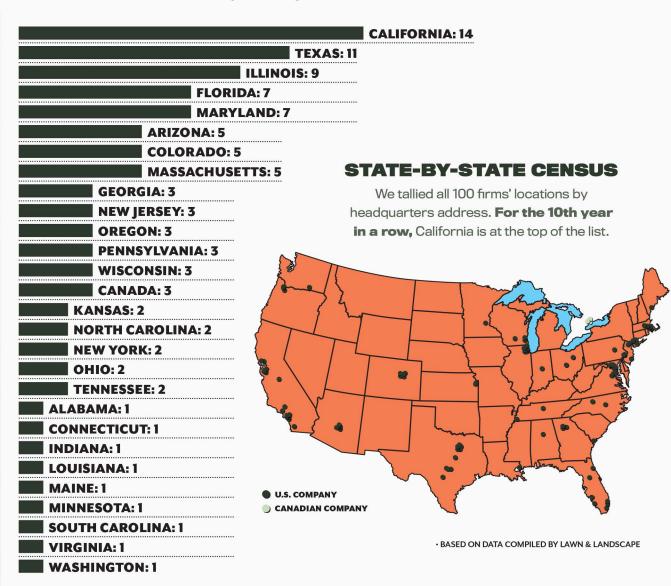


### STATE BREAKDOWN

#### FIND OUT WHERE THE TOP 100 COMPANIES CALL HOME.

Once again, California houses the most top 100 companies with 14,

followed by Texas with 11 and Illinois with nine. But revenue wise, it's a different story. Pennsylvania, with three companies, including the largest company on the list, generated the most revenue while Tennessee comes in second thanks to being home to the second-largest company on the list. Ohio claims the third-largest company and lands third on the list, while California and Florida round out the top five with a large percentage of companies on the list headquartered there.



#### TOP STATES BY REVENUE

	1			
PENNSYLVANIA	TENNESSEE	ОНЮ	CALIFORNIA	FLORIDA
'18: \$2,651,500,000	'18: \$1,404,027,944	'18: \$1,052,924,692	'18: \$769,988,692	'18: \$638,426,729
17: \$2 549 000 000	17- \$1 375 896 347	17: \$951 700 000	17: \$661 290 625	717: \$656 803 116

## TOP 100 NEWS & NOTES

### Brightview's big 12 months

It's been a busy year for the nation's largest landscaping company. In June of 2018, Brightview officially went public as company CEO Andrew Masterman rang the bell on the New York Stock Exchange on June 28.

The initial public offering of 21,300,000 shares of the company's common stock was priced at \$22 per share raising \$468.6 million. Bright-View CEO Andrew Masterman said at the time that the move is not only a positive for BrightView but for the industry as a whole.

"This provides a platform for everyone to look to and say this is absolutely and unquestionably a very big and prominent industry," Masterman said.

"If your aspiration is to be someone who runs a smaller organization, that's great. If you have aspirations to be involved with a larger company, it all exists within the landscaping industry."

As of mid-April, the stock was selling at about \$15 per share and the 52-week high was \$23.42.

The company also made a handful

of acquisitions. In November, Brightview acquired Russo Lawn & Landscape while in January added Emerald Landscape Company.

In February, it acquired Benchmark Landscapes, based in Austin, Texas. Russo, located in Hartford, Connecticut, services 26 cities in the state and six more in Massachusetts. The commercial landscaping company has been in business since 1990.

Emerald specializes in commercial landscape maintenance, enhancement, tree care, turf management and irrigation services, employing more than 200 people. It operates branches in the Bay Area markets of Livermore, Hayward, Concord, San Jose, Manteca and Tracy.

Benchmark was founded in 2002 and provides landscape maintenance, design, installation, hardscapes, irrigation and tree care. It ranked No. 89 on Lawn & Landscape's 2019 Top 100 list and reported a 2018 revenue of over \$23.9 million.

Benchmark covers a service area from Austin to San Antonio, inclusive of the San Marcos and New Braunfels areas, and Corpus Christi. The company operates six branches in four markets.

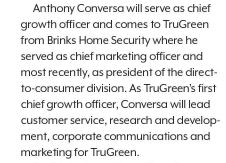
#### TruGreen names new president and three new executives

TruGreen appointed John Cowles as president and CEO in September after former president and CEO David Alexander retired.

Prior to joining TruGreen, Cowles was president and CEO at FXI, a producer for the home, healthcare, electronics, industrial, personal care and transportation markets. Cowles is a 30-year business veteran who has held senior leadership positions at major companies such as Touchstone Wireless, Kraft Foods, Campbell Soup Company and George Weston Bakeries.

In early 2019, the company also hired three new executives who will report to Cowles.

Michael Sims joined TruGreen as senior vice president and chief financial officer. In his most recent role as senior vice president and CFO of AdvancePierre, he led the company through an IPO and subsequent acquisition by Tyson Foods. At TruGreen, Sims will be responsible for driving sustainable revenue and EBITDA growth.



As chief information officer, Ayman Taha brings 25 years of information technology experience to TruGreen. Most recently, Taha served as senior vice president of enterprise technology solutions at MGM Resorts International. At TruGreen, he will be in charge of developing digital technology designed to enable an improved consumer and associate experience.

# Weed Man purchases rights to Canadian territories

In January, Brenda Rice, the co-founder and president of Weed Man, has announced her retirement after nearly 50 years of leadership. Keeping leadership in the Weed Man network, the CEO of the United States master franchisor, Roger Mongeon, will now take over leadership of the Canadian territories.

Mongeon formed a new company called TH Canada, and in total, the Weed Man team now oversees more than 680 territories worldwide. Weed Man was launched in Mississauga, Ontario, in 1970 by the late founder Desmond "Des" Rice and Brenda, his wife. The couple started franchising in 1976.

Jennifer Lemcke, Weed Man's chief operating officer, will work with all the Weed Man Canada franchisees. Through her efforts, the U.S.-based contingent of Weed Man was named one of the fastest-growing franchises by Entrepreneur Magazine's annual Franchise 500, earning the No. 59 spot in 2019.

### M&A IN THE TOP 100

## Brightview wasn't the only company busy making acquisitions.

Below is more Top 100 M&A news:

- · Aspen Grove Landscape Group, No. 7, acquired Long Brothers Landscaping, a family-owned business with more than three decades of experience. Located in Raleigh, North Carolina, Long Brothers serves the Triangle and Triad regions and is the second North Carolina company that Aspen Grove acquired.
- · Bartlett Tree Experts, No. 4, announced in February that the company completed eight acquisitions in six months. The acquisitions were; **Tree** Frog Tree Care in Alberta, Calgary; Colorado Treescapes in Littleton, Colorado; C.L. Frank and Co., in Northampton, Massachusetts; Mellinger Tree Service in Santa Monica, California. The remaining four acquisitions bolster the company's customer base in existing operating areas. These include **Clean** Cutt Tree Service in Wilmington, Delaware; **Pavey Tree** in Dwight, Ontario; Weise Choice Tree Services in western Connecticut; and Connecticut Arborists in Monroe. Connecticut.
- The Davey Tree Expert Co., No. 3, acquired certain assets of Landscape Management Services, a commercial landscape management company based in Houston. The majority of the 60-person LMS team is still on staff.
- Juniper Landscaping, No. 21, acquired Prestige Property Maintenance in September. Prestige has been serving Dade, Broward and Palm Beach counties since 1986 providing landscaping services, and owns a 25-acre nursery. Prestige employs about 120 people, and the acquisition pushed Juniper's revenue to around \$71 million at No. 21 on the list.

- In September, **Westhook Capital**, a new Los Angeles-based private equity firm invested in **Metco Landscape**, No. 26. The investment was Westhook's first as a company. Metco, based in Aurora, Colorado, will continue to be led by Mark Tomko who will remain in his position as CEO.
- New to the list at No. 55, **Signature Coast Holdings**, a landscaping
  company with operations in Northern
  California and Nevada, has acquired **C&R Landscape** of Rocklin, California.
  Founded in 2001, C&R Landscape had specialized landscape maintenance services for multi-family properties. C&R also offered landscape construction and tree care services and earned \$10 million annually.
- Stay Green, No. 81, acquired Pacific Crest Landscape of Orange County, expanding its services throughout Southern California. Donnie Smith, owner of Pacific Crest, continued to supervise operations from the Orange County location that he first acquired in 2009. Smith will oversee the day-to-day operation of the former Pacific Crest team.
- In August, **Yellowstone Landscape**, No. 5, acquired **Somerset Landscape & Maintenance**, a \$30-million company based in Chandler, Arizona. Somerset was No. 54 on last year's list with \$32.8 million. The Somerset acquisition breaks Yellowstone into the Dallas/Fort Worth, Phoenix and Las Vegas markets for the first time. Somerset will join Yellowstone, who is owned by CIVIC Partners, a private equity firm based in Chicago. Also last summer, Yellowstone acquired Leaderscape, which is located in Palm Beach, Florida, and employs 100 people.







## **KOHLER**。

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## ABBREVIATIONS

%MT: Maintenance
%CLC/F: Chemical Lawn Care/Fertilization
%LD/B/I: Landscape Design/Build/Install
%II/MT: Irrigation Installation/Maintenance

%IL: Interior Landscaping %CR: Commercial Revenue %RR: Residential Revenue N/A: No Answer/Unknown

## **ABOUT THIS LIST**

**THE LAWN & LANDSCAPE TOP 100** is based on 2018 revenue from landscape profit centers. Most information is reported by each company listed, and supplemental data are sourced from public records and reporting by L&L staff.

- ► Companies on the list earned a combined revenue of \$10,221,735,143 in 2018, which is an increase of \$603,045,036 or 6.27 percent, compared to 2017. The average expected growth for 2019 is 10 percent. Companies also reported total employment of 97,269.
- ► Brightview does not include US Lawns revenue but does include franchise payments. The company acquired Benchmark

McHale Landscape Design

**Complete Property Maintenance** 

92

90(t)

\$22,000,000

\$21,500,000

Upper Marlboro, Md.

Coconut

Creek, Fla.

235

375

5%

0%

8%

12%

30%

70%

0%

5%

70%

5%

0%

5%

0%

0%

0%

90%

100%

10%

- ► This year's list includes companies from 27 states and three firms in Canada.
- ▶ Revenue reported in Canadian dollars has been converted to U.S. dollars using the 2018 average conversion rate of 0.77.
- ▶ Juniper Landscaping saw the largest growth in 2018 with a 42 percent increase in revenue for 2018.

2019 RANK	COMPANY	2018 RANK	2018 REVENUE	HEADQUARTERS	EMPLOYEES	% CHANGE FROM 2017	% CHANGE EXP. FOR 2019	% MT	%CLC/F	%LD/B/I	%II/MT	% IL	%CR	%RR
1	BrightView	1	\$2,350,000,000	Plymouth Meeting, Pa.	20,000	6%	2%	N/A	N/A	N/A	N/A	N/A	100%	0%
2	TruGreen Cos. The Davey Tree Expert Co.	2 3	\$1,369,000,000 \$1,020,000,000		13,504 9,500	2% 12%	5% 1%	1% N/A	82% N/A	0% N/A	0% N/A	0% N/A	14% N/A	85% N/A
4	Bartlett Tree Experts	4	\$297,000,000	Stamford, Conn.	2,000	10%	8%	0%	0%	0%	0%	0%	30%	64%
5 6	Yellowstone Landscape Gothic Landscape	8 5	\$230,300,000 \$218,200,000	Bunnell, Fla.  Valencia, Calif.	3,300 2,200	32% 20%	10%	80% 27%	0%	18% 73%	0%	0%	100% 95%	0% 5%
7	Aspen Grove Landscape Group	6	\$187,000,000	Willow Grove, Pa.	2,000	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
9	Ruppert Landscape Park West Cos.	7	\$184,900,000	Laytonsville, Md.  Rancho Santa	1,600	19%	6% 0%	50% 36%	0%	50% 60%	0%	0%	100%	0%
10	LandCare	10	\$175,000,000	Margarita, Calif. Frederick, Md.	3,200	10%	15%	100%	0%	0%	0%	0%	100%	0%
11	U.S. Lawns	9	\$172,050,000	Orlando, Fla.	2,250	3%	5%	68%	4%	15%	3%	0%	100%	0%
12 13	Weed Man Ferrandino & Son	11	\$171,800,496 \$145,000,000	Mississauga, Ontario Farmingdale, N.Y.	NA 325	8%	6% 6%	0% 40%	100%	0%	0%	0%	5% 100%	95%
14 15	SavATree Lawn Doctor	15(t)	\$138,000,000 \$128,400,000	Bedford Hills, N.Y. Holmdel, N.J.	1,133 1,350	27% 9%	15% 5%	0% 0%	17% 90%	1%	1% 0%	0%	30% 5%	70% 95%
16	Ambius	15(t)	\$114,500,000	Reading, Pa.	1,032	5%	4%	0%	0%	3%	0%	97%	100%	0%
17 18	The Grounds Guys Mainscape	17 18	\$77,250,000 \$72,900,000	Waco, Texas Fishers, Ind.	600 1,050	12% -3%	20% 3%	50% 68%	10%	13%	1% 8%	0%	50%	40%
19	Clintar Commercial Outdoor Service	25	\$71,700,000	Markham, Ontario	1,100	17%	10%	40%	0%	5%	0%	0%	99%	1%
20	Massey Services	20	\$71,601,729	Orlando, Fla.	2,060	6%	15%	0% 40%	83%	4% 44%	13%	0%	13%	87%
21 22	Juniper Landscaping Rotolo Consultants	31	\$71,000,000 \$70,200,000	Ft. Myers, Fla. Slidell, La.	700 700	42% 32%	38% 17%	40%	10%	35%	16%	0%	100%	60%
23 24	NaturaLawn of America Acres Group	22 29	\$68,287,667 \$67,000,000	Frederick, Md. Wauconda, III.	743 865	7% 20%	6% 2%	0% 40%	99%	0% 25%	0% 3%	0%	3% 95%	97% 5%
25	The Greenery	23	\$65,641,000	Hilton Head Island, S.C.	1,000	5%	5%	72%	0%	25%	3%	0%	90%	5%
26	Metco Landscape	28	\$64,000,000	Aurora, Colo.	550	12%	0%	20%	0%	75%	0%	0%	95%	5%
27	Spring-Green Lawn Care	27	\$62,200,000	Plainfield, III. Fort Washington,	542	7%	7%	0%	95%	0%	1%	0%	7%	93%
28(t)	Denison Landscaping	24	\$62,000,000	Md. Farmers Branch,	640	0%	5%	10%	0%	80%	8%	0%	98%	2%
28(t) 30	Garden Design  Heartland	26 35	\$62,000,000 \$53,700,000	Texas  Mission Woods, Kan.	74 750	5% 13%	3%	2% 85%	0%	98%	0%	0%	32%	68%
31	Lucas Tree Expert Co.	33 (t)	\$53,000,000	Portland, Maine	650	8%	10%	0%	3%	0%	0%	0%	97%	3%
32 (t) 32 (t)	Cagwin & Dorward  Mariani Landscape	37 33 (t)	\$48,000,000 \$48,000,000	Novato, Calif.  Lake Bluff, III.	550 550	10%	8% 7%	55% 59%	0%	25% 38%	10%	0%	100%	0% 90%
32 (t)	Sebert Landscaping	40	\$48,000,000	Bartlett, III.	365	10%	10%	40%	10%	20%	10%	0%	95%	5%
35 36	Clean Scapes Choate USA	32 39	\$46,581,000 \$45,759,649	Austin, Texas Carrollton, Texas	526 170	-7% 12%	22% 5%	33%	1%	48% 60%	14% 40%	0%	100%	0% 20%
37 38	Dixie Landscape Co. Landscape Workshop	36 47	\$43,975,000 \$41,713,675	Medley, Fla.  Birmingham, Ala.	305 574	N/A 20%	2% 7%	16% 65%	0%	64% 15%	20%	0%	100%	0% 5%
39	Baytree Landscape Contractors	52	\$40,600,000	Stone Mountain, Ga.	325	21%	15%	29%	0%	71%	0%	0%	100%	0%
40 41	Pierre Landscape Christy Webber Landscapes	48 53	\$40,000,000	Irwindale, Calif. Chicago	260 330	N/A 0%	20% 9%	8% 46%	0%	77% 38%	15%	0%	85% 75%	15% 15%
42	Ryan Lawn & Tree	49	\$38,651,698	Overland Park, Kan.	310	13%	15%	0%	45%	5%	15%	0%	5%	95%
43 44	Chapel Valley Landscape Co.  Greenscape	41 59	\$38,500,000 \$37,000,000	Woodbine, Md. Raynham, Mass.	500 325	2%	10%	65% 35%	5% 0%	20% 40%	5% 0%	0%	85% 98%	15%
45 46	R.P. Marzilli & Co. Elite Team Offices	58 46	\$36,630,000 \$36,500,000	Medway, Mass. Clovis, Calif.	205 265	21%	15% 5%	21%	0%	74% 80%	0%	0%	8% 99%	92%
47	Teufel Landscape	43	\$36,370,000	Hillsboro, Ore.	340	3%	30%	14%	3%	70%	9%	2%	99%	1%
48	Schumacher Cos.	64	\$36,000,000	W. Bridgewater, Mass.	300	10%	0%	0%	2%	88%	10%	0%	10%	90%
49 50	Bemus Landscape  AAA Landscape	44 57	\$35,560,000 \$35,500,499	San Clemente, Calif.  Phoenix	430 610	1%	10%	80% 50%	0% 2%	10%	0% 40%	0%	99%	1%
51	Gachina Landscape Management	55	\$35,477,671	Menlo Park, Calif.	425	9%	15%	59%	0%	30%	11%	0%	84%	13%
52 53	Landscape Services Earthtones Design	65 71	\$35,027,944 \$33,400,000	Nashville, Tenn.  Midlothian, TX	300 205	22%	15% 5%	80% 3%	1% 2%	10% 55%	5% 40%	0%	98%	2% 10%
54 55	Dennis' 7 Dees Landscaping Signature Coast Holdings	51	\$33,223,918 \$33,320,000	Portland, Ore.  Napa, Calif.	275 600	0% 15%	8% 30%	14% 77%	0% 2%	48% 18%	11%	2% 0%	38% 91%	39%
56	Environmental Management	42	\$32,924,362	Plain City, Ohio	365	-7%	5%	32%	1%	57%	1%	0%	95%	5%
57 58	Beary Landscaping  Complete Landscaping Service	61	\$32,500,000 \$32,155,737	Lockport, III.  Bowie, Md.	300 375	8% 7%	10% 7%	41% 72%	2% 4%	24% 18%	3% 2%	0%	85% 100%	15%
59	SiteWorks	83	\$32,147,260	Chandler, Ariz.	225	39%	25%	18%	0%	59%	15%	0%	100%	0%
60	Russell Landscape Group  Caretaker Landscape	73 50	\$32,118,575 \$31,857,317	Sugar Hill, Ga.	525 376	-5%	15%	30%	7%	60%	5% 3%	0%	98%	75%
	and Tree Management McFall & Berry			Gilbert, Ariz.										
62 63	Landscape Management  Maldonado Nursery & Landscaping	56 45	\$31,484,000	Annandale, Va. San Antonio	385 450	-12%	2%	58% 34%	5% 3%	23%	2%	0%	99%	1% 7%
64(t)	Landtech Contractors	*	\$30,000,000	Aurora, Colo.	300	15%	6%	22%	2%	43%	31%	0%	100%	0%
64(t) 66	Landscape Concepts Management  Berghoff Design Group	66 95	\$30,000,000 \$29,795,500	Grayslake, III. Scottsdale, Ariz.	264 295	8% 15%	0%	38% 35%	0%	31% 35%	5% 20%	0%	99%	1% 80%
67	Senske Lawn & Tree Care	67	\$29,602,000	Kennewick, Wash.	500	6%	8%	17%	52%	0%	3%	0%	25%	75%
68 69	M. Neves Southern Botanical	74 69	\$28,888,755 \$28,495,347	Dartmouth, Mass.  Dallas	200	11% 5%	10%	30%	5% 6%	30% 54%	5% 13%	2%	90%	10% 30%
70	Chalet Nursery, Landscape and Garden Center	62	\$28,300,000	Wilmette, III.	350	-3%	14%	60%	5%	35%	0%	0%	0%	100%
71(t) 71(t)	Merchants Landscape Services Impact Landscaping & Irrigation	68 94	\$28,000,000 \$28,000,000	Santa Ana, Calif.	450 350	0% 7%	4% 39%	90% 27%	5% 3%	0% 50%	5% 20%	0%	100%	0%
73	Naturescape	72	\$27,550,431	Jupiter, Fla.  Muskego, Wis.	295	3%	5%	10%	80%	0%	0%	0%	5%	95%
74 75	Kline Bros Landscaping Designscapes Colorado	77(t)	\$27,500,000 \$27,497,000	Manahawkin, N.J. Centennial, Colo.	154 257	5% 5%	10% 9%	8% 16%	0%	70% 79%	10%	0%	40% 62%	60% 38%
76	The Bruce Co. of Wisconsin	63	\$27,313,736	Middleton, Wis.	317	-8%	8%	38%	0%	51%	2%	0%	80%	20%
77 78	David J. Frank Landscape Contracting Gibbs Landscape Co.	77(t) 77(t)	\$27,000,000 \$26,760,000	Germantown, Wis. Smyrna, Ga.	300 350	N/A 7%	N/A 3%	N/A 75%	N/A 0%	N/A 25%	N/A 0%	N/A 0%	N/A 60%	N/A 40%
79	Bland Landscaping Co.	90(t)	\$26,200,000	Apex, N.C.	350	20%	15%	70%	0%	20%	5%	0%	85%	15%
80 81	Harvest Landscape Enterprises Stay Green	80	\$25,500,000 \$25,435,853	Orange, Calif. Santa Clarita, Calif.	525 335	4% 5%	13% 12%	60% 70%	5% 0%	10% 15%	10% 5%	0%	100%	0%
82 83	Perfect Cuts of Austin Scott Byron and Co.	<b>*</b> 76	\$25,365,000 \$25,174,000	Austin, Texas  Lake Bluff, III.	69 215	18%	10% 6%	28% 19%	0% 6%	72% 72%	0% 3%	0%	100% 5%	0% 95%
84(t)	Designs by Sundown	84	\$25,000,000	Littleton, Colo.	200	8%	10%	28%	3%	60%	5%	0%	10%	90%
84(t) 86	Superscapes DLC Resources	<b>*</b> 87	\$25,000,000 \$24,900,000	Carrollton, Texas Phoenix	200 350	14%	13%	15% 80%	0%	62% 12%	23%	0%	76% 100%	24%
87	Pacific Landscape Management	*	\$24,471,518	Hillsboro, Ore.	275	13%	8%%	50%	0%	30%	10%	0%	100%	0%
88 89	High Tech Landscapes  Benchmark Landscapes	88 82	\$24,429,839 \$23,900,000	Branchburg, N.J. Austin, Texas	315 350	9%	-2% 4%	58% 58%	5% 0%	15% 27%	7% 11%	0%	60% 100%	30%
90 91	The Budd Group  Benchmark Landscape	<b>*</b> 81	\$23,750,000 \$23,064,375	Winston-Salem, NC Poway, Calif.	N/A 250	N/A -5%	N/A 5%	N/A 40%	N/A 0%	N/A 50%	N/A 5%	N/A 0%	100%	0%
92	Environmental Designs	*	\$23,000,000	Henderson, Colo.	300	29%	13%	20%	3%	56%	8%	0%	68%	32%
93 94	Andre Landscape Service Nutrilawn	86 89	\$22,730,793 \$22,330,000	Azusa, Calif. Toronto	325 N/A	0% 5%	20%	64% 0%	5% 90%	6% 0%	10%	0%	99%	1% 95%
95	Southview Design	93	\$22,268,000	St. Paul, Minn.	170	5%	15%	26%	0%	62%	3%	0%	30%	70%
96	Frank and Grossman Landscape Contractors	85	\$22,200,000	Hayward, Calif.	211	-2%	10%	40%	0%	10%	36%	7%	35%	65%
97 98(t)	Earthworks LEI Corporation	*	\$22,092,350 \$22,000,000	Lillian, Texas  Boylston, Mass.	375 110	20%	10%	60% 40%	0%	25% 20%	10%	0%	100%	0%
-		92		Upper Marlboro, Md	235	5%	8%	30%	0%	70%	0%	0%	0%	100%