

state of the LANDSCAPE LABOR MARKET

It's still challenging to find employees, but sometimes it's the basics that make your company attractive to current and potential employees.

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Executive Summary

Dear Industry Peers,

The landscaping industry is moving fast, but speed doesn't equal certainty. Margins are tighter. Labor is leaner. Expectations are higher. And while crews hustle to meet demand, most operators are still planning with assumptions and managing with hope.

It's not a labor shortage. It's a clarity shortage.

This report was created to change that to show what's really happening on job sites across the country, and what separates top-performing companies from the rest.

The insights come from two places:

1. A national survey of operators across revenue bands and regions
2. Our work directly with some of the fastest-scaling commercial landscape companies in North America

We observed how real crews work, where time actually goes, and how labor planning connects to field performance. The result is a benchmark built on field truth, not back-office theory.

You'll also find the "**Landscape Operations Maturity Model"**, a framework to help you assess where your business stands, where the friction lives, and what steps move you forward.

We built this report not from a distance, but from the field alongside operators, planners, account managers, and crew leaders.

With respect,

Sashikumar Yeddnapudi

Chief Revenue Officer

TOP Green by Turing



Sashikumar Yeddnapudi

TOP Green is built to serve this industry. Backed by **$14 million in Series A funding through Turing**, we're committed to delivering products that drive performance in industries that depend on people, equipment, and time.

> **As an engineer and entrepreneur, I believe the future belongs to those who manage with clarity, not guesswork. This report is meant to do just that — bring data and decisions closer together.**

This isn't just about reporting what's happening, it's about helping you plan smarter, execute tighter, and protect your margin every step of the way.

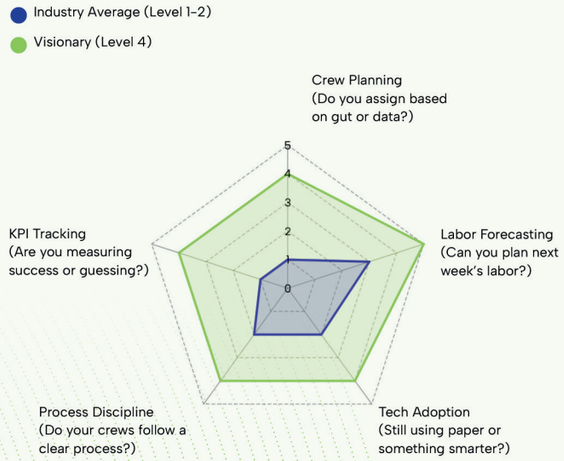
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WHERE DO YOU STAND?

UNCOVER THE GAPS IN YOUR LANDSCAPE OPERATIONS, BEFORE THEY COST YOU

TOP Green helps landscape companies shift from guesswork to data-driven operations.

WHERE DO YOU STAND ON THE MATURITY CURVE?



59% Can't accurately forecast labor needs

48.7% Don't track production rates for planning

79% Lack clear career paths for field teams

25.4% Don't measure drive time vs. job time

THIS ISN'T JUST A PERFORMANCE ISSUE. IT'S A MATURITY GAP.

MOST OF THE INDUSTRY IS STUCK AT LEVEL 1 OR 2 AND THEY DON'T EVEN KNOW IT.

THE LANDSCAPE OPERATIONS MATURITY MODEL

Built from real-world field data and daily crew challenges, this model helps you see where your ops stand and what it'll take to level up.

- **Level 1: Reactive**
  Every day's a scramble. Verbal plans, no forecasts, no visibility.
- **Level 2: Organized**
  You've got structure, but it's manual. SOPs are spotty. Metrics? Rare.
- **Level 3: Optimized**
  Plans go digital. Crews hit KPIs. You're tracking and improving.
- **Level 4: Visionary**
  Ops run on data. Forecasts are sharp. Your team adapts in real time.

DISCOVER YOUR MATURITY LEVEL. SEE HOW TO MOVE UP.

Take the 2-Minute Maturity Quiz

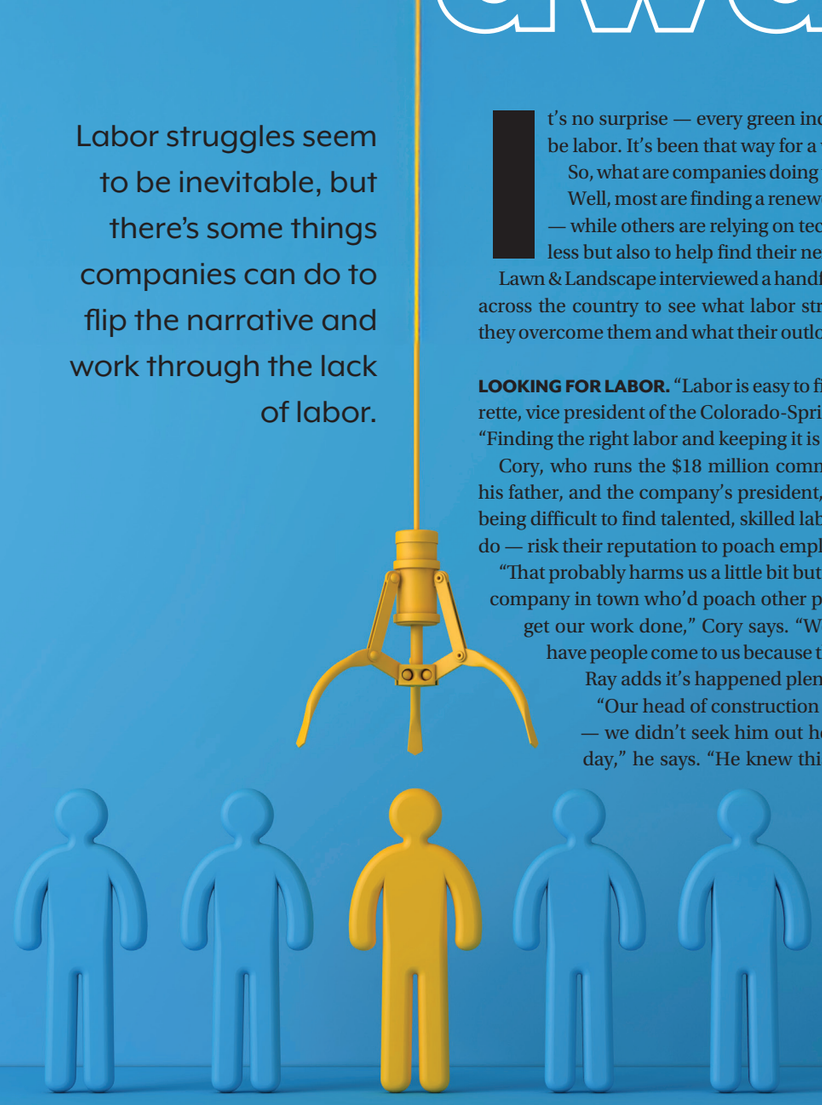
Scan the QR code to find out where your ops stand and what to fix first.

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Laboring away

By Kim Lux

Labor struggles seem to be inevitable, but there's some things companies can do to flip the narrative and work through the lack of labor.



It's no surprise — every green industry's biggest obstacle seems to be labor. It's been that way for a while.

So, what are companies doing to combat those labor challenges?

Well, most are finding a renewed focus on training and retention — while others are relying on technology to not only do more with less but also to help find their next shining star.

Lawn & Landscape interviewed a handful of landscaping companies from across the country to see what labor struggles they're dealing with, how they overcome them and what their outlook is on the future of the industry.

LOOKING FOR LABOR. "Labor is easy to find in our market," says Cory Shorette, vice president of the Colorado-Springs-based Landscape Endeavors. "Finding the right labor and keeping it is more of the challenge."

Cory, who runs the $18 million commercial-based business alongside his father, and the company's president, Ray Shorette, says that despite it being difficult to find talented, skilled labor, there's one thing they'll never do — risk their reputation to poach employees from a competitor.

"That probably harms us a little bit but we don't want to be known as the company in town who'd poach other people's employees just so we can get our work done," Cory says. "We want to do it the right way and have people come to us because they know we're a good company."

Ray adds it's happened plenty of times before.

"Our head of construction came here from a large company — we didn't seek him out he just showed up at the door one day," he says. "He knew this was the place he wanted to be. Our reputation in town and just how long we've been around helps us hold our own.

"We're always happy to take on a good team member," Cory adds. "Especially somebody who is unhappy somewhere else. Let's bring you over here and make you happy."

In Pinecrest, Florida, CEO of Nature's Dream Landscape Ray Rueda says he too is seriously struggling to find skilled labor. Currently, his business has 22 employees and earned about $2.7 million in revenue in 2024.

"First, we have issues getting crew leaders from the local market — we can't locate them, so we've basically decided to start the training program internally to provide training paths for some of our key people we've identified who have some of the qualifications we'd consider essential for a crew leader," Rueda says. "On the tree side it's even worse — it's very hard to find anybody qualified for that kind of work locally. So, we've done the same thing there. We're training them as fast as we can to try and get some additional people."

Joseph Duff, owner of Lang's Garden + Design, has a pretty diverse career background as a former union bricklayer turned IT executive for a Fortune 500 company.

But six years ago, Duff and his wife purchased the $4.5 million Linwood, New Jersey-based company that primarily does high-end design installations and very little maintenance.

"Our whole goal of getting into buying businesses, and leaving our corporate jobs, was to grow and create opportunities for people," he says. "In order to keep our staff engaged, we knew we'd have to create some bigger roles and we've since done that over the past six years."

Like Rueda and Duff, the Shorettes say they'd rather build up their existing staff than have to worry about finding labor elsewhere.

"We've always entertained the idea of the H-2B program, but we made the decision we're going to stick with local labor," Cory says. "We don't want to be in the lottery system and have a bad year because we didn't get our H-2B guys. We'd rather be different than most of those other big companies and not rely on that.



"Local labor does come with its challenges and turnover rates," he adds. "But if you invest in management and continue to focus on leadership you can see a big difference. This last winter, when we scaled down, we kept about 90 employees, and then scaled back up for peak season."

Currently, Landscape Endeavors has 140 employees.

H-2B RELIANCE. Ray says the primary reason the company is against utilizing the H-2B program is it would force them to raise wages too much.

"Here in Colorado Springs, it's about $20.50 per hour for H-2B," Shorette says. "When you hire just one of them then the whole company has to start at that level. We have a lot of entry-level labor in the $17-18 range."

Additionally, if the lower-level laborers were to be making more money that may cause a domino effect driving supervisors and foremen to expect higher wages too.

"The other issue we fight with it is if we bring in a large about of H-2B guys to make it worth it, and they're all at $20.50, and then we've got lead guys at $21 or $22 then it puts everybody a lot closer to together," Ray says. "There's not much separation. That can also make it a struggle… it shouldn't necessarily get under somebody's skin, but it does."

While H-2B labor might not be a viable option for them, Frank Vito, president of Vito's Lawn Care & Landscaping, says it's essential to solving their labor struggles.

"We rely on a lot of H-2B workers," he says. "About half our workforce is H-2B."

The $2.6 million Pennsylvania-based company currently has 25 employees.

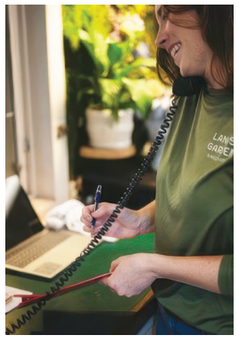
Vito says it was a drought in the local market that turned the company toward the H-2B program.

"We just weren't really finding the most reliable teammates," he says. "There really was a disconnect between the experience and the training these people were coming in with and the compensation expectations. With the H-2B program, we've been able to access more reliable labor, more trained labor, and I think the compensation structure has just been more aligned with different levels of experience."

Vito adds that by using the labor program, his company has actually put a more structured career ladder in place.

For Rueda, he says H-2B won't solve his labor woes as the warm Florida climate makes it difficult to qualify for seasonal assistance.





Incentive or referral bonuses can be great ways to keep employees engaged and help entice new additions to the company too.

Not all percentages will equal 100 due to rounding, survey data is based on more than 200 survey respondents.

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Because qualified labor can be hard to come by, training and employee retention become even more important.

"H-2B visas don't work down here in Florida because it's year-round and not a seasonal basis requirement for labor," he says.

ENTICING COMMITMENT. But whether it's labor from the local market, or seasonal H-2B help, all those interviewed say that training and retention are of upmost importance.

"We tend to focus more on hiring and training than hiring with experience," Duff says. "We have a unique approach to our maintenance program that's hard to teach if people are used to using power tools to maintain beds."

In addition to placing a high priority on training, Duff says his company has several incentives that encourage retention.

"We really haven't had much attrition," he says. "Paying well really has been what we find to be the best thing. We typically land on the higher end for most services. We gave a lot of pay increases during the COVID years to try and protect our labor force from leaving because there were so many opportunities. We really took care of our critical employees and added a bonus incentive structure that really tied everyone to the same goals."

Duff says that the bonus incentive is 13% of the company's net profit and is paid out twice a year to employees.

"The bonus is one thing, and I think it's been somewhat of a carrot, but I don't think it's as effective as I would've thought it'd be to an employee," he admits.

But what's been a great motivator Duff says is the company's 401K match.

Do you have an organizational chart at your company?



Do you have an employee recruiting and retention strategy in place for your company?



"The 401K in lieu of benefits and with the match up to 6% has been the biggest thing to get younger folks to stay on," he says. "Now some of them are filling foreman roles…With the match, you're vested after two years so you get the match, and you see that in your account every week with your contribution and the company match. By the time that two years is there, they have a significant amount of funds in the account."

Rueda says he finds most of his new hires through offering a referral bonus.

"We also get a lot by word-of-mouth and offering incentives to the employees," he says. "We offer them $300 if the person is there for three months. That one is probably my preferred way of getting people in."

TURNING TO TECH. Additionally, Rueda says he's starting to rely more and more on technology to entice prospective employees.

"We do some ads on TikTok and Facebook and try to get somebody there. But honestly, a lot of the times we're getting people who are not qualified — so it's been worth it to screen them. It's so many calls from unqualified candidates," he says.

In order to refine those job postings, Rueda says generative AI chatbots, like ChatGPT, have been essential.

"We're trying to do a lot of that," Rueda says of relying on technology. "We're using a lot of AI to do SOPs (Standard Operating Procedures) and optimize routing and all those things. We've also been using that to improve the quality of our ads out there to make them more enticing. So, we've gotten a better reach with those AI-written posting."

Previously, Rueda says he had software he invested in to find better qualified candidates, but he gave up that subscription awhile back.

"Before we were using a program that helped us to post for openings and they did a lot of the screening and they pre-selected candidates…but it was a really expensive app," he says.

Duff says a POS software (Point of Sales) has been huge for running his business more efficiently with its small staff.

"Because we have a retail component (it) has been a gamechanger in terms of being able to run the company somewhat remotely," he says. "We have everything under one roof and it's such an intuitive software.

"If they tripled their fee, I would happily pay it," Duff jokes. "It makes reporting, payroll, benefits, the 401K program all so seamless."

Aside from that software, Duff says he's been shying away from too much tech overload for now.

"What I've found is, even with some of the younger seasoned guys, having technology in the trucks have been somewhat of a burden," he says. "If we were to double the company size then we might have to do something about it and roll some of that out."

Vito says he's in the same boat — primarily relying on a single software.

"We do run a CRM that gives them their work orders, helps with their dispatching and gives them the crew assignments for the day," he says.

Though he adds that keeping his fleet and equipment up to date is important for employee retention and morale.

"We're trying to keep the hand-held and mowing equipment more current, so they're using top-of-the-line stuff," he says. "That makes their lives easier out there."

The Shorettes say that's their philosophy, too.

"We're heavy on machinery — if we can use a piece of machinery to reduce manual labor, we'll do that," Cory adds.



Labor struggles aren't going anywhere any time soon, so companies need to get creative to keep crews on board.

FORECASTING THE FUTURE. Despite a few struggles in terms of labor, Cory and Ray say they're not too worried about the problem getting worse.

"I honestly don't have a concern about the labor market," Cory admits. "More of our concerns are about the tightening of the market overall as things slow down — especially the tightening of pricing across the board."

Though Ray says every once in a while, there are instances where the labor market tightens too.

"We do see some strain on labor when other companies don't get their H-2B," Ray adds. "We have some of the larger players here and when they don't get their H-2B that labor market for us does shrink." Rueda is not as optimistic. He says that as labor becomes harder to find, that means paying more, which translates into raising prices for his clients.

"We're increasing all our rates too and paying the guys a lot more than we used to before. I think that'll be a trend where we'll have to keep increasing rates," he says. "We've had to increase prices and even lately we wrote a little paper explaining why we have to charge $60 per man hour. It's a little narrative there to explain the reason behind it. I try to be very open book… we're not getting rich, but this is how we get to the numbers at all that."

Rueda says customers reception to that has been so so.

"Some people understand, and some others just don't care — they say it's too much," he says.

For Vito, his outlook on the labor market contains a healthy level of uncertainty — especially when it comes to H-2B and governmental changes.

"There's still a feeling of unease for some of the H-2B workers. I hope that doesn't give them a sour outlook or make them not want to return next year," he says. L&L

The author is senior editor at Lawn & Landscape.

What benefits do you offer currently?

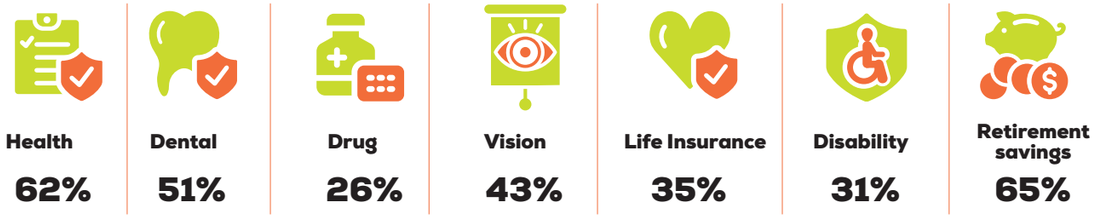
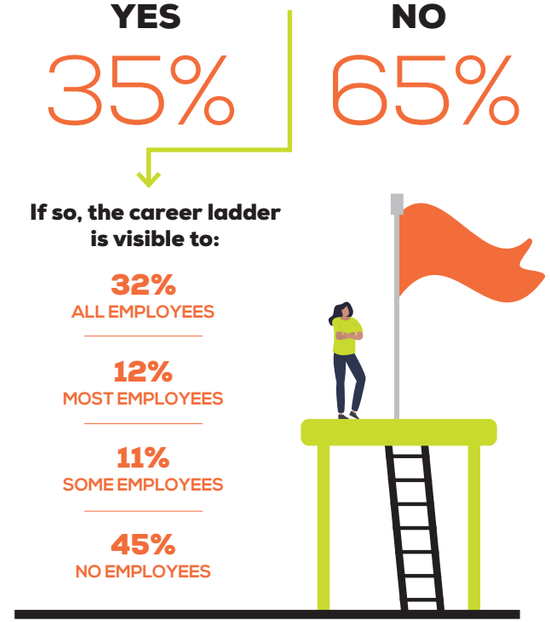


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