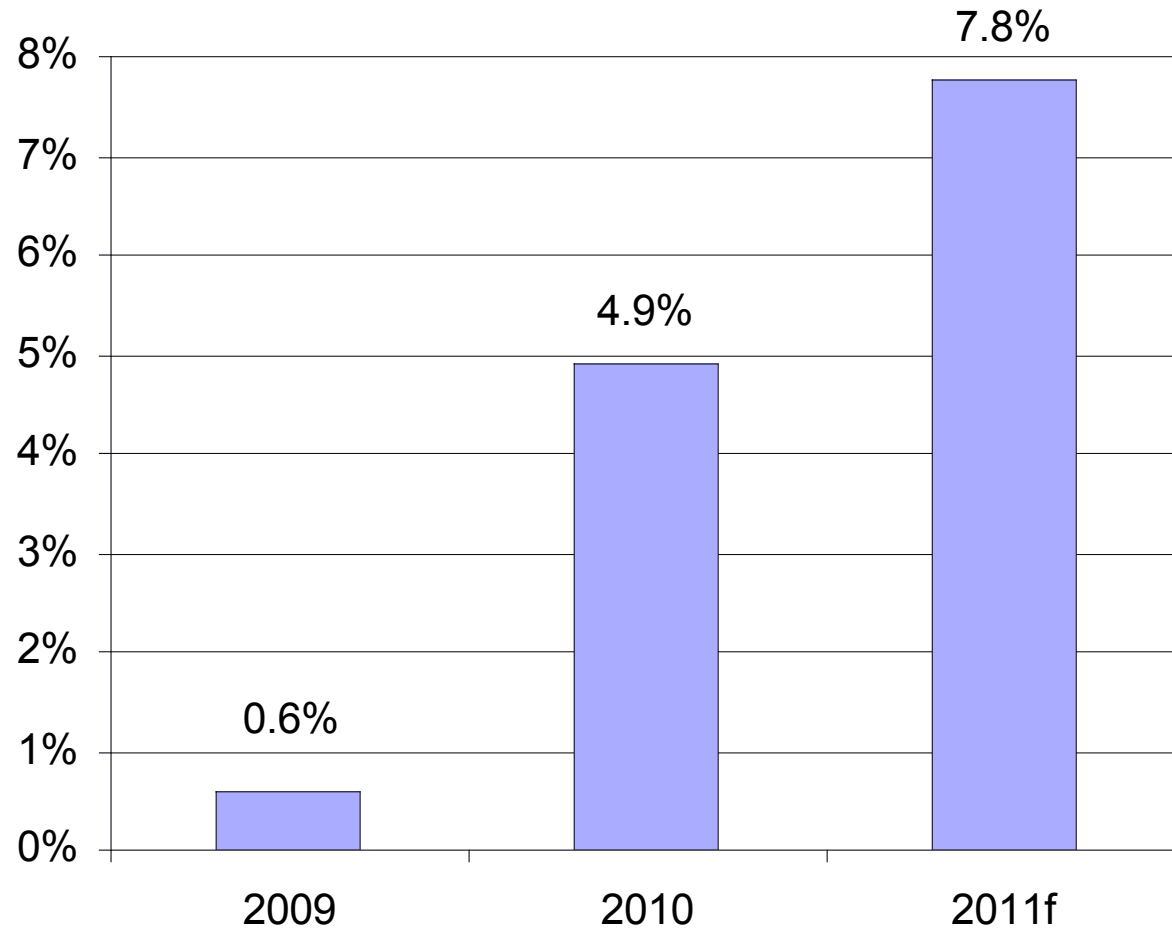
How Much Better Was it in 2010?



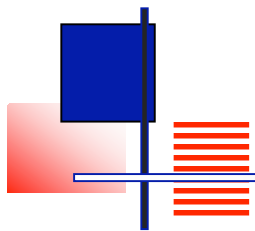
Source: Environmental Financial Consulting Group, New York



EBJ Snapshot Survey 2011 Results: Mean Growth



Source: *Environmental Business Journal 2011 Snapshot Survey*



EBJ Snapshot Survey 2011 Results: Mean and Median Growth

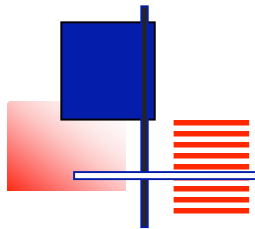
Mean Growth by Environmental Service Sector

	2009	2010	2011
All	0.6%	4.9%	7.8%
C&E	0.7%	4.3%	7.9%
Remediation	4.2%	11.1%	11.8%
Labs	0.7%	3.3%	4.8%

Median Growth by Environmental Service Sector

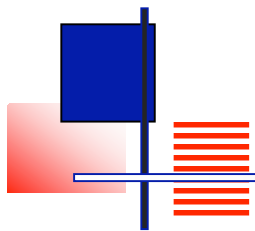
	2009	2010	2011
All	0-2%	2-4%	6-8%
C&E	0-2%	2-4%	6-8%
Remediation	4-6%	8-10%	8-10%
Labs	2-4%	0-2%	2-4%

Source: *Environmental Business Journal 2011 Snapshot Survey*



EBJ Snapshot Survey 2011 Results: January-February 2011: 324 Respondents

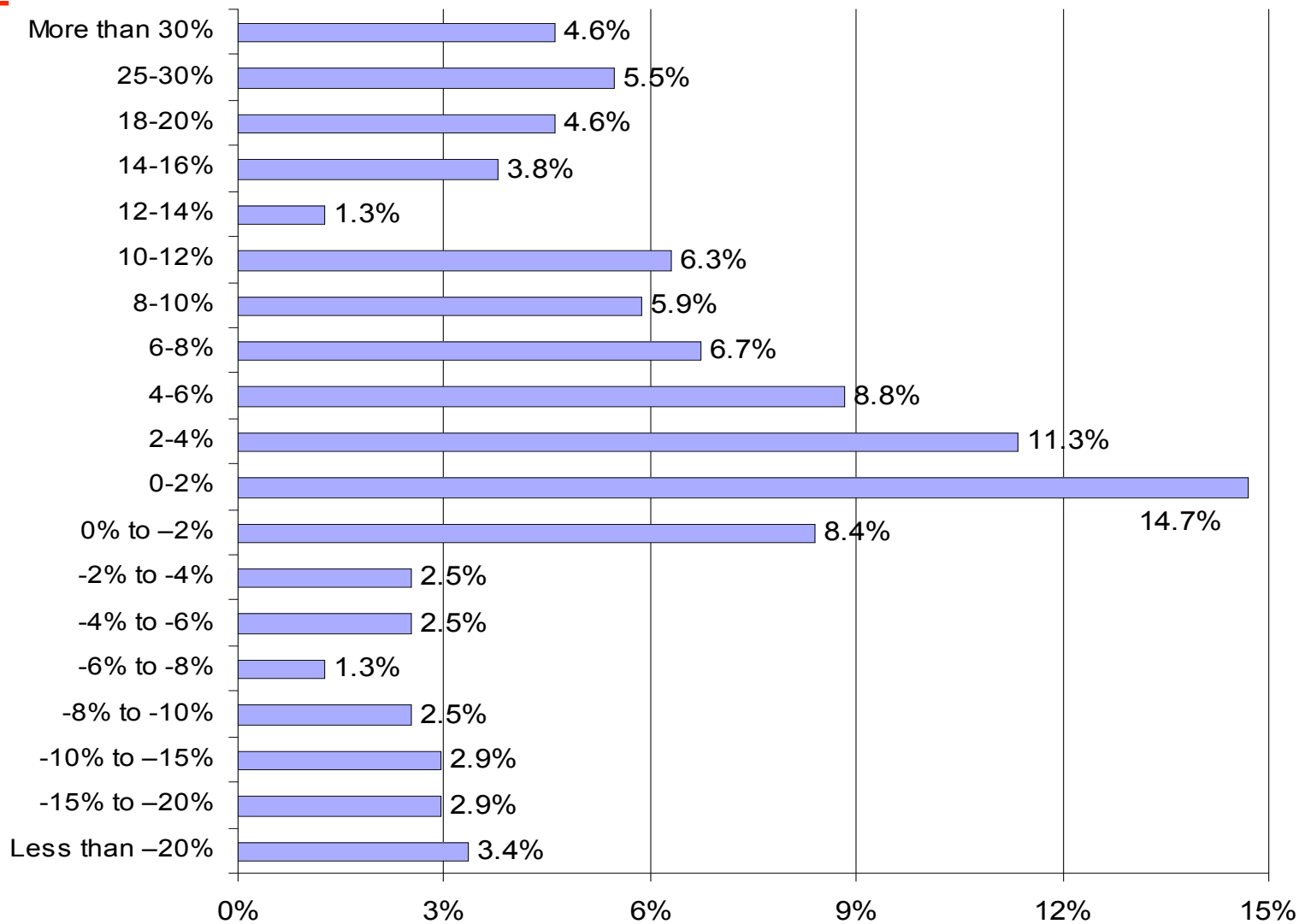
Laboratory Testing or Analytical Services	7.8%
Solid Waste Management	1.2%
Hazardous Waste Management	0.8%
Remediation or Industrial Services Contracting	9.5%
Environmental Consulting & Engineering	47.3%
Sustainability or Climate Change Consulting	3.7%
Water Equipment and Chemicals	2.5%
Instruments/Information Systems & Software	1.6%
Air Pollution Control Equipment	2.9%
Waste Management Equipment	2.1%
Renewable/Clean Energy Systems & Equipment	2.1%
Renewables/Energy Efficiency Services	2.9%
Water/Wastewater Utility	1.6%
Non-Profit/NGO	4.5%
Government	4.1%
Investment/Business Consultant	2.5%
Insurance/Accounting/Legal Services to Env'l Cos	0.4%
Industry/Customer/User Community	2.5%



EBJ Snapshot Survey 2011 Results: January-February 2011: 324 Respondents

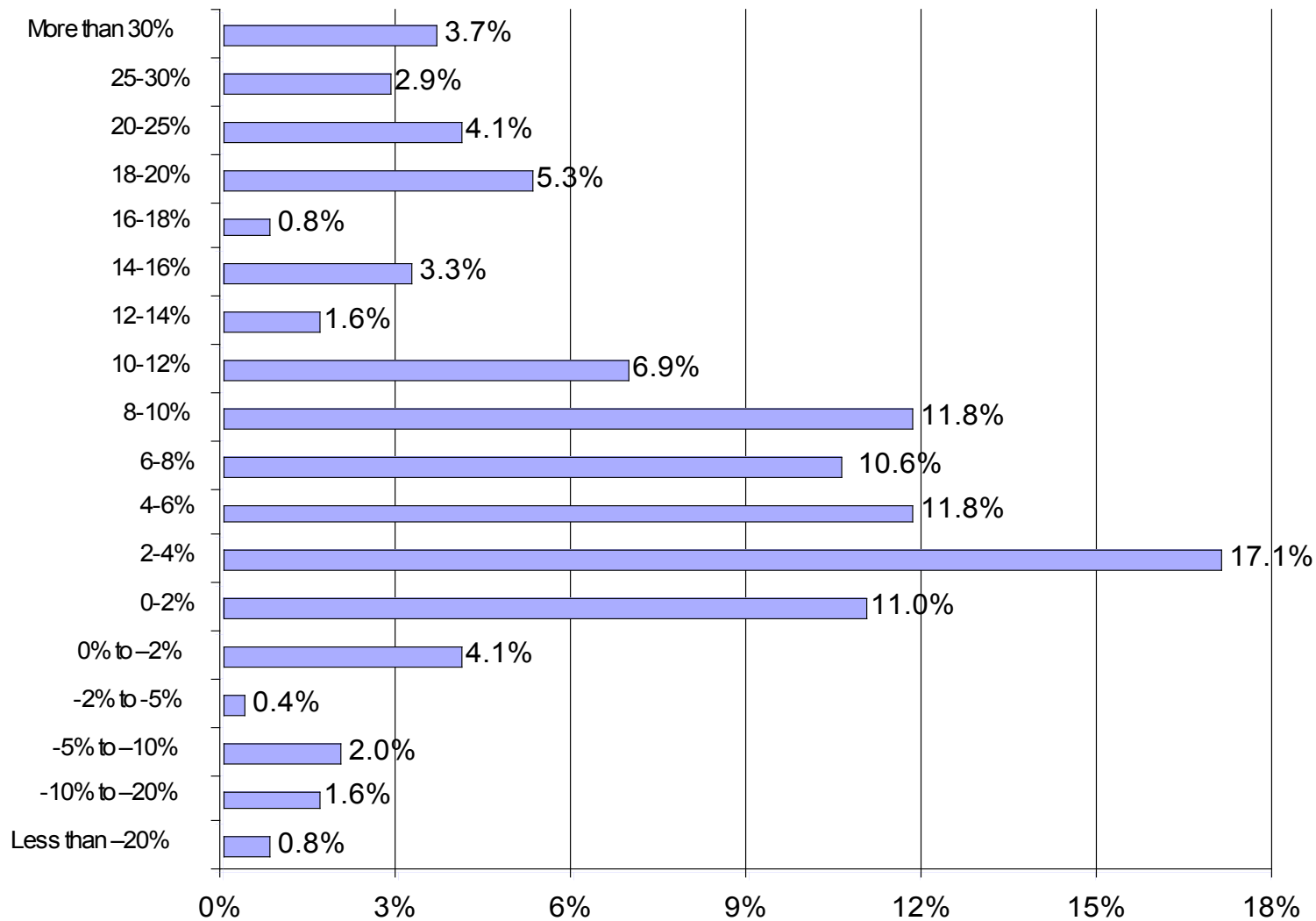
\$0-3 million in revenue	31.7%
\$3-10 million in revenue	14.5%
\$10-20 million in revenue	9.2%
\$20-50 million in revenue	11.8%
\$50-100 million in revenue	6.5%
\$100-500 million in revenue	12.5%
\$500-1,000 million in revenue	3.8%
More than \$1 billion in revenue	9.9%

2010 Growth: 27% declined; 26% grew 0-4%; 28% grew 4-12%; 19% grew 12% or more

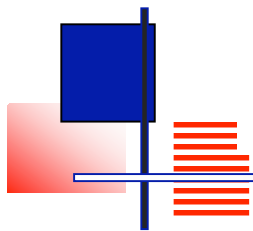


Source: *Environmental Business Journal 2011 Snapshot Survey*

2011 Forecast: 9% decline; 28% grow 0-4%; 41% grow 4-12%; 22% grow 12% or more



Source: *Environmental Business Journal 2011 Snapshot Survey*



Ranking of Market Drivers in 2011: Positives

	V Strong: Positive	Strong: Positive	No Impact	Strong: Negative	V Strong: Negative
Activity in energy & power sector	14%	51%	30%	4%	1%
Activity in extraction (O&G, shale, mii	13%	44%	39%	4%	1%
Federal air/water/waste regulations	9%	55%	29%	8%	1%
Programs in clean energy infrastructure	8%	50%	38%	4%	0%
State of the economy	9%	44%	9%	33%	6%
Obama administration env'l policy	6%	53%	26%	11%	4%
Corporate sustainability initiatives	7%	46%	39%	8%	0%
U.S./regional/state climate change p	6%	43%	42%	6%	3%
Federal budgets	10%	33%	27%	28%	3%
Price of oil	8%	36%	36%	16%	5%
ARRA or the U.S. stimulus package	8%	35%	47%	9%	1%

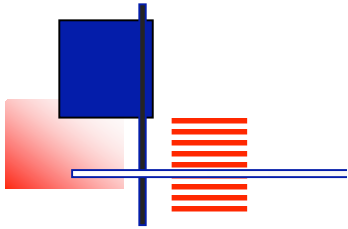
Source: Environmental Business Journal 2011 Snapshot Survey of 324 executives; Question was: Please assess the expected impact of market drivers in 2011 on your company's ability to generate revenues.



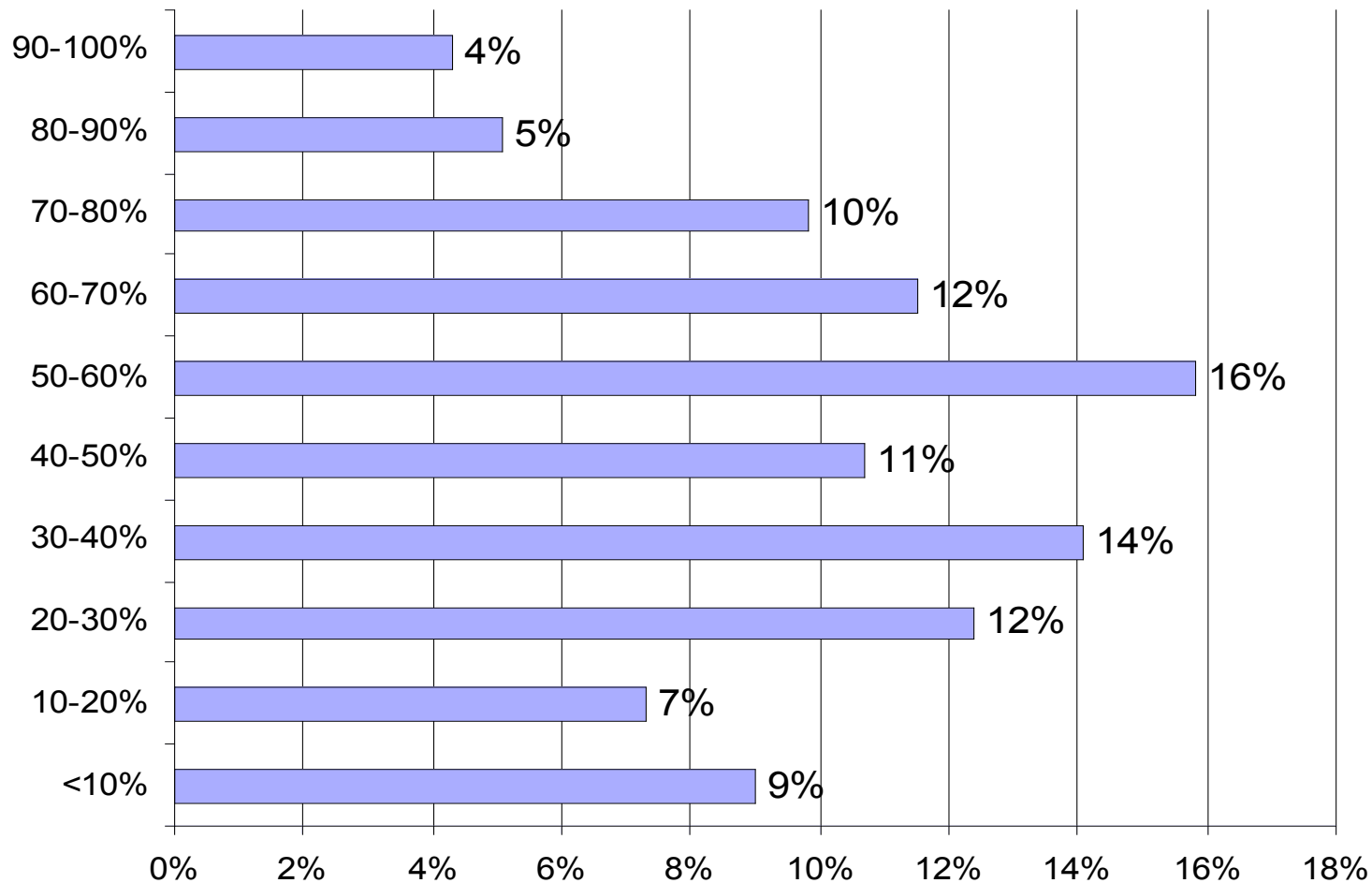
Ranking of Market Drivers in 2011: Negatives

	V Strong: Positive	Strong: Positive	No Impact	Strong: Negative	V Strong: Negative
Programs to develop 'green jobs'	6%	34%	55%	5%	1%
International climate change policy	5%	30%	55%	7%	3%
Availability of credit	5%	30%	39%	21%	6%
Popular perceptions on climate change	2%	34%	60%	5%	1%
Property values	4%	25%	50%	21%	1%
Stock market performance	2%	31%	60%	7%	1%
Value of the dollar	0%	29%	56%	15%	1%
Level of consumer spending	2%	21%	61%	15%	3%
International climate change negotia	1%	23%	72%	4%	1%
Municipal budgets	6%	25%	29%	28%	11%
State budgets	6%	25%	25%	34%	11%
U.S. Congress rollback of envi'l regs	3%	19%	25%	41%	11%

Source: Environmental Business Journal 2011 Snapshot Survey of 324 executives; Question was: Please assess the expected impact of market drivers in 2011 on your company's ability to generate revenues.

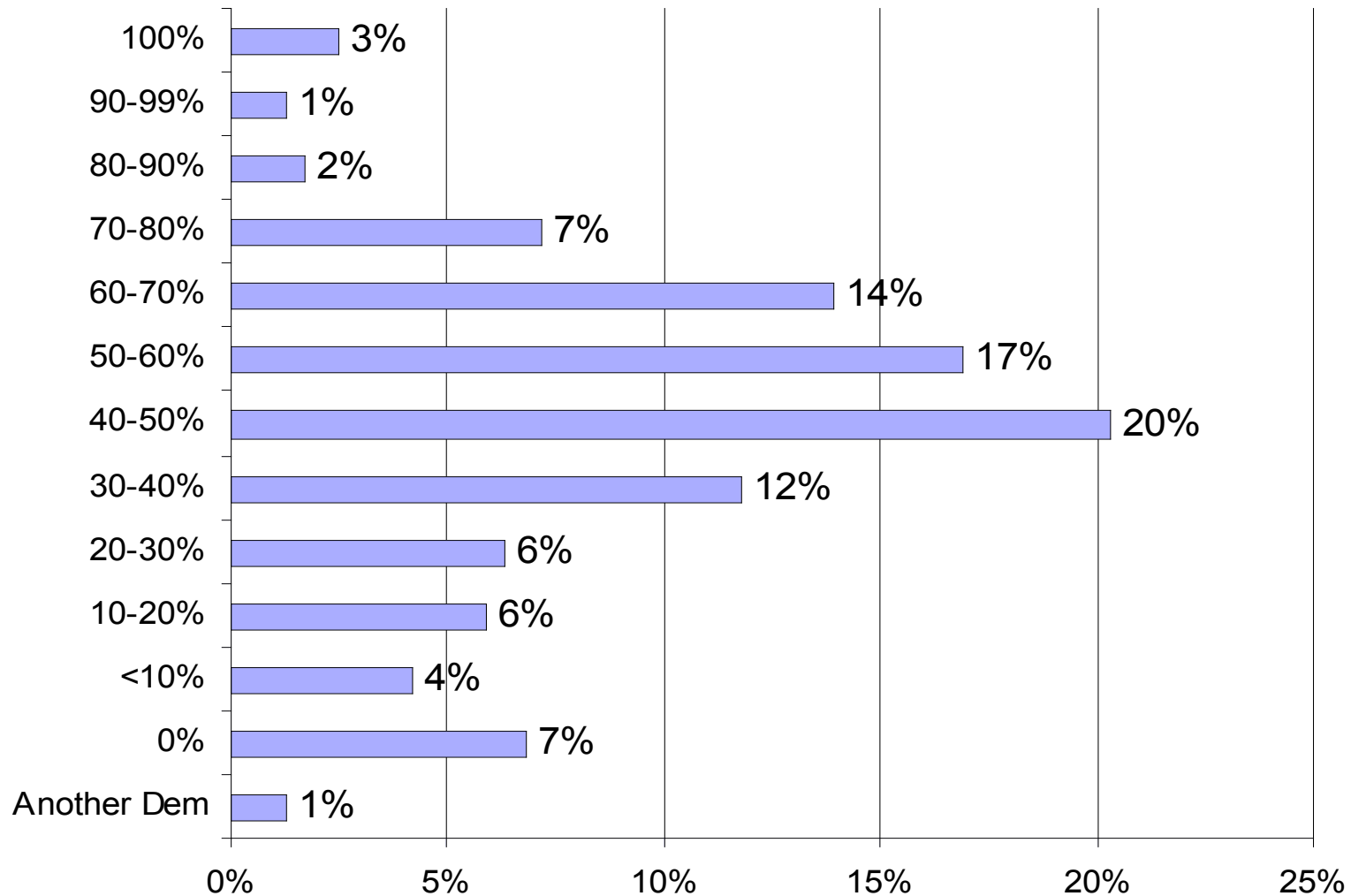


What is the likelihood that Congress will succeed in preventing EPA from regulating greenhouse gas emissions under the Clean Air Act?



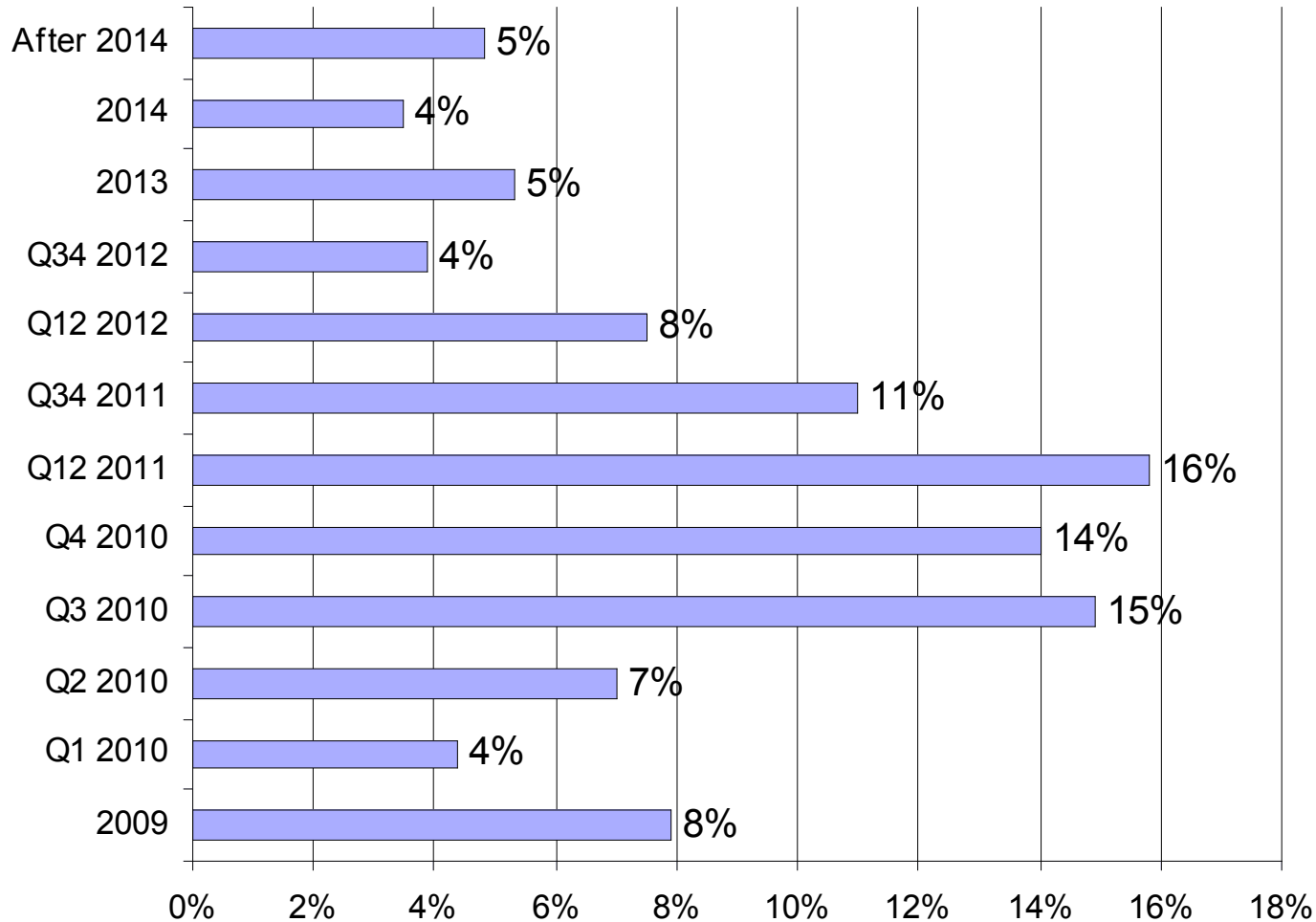
Source: *Environmental Business Journal 2011 Snapshot Survey*

What is the likelihood of Barack Obama getting re-elected in 2012?

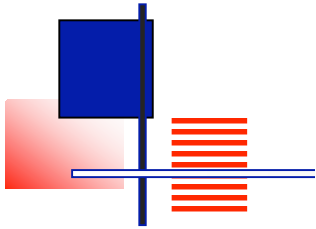


Source: *Environmental Business Journal 2011 Snapshot Survey*

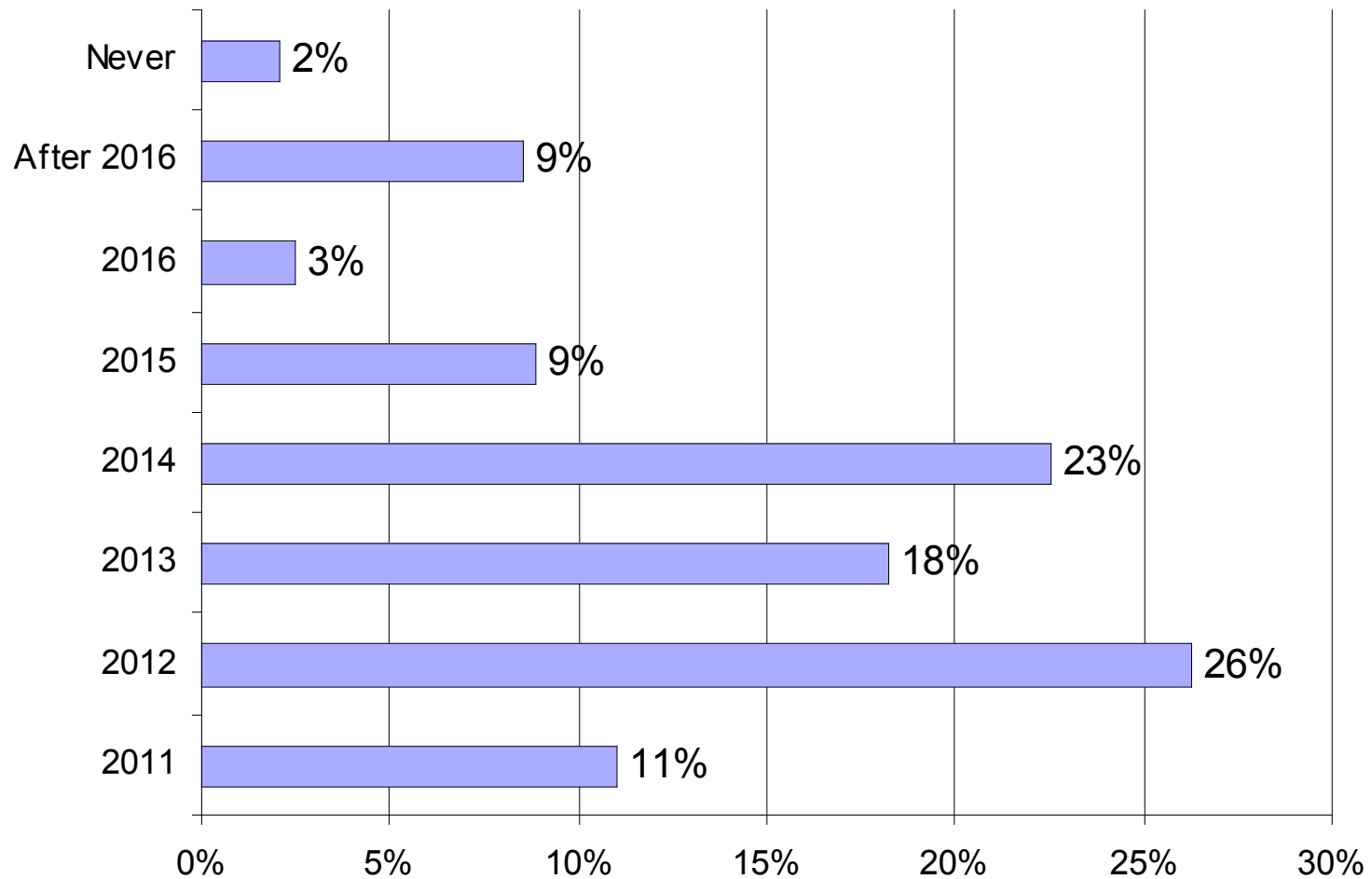
When do you think was/will be the low point of unemployment in the USA?



Source: *Environmental Business Journal 2011 Snapshot Survey*

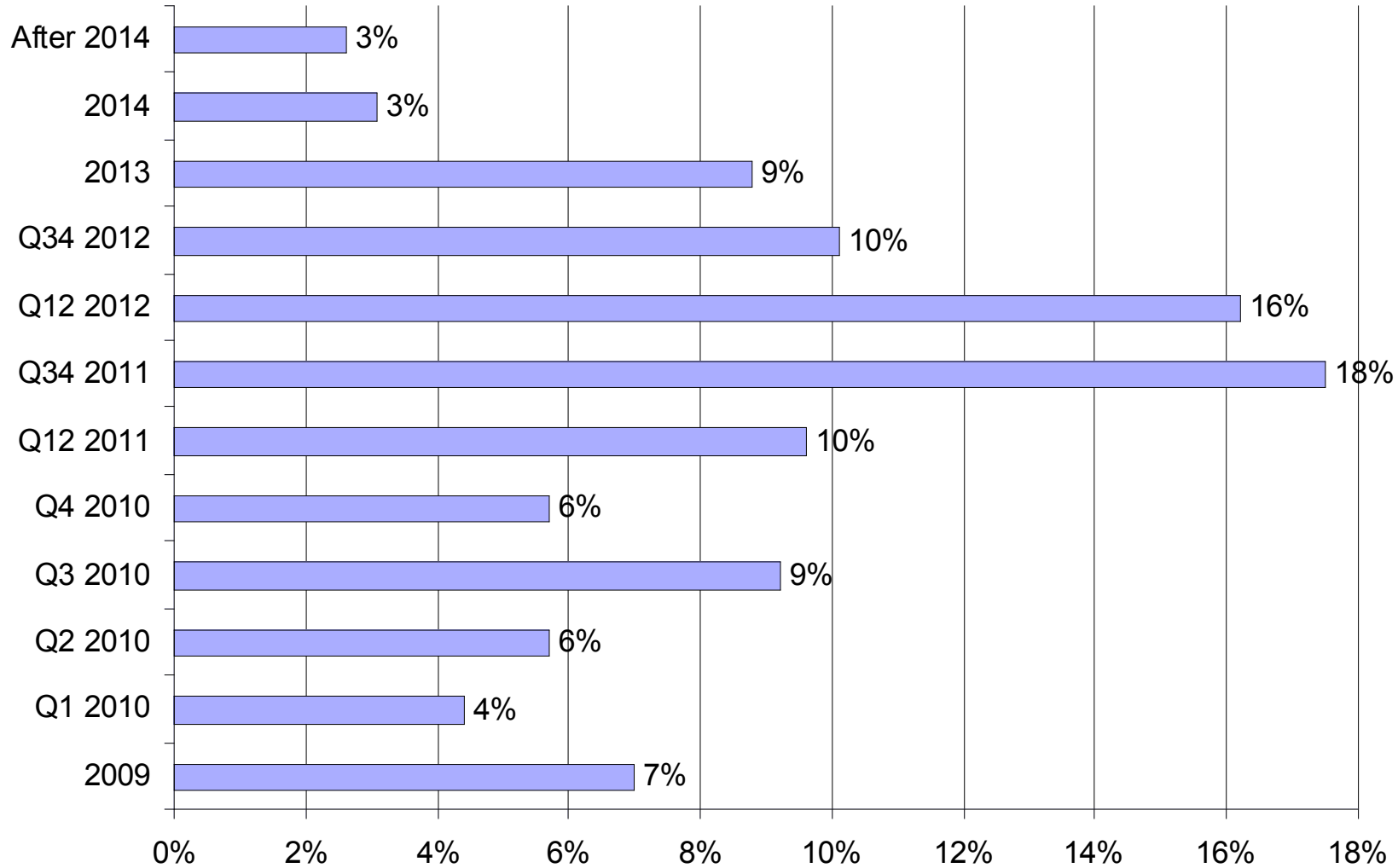


When do you think the Dow Jones Industrial average will return to its high point of around 14,000 from October 2007?



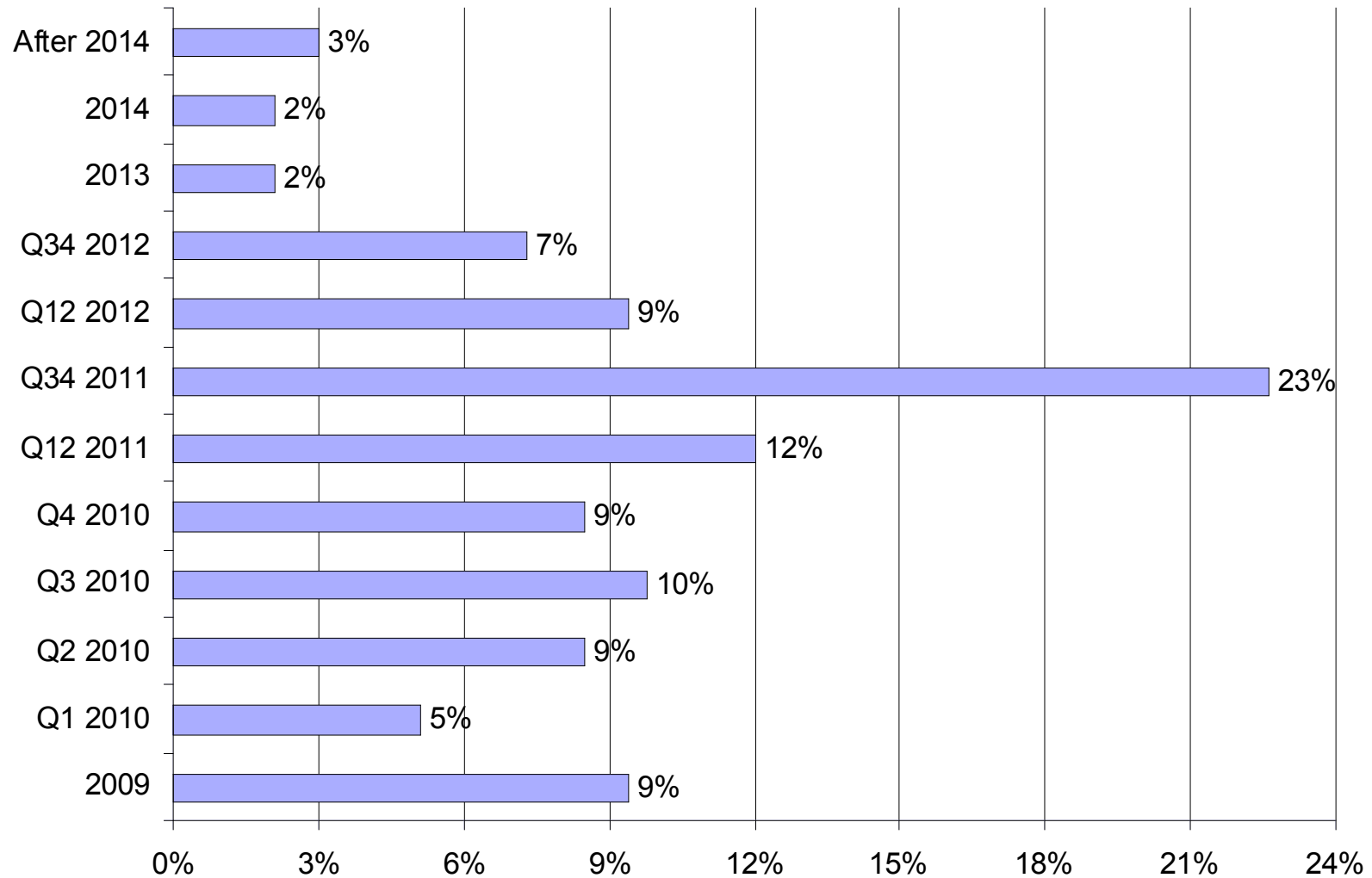
Source: *Environmental Business Journal 2011 Snapshot Survey*

When do you think was/will be the low point of commercial property values in the USA?

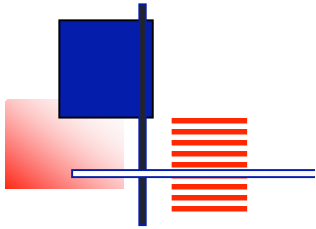


Source: *Environmental Business Journal 2011 Snapshot Survey*

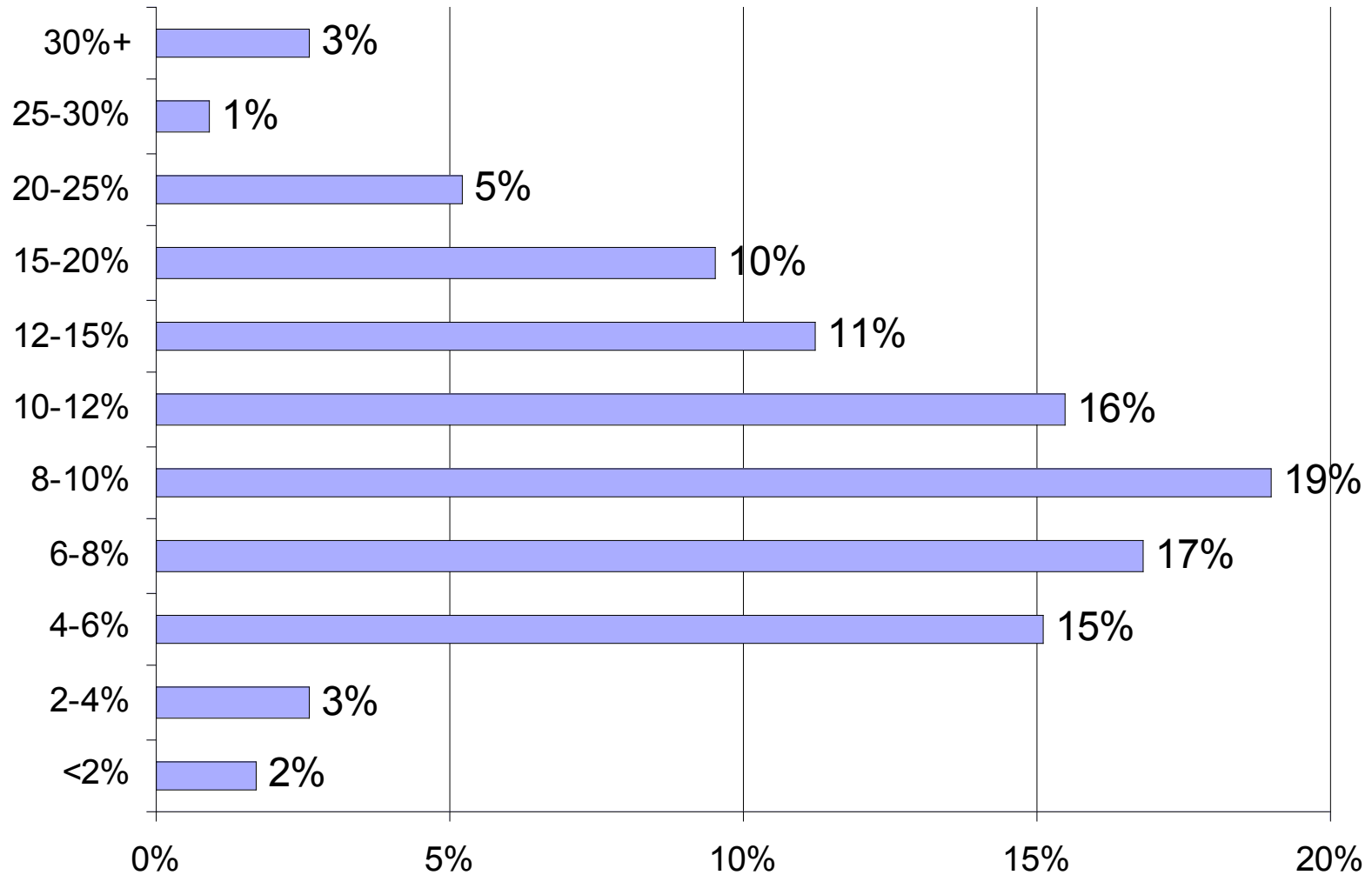
When do you think was/will be the low point of residential property values in the USA?

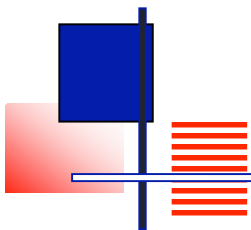


Source: *Environmental Business Journal 2011 Snapshot Survey*

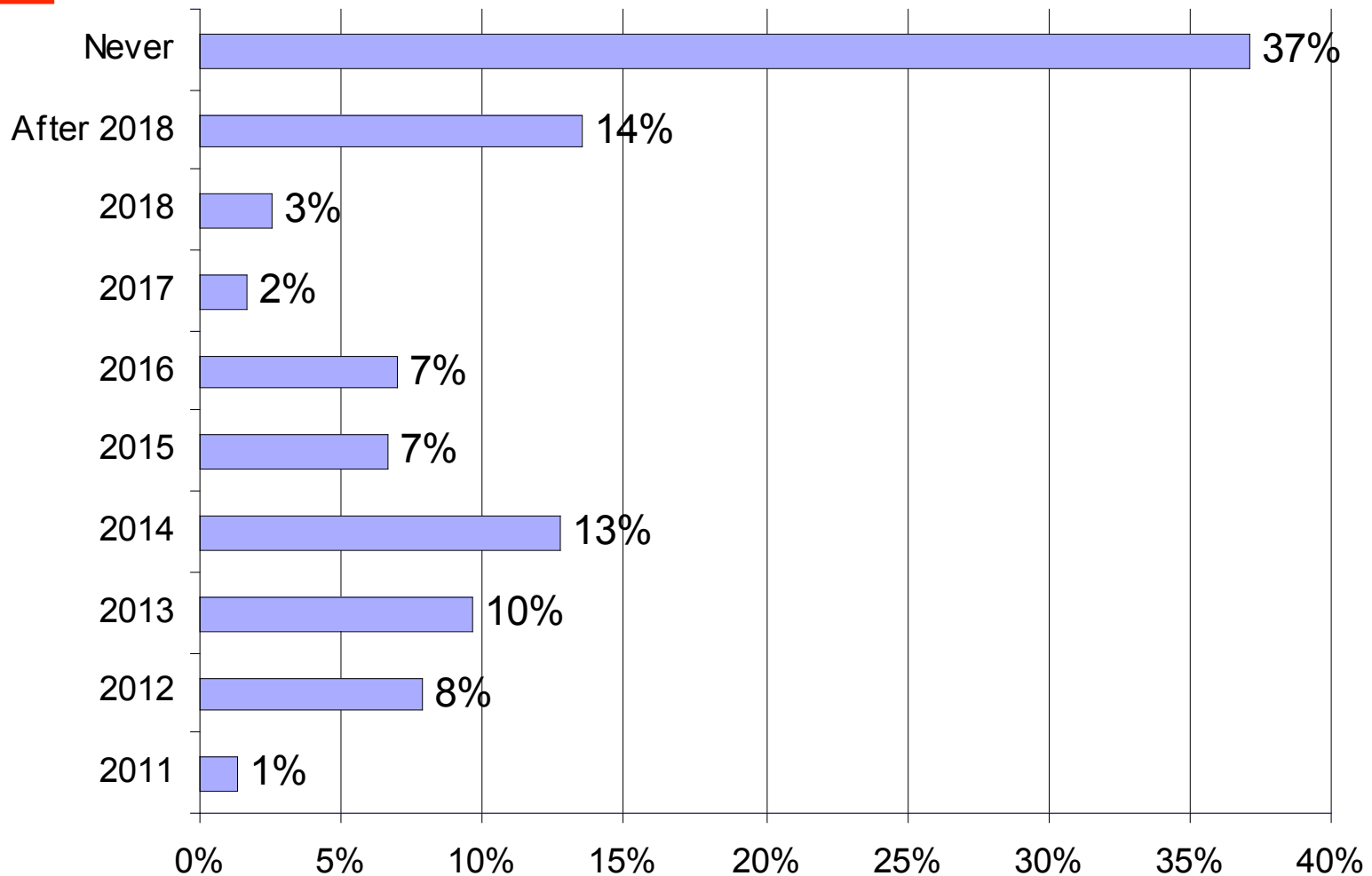


Non-hydro renewables were responsible for 2.4% of U.S. electricity generation in 2006 and 3.6% in 2009. What percentage will non-hydro renewable sources will represent in 2020? (includes wood, municipal solid waste, landfill gas, sludge, biomass, geothermal, solar and wind)

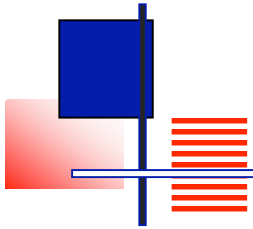




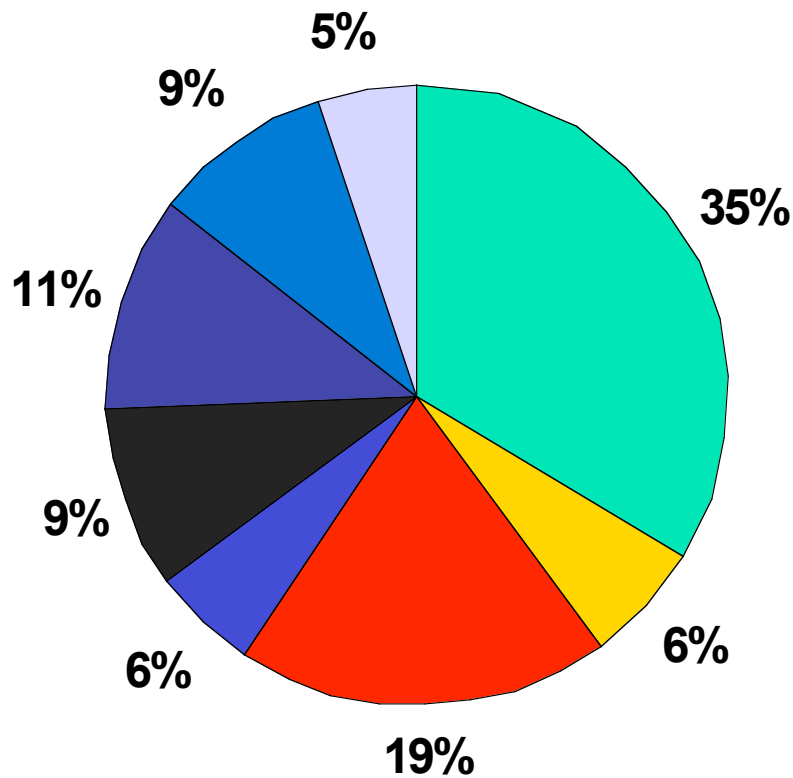
When will the US institute a cap-and-trade system similar to the EU-ETS system?



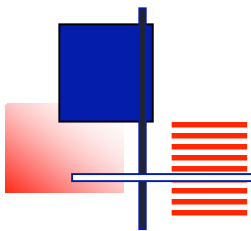
Source: *Environmental Business Journal 2011 Snapshot Survey*; 2009 response: 68% said 2010-2012 and never was 13%; 2010: 37% said 2010-2012 and never was 25%.



2009 C&E Revenue by Client



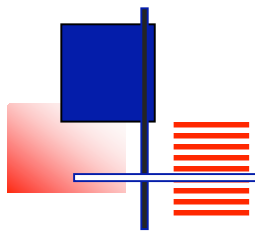
Source: Environmental Business International Inc., Annual model of the C&E industry



Ranking of Environmental Industry Client Sectors in 2011-2013

	Strong	Good	Slow/Flat	Decline	2010 Rank
Shale gas exploration & production	52%	28%	20%	0%	1
Renewable energy development	41%	41%	18%	0%	3
Petroleum extraction & refining	36%	35%	29%	0%	2
Mining	28%	38%	32%	2%	4
Power utilities	26%	42%	30%	2%	7
Primary metals	22%	40%	38%	0%	5
Chemical	24%	41%	35%	0%	6
Electronics/computer manufacturing	24%	31%	44%	1%	8
Solid waste utilities & companies	17%	22%	61%	0%	9
Water utilities	18%	32%	47%	4%	14
Transportation mfg (auto & aero)	12%	33%	55%	0%	17
Major retailers	11%	23%	64%	1%	20
Metals fabricating/coating	9%	35%	56%	0%	18

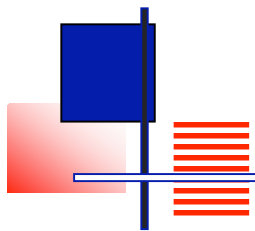
Source: Environmental Business Journal 2011 Snapshot Survey of 324 executives; Question was: Please rate the following customer areas in terms of prospects for sales growth in the next two to three years. Responses are consolidated from the following options: Very Strong, Strong, Slow Growth, Flat, Modest Decline, Big Decline



Ranking of Environmental Industry Client Sectors in 2011-2013

	Strong	Good	Slow/Flat	Decline	2010 Rank
Banks & Law Firms	11%	31%	54%	5%	13
Consumer products	8%	35%	54%	3%	12
Federal government: DOD	12%	25%	54%	9%	11
Petroleum retail/gas stations	10%	23%	60%	7%	16
Other manufacturing	6%	22%	67%	5%	21
Federal government: DOE	8%	28%	56%	8%	10
Federal government: EPA	9%	18%	63%	9%	15
Property developers: commercial	8%	17%	65%	11%	24
Federal government: Other	10%	14%	59%	17%	18
Property developers: residential	5%	16%	66%	12%	26
Pulp & paper	4%	15%	65%	16%	22
State government	5%	11%	63%	22%	23
Local government	6%	8%	65%	22%	25

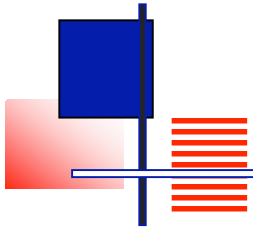
Source: Environmental Business Journal 2011 Snapshot Survey of 324 executives; Question was: Please rate the following customer areas in terms of prospects for sales growth in the next two to three years. Responses are consolidated from the following options: Very Strong, Strong, Slow Growth, Flat, Modest Decline, Big Decline



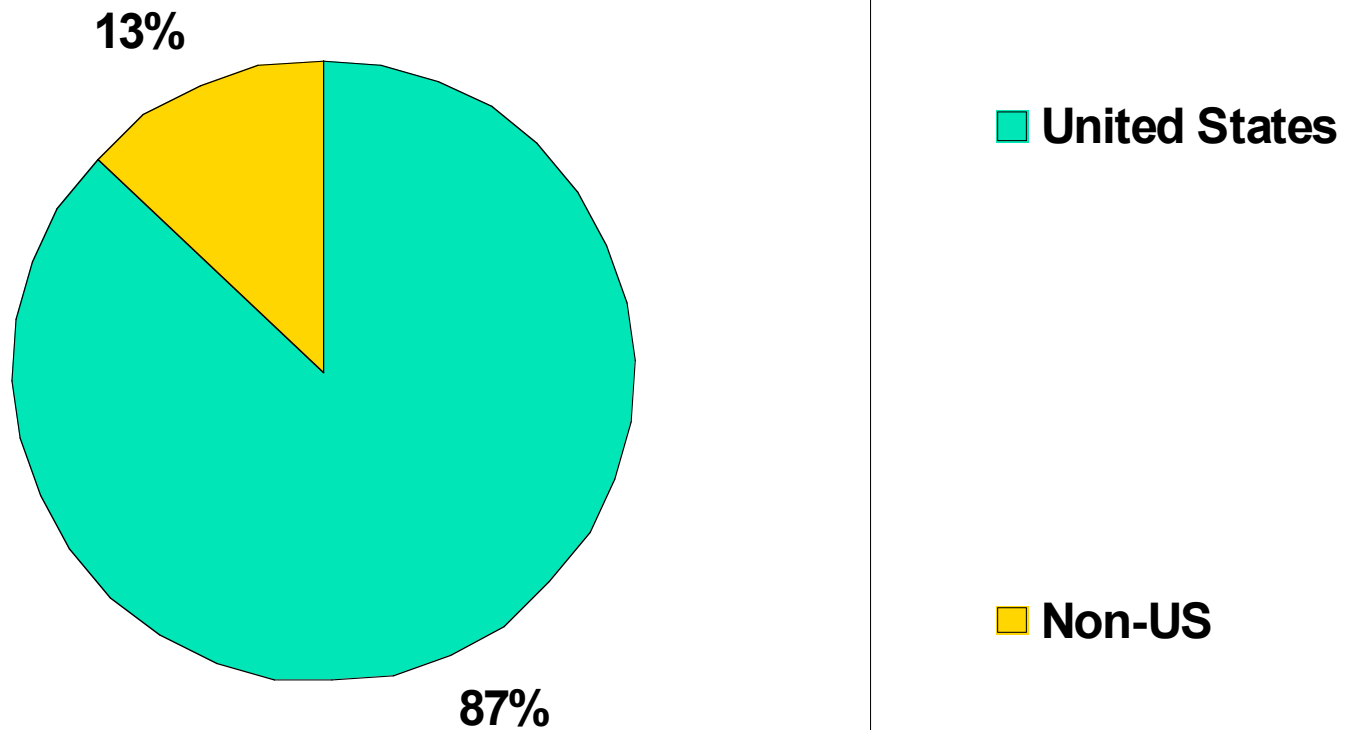
Ranking of Growth Prospects by US Geographic Region: 2011-2013

	Strong	Good	Slow/Flat	Decline	2010 Rank
Gulf Coast/Texas	23%	41%	35%	1%	1
Southeast	17%	35%	45%	3%	2
All United States	14%	32%	53%	1%	4
Rockies	15%	35%	49%	1%	6
Mid-Atlantic	14%	33%	48%	6%	3
Southern California	14%	30%	49%	7%	10
Northeast	13%	28%	52%	7%	5
Midwest	9%	33%	53%	5%	7
Northern California	13%	27%	55%	5%	11
Pacific Northwest	7%	41%	48%	5%	8
Southwest/Desert	8%	32%	54%	6%	9

Source: Environmental Business Journal 2011 Snapshot Survey of 324 executives; Question was: Rate regions in terms of prospects for sales growth in the next two to three years. Responses are consolidated from the following 7 options: Very Strong, Strong, Good Growth, Slow Growth, Flat, Modest Decline, Big Decline



2009 U.S. Environmental Co. C&E Revenue



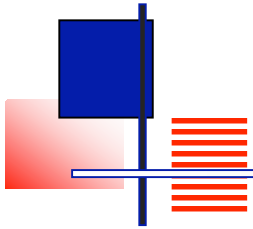
Source: Environmental Business International Inc., Annual model of the C&E industry



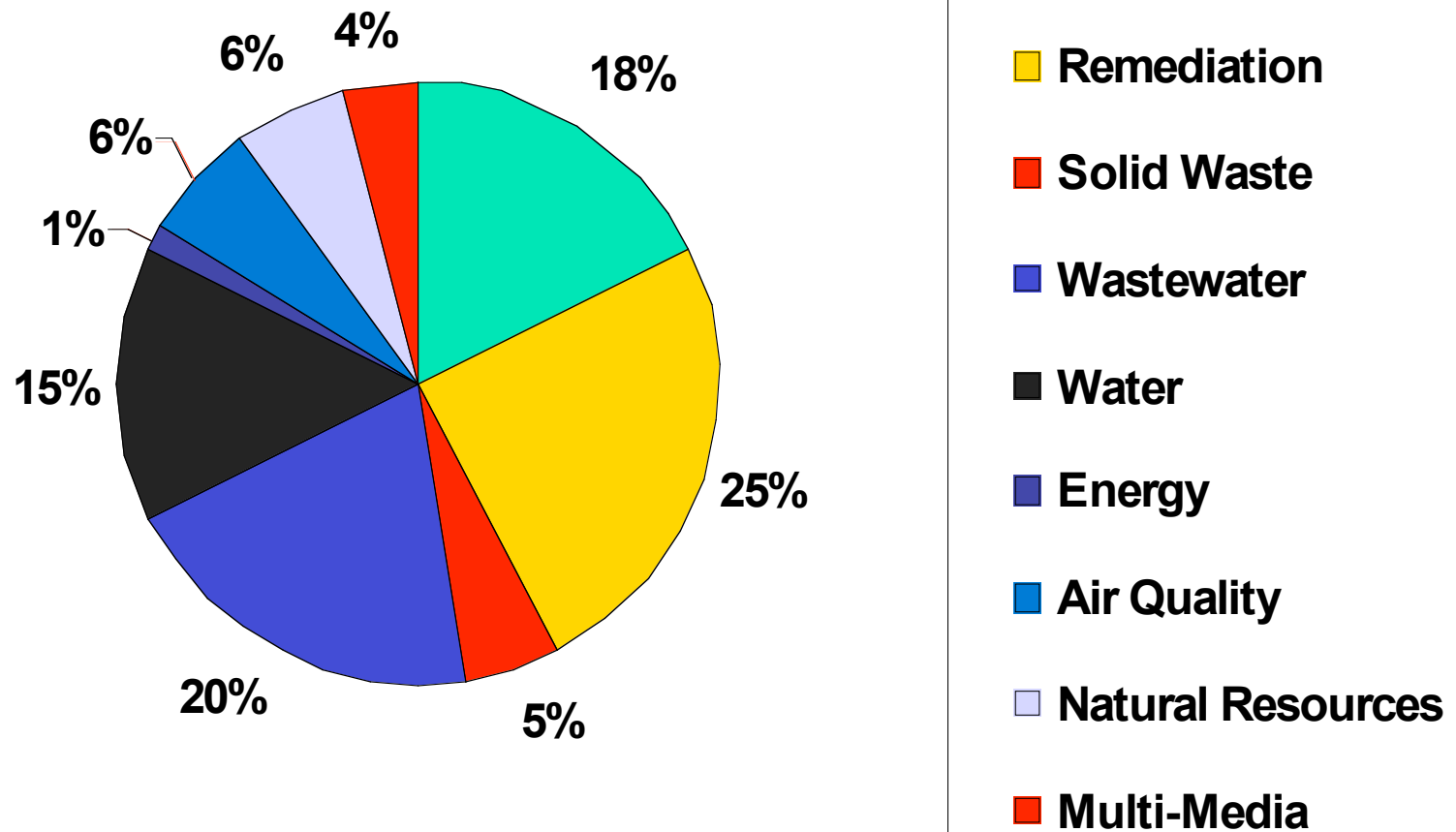
Ranking of Growth Prospects by Global Geographic Region: 2011-2013

	Strong	Good	Slow/Flat	Decline	2010 Rank
China	52%	31%	15%	1%	1
India	48%	33%	15%	3%	2
Middle East	33%	26%	35%	6%	4
Central & S. America	27%	31%	39%	3%	6
Australia/NZ	23%	44%	30%	4%	3
United States	16%	35%	48%	1%	9
Canada	18%	34%	46%	1%	7
Rest of Asia	16%	44%	36%	4%	5
All Non-USA	10%	47%	41%	1%	8
Africa	18%	29%	39%	14%	10
Eastern Europe	13%	30%	52%	6%	12
Western Europe	14%	14%	63%	9%	15
Japan	10%	31%	49%	10%	13
Mexico	5%	29%	52%	14%	14
Russia	4%	33%	50%	13%	11

Source: *Environmental Business Journal 2011 Snapshot Survey*

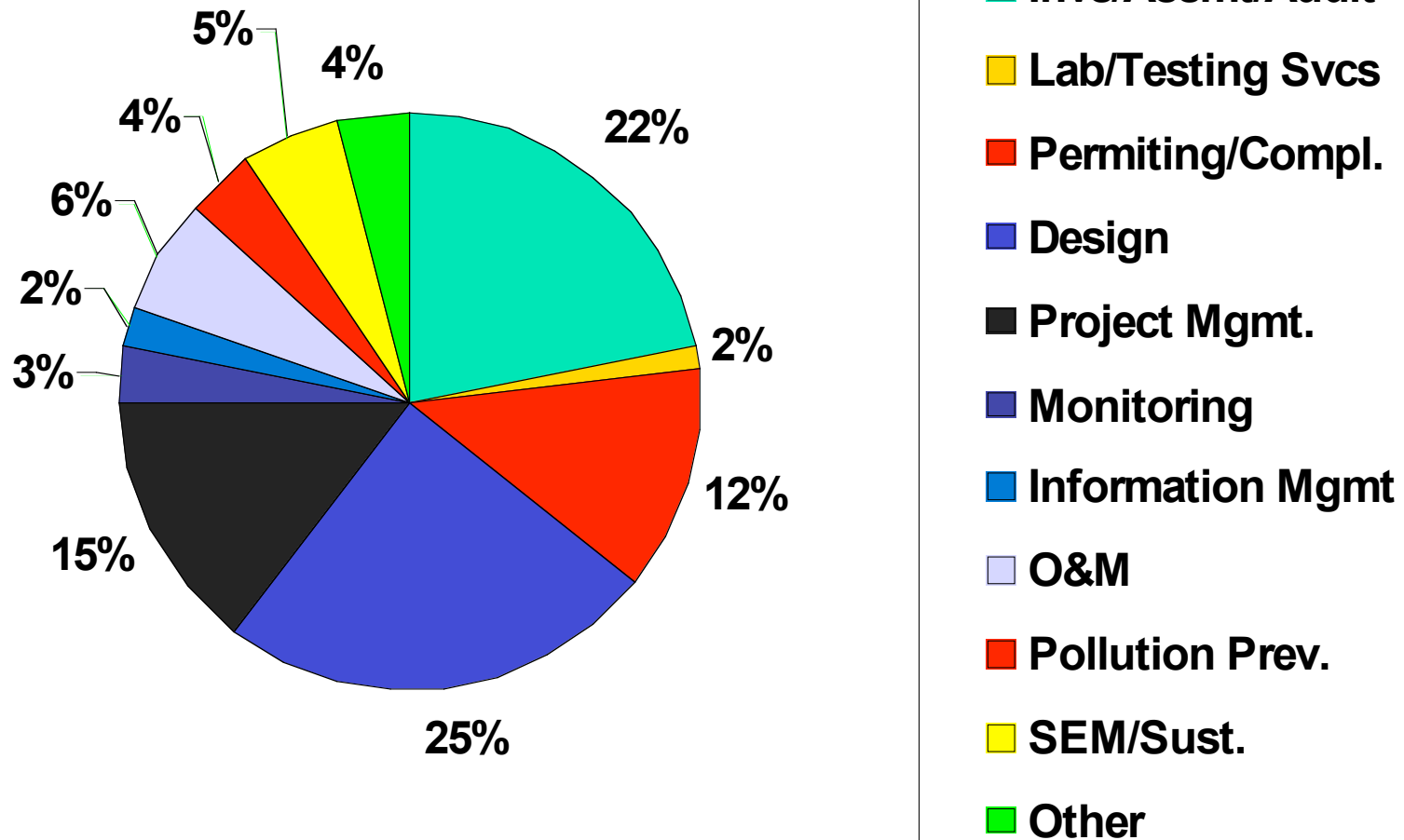


2009 Environmental C&E Revenue by Media

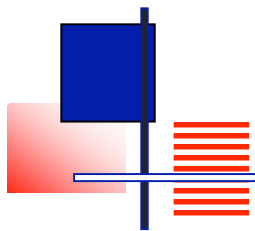


Source: Environmental Business International Inc., Annual model of the C&E industry

2009 Env'I C&E Revenue by Service



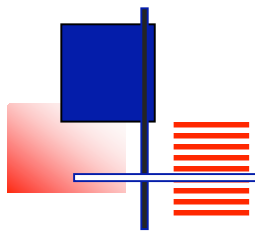
Source: Environmental Business International Inc., Annual model of the C&E industry



Ranking of Growth Prospects by Service/Media Category: 2011-2013

	Strong	Good	Slow/Flat	Decline	2010 Rank
Energy efficiency/demand response	42%	37%	21%	0%	2
Renewable energy development	44%	30%	27%	0%	1
Water recycling/reuse	35%	33%	32%	0%	6
Smart growth/"green" planning	26%	41%	34%	0%	3
Air quality	26%	29%	45%	0%	7
Water purification/delivery	27%	34%	38%	1%	10
Green building design/construction	22%	41%	37%	1%	4
Sustainability/corporate responsibility	24%	40%	34%	2%	5
Natural resources/ecological restoration	18%	36%	46%	0%	11
Wastewater treatment	19%	40%	41%	1%	12
Carbon/climate change consulting	22%	28%	47%	3%	8
Environmental information management	18%	30%	52%	0%	9

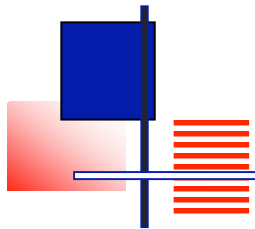
Source: *Environmental Business Journal 2011 Snapshot Survey*



Ranking of Growth Prospects by Service/Media Category: 2011-2013

	Strong	Good	Slow/Flat	Decline	2010 Rank
Design and project engineering	16%	34%	49%	1%	15
Permitting/compliance	13%	33%	52%	1%	14
Solid waste	17%	24%	58%	1%	22
Project management/Construction mgmt.	15%	24%	57%	4%	20
Operations & maintenance	13%	31%	55%	1%	13
Pollution prevention	13%	23%	63%	1%	18
Investigations/assessments/audits	10%	29%	57%	3%	19
Government remediation/base conversion	15%	24%	54%	7%	23
Private remediation & redevelopment	14%	26%	53%	7%	24
Monitoring & analytical work	11%	24%	62%	4%	21
Outsourced EHS functions	8%	23%	67%	2%	17
Industrial hygiene & safety	6%	22%	70%	2%	16
Ongoing generation of hazardous waste	12%	23%	51%	14%	25

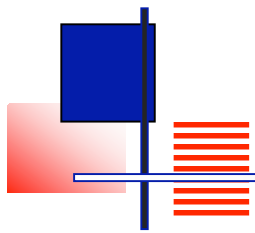
Source: Environmental Business Journal 2011 Snapshot Survey



Importance of the stimulus package to your business

	2009-2010	2011
Meaningless	31%	38%
A marginal impact on our business plan	48%	48%
One of a few key initiatives for new business development	16%	10%
The majority of our new business efforts	4%	3%
The centerpiece of our focus	2%	1%

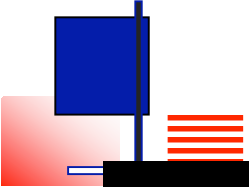
Source: Environmental Business Journal 2011 Snapshot Survey



Distribution of Environmental Consulting & Engineering Firms in 2009

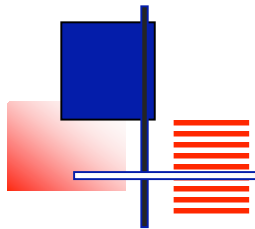
Size	Firms	Gross Env'l C&E Revs	Average	% of Mkt
Large >\$100 million	44	18,157	413	65%
Mid 20-100	120	4,748	40	17%
S 10-20	113	1,616	14.3	6%
S 5-10	170	1,226	7.2	4%
S 1-5	536	1,158	2.2	4%
S <1 mil	2,737	1,165	0.4	4%
Total	3,720	28,070	7.5	

Source: Environmental Business Journal's annual model of the U.S. environmental consulting & engineering industry. Revenues listed are gross revenues for environmental consulting & engineering only (note total gross revenues exceed market size expressed in net revenues). Based on annual surveys of C&E firms by EBJ, compiled revenue data derived from various sources including ENR, EFCG, ZweigWhite and public company data.



Top 20 of EBJ's Top 450 Environmental Consulting & Engineering Firms in 2009

Company	Gross Revenues	Env'l Cont/ HW	Env'l C&E
CH2M Hill Inc.	6,299	1,575	2,205
AECOM Technology Corp	5,087	42	1,730
Tetra Tech Inc.	2,187	496	1,495
URS Corporation	9,364	1,969	1,309
ARCADIS USA Inc.	1,243	56	1,118
Battelle Memorial Institute	4,500	-	940
MWH Global	1,188	289	864
SAIC	11,032	-	662
ERM	606	-	606
CDM	1,015	319	605
Black & Veatch Corp.	2,687	531	409
HDR Inc.	1,498	161	408
Parsons	3,175	882	388
Shaw Group	7,086	958	318
ICF International	671	-	288
Stantec Consulting Inc.	1,326	227	264
Bechtel Group Inc.	29,329	2,967	259
Brown and Caldwell	255	-	255
The Louis Berger Group Inc	1,087	184	240
ENVIRON Holdings Inc.	224	-	224



Big Deals of 2010

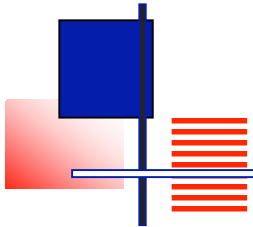
Buyer: AECOM; Seller: Tishman Construction

Buyer: URS; Seller: Scott Wilson (U.K.), \$340 million in revenue; URS outbid CH2M HILL

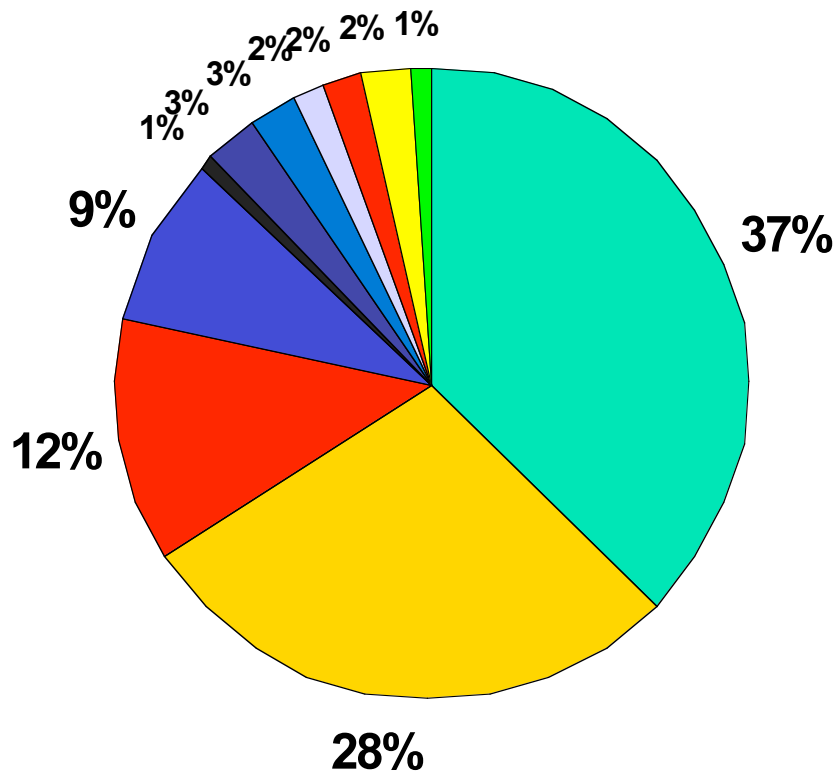
Buyer: CDM; Seller: Wilbur Smith (transportation)

Buyer: WS Atkins; Seller: PBS&J; Atkins re-established presence in U.S., after selling Benham to SAIC in 2003.

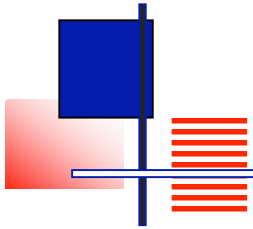
Buyer: Cardno; Sellers: Environmental Resolutions, Entrix; \$140 million combined



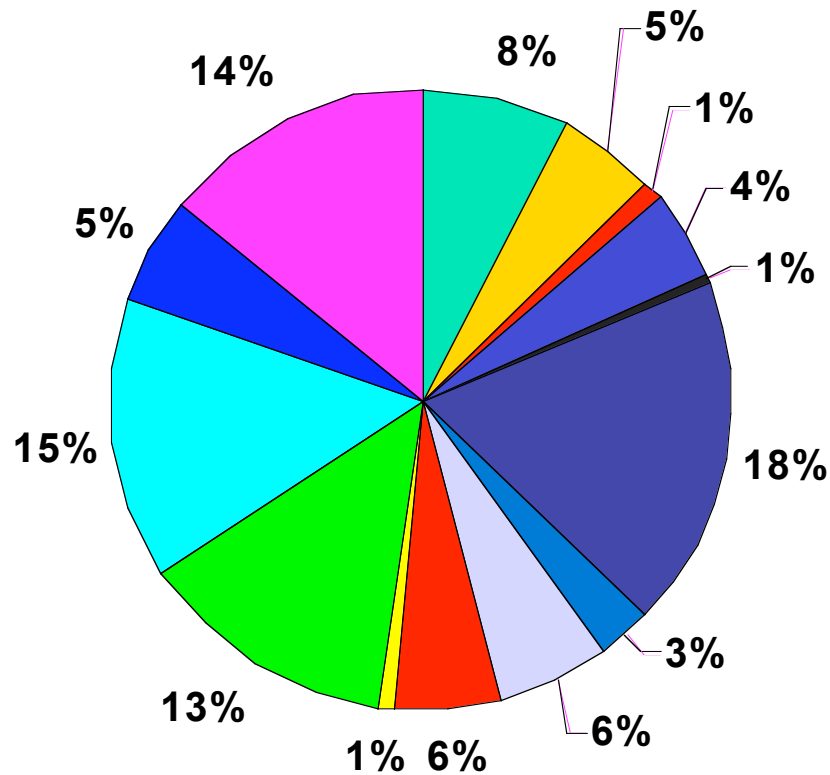
\$776-Billion Global Environmental Market in 2009



Source: Environmental Business International Inc.

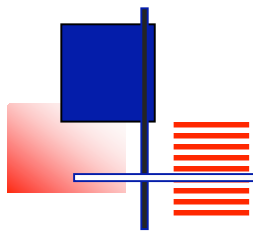


\$776-Billion Global Environmental Market in 2009



- Water Equipment & Chemicals
- Air Pollution Control
- Instruments & Info Systems
- Waste Mgmt Equipment
- Process & Prevention Tech
- Solid Waste Management
- Haz Waste Management
- Consulting & Engineering
- Remediation/Ind'l Services
- Analytical Services
- Water Treatment Works
- Water Utilities
- Resource Recovery
- Clean Energy Systems & Power

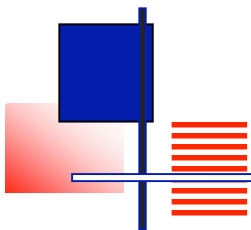
Source: Environmental Business International Inc.



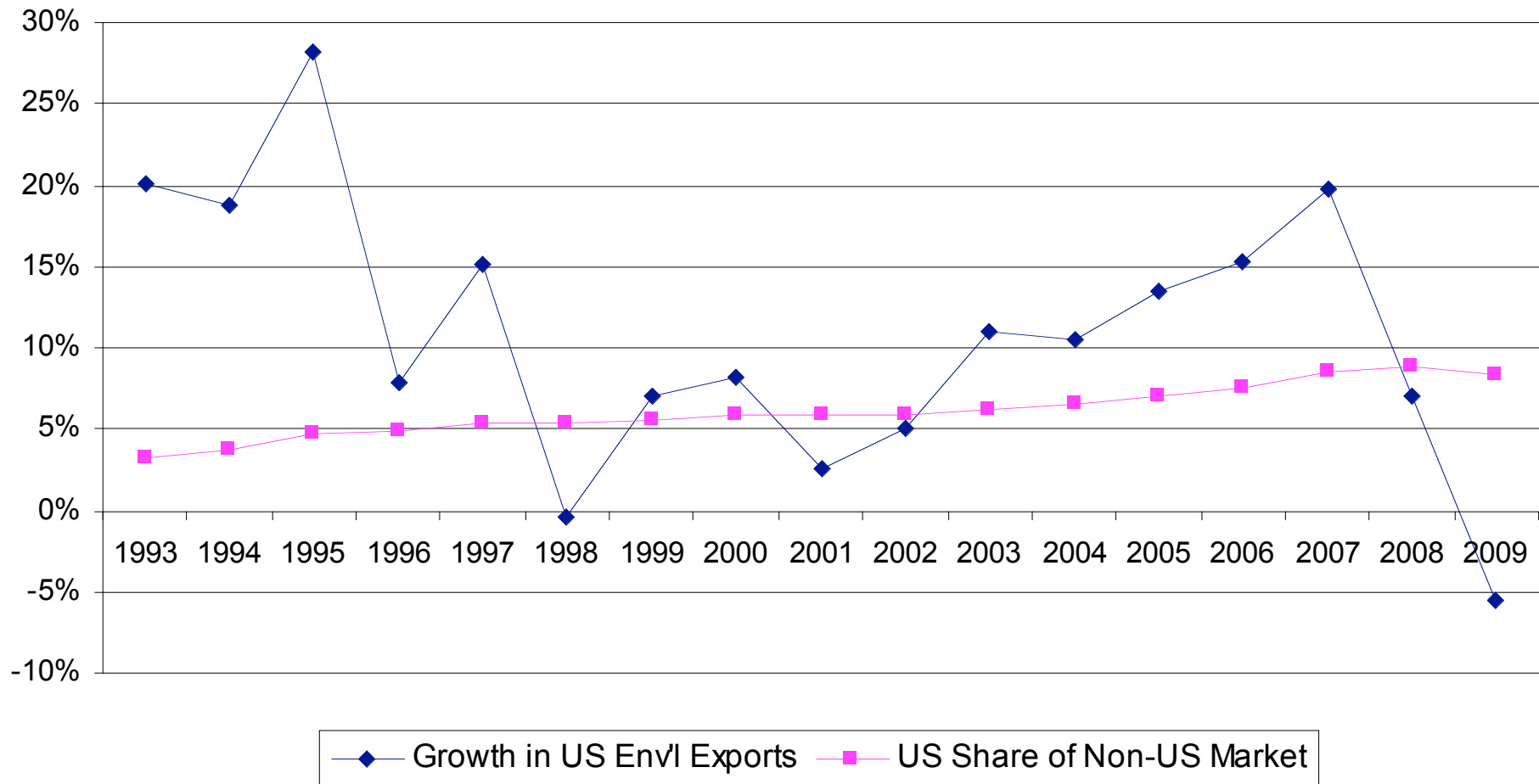
2009 US Environmental Trade Balance

<i>Equipment</i>	US ind	US mkt	surplus	exports	imports	%export
Water Equipment & Chemicals	26.6	22.7	3.9	9.93	6.0	37%
Air Pollution Control	15.8	17.2	-1.3	2.46	3.8	16%
Instruments & Info. Systems	5.2	3.1	2.1	2.45	0.4	47%
Waste Mgmt Equipment	11.0	10.0	0.9	2.85	1.9	26%
Process & Prevention Tech.	1.8	1.9	-0.1	0.13	0.2	7%
<i>Services</i>						
Solid Waste Management	51.1	51.6	-0.5	0.15	0.7	0.3%
Hazardous Waste Mgmt	8.6	8.6	0.0	0.09	0.1	1%
Consulting & Engineering	26.1	24.3	1.9	3.32	1.5	13%
Remediation/Industrial Svcs.	11.9	11.6	0.3	0.79	0.5	7%
Analytical Services	1.9	1.7	0.1	0.14	0.0	8%
Water Treatment Works	44.1	44.9	-0.8	0.24	1.1	0.5%
<i>Resources</i>						
Water Utilities	40.6	42.1	-1.5	0.08	1.6	0.2%
Resource Recovery	24.5	10.3	14.2	14.81	0.6	60%
Clean Energy Systems & Power	35.8	42.1	-6.3	3.03	9.3	8%
Total	305.1	292.1	13.0	40.5	27.5	13.3%

Source: Environmental Business International Inc.



U.S. Environmental Export Performance



Source: Environmental Business International Inc.



The Climate Change Industry



CLIMATE CHANGE BUSINESS JOURNAL™

Climate Change Policy (December 2010)

Climate Change Industry Overview (Oct/Nov 2010)

Information Technology in the Climate Change Industry (Aug/Sept 2010)

Investment & Finance in the Climate Change Industry (July 2010)

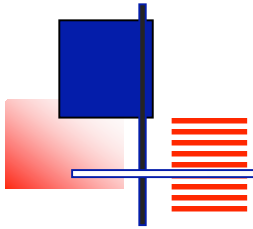
Transportation: Climate Change Markets (June 2010)

The Wind Energy Industry & North American Market Review (April/May 2010)

Consulting & Engineering in the Climate Change Industry (Feb/March 2010)

Professional Services in the Climate Change Industry (January 2010)

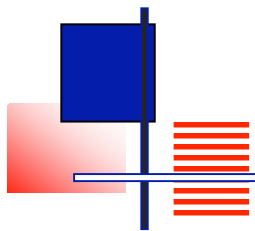
Climate Change Adaptation (November 2009)



Nine Segments of the Climate Change Industry

1. Low-Carbon Power	Renewable & Conventional Power Sales; Specialty Equipment & Services
2. Carbon Capture & Storage	Systems, Equipment and Operations
3. Energy Efficiency & Demand Response	Appliances, Devices, Equipment & Services including SmartGrid
4. Energy Storage	Equipment & Systems: Utility-Scale, Batteries and Fuel Cells
5. Green Buildings	Design & Development; Construction, Building Materials & Supply
6. Transportation	Vehicles, Fuels & Systems, Transit, Planning & Engineering
7. Carbon Markets	Credit & Offset Trading; Project Development, Verification and Registration
8. Adaptation	Risk Assessment, Planning, Engineering & Construction
9. Consulting & Research	Consulting & Engineering; Professional Services; Research

Source: EBI Inc., San Diego, Calif. Segments are quantified from 53 distinct subsegments



Global and U.S. and Climate Change Industry 2010 (\$bil and % share)

	USA	Rest of World	Global	% USA	% ROW
Low-Carbon Power	31.4	172.7	204.1	15%	85%
Carbon Capture & Storage	0.1	2.3	2.4	4%	96%
Energy Efficiency & DR	57.5	122.5	180.1	32%	68%
Energy Storage	3.7	7.6	11.2	33%	67%
Green Buildings	54.5	110.6	165.0	33%	67%
Transportation	77.2	354.5	431.7	18%	82%
Carbon Markets	0.5	152.8	153.3	0%	100%
Adaptation	0.5	1.1	1.6	33%	67%
Services: Consulting & Engineering	3.0	5.5	8.6	36%	64%
Total Climate Change Industry	228	930	1,158	20%	80%

Source: EBI Inc., San Diego, Calif.



California Climate Change Industry: Number of Companies and Jobs

	California 2009 Market \$bil	California Employment	California Number of Companies
1. Renewable Energy			
Wind Energy	1.06	2,552	300-400
Wave & Tidal	0.01	162	30-40
Solar Energy	1.95	13,520	1200-1500
Biomass	0.63	1,748	100-120
Geothermal	1.20	2,495	70-100
2. Carbon Capture & Storage	0.00	20	10-20
3. Energy & Resource Efficiency and Demand Response	5.15	24,014	600-800
4. Energy Storage	0.65	2,237	80-100
5. Green Buildings	9.33	47,907	1000-1200
6. Transportation	6.59	25,042	300-400
7. Carbon Markets	0.06	171	30-40
8. Adaptation	0.07	632	20-30
9. Services	0.30	2,417	200-300
Climate Change Industry	27.00	122,917	4000-5000

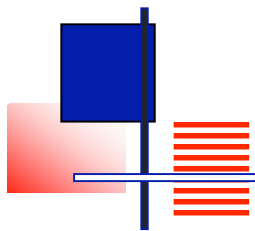
Source: EBI Inc., San Diego, Calif.; 123,000 represents 1% of 12.6 million jobs in California



California Climate Change Industry: Growth Scenario to 2020 (\$bil)

CCI Segment	2010	2011	2012	2015	2020	Added 2010-2020
Low-Carbon Power	6.12	9.14	13.14	22.66	30.21	24.09
Carbon Capture & Storage	0.00	0.01	0.02	0.40	2.09	2.08
Energy Efficiency & Demand Response	5.61	5.96	6.13	7.30	9.31	3.70
Energy Storage	0.78	0.95	1.18	1.94	3.29	2.51
Green Buildings	9.26	10.79	13.02	20.85	38.41	29.15
Transportation	7.06	8.21	9.87	18.06	33.93	26.87
Carbon Markets	0.05	0.22	1.56	10.93	21.93	21.88
Adaptation	0.10	0.11	0.13	0.30	1.53	1.43
Services: Consulting & Engineering	0.30	0.36	0.41	0.60	0.97	0.67
Total Climate Change Industry	29.28	35.74	45.44	131.69	141.66	112.39
Growth*	8%	22%	27%	22%	15%	284%

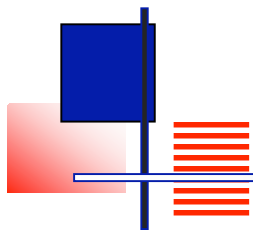
Source: EBI Inc., San Diego, Calif. * Growth is average annual growth rate in 2012-2015 and 2010-2020



U.S. and California Climate Change, Environmental and Green Industries

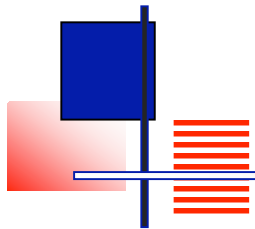
	USA Sales (\$bil)	CA Sales (\$bil)	CA % of USA
The Green Economy*	525.90	64.91	12.3%
The Environmental Industry	304.60	39.89	13.1%
The Climate Change Industry	223.57	27.00	12.1%
	USA employment	CA employment	CA % of USA
The Green Economy*	2,842,831	336,485	11.8%
The Environmental Industry	1,628,000	207,070	12.7%
The Climate Change Industry	1,126,610	122,917	10.9%

*Source: EBI Inc., San Diego, Calif. Note: Some overlap exists in environmental and climate change industry figures, notably renewable energy, and all environmental and climate change industry figures are included in the green economy. *Green economy figures are for 2008.*



U.S. Environmental Industry

	Revenues \$bil	Companies	Exports 2009 \$mil	Employment 2009	2009 avg \$/FTE
Analytical Services	1.9	1,000	143	19,700	94,200
Wastewater Treatment Works	44.1	26,300	238	169,000	260,700
Solid Waste Management	51.1	9,850	153	265,300	192,500
Hazardous Waste Management	8.6	530	86	42,100	205,000
Remediation/Industrial Svcs.	11.9	2,100	787	100,000	119,300
Consulting & Engineering	25.7	3,480	3,317	242,100	106,000
Water Equipment & Chemicals	26.6	2,030	9,929	157,300	169,200
Instruments & Info. Systems	5.2	690	2,451	36,100	144,300
Air Pollution Control Equipment	15.8	1,770	2,456	101,800	155,600
Waste Management Equipment	11.0	850	2,850	73,800	148,500
Process & Prevention Tech.	1.8	370	126	28,600	63,000
Water Utilities	40.6	61,800	81	162,000	250,500
Resource Recovery	24.5	4,650	14,811	169,100	145,000
Clean Energy Systems & Power	35.8	2,230	3,030	141,700	253,000
Totals:	304.6	117,650	40,459	1,708,600	178,274



Framework for Green Jobs
