

SUPPLEMENT TO

Lawn & Landscape

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2025 REPORT BENCHMARKING *your* BUSINESS

While some companies are flourishing, others are watching their wages and property costs closely to be profitable.

ILLUSTRATION BY MATT CHINWORTH

THE ONLY CONSTANT IS CHANGE

REGARDLESS OF WHETHER the past year was your best yet, or you were simply holding the line, nobody is in a better position to influence change in your business as you. Whether your goal in the next year is to keep the momentum rolling, or strive for growth, the future is in your hands.

Never before have landscape professionals had so many powerful tools at their fingertips. And while the pace of change seems to be getting faster, it's up to you to decide which advances can bring true benefits to your business. That's why understanding the trends in the market and choosing suppliers you can trust goes a long way in giving you the right answers for your business.

The 2025 Benchmarking Your Business Report is a valuable resource to help you understand how landscape and lawn care pros are succeeding in the markets they serve. The report offers insight into the ways contractors are evolving to meet the challenges of today and prepare for tomorrow's opportunities. We hope the perspective empowers you to move forward with confidence and grounded optimism.

At Exmark and Z Turf Equipment, we're committed to innovations that enable our customers to do more, more efficiently, to maximize their competitive edge and ultimately make more money. In fact, 30 years ago we revolutionized the industry with the introduction of our first Lazer Z zero-turn mower. The Lazer Z truly raised the bar for the speed, productivity, cut quality and durability contractors could expect in a commercial mower.

For 2025, the Lazer Z Legacy continues by taking a huge step forward with the launch of revamped Lazer Z X-Series and Lazer Z S-Series models, as well as an all new Lazer Z E-Series platform. Each new Lazer Z model delivers industry-leading performance and durability, with long-term value our customers can count on.

And as we launch our first autonomous mower — the Turf Tracer with XiQ Technology — we remain fully committed to testing our machines to a higher standard. When a new technology is ready for commercial contractor use, you'll see it from Exmark and Z Turf Equipment. We've built our business helping our customers constantly exceed expectations, and we value the relationships we've built with each customer.

If you're already a part of the Exmark family, thank you. If you're not yet a customer, I invite you to visit your local Exmark or Z Turf Equipment dealer. There, you can learn more about how we can help you embrace change and take your business to the next level, today, tomorrow, and well into the future.

Here's to 2025 being your best year yet.

Warm regards,



Jamie Briggs



Jamie Briggs
Director of Marketing,
Exmark and
Z Turf Equipment



**The world didn't need a new mower.
It needed a new Lazer Z.**

The Lazer Z X-Series has arrived—built to deliver unmatched durability, legendary cut quality, and performance that exceeds expectations at every turn. The future of mowing has never looked so good. Visit your dealer to experience the Lazer Z.



Explore the
legacy behind
the legend.



COMPARE & CONTRAST

From legislative changes to increasing labor rates, contractors are keeping an eye on costs as they forecast the season ahead.

By Kim Lux

Illustrations by Matt Chinworth

Our annual **Benchmarking Your Business Report** features exclusive data from across North America showcasing the numbers behind the green industry. It gives you the chance to see how you measure up against the rest of the industry. We've also checked in with landscapers to get a feel for their local markets and the ups and downs with pay, profits and everything in between.

E.A. Quinn Landscape Contracting

Glastonbury, Connecticut

Vice President of Operations Matt Bagshaw says E.A. Quinn is in the midst of an aggressive growth phase this year.



Matt Bagshaw

"We're in an ambitious growth cycle," he says. "We were bought by private equity a few years ago and our goal is to grow and do it profitably. We're proposing an 11% increase this year over last, so we're actively growing. It's just not as easy as it used to be."

The company, which has about 140 employees, garnered more than \$22 million in revenue in 2024.

Bagshaw says with everything from material costs to wages and all sorts of other costs rising, the business is forced to focus on what it can control.

"The best way we go about trying to fight inflation and rising costs is by honing in on

efficiencies and ways to do things quicker and better," he says.

To reduce some labor struggles, E.A. Quinn uses the H-2B program — but with that comes a mandatory minimum wage that means higher costs for the business and for customers.

"We'll have 25 guys from Mexico on that. That program, per federal law, then dictates what our minimum wage is for anyone working in that classification — which is basically all of our labor pool. Our wage last year was \$19.70 an hour and this year it's going up to \$21.61 an hour. That's a pretty decent jump," he says.

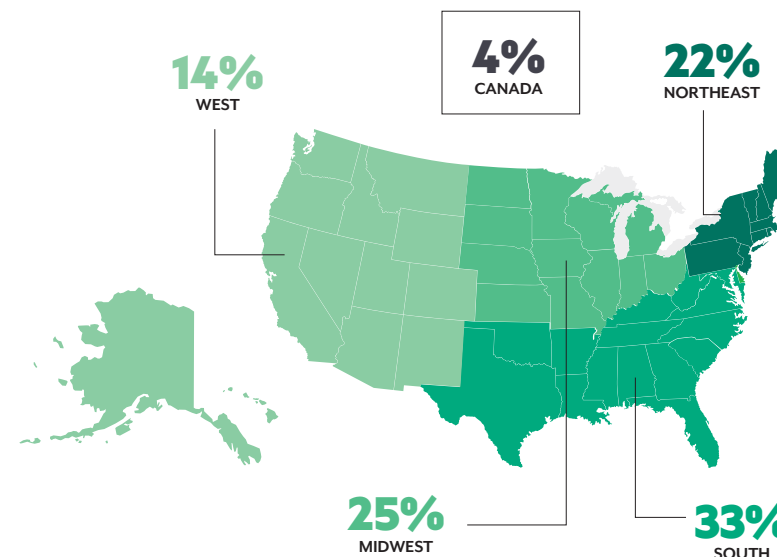
"It drives additional costs we have to absorb. You can try and pass it all through to the customer, but the reality is that it's easier said than done. So, you're back to trying to find ways to be more efficient. Whether that's through machinery, trucks and equip-

"THE BEST WAY WE GO ABOUT TRYING TO FIGHT INFLATION AND RISING COSTS IS BY HONING IN ON EFFICIENCIES AND WAYS TO DO THINGS QUICKER AND BETTER."

— Matt Bagshaw,
Vice President of Operations

ABOUT THIS SURVEY: The survey was closed for tabulation on Jan. 27, 2024, and results are based on 433 landscapers and lawn care operators. The margin of error is ±4.7 percentage points at the 95% confidence level. Not all percentages will add to 100% due to rounding.

In which state/province is your location?



■ NORTHEAST

New England (CT, MA, ME, NH, RI, VT) 8%
Middle Atlantic (NJ, NY, PA) 14%

■ MIDWEST

East North Central (IL, IN, MI, OH, WI) 16%
West North Central (IA, KS, MN, MO, NE, ND, SD) 9%

■ SOUTH

South Atlantic (DC, DE, FL, GA, MD, NC, PR/VI, SC, VA, WV) 21%
East South Central (AL, KY, MS, TN) 6%
West South Central (AR, LA, OK, TX) 6%

■ WEST

Mountain (AZ, CO, ID, MT, NM, NV, UT, WY) 7%
Pacific (AK, CA, HI, OR, WA) 7%

■ CANADA

Atlantic Canada (NB, NL, NS, PE): 0%
Central Canada (ON, QC): 2%
Northern Canada (NT, NU, YT): 0%
Western Canada (AB, BC, MB, SK): 1%
Other foreign: 1%

No answer: 2%

ment, training — you pick at all those different buckets and try to find those savings somewhere.”

Another cost concern for Bagshaw is the increasing material, equipment and vehicle prices — something that has not let up. “In these last couple years here, costs are rapidly rising,” he says. “It’s a little out of hand at this point.”

Bagshaw says a basic lawn mower has gone up from around \$16,000 to over \$23,000 at this point, and parts for basic equipment have skyrocketed as well.

“Pricing is all over the map, so we’re seeing big discrepancies in pricing from vendor to vendor,” he says. “We’re extremely loyal and always have been to our vendors, but this market has us looking around a little more than normal.

“In better times, you kind of trusted the vendors in terms of pricing and took it at face value, but now we’re scratching at that more than we used to,” Bagshaw adds.

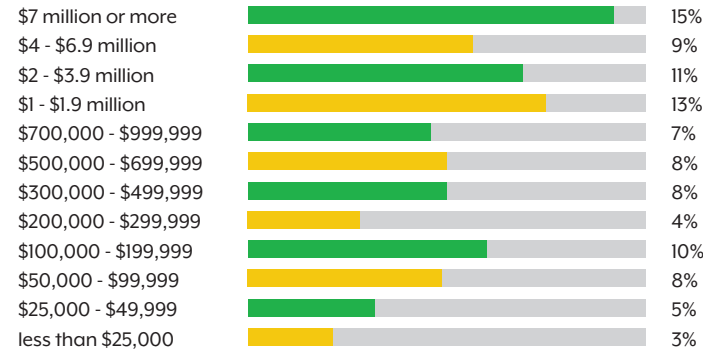
Despite all these hurdles, Bagshaw says he feels 2025 will be another banner year for the business. He’s more concerned about what’s on the horizon after that.

“Our backlog is almost double what it was last year at this time,” he says. “We have the work. To be honest, we’re already looking into 2026 — that’s a little more where our concern is than 2025. I think 2025 will turn out to be a great year. We are still waiting to see what 2026 will look like just in terms of all the legislative changes and things happening.”

Bagshaw notes he’s also curious how recent government changes will impact some of the “endless amounts of paperwork” the company deals with.

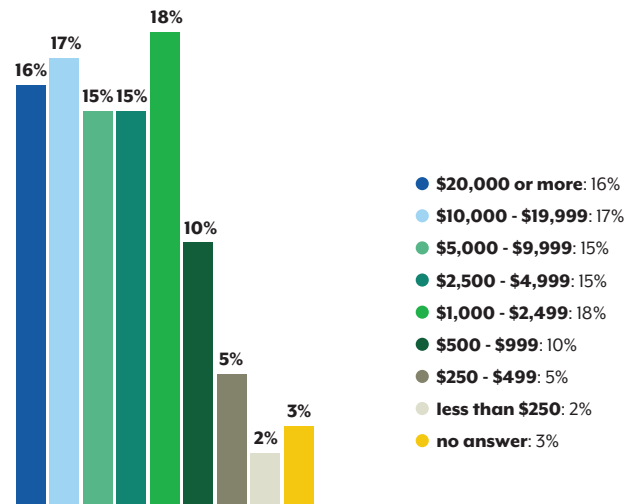
“Connecticut is a very difficult state to do business in,” he says. “There’s a lot of paperwork and roadblocks and red tape. From our perspective, hopefully some of that will get better with some streamlining of government operations.”

Approximately what was your gross revenue in 2024?

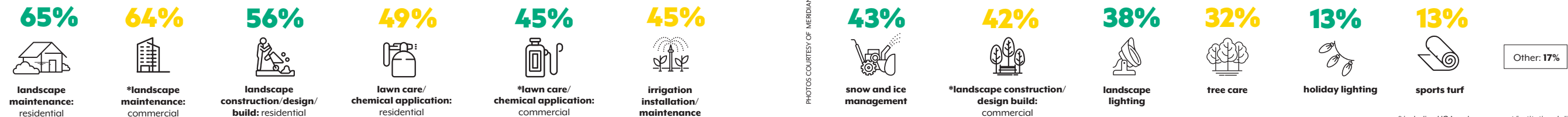


mean: \$2.25 million median: \$920,000

Approximately what was your company's gross revenue per customer in 2024?



What services did you offer in 2024?



*including HOA and government/institutional clients



Meridian Landscaping

Sterling, Virginia

It’s been a decade now since Tim Gardiner, president of Meridian Landscaping, has been working in the green industry full-time.

“Someone I grew up with wanted to start a landscaping company, so I was kind of a silent partner for the first 10 years,” he says.

“When he stepped out of the business, Meridian had grown to \$1.5 million in revenue... I left the software market and purchased him out, and came into the business full-time in 2015.”

Now, the company does about \$16 million in revenue and is expecting to reach \$20 million in 2025. They have about 200 employees across three branches.

“We’ve had 20- to 30% growth year-over-year for the past 10 years,” Gardiner notes. “I like to tell people we were doing a lot of things but probably weren’t doing a lot of things well.”

So, Gardiner decided to focus the company on commercial maintenance work instead — and even made an acquisition to help further their growth in 2024. He says all this was necessary to stay competitive in their market.

PHOTOS COURTESY OF MERIDIANLANDSCAPING / ICONS: ADOBE STOCK

“In the Washington D.C. area, every major company either has branches here or is headquartered here. It is a pretty competitive market. It is not challenging for customers to switch vendors if they need to — you do have to provide a quality product at a market-based price,” he says.

Gardiner says one of the biggest struggles to providing a lucrative price to customers is labor.

“There is a labor shortage in our industry. Finding quality people is the key determining factor to our growth. If we were able to hire all the people we needed, our growth would be even higher,” he says.

“It’s the thing we spend the most time on — making sure we are hiring the right people, but more importantly retaining and training those people so that they stay.”

Gardiner adds employee retention is huge in terms of growth, and when done right, translates into customer retention. Meridian’s customer retention is at about 95% currently.

“Our turnover has been fairly low; we invest a lot of time and money in our benefits and training,” he says. “We try to give people pay raises proactively and sit down and provide a career ladder to them. I think that’s an element that, if we weren’t doing that, we’d be losing our people.”

This strategy has made Gardiner optimistic for the year ahead — for his company and the rest of the industry.



Tim Gardiner

“We’re very optimistic for our market and for the green industry,” he says. “We are anticipating growth of 25% this year. The industry changes... but there’s always going to be buildings that need to be maintained.”

“People are continuing to focus on the exterior of their properties and making them something to showcase... I don’t think the green industry is going anywhere. I think it’ll continue to have steady growth.”

Gardiner adds that private equity’s extreme interest in the green industry is only helping to raise the industry and provides numerous benefits.

He says the increase in companies utilizing technology and software also helps all tides rise.

“The technology platforms that a lot of the landscaping companies are starting to use on the commercial side, people are starting to truly understand their costs,” Gardiner says. “That helps.”

What does your location charge, on average, per hour for labor for each of the following services?



SNOW AND ICE MANAGEMENT
\$108.07



TREE CARE
\$97.37



IRRIGATION INSTALLATION/ MAINTENANCE
\$82.69



LANDSCAPE CONSTRUCTION/ DESIGN/BUILD
(RESIDENTIAL AND/OR COMMERCIAL)
\$80.13



LAWN CARE/ CHEMICAL APPLICATION
(RESIDENTIAL AND/OR COMMERCIAL)
\$74.27



LANDSCAPE MAINTENANCE
(RESIDENTIAL AND/OR COMMERCIAL)
\$65.63

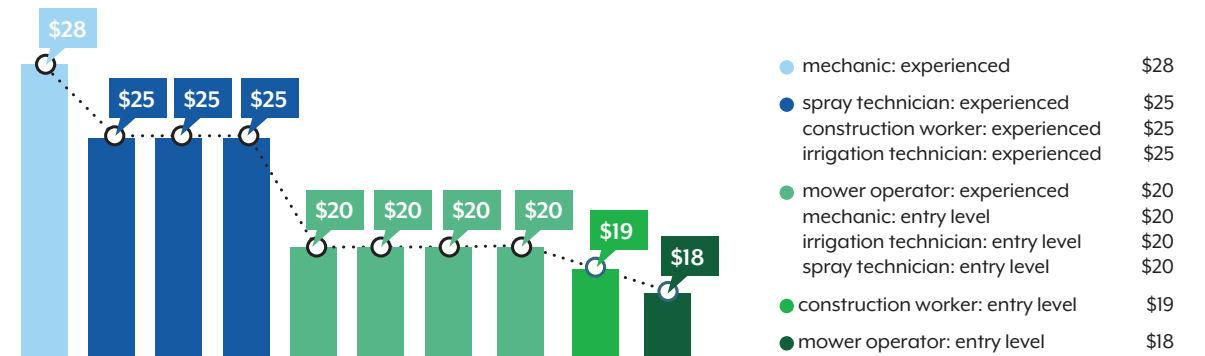


Summit Lawns
Lincoln, Nebraska

Summit Lawns has experienced about 60% growth over the last two years, says Founder Ted Glaser. The company now sits at about \$4.2 million in revenue and has nearly 40 employees during peak season. A key to the company’s success is they keep it simple, Glaser says. Summit Lawns doesn’t provide design/build or similar services but instead focuses on residential lawn care and maintenance.

“We are doing very simple services at a high volume,” Glaser says. “I often call us the Chick-fil-A of lawn care because we’re not a five-star steakhouse or a Michelin star restaurant with very expensive, curated experiences that are custom to everyone. We’re a fast-food restaurant — but we’re a nice fast-food restaurant. We do very simple things and have just

As of Nov. 1, 2024, what did your company pay per hour, on average, for each of the following positions it had (in U.S. dollars)?



scaled it.” Summit Lawns is up to about 4,000 customers with more expected in the year ahead.

“Historically, we’ve had a pretty high close rate,” Glaser says. “We aim for 50% conversion across the board. We have a pretty good lead volume coming in.”



Ted Glaser

For Glaser, the challenge then becomes how do you incorporate price increases as inflation and other costs eat into profitability?

“On existing clients, there were years in the past where we took pride in not doing price increases and that was foolish thinking,” he says. “It also made price increases difficult when you had to then do it in big leaps and bounds.”



Nowadays, Glaser says the company is all about analyzing the numbers before the season kicks off.

“What we do now is small cost of living increases,” he says. “We have roughly 4,000 clients right now and we run an analysis on basically every single account.

“We do an analysis across all of our service lines every year,” Glaser adds. “We set our annual budget in January, and we determine what our break-even is across different service lines. We build our profit goals into that.”

Additionally, Glaser says Summit Lawns has a new way to combat increasing labor costs.

“We are totally bought in on pay-for-performance and incentive-based pay,” he says. “It’s taken us a couple years to deploy this. We have three main service lines in our company — mowing, fertilizer and enhancement work. We rolled out pay-for-performance about two years ago with our fertilizer crews and now it’s launching with mowing this spring. Everyone is very excited for it because they’ve seen how it worked on the fertilizer side.”

Glaser says a pay-for-performance model helps shift the mindset of some crews and motivates them to work more efficiently.

“Fundamentally, a manager’s job is to get the employees to do more work in less time, which from the employee’s standpoint,

Of your location's customers 12 months ago, what percentage are still customers today?

88% mean
93% median

means the better they get at their job, the less they get paid for it. It’s a perfect world of inefficiencies because our incentives are not aligned,” Glaser says.

“We have structurally fixed our labor rate. The motivation of our team and how they manage their time is very different. They’re empowered to use their time as they see fit.”

Glaser equates pay-for-performance to a server in a restaurant. You start out with four tables and can make as much as you can with those four tables.

If you are successful — management will add more tables to your section. The same goes for a technician’s routes density and pay-for-performance.

However, Glaser acknowledges one of the biggest misconceptions about the model is that it encourages speed and reduces quality — he doesn’t agree.

“It’s very self-policing and self-managing because our crews know if they work too fast and their quality suffers, they will lose properties and that will make their days longer because they’ll have to drive more in between other stops,” he says. “They’ve lost the ability to get work done quickly.”

As of Nov. 1, 2024, what was your location's average annual salary for each of the following positions it had (in U.S. dollars)?



SpyGrass Innovations

Pelham, Alabama

For Founder and President, Phillip Romei, it’s all about the sale. “I started this as just a hobby,” he says. “I came from a sales background in the food industry. I knew selling was the key and so was delivering on your commitments.

“We started out in 2016 and we grew extensively over the last eight years,” Romei adds. “Our first year in business, we did about \$17,000 and every year after that, we’ve grown. Right now, we’re a little over \$2 million.”

Currently, SpyGrass Innovations has a staff of 19 but that will build up to over 25 during peak season.

Romei adds it’s his core values that drive his business and his price setting.

“I’ve used to be accused of undercharging all the time,” he says. “It’s not because I liked the competition, but I was just trying to conquer the world. We run a very efficient company. I’m not interested in money. It doesn’t motivate me or drive me to do what I do. I’ve always told people — ‘Do not chase the money.’ Build your business off your core values and continue to preach it and make sure your customers know what you believe in.”

That’s why Romei suggests always getting your customer to verbally agree that the pricing is fair going into the agreement.

“I always make the customer agree that it’s fair. I want to hear them say it’s a fair price because now we’re partners. There’s no me coming back to you or you coming back to me. It is what it is,” he says. “One of my core values is authenticity — and that’s a word all over the news right now. That’s how we raise our prices — based on our core values. When you’re selling people authenticity, integrity and character — it’s easy to charge them fairly.”

Another decision that’s helped Romei grow the company is selling off his residential



Phillip Romei

I’VE ALWAYS TOLD PEOPLE — ‘DO NOT CHASE THE MONEY.’ BUILD YOUR BUSINESS OFF YOUR CORE VALUES AND CONTINUE TO PREACH IT AND MAKE SURE YOUR CUSTOMERS KNOW WHAT YOU BELIEVE IN.”

— Phillip Romei, founder and president

Including you, how many full-time, part-time and seasonal employees does your location currently have? (Do not include contractors)

26 full-time
2 part-time
10 seasonal

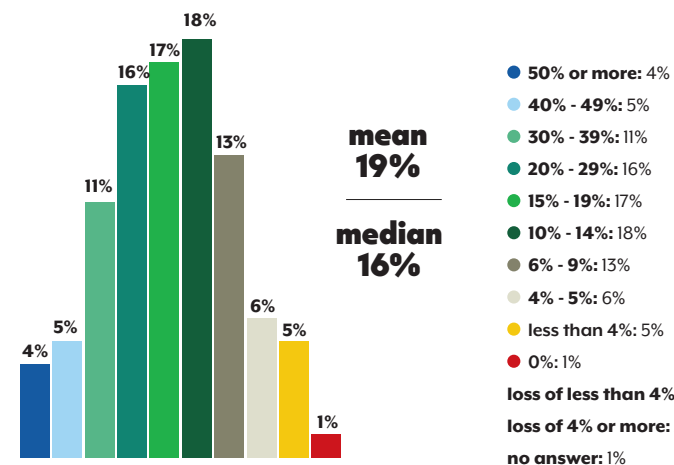


PHOTOS COURTESY OF SUMMIT LAWNS

ILLUSTRATION: MATT CHINWORTH / PHOTO COURTESY OF SPYGRASS INNOVATIONS



Approximately what was your company's net profit margin in 2024?



customers a few times and continuously upgrading his equipment.

"We don't do any residential work," he says. "I've sold all that business off three different times. I've made some good revenue just by selling off my residential."

"I believed in divide and conquer — so every time you got a bunch of residential clients, you'd sell that off and start all over. I'd keep that (person) close to me for about two years. Even though he didn't use my name, he was still a part of my company."

The same goes for SpyGrass Innovations' mowers and fleet.

"We rotate our equipment every two to three years minimum," he says. "That's for our zero-turns and our walk-behinds. If you build a network of employees who want to go out on their own and start their own business, they don't have the resources that I have. They can't buy a fleet of equipment. I sell my used equipment to those employees who used to work for me. It's networking. It's been a really good system."

For the commercial maintenance work the company is concentrating on now in 2025, Romei says his biggest concern is for his labor force — and the industry's.

"Our industry is heavily Hispanic," he says. "ICE is already out looking."

While Romei notes his company follows all the laws in terms of hiring and they are an E-Verify employer, there is still plenty of cause for concern.

"Labor has never been an issue in terms of getting it," he says. "But the labor we get is very concerned coming into 2025. We don't know what's going to happen. Are they really going to deport 10 million people? If they do there's going to be a lot of shortages — not just of people cutting grass."

Romei says he's trying to be proactive ahead of the season and working out contingency plans to be ready for a worse-case scenario.

"I'm already putting a plan together in case we start losing employees," he says.

"Last month we had four employees elect to go home... they're concerned for their families. I think it's going to be a major issue this year."

NW Bloom Ecological Services

Seattle, Washington

Owner Jessi Bloom started the business 25 years ago. The design/build and maintenance company, which specializes in ecological services, made a little over \$1.4 million in 2024 and has 11 employees.

Yet Bloom says one of the biggest growth inhibitors she faces isn't inflation or product price hikes, but the expensive real estate market in her area.

"We've had to move around a little bit in terms of leasing properties. In this area,

we've lost a lot of nurseries and yards in this industry. The industrial areas that are available for lease are super expensive," she says.



Jessi Bloom

"To have a parking spot for multiple trucks and employee vehicles with an office is almost unattainable financially. We can't grow anymore in this spot because we're maxed out. We'll have to either start another branch or go find a bigger lot, which is so expensive."



Approximately what percentage of your location's 2024 gross revenue came from each of the following services?

- 37%** landscape maintenance: residential and/or commercial
- 25%** landscape construction/design/build: residential and/or commercial
- 15%** lawn care/chemical application: residential and/or commercial
- 7%** irrigation installation/maintenance
- 6%** snow and ice management
- 3%** tree care
- 2%** landscape lighting
- 1%** sports turf
- 1%** holiday lighting
- 5%** other

Bloom says some industrial offices are expecting \$30,000 a month in rent. And while she'd like to move the company to a more affordable headquarters, she's worried the added drive time will lose her valued employees.

"We don't want to lose employees because the commute is too far," she adds.

It seems the competition in the Seattle market is continuing to heat up.

"There's a lot of competition here. It's a very saturated market," she says. "But in terms of where we are at, and the niche that we're in, I think we're at the top. There's not any other company doing comparable work. There's a lot of people doing patios and doing habitat restoration — but we're a design/build company that does it all."

In fact, one of the things Bloom says sets her apart from her competition is NW Bloom does not perform free estimates on design/build work.

"We do things a lot differently than others in the industry," she says. "I don't

do free estimates. Our design ideas are the information that's taken years to develop...we've won numerous awards for aesthetic design as well, so they're paying for someone in that first meeting who has a lot of information to share and not necessarily trying to sell something.

"I think that level of first interaction, in terms of paying for the consultation, actually gives us a leg up in being professionals because they're paying for our time and that knowledge," Bloom adds. "There's a relationship then built on trust. We're not pushing for sales. That's not the driver.

It just happens naturally. I know a lot of other companies are very sales focused and chasing down leads. We just don't. We leave people to decide at their own pace, and when they're ready, they will call us. As a homeowner, the amount of chasing down leads, in some cases, can feel predatory."

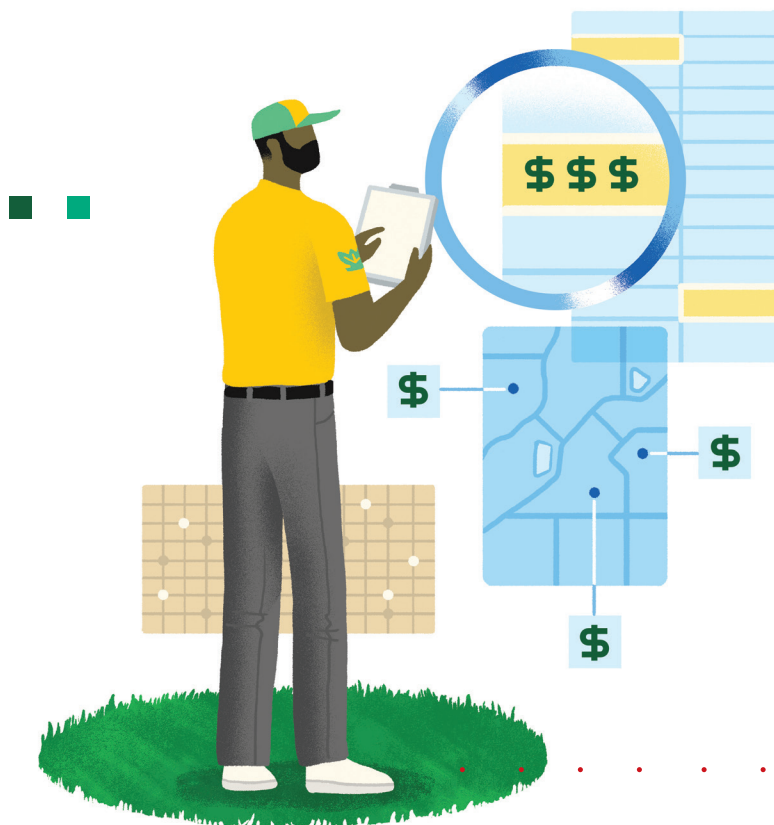
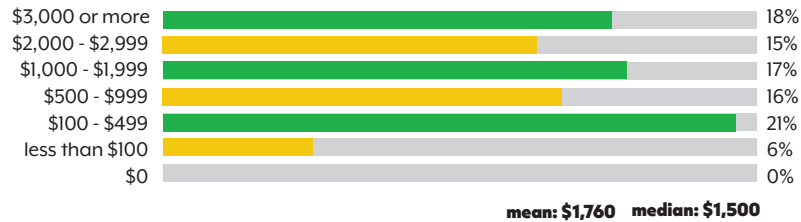
Outside of her competitive market, Bloom says Washington's changing climate is also adding to her company's financial stressors.

"One of the biggest challenges I think we face is climate change," she says. "Our temperatures are changing drastically...I don't get super doom and gloom about it, but it has changed how we care for our employees as well in terms of safety. We have wildfire smoke on a regular basis for several months of the year. Along with temperatures so high we have to pull crews. It might be laughable to other parts of the country, but when we have 100 degrees here with the humidity — people aren't adapted to it."

Bloom recalls a time in 2022 when her crew couldn't work for three weeks because of nearby wildfires.

"I think it's going to continue to be a bigger and bigger challenge," she says. "Weather has always been something we've had to deal with, but these are things that are a lot more serious in terms of human health and safety. It's hard because if we can't work people aren't getting paychecks and also the work just isn't getting done — it's a domino effect of problems."

Approximately what was your company's net profit per customer in 2024?



Trio Landscaping
Minneapolis, Minnesota

Times have been tough for Diana Grunden, owner and principal designer for Trio Landscaping.



Diana Grunden

The company earned just over \$500,000 in 2024, which was a down year for them.

"I have not been able to pay myself in the past couple of months," Grunden says. "The cashflow was just not there the way we anticipated it."

The design/build firm employs three part-time office staff members in addition to Grunden and a handful of trusted subcontractors to perform the installations.

"The labor rates have snuck up there over time," she says. "It's definitely gone up for the customer; however, we did find it cut into our pricing some as well."

Grunden adds that since the COVID-19 pandemic, pricing for materials has just never leveled out.

"We do adjustments as we find out materials have increased throughout the year," she says. "That's new since COVID. Before COVID, any of our vendors would set the prices at the beginning of the year and that would be it and it'd be fine. Now we need to be a little more reflective and know prices may change midseason, so we need to adjust them."

And while she wants to stay competitive, Grunden acknowledges to customers that her company isn't a fit if they're price shopping.

"I tell my clients we aren't going to be the cheapest — if I'm the cheapest then we're doing something wrong," Grunden notes. "But we're also not going to be the most expensive. There's going to be a number of my friendly competitors that are going to be more expensive, just because of their structure. I try to be right in there."

"I'm not out here trying to get rich quick. I'm just trying not to go broke fast either," she jokes.

Grunden recalls that she was booking a backlog of work six months or more in advance in 2021 through 2023. But once the COVID boon on design/build died, then projects started to dry up.

"I was warned by a number of people in landscaping and in construction that they were seeing a shift in the economic comfortability when it comes to doing remodels and update projects," she says.

Grunden says she's revving up her marketing efforts in order to make up some of that lost revenue.

"We're re-evaluating some of our marketing," she says. "Our marketing has been very relaxed — I have not been an aggressive marketer. I really hate just throwing money at marketing if it doesn't have a true ROI and I'm frugal as all get out. But we're updating our website and making some enhancements to it for SEO and some other things." **L&L**

The author is senior editor with Lawn & Landscape.

ILLUSTRATION: MATT CHINWORTH

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