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State of the Industry

SPONSOR LETTER

Fall 2025 industry outlook and how to position for growth in 2026

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EXCLUSIVE RESEARCH

Halfway through the decade, it's open roads for some traffic for the industry as we head into 2026.

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COAST-TO-COAST

Landscapers from across the United States and Canada weigh in on the last 12 months and look forward to 2026.

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Illustration by **blindSALIDA**

2025 State of the Industry REPORT
sponsor letter

Fall 2025 Industry Outlook and How to Position for Growth in 2026

Paul Manger
Executive Director
of Product Marketing,
Kubota Tractor
Corporation

Dear customers and industry colleagues,

After a first half of 2025 that felt much like late 2024, with stop-and-start momentum and plenty of unanswered questions, early summer brought a welcomed uptick. June and July were more positive, suggesting our customers are adapting to an unstable market. While two months don't make a trend, they do give us reason for cautious optimism.

As we head into fall, we still face real headwinds: lingering supply chain friction, tariff-related cost uncertainty, and ongoing challenges around labor, regulation, and weather variability are unpredictable parts of doing business in our industry. We're not changing our near-term plan, but we are prepared to pivot quickly if tailwinds strengthen. In short, we're steady, optimistic, and ready to move into 2026 with a clear plan—and you should be, too.

PLAN WITH CONFIDENCE: HOW TO STAY A CUT ABOVE IN 2026

- **Secure critical assets early:** Place Q1–Q2 2026 equipment orders in the fall with realistic lead-time buffers. Whether you need a new stand-on or zero-turn mower, utility vehicle or track loader, we continue to diversify our equipment lines to give you versatile, high-quality options to right-size your fleet and keep your crews productive.
- **Standardize where possible:** To simplify your operations, standardize the brands you use, your training, diagnostics, and parts stocking processes. At Kubota, our one-stop shop equipment offerings are in direct response to your specific needs, working with our dealers to back your business with the best service and support. To further simplify, consider fleet programs like Kubota's Turf Fleet Program that offer exclusive discounts and ensure you get the best value to keep you mowing while your equipment is in for service.
- **Make the most of your fleet:** Maximize productivity gains by investing in standardized systems and technology like telematics for route optimization to help offset labor and material costs.
- **Invest in people:** Strengthening retention strategies with predictable schedules, recognition, and clear career paths is often more effective than chasing headline wage rates.
- **Finance wisely:** Revisit financing offers to gear up for spring. Lock in terms and keep working capital flexible. When possible, align payment milestones with project phases to protect cash flow.
- **Diversify and harden operations:** Broaden your client mix across sectors and geographies where feasible. Specify resilient, region-appropriate plant palettes and soils. Document storm response plans and communicate them to your customers before weather events occur.

The fundamentals of the turf industry remain strong, and with thoughtful early planning we can convert today's variables into tomorrow's advantages. By investing in the right people and tools and partnering closely with Kubota as your one-stop-shop, we can help you turn uncertainty into opportunity.

Thank you for your continued trust and partnership. Here's to finishing 2025 strong and entering 2026 prepared, resilient, and focused on growth.

With appreciation,
Paul Manger

Kubota

2025 State of the Industry REPORT

2025 State of the Industry

Halfway through the decade, it's open roads with some traffic for the industry as we head into 2026.

The results of our State of the Industry survey across the board remained similar to last year's survey in a lot of areas. One significant change came in the percentage of people who anticipate their business will be sold in the next 10 years. Last year, 25% anticipated a sale while this year 36% percent expect they will sell. In the past 12 months, 54% of respondents have been approached about selling their company compared to 44% in the 2024 report. What's concerning those in the industry has also stayed somewhat similar except for economic recession and high fuel prices and a few other areas. Concerns over an economic recession decreased from 47% to 39%, while fuel price concerns decreased from 51% to 39%. Difficulty in raising prices increased from 39% to 44%, while low consumer confidence and immigration regulations increased by about 5%. We asked about tariffs this year, which showed 24% being very concerned. In 2024, the industry saw a slight decrease in mean and median revenue. Confidence in company and industry growth are slightly down to only 89% expressing some form of growth confidence for both areas, decreasing from the low 90s last year. —**Brian Horn**

What was the most profitable service your location offered in 2024?

24% design/build services

22% landscape maintenance (mowing, edging/ trimming, pruning)

16% lawn care/chemical application

12% snow and ice management

5% irrigation installation/ maintenance/service

5% tree and ornamental installation/care

1% waterscapes/ fountains

5% landscape lighting

other: 7% none: 2% no answer: 1%

survey methodology

Data for this survey was collected from June 17 to July 15, 2025, and is based on 193 responses. The margin of error for percentages based on 193 landscape contractors/lawn care operators is ±7.0 percentage points at the 95% confidence level. Not all results will equal 100 percent due to rounding.

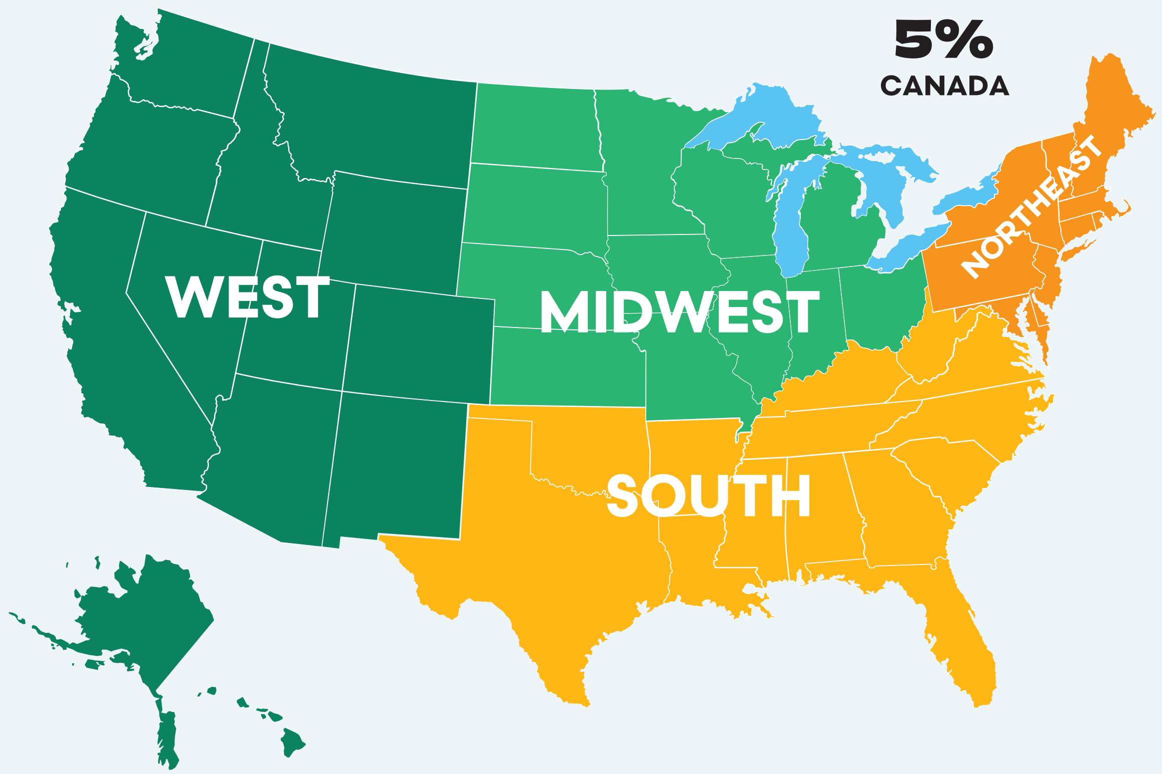
spot illustrations by **blindSALIDA**

MAP, BACKGROUND, FLOWERS AND ROAD GRAPHIC ELEMENTS: ADOBE STOCK

2025 State of the Industry REPORT

Companies by location

(by state or province)



18%	24%	38%	15%
WEST	MIDWEST	SOUTH	NORTHEAST

NORTHEAST

New England (CT, MA, ME, NH, RI, VT) 7%
Middle Atlantic (NJ, NY, PA) 8%

MIDWEST

East North Central (IL, IN, MI, OH, WI) 12%
West North Central (IA, KS, MN, MO, NE, ND, SD) 12%

SOUTH

South Atlantic (DC, DE, FL, GA, MD, NC, PR/VI, SC, VA, WV) 20%
East South Central (AL, KY, MS, TN) 8%
West South Central (AR, LA, OK, TX) 10%

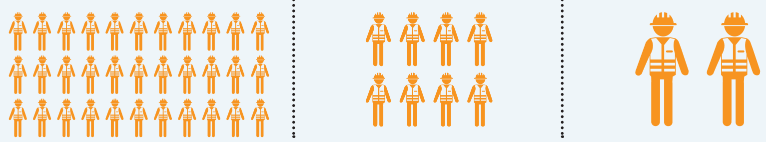
WEST

Mountain (AZ, CO, ID, MT, NM, NV, UT, WY) 9%
Pacific (AK, AS, CA, HI, OR, WA) 9%

no answer: 1%

How many full-time, part-time, and seasonal employees does your location currently have?

FULL-TIME: 33 | SEASONAL: 8 | PART-TIME: 2



Total current employees: 43

Approximately what was your location's gross revenue in 2024 (in USD)?

	2020	2021	2022	2023	2024
Mean (MILLIONS)	$1.29	$1.74	$2.32	$2.44	$2.22
Median (MILLIONS)	$273,000	$604,000	$1	$1.26	$910,000

DESIGN/BUILD SPOT: blindSALIDA | MAP AND STICK FIGURE ICONS: ADOBE STOCK

WHICH OF THE FOLLOWING SERVICES DOES YOUR LOCATION CURRENTLY OFFER?

91% Lawn care/ chemical application

81% Landscape maintenance

73% Landscape design/ construction

68% Trees & ornamental

57% Irrigation

41% Snow and ice management

22% Mosquito control

18% Holiday lighting

12% Sports turf

2025 State of the Industry REPORT

State of the Industry:

Coast to coast

Landscapers from across the United States and Canada weigh in on the last 12 months and look forward to 2026.

By Kim Lux and Jimmy Miller

spot illustrations by **blindSALIDA**

SURVEY SAYS ...

Approximately 5% of your location's 2024 gross revenue came from trees and ornamentals.

ALL HEAD SHOTS AND PHOTOS COURTESY OF RESPECTIVE COMPANIES

Eddie Martindale

owner of D&E Landscaping & Grading,

Richmond, Michigan

Martindale and his team of 40 employees have been working around the clock this year and it's paying off.

"This year for us is busier than last season," Martindale says. "Jobs that were bid a few years ago actually landed all together this year one after another.

"It put a strain on us to get it done," he admits. "But we worked through it…We pushed a little more work than we were capable of — but we pulled some rabbits out of our hat to make it work. I'm pretty proud of that and proud of the guys. We held together a lot more work that I thought we were capable of for the size that we are."

Despite it being a demanding season for them, Martindale says that's not his biggest concern as of late. Customer expectations have been draining and he's constantly working to educate clients on the true costs of materials and labor.

"On the maintenance side, we're doing great," he says. "On the residential side, we've seen the word 'budget' come up more. People are on a budget, and they're very interested in getting the work done but they are conscious of spending. But demand is still there.

"As for other challenges, meeting customer demands at five years ago pricing is difficult," Martindale adds. "Due to the cost of the products, the labor increases and costs of equipment — we are significantly higher priced than we were five years ago."

Martindale says he can't fault his customers for being frugal, but sometimes they have to lower their expectations and go with options that are more aligned with their budgets.

"People always want more for their money — that's a given and doesn't change in any industry," he says. "We just had to cut back some areas of landscaping on the projects or maneuver to cheaper, budget products on the jobs to stretch the money. People want the higher-priced products but settle for what is in their price range. All in all, it still looks great when its installed."

Another factor in this whole pricing fiasco is the higher cost of housing in his small-town Michigan market, Martindale says.

"Housing is approaching high levels here in terms of cost," he says. "Due to the cost of housing, some of the projects are a little bit smaller than we've seen over the past five years."

"That's the general issue — they spend a lot on the inside of the house and landscaping gets cut accordingly," Martindale adds.

It's been the busiest season in a while for D&E Landscaping & Grading, but Martindale says they've made it work.

"On the residential side, we've seen the word 'budget' come up more. People are on a budget, and they're very interested in getting the work done but they are conscious of spending. But demand is still there."

— Eddie Martindale, owner of D&E Landscaping & Grading

2025 State of the Industry REPORT

Lawn Plus Landscaping will soon have 400 more customers to service after the company made a small acquisition.

Jamie Jones

owner, Lawn Plus Landscaping

Fort Wayne, Indiana

If only Jones could find another handful of good, skilled employees — then his business would be booming even more.

"It's been a good year, but we've pulled back from sales because I don't want to bite off more than we can chew," he says. "But the guys we have are really good; I just wish I could find enough of them."

Currently, Lawn Plus employs between 18 to 20 crew members throughout the season. The company does about $2 million in revenue.

And finding more people to fill the open roles hasn't been easy.

"It's always been bad but know we're assuming they won't show up," Jones says of the interview process now.

He's unaware of what more can be done to find and retain quality employees — but that is his goal for the offseason.

"I know I don't want to go poach somebody," he says. "We always have these good ideas about hiring and retention and then there's always another fire to put out and it gets moved to the sidelines."

The lack of labor is 100% his biggest growth inhibitor, Jones says.

But more employees can't come soon enough — as Lawn Plus is about to have about 400 more customers here shortly.

"We're in the process of a small acquisition in an area we really want to go to," he says. "I'm really excited about it."

And Jones hopes this acquisition and future growth will help set the company up for success down the road — so he can enjoy his retirement.

"I'm really hoping to be out in five years," he says. "I'm tired. I know it will be the hardest day of my life...but I'm starting to realize I can't do as much in the field as before."

Jones says he's hoping his son or another tenured employee will want to take over the company when the time comes.

"I want to get it up and running and get it turnkey and just let them take it," he adds.

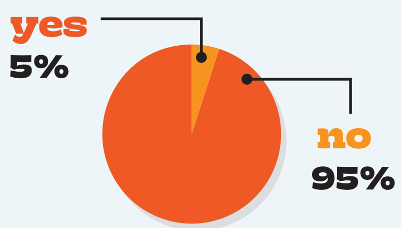
If they don't want to pursue Lawn Plus' progress, Jones says he's sure he can find another buyer.

"I get emails twice a week about selling to private equity," he says.

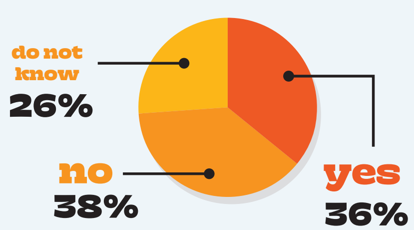
Overall, Jones is still enjoying his time in the industry but is ready for the next phase of his life.

"Thirty years is a long time, and I've sacrificed a lot," he says. "I'm thankful for it and it's been great, but I'm ready to enjoy more in life."

DOES YOUR COMPANY CURRENTLY HAVE PRIVATE EQUITY INVESTORS?



DO YOU ANTICIPATE YOUR BUSINESS WILL BE SOLD IN THE NEXT 10 YEARS?



Ben Green

COO of Strata Landscape Services,

Los Angeles, California

Strata Landscape Services was formed last year and finished out with $6 million in revenue, now the company is already up to $18 million after a few more acquisitions.

"Our goal is to grow a very robust company that's really rooted in the industry," Green says. "You could say a lot of the (private equity) rollups these days are just a financial transaction but I'm the tree-hugging hippie who wants to ensure we see beautiful flowers, trees and lush grass.

"Everything we're doing right now are initiatives focused on improving the quality of the landscapes," he adds.

Green says private equity's involvement in the green industry and the high volume of mergers and acquisitions won't be slowing down any time soon. However, he does question the intentions behind a good majority of those deals.

"There's a bunch of rollups, there's a lot of gimmicks and I do believe that it has the ability to either propel our industry forward or potentially damage our industry," he says. "The sacrifice that's being made consistently is the quality of the product."

That's why finding the right private equity partner was of upmost importance for Green and Strata Landscape Services.

"I think that every PE firm has a different approach. The clear goals and objectives when you sign up with a private equity firm and the most critical part is the beginning," he says.

"Working with a PE firm, the thing I really like about them, is they ask us this question every single week — What is your differentiator? What differentiates you from every single company in the industry? And if we don't have a good answer, they tell us to go back to the drawing board."

And while that answer may change from time to time, the overall foundation behind Strata's motives remains the same.

"The word that sums it up for us — and what we've been using as a guiding light — is pride," he says. "It's about pride in our product and pride in our people.

"That's something I hold really near and dear. We're not going to be able to advance and really grow unless we can really be proud of what it is we're doing."

That's why service, and their product, trumps profit in Green's eyes.

"I feel a lot of the rollups that are happening are only about the bottom line and only about money," he says. "At some point you have to deliver a service and that service has to align with customer expectations and has to be representative of the business in which you're forming. If that goes away — then you are lost, and you will never find your way back."

And getting buy-in on that from the company's 150 employees during the post-acquisition process has been Green's biggest obstacle, so far.

"The biggest challenge, for me, is about having the team recognize that the value of this business is in the sum of its parts," he says. "Each individual adds a contribution. To be able to motivate the team to believe what I'm saying, and to actually practice it, has been the largest challenge.

"I'm trying to convince everybody that what we're doing is intended for their success and that their success is more important than mine because I can't be successful unless they are," Green adds.

"I don't think a lot of people buy that line. I don't think they believe it. So, I have to make believers out of people."

SURVEY SAYS ...
36% anticipate your business will be sold in the next 10 years.

2025 State of the Industry REPORT

Brandon Fusaro

owner, Twins Lawn Service

Sterling, Massachusetts

"Whether that's individuals that don't have any skills that we want to train or somebody that is skilled... There's a balance around who do we want to hire versus hiring anyone that comes through our door."

— Brandon Fusaro, owner of Twins Lawn Service

For Fusaro, this is his first year back in the green industry full-time since ending his corporate pharmacy career in April.

"I own the business with my twin brother, Mike," he says. "We really started in high school and paid our way through college by mowing lawns and working in the business. I went to pharmacy school and worked in corporate pharmacy for seven years while he really ran the day-to-day of the business and I ran the behind-the-scenes stuff."

And it's been a welcome return, as Twins Lawn Service is doing extremely well.

"We're beating our projected revenue numbers so far year-to-date," he says. "Our actuals are beating our budgets and that's always a good thing. We're selling jobs, we're producing jobs — we're on the right track this year with sales and revenue."

In 2024, the company made about $2.3 million in revenue, and this year should be even higher.

"We always want to grow in the 15- to 20% range," Fusaro notes. "We are already up 14- to 15% this year."

Fusaro adds that growth percentage could be even higher if the company, which employs 27 workers, had more staff.

"What maybe inhibits our growth is making sure we have the right equipment and staff in place," he says. "Something I'm always big on is that if we want to grow, then we always need to be adding trucks and we need to be hiring.

"Sometimes, even if there isn't any in the moment need for an employee, if we come across someone who is a good fit, we'll take them on. Because we know we can grow the business and take more jobs if we keep growing our employees." Finding those perspective employees is Fusaro's biggest challenge.

"Skilled labor is still probably our biggest issue," he says. "I could go out today and hire five people to come and work for us. But I think it's more about finding the right fit for us, the right fit for the company and the right fit for our culture.

While experience is nice, Fusaro says sometimes it's worth taking a risk on someone who may not have industry experience but has the necessary soft skills and personality traits.

"For us, it's kind of a mixture of both," he says. "We're not afraid to hire somebody who doesn't have any skills or experience in landscaping as long as they're going to show up every day and work hard... But also, we still do have a need for those skilled individuals. We needed a skilled mechanic, on the design/build team. We do need people who have hardscape experience.

"Our snow operations needs people who know how to operate equipment," he adds. "Yes, we can teach somebody how to plow or operate a snowblower, but we need those skilled individuals... though we don't shy away from those people who don't have experience."

SURVEY SAYS ...

the average number of employees for companies was 42.

Ted Glaser

Founder, Summit Lawns

Lincoln, Nebraska

Ted Glaser believes Summit Lawns has a very basic business model — the company primarily focuses on lawn care, mowing, general maintenance and snow removal. It's no accident: Glaser says this model empowers the team to focus on fine-tuning rather than being a one-stop-shop for everyone.

"It's really easy to scale simple things," Glaser adds.

Doing work fast and offering good customer experience is Glaser's primary goal. And it's worked. Glaser says they're still figuring out the Omaha market where they bought out another company last year, but in Lincoln where Summit Lawns is based, the market has long felt steady, even amidst uncertainty nationwide.

"The waters in Lincoln never really get shook. When the economy is skyrocketing, Lincoln's just kind of whatever's going on. When the economy's tanking, Lincoln's just kind of whatever's going on. We don't get the really big ebbs and flows and the big swings. We don't feel the emotional roller coaster or financial roller coaster that major metropolitan areas would feel.

"We sell affordable things so even when the economy is tough, it doesn't affect us as dramatically," Glaser adds.

Despite staying steady, Glaser says wage inflation has bloomed in Lincoln, just like everywhere else.

The company implemented pay-for-performance, so technicians are paid a percentage of the labor revenue they bring in. So, Glaser says this has combatted the wage inflation because this process empowers them to take on more work and because they've raised prices on clients.

"They're doing more work faster," Glaser says of his mowing team. "We have fewer team members doing more work. Labor as a percentage of revenue is going down."

The only other major abnormality about Lincoln this summer was that it was a particularly wet summer. Interestingly, it's usually quite dry in the winters, so it's been hard to grow that side of the snow removal market for landscaping companies. That wasn't the case for services like lawn care and pest control this summer.

"On the snow side of things, we've really struggled to grow our snow business," Glaser says. "But on the summer side of things, we had a ton of rain this year, so it really kept us busy all summer long. It led to a lot of fungus and disease issues in the lawn, and we also had a lot of pest issues, which is a headache to deal with but also creates a lot of sales opportunity. We've been able to capitalize on the disease and insect issues...which we normally would never get."

A switch to a pay-for-performance model has helped Summit Lawns combat wage inflation.

Despite that, Glaser says it was largely business as usual this year at Summit Lawns. He feels it's like that similarly with the other landscapers he talks with most frequently. Everyone he knows is really focused on leveling up their existing teams, and nobody is overly struggling with fuel or tariffs.

"(They're) really working on labor efficiencies — at least in my circles, there's a heavy obsession with that," Glaser says.

APPROXIMATELY WHAT PERCENTAGE OF YOUR LOCATION'S 2024 GROSS REVENUE CAME FROM EACH OF THE FOLLOWING SERVICES?

39% landscape and mowing maintenance

22% landscape design/construction

17% lawn care/chemical application

8% snow and ice management

6% irrigation installation/maintenance/service

5% trees & ornamental

1% holiday lighting

other: 3%

Greg Loewen

president, Spruce Acres Landscaping

Manitoba, Canada

"As a landscaping company we're so dependent on the weather and last spring started very wet. It was wet for many weeks and that had a real impact on our ability to both sell and deliver."

— Greg Loewen, president of Spruce Acres Landscaping

Good things are on the horizon for Spruce Acres Landscaping, Loewen says of his $1 million Canadian company.

"This year, in every measurable aspect, it's been a very good and productive year — a year of high growth," he says. "I don't know if we'll clear 50% growth, but we've achieved 40% growth year-over-year."

After a tough 2024 weather-wise, Loewen says he's happy to see clearer skies both literally and figuratively.

"Being a landscaping company in Canada — we have a limited timeframe to get most of our work done. We operate roughly from mid-April to mid-November," he says. "Last year was a challenging year. As a landscaping company, we're so dependent on the weather and last spring started very wet. It was wet for many weeks and that had a real impact on our ability to both sell and deliver."

Not only are crews stalled during the rain, but Loewen says the phones don't ring much, either.

"When it's raining, people hide inside their homes and don't think about landscaping — they probably just watch Netflix or something," he jokes.

In addition to the better weather, Loewen says the company's focus on local, rural work has also benefited them growth-wise.

"We have to grow bigger, faster and we've had a growth mentality from day one. There's nothing stopping us from continuing to grow," he says. "Our initial go-to market strategy was actually focusing on rural versus urban. We were looking for a differentiator and through our market research we heard that a lot of the companies avoided work outside the main center, which is Winnipeg. Customers who were located in the rural areas had a hard time getting the attention of landscapers."

Despite being focused on providing rural-based services, Spruce Acres isn't behind the times or using back-road business strategies — they are fully focused on technology.

"From the very beginning, every piece of software we've used to run the company has been cloud-based software," he says. "We continue to double down in that mode of doing business, which makes all of our systems very accessible regardless of where people are."

Loewen says they've even started playing around with AI and some other more creative forms of technology.

"We're dabbling now in AI," he says. "We haven't made massive investments or anything but we're keeping our eyes open and using the tools that are readily available to us."

There's still plenty of more to learn when it comes to their industry-specific software use.

"Like all good software — we're maybe using 20%," he says. "There's lots more for us to learn and implement."

Shawn Jones

owner, 417 Mowing

Springfield, Missouri

The most turbulent part of Jones' summer season has been something he can't control — the weather.

"We had the wettest April-May combo in history, then we followed that up with a current drought," Jones says. "It's been horrible weather-wise."

Jones, who manages 417 Mowing in Missouri, says the rough weather will affect the company's third-quarter gross profit, but he also expects some rebound in the fall. That's because Jones and his 12 employees do whatever they can to be a full-service landscaping company, even if 85% of their work is mowing.

The company, which is on track to earn $1.1 million this year, is anticipating its clients to request more fall maintenance and fertilizer work since their properties will be damaged from the difficult summer season.

"I'm expecting an uptick as people try to recover from the drought," Jones says.

One inexplicable trend he's noticed this year has been that labor has been easier to come by — not easy, he clarifies, but easier. After the post-COVID wage bump to get people in the door, he's kept his wage above what Jones believes is his market's entry-level value.

"Hiring has been a constant problem forever," Jones says. "It's just hard, hot work. Getting people interested, and keeping them interested, has always been a challenge."

Still, this year was a pleasant relief.

"It's been actually a little better than it has been over the previous years, and I don't know why that would be," Jones says. "It just seems like we have some better hires and guys sticking around longer than normal."

Retaining those employees will continue to be costly. One nice thing is that Jones says fuel seems to have leveled off in his area, which is a relief for a company with costs that are primarily centered around fuel.

He anticipates tariffs will impact his parts replacements on mowers, but beyond that, Jones says the steady cost of fuel has been a welcome change.

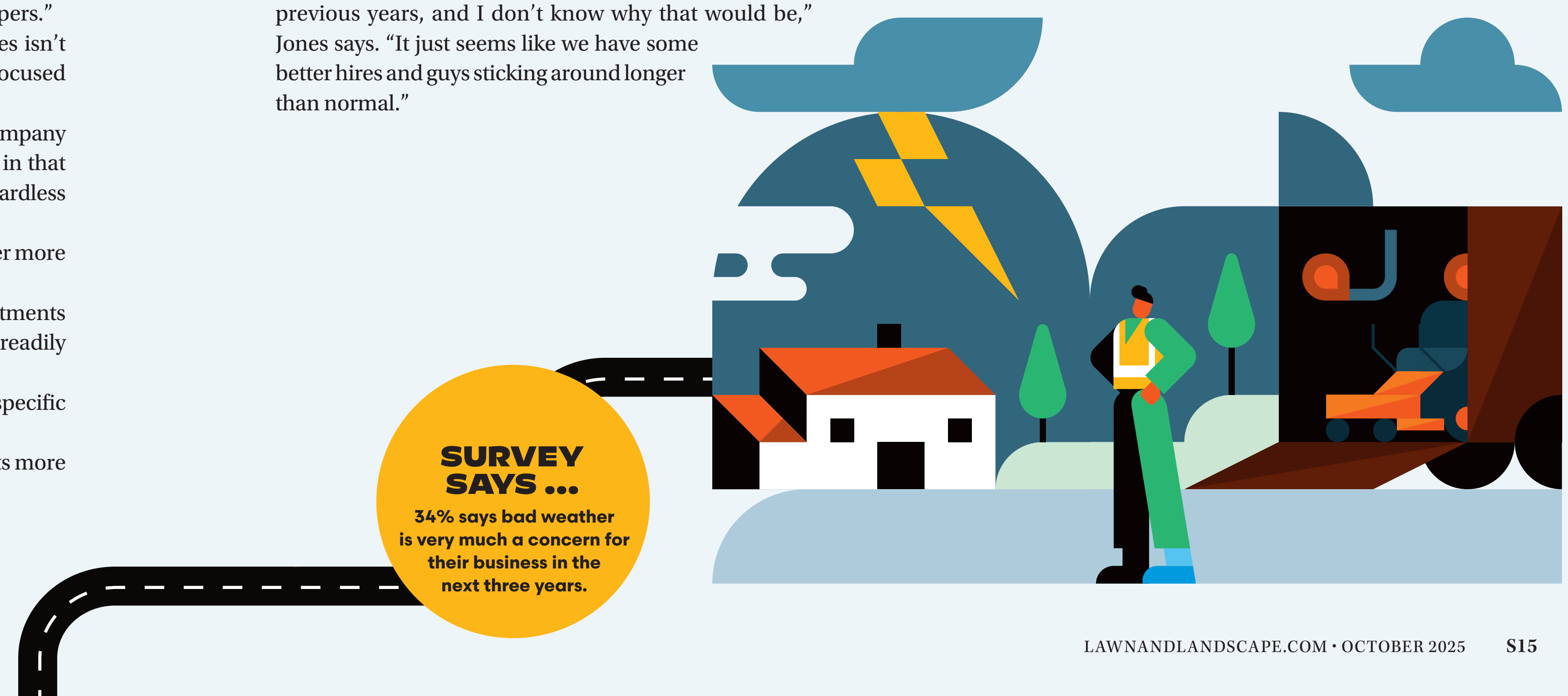
417 Mowing also offers snow removal services, and Jones says he's curious to see what pricing out products in that market might look like.

"With mowing, we're not always buying a lot of product," Jones says. "I have not priced out ice melt for this year yet, but I'm interested to see what that's going to be like since it's local and not imported."

"We've got 12 employees and probably 85% of what we do is mowing, but we are licensed for chemical, fertilizer weed control, landscaping, bed maintenance, snow removal, tree service. Whatever comes along, we do whatever we can to be full service."

Beyond that, his work has primarily been business as usual.

"It's pretty much watch the weather and manage employees," Jones says. "Past that, it's stay the course."



SURVEY SAYS ...

34% says bad weather is very much a concern for their business in the next three years.

Our latest lineup of lead generation tools.

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2025 State of the Industry REPORT

"We wouldn't take on work that didn't fit within that even if that meant leaving some revenue on the table."

— Joe Brewer, president of Lexcut

Joe Brewer

president, Lexcut

Lexington, Kentucky

Brewer is back in the industry after stepping away for over a decade.

"I took over Lexcut last April," he says. "I spent the last 15 years in the corporate world, but I was in the industry prior to that — and found myself back in it. It's been an interesting journey… I never thought I'd find myself back in it."

And one of the first changes Brewer made to the company, which employs 20 people and does about $2 million in revenue, is make the switch to all commercial maintenance work.

"When I took over, we were about 80% commercial and 20% residential, and I shifted it to fully commercial work," he says. "There were several motivations behind that. One was the old '80/20 Rule,' I was spending 80% of my time dealing with billing, quality issues or customer complaints with the residential side of the business and it made up so little of our revenue.

"The nature of commercial work is obviously very appealing to a lot of people — being under contract and have reoccurring opportunities to sell enhancement work and things like that," Brewer adds. And the decision has paid off. Brewer says things are going good and he only expects them to get better.

"This year is going well on paper," he says. "We were able to grow about 30% over the previous year. This year the outlook is looking even greater. Hopefully 2026 will turn out to be the best year yet in the company's history."

By making the switch to solely commercial work, Brewer says the company intentionally narrowed down its customer range. But doing so helped add focus.

"We stopped chasing the shiny object and focused on what we're good at and nailed down our ideal customer profile," he says. "We wouldn't take on work that didn't fit within that, even if that meant leaving some revenue on the table."

The other focus of Brewer's lately has been company culture and retention. After a year of high turnover in 2024, he felt it was necessary.

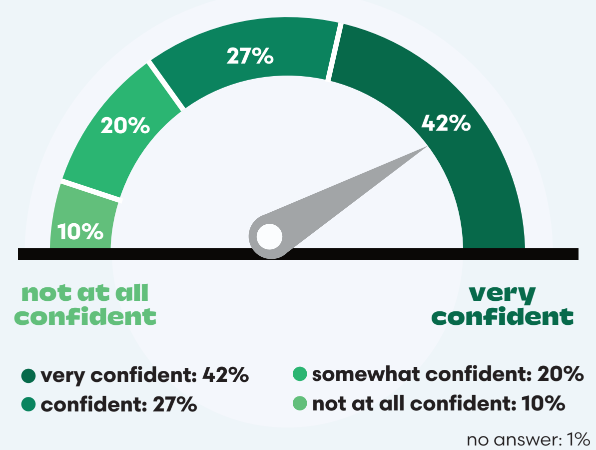
"Where we live in Lexington, there's a large Hispanic workforce already because of the equine and horse farms, so everybody knows they can find a job pretty easy — so you've really got to work on culture and retention to keep the good talent around or they'll move on to something else," he says.

"Little things go a long way to show you care. One of the things we noticed right away was the crews don't want to operate old equipment that's breaking down all the time. To get the good talent, you've got to make sure you've got good equipment. We invested in new mowers, trimmers, edgers and all that stuff."

Brewer also began providing uniforms and implemented a boot stipend for employees.

"Small things like snacks and water for the guys and actually making a dedicated employee area where they feel like they have a place to hang out and converse with the other crew members — that's what we've done so far," he says.

HOW CONFIDENT ARE YOU THAT YOUR LOCATION'S BUSINESS WILL GROW IN REVENUE IN 2025?



Doug O'Bryan

owner, O'Bryan's Grounds Maintenance

Stow, Ohio

For O'Bryan, this is the first year in several that he had enough labor help to cover landscaping.

O'Bryan's Grounds Maintenance employs 15 people full time during the summer and up to 35 more seasonal helpers during the winter, which is where O'Bryan's makes 75% of its revenue.

For his part, O'Bryan is unsure if the added help he has is a sign the labor market's improving or just pure coincidence — but he's certainly not going to be upset about the change.

"We normally have 11 or 12, so I'm always just a little bit short in the peak of summer," O'Bryan says. "This year, we tackled jobs as they came in and quickly. Right this moment, I actually have too many people. I'm shortening their hours a bit."

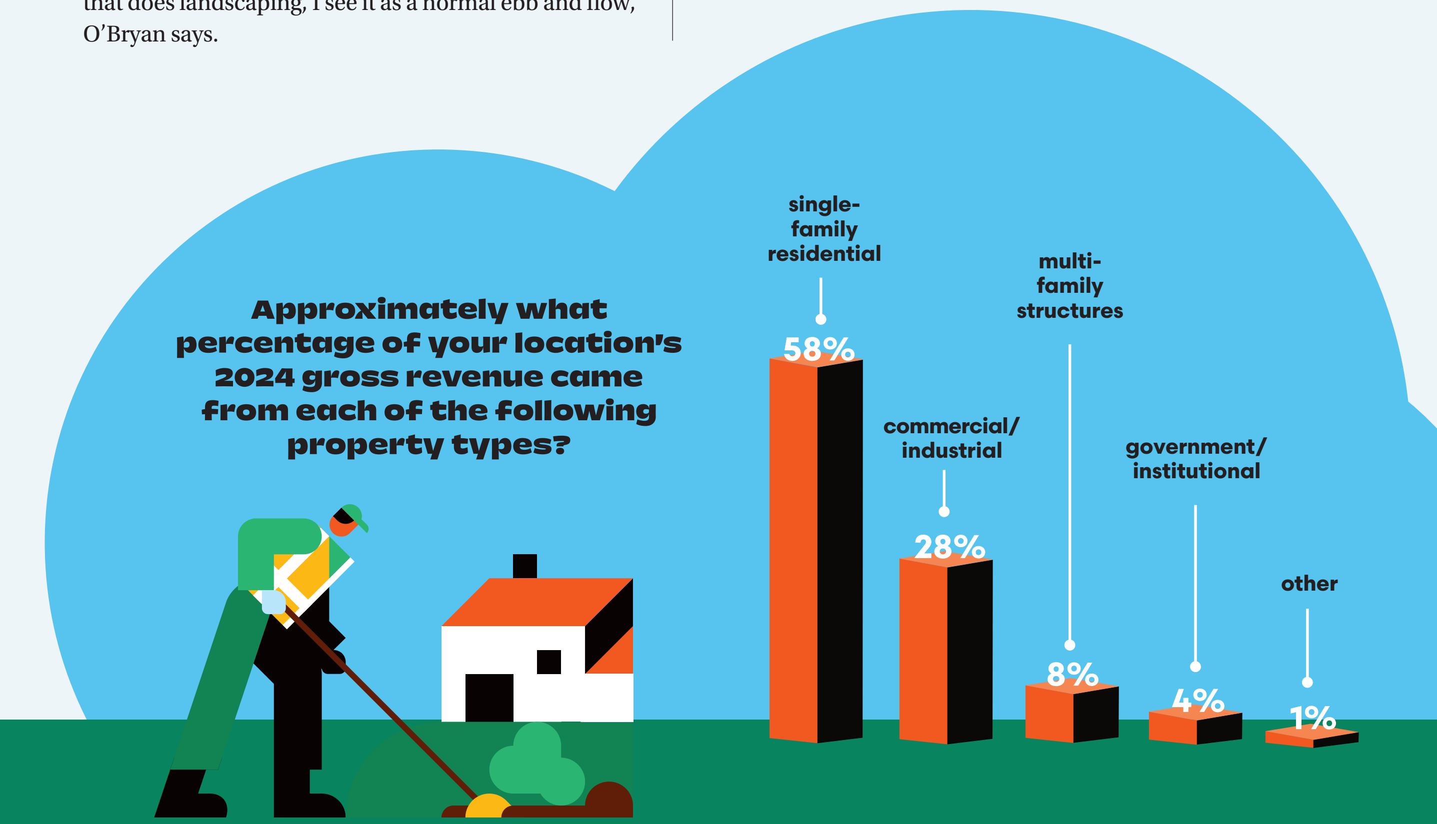
O'Bryan says he's noticed the price increase that all contractors are talking about nationwide — everything's up, from insurance to materials. He's not worried too much about it. "A lot of people are making it sound like the sky is falling, but being a snow plowing contractor that does landscaping, I see it as a normal ebb and flow," O'Bryan says.

O'Bryan acknowledges that it might not be everybody who's feeling this generally positive in the landscaping market, and his company size helps with that. Even in years where labor's short, being down 5% means one or two missing helpers. For larger companies, that gap in labor help is more problematic.

"I'm in a sweet spot," O'Bryan says. "I'm just happy that I do have enough people. I don't talk with a lot of other guys to know if they're in the same boat."

O'Bryan's sunny-side outlook can be taken literally, too. He says his team dealt with a drier than typical summer but nothing atypical, so they didn't lose too many days and worked through some of the lighter, misty afternoons.

"We really did have a pretty middle-of-the-road, nice, easy season," O'Bryan says. "I don't think it's been that much drastically different than it has been."



LANDSCAPER SPOT ILLUSTRATION: blindSALIDA | BAR CHART: STAFF GRAPHIC

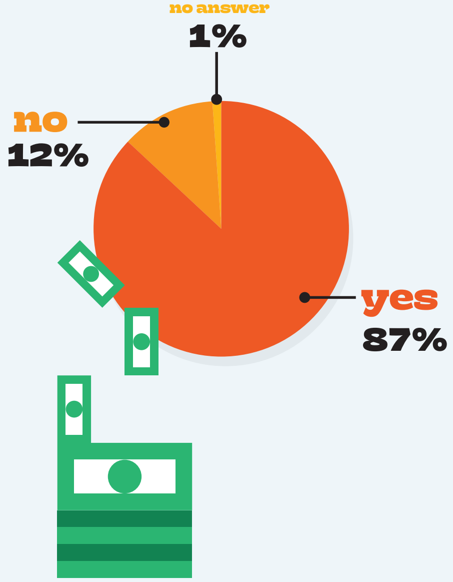
2025 State of the Industry REPORT

"We have outstanding customers. I've been doing this for 35 years. Many are loyal."

— Mike Wheeler, president and CEO of Tri State Enterprise

DID YOUR LOCATION TURN A PROFIT IN 2024?

(1 PERCENT DECREASE IN "YES" FROM LAST YEAR)



Mike Wheeler

president/CEO, Tri State Enterprise

Flatwoods, Kentucky

Planning ahead helped Mike Wheeler and his team navigate the post-pandemic price surges. Now, it continues to pay to think for the future.

Wheeler says that as the cost of goods and cost for paying employees has increased, the volume of distributors they've worked with has increased, too. By forging new relationships with folks who can get them the best bang for their buck, Wheeler says the 5-10% increases on materials across the board haven't been too turbulent.

Plus, Wheeler says the company has even been able to eat some of these costs in its commercial accounts without too much turbulence. About 65% of their accounts are commercial, so the remaining accounts in residential largely rose with price increases. The commercial accounts locked into multi-year contracts didn't need to be renegotiated.

"During the pandemic, we had noticed a lot of different changes, so we've tried to plan ahead for these types of things," Wheeler says. "The cost of goods and cost for paying employees has increased. It wasn't a surprise."

Wheeler says labor is still tough to find, even with wage inflation rising in that same 5-10% range. "It's still a tight market to find the right people," he says. "We always use word-of-mouth and referrals, and we use Facebook, Indeed (and) LinkedIn."

Wheeler employs 20 full-time employees that do a wide range of services from landscape installation, irrigation, maintenance, fertilizing and more. He says finding new employees on the hiring cycle often comes down to asking the right questions during interviews to make them feel that they'd be prioritized at the company.

One other way Wheeler is always planning ahead is by taking resumes in on a rolling basis throughout the year. When a job opens up for someone who seems promising, they've got resumes ready to sift through without needing to spend tons of money marketing the open gig. "We're always accepting resumes, whether we're hiring or not," he says. "That way, if we decide we've found a good one, six months (later) we can call that potential new employee."

Wheeler says one challenge in the mowing side of the business is lowball competition. He remembers being 14 and going out with a push mower underpricing jobs, but now, some contractors say this competition makes it difficult to justify price increases.

For Wheeler, he hasn't seen lots of client turnover yet.

"We have outstanding customers," he says. "I've been doing this for 35 years. Many are loyal."

Andrew Montesi

vice president, J.Rick Lawn & Tree

Colorado Springs, Colorado

In their market, Montesi says residential lawn care makes up about 85% of the company's approximate $2 million in revenue.

Though this year, Montesi says things are starting to slow down.

"Growth wise on the residential side, it has slowed pretty drastically. The bulk of our client base is higher-end properties. We're fairly expensive in our market as far as options for people go," he says. "That being said, I don't think it's a market-wide thing. I think it's just on the high-end of the market like we are."

Because of this, J.Rick Lawn & Tree is doing several new things to combat this.

"We've invested heavily in municipal contracts," he says. "Historically, we hadn't been in to it just because of the heavy amount of office and administrative work associated with it…Moving into growth mode, not only does it help to boost revenue drastically, but it helps expand our reach in terms of visibility."

Ultimately, despite the dip in residential work, Montesi says it's been a good year for the company. They've even started dabbling in some high-tech new services — drone spraying.

"We've actually started expanding into the agricultural side of the business," he says. "In the Midwest, drone spraying is a very big industry. Here, it hasn't really taken off yet. But we're trying to utilize it a bit different — we're using it for native spraying on ranches and ranch-land weed control. We kicked that off this year and we're starting to expand pretty rapidly."

And customer reception to the new service has been great, Montesi says.

"The initial client base has been existing clients," he notes. "We've been doing ranch-land spraying for a while but with tractors and side-by-sides. Basically, between 40 and 80 acres it doesn't make sense to try and do that on the ground… so now we use drones on them. We'll be able to grow that client base just based on reputation."

While they didn't have to go out and find new clients for the work, Montesi does acknowledge it takes employees with a whole other skillset.

"It's not something we use any of our existing employees for because the regulations and licensing around it are so strict," he says. "We hired specifically for that somebody who already has the qualifications."

It's been a year of advancement at J. Rick Lawn & Tree. The company went paperless and also added new drone spraying services.

And drones are the only new technology making an impact at J.Rick Lawn & Tree. The company is also moving into the digital age in terms of software upgrades.

"Only a year ago we were in the stone ages," Montesi admits. "We did everything on paper. We're starting to leverage technology and are all electronic now.

"For our employees in the field it's been extremely good," he says of tech advancements. "It's a relief not having to juggle with paper all the time. The communication between the field and the office has increased significantly. It's made our office as a whole more responsive."

With the busy season coming to an end, Montesi says he'll have more time to get the crews trained on the new technology and able to better utilize it next year.

"As we go through our off-season this winter there will be a lot to tweak and hone in on — but overall, I don't see a disadvantage to it whatsoever," he says.

2025 State of the Industry REPORT

Kazwel Levandoski

president, Lone Goose

Manitoba, Canada

Lone Goose is trying to make waves in the technology game — but their geographic location is making it a little bit difficult, Levandoski says.

"The largest challenge that I'm experiencing is that technology is late to come here," he says of Canada. "We want to start expanding into the autonomous stuff and we're a little bit limited as far as what we can get from suppliers."

With limited options, Levandoski says there's not a lot of opportunities to shop around or even test out the products before making a big financial commitment.

"Not all of our suppliers carry the stuff…so we don't get the try it before you buy it scenarios," he says.

But despite not having the technology in hand at this time, Levandoski says Lone Goose is still all systems go for it.

"We're building the clientele without having the equipment here yet," he says. "We're prepping our clients and saying we'll be doing this in a couple years, so that when we do order stuff and get equipment, our order is large enough to get attention. That way, when we need support and service, they are there."

Autonomous mowing is a major priority for Lone Goose because Levandoski says he feels it's the way of the future.

"I personally believe in 10 years, that'll be a good chunk of the marketplace," he says of autonomous.

"The other side of it too is on the employee side — mowing grass every day can become kind of monotonous…controlling robots fits that younger demographic. The other aspect is consistency — clients' grass never looks uncut."

Levandoski adds those who don't start embracing technology now are at risk of being left behind.

"In 20 years from now, 80% of the jobs out there don't even exist now, so we use technology every day — we'd be silly not to look into it for the future when it comes to mowing," he says.

And Lone Goose is already making strides with technology — as they've been embracing electric equipment for years.

"Residentially speaking, yes — we're pretty much 100% electric on lawn," he says. "Commercial wise, we are riding mowers and what not. We have a few gas trimmers but still try to do all handhelds in battery still."

And it's worked out well for Lone Goose — who is projected to do about $1.3 million in revenue in 2025.

"This year has been a good year for Lone Goose," he says. "I think we'll increase about 35% revenue wise by the end of the year…The biggest driver for us this year is we've taken on a few larger-scale clients. One in particular was a large-scale business park."

The company also recently expanded into irrigation services and hopes to boost its commercial bottom line as well.

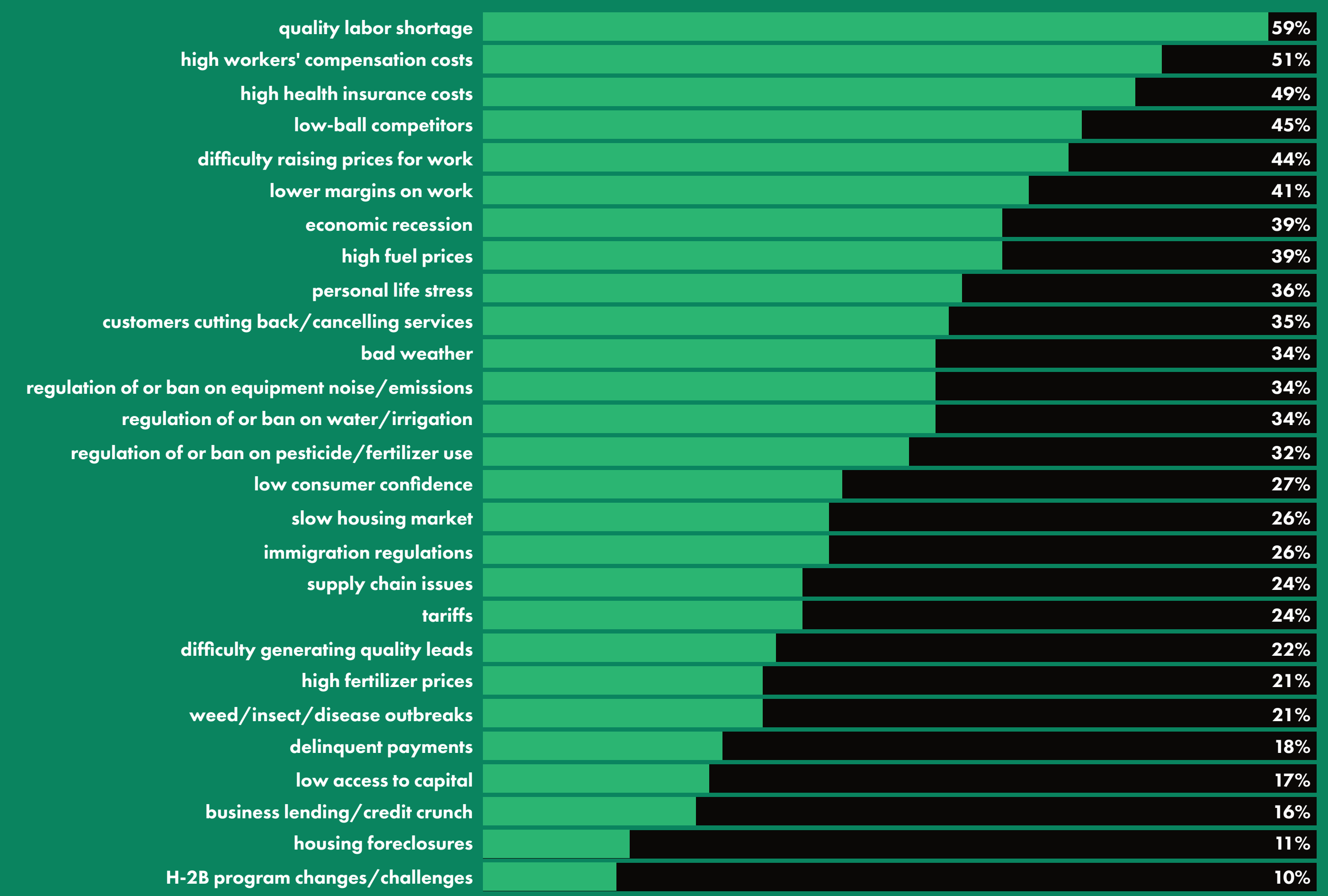
"We do plan to expand into a bit more commercial site management — lot sweeping, line painting and stuff like that," he says. "But for the most part, getting really good at what we're already doing is my five-year plan. I want to be the marquee name for maintenance in our space."

> **"Mowing grass every day can become kind of monotonous… controlling robots fits that younger demographic."**
>
> — Kazwel Levandoski, president of Lone Goose

How concerned are you?

RATE THE IMPACT OF EACH OF THESE ISSUES ON YOUR BUSINESS IN THE NEXT THREE YEARS.

(RATED 4 OR 5 ON A 5-POINT SCALE WHERE 5 = VERY CONCERNED AND 1 = NOT AT ALL CONCERNED)



SURVEY SAYS …

34% are concerned with the regulation of or ban on equipment noise/emissions.

2025

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