

2017 COMMEMORATIVE POSTER



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MAPPING REVENUE

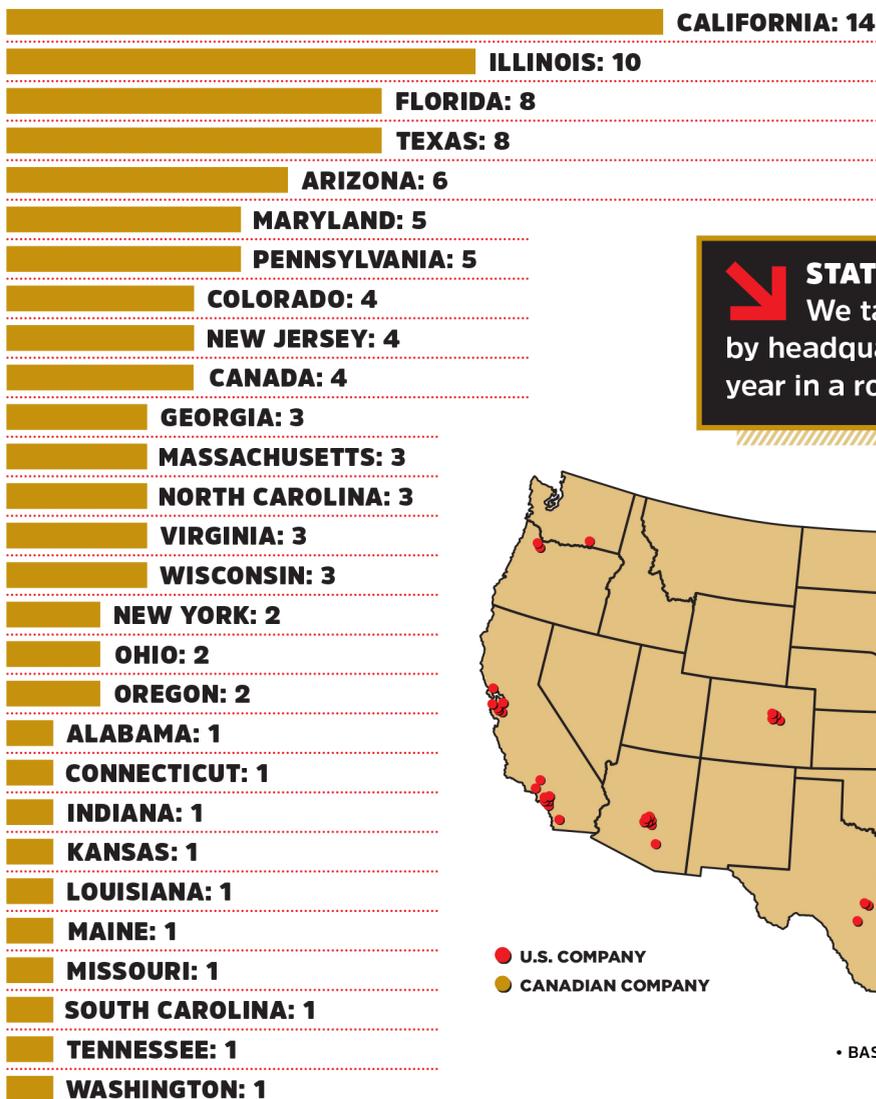
JUST ONE STATE REPRESENTS A THIRD OF THE TOTAL TOP 100.

Pennsylvania boasts 28 percent of total Top 100 revenue with \$2.6 billion from just five companies (BrightView, Five Seasons Property Management, Ambius, Merit Service Solutions and Shearon Design).

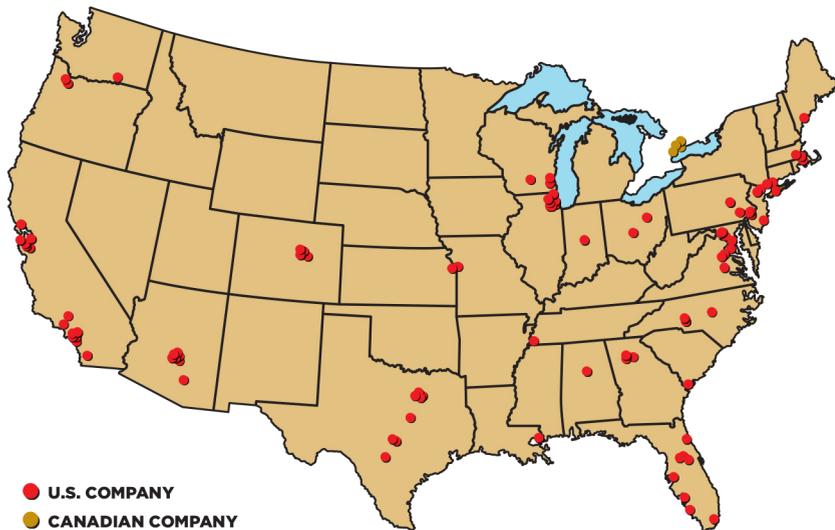
Tennessee comes in second place, but has only one company: TruGreen. The lawn

care giant posted \$1.3 billion in 2016 and represents 14 percent of the total list.

California is the third largest, but claims just 7 percent of total list revenue (\$648 million) with 14 companies. To put that in context, you'd need to triple all the Top 100 companies in California to equal just one BrightView.



STATE-BY-STATE CENSUS
 We tallied all 100 firms' locations by headquarters address. For the eighth year in a row, California tops the list.



• BASED ON DATA COMPILED BY LAWN & LANDSCAPE

\$9.16 BILLION ↘ The total revenue for the Top 100 companies, an increase of \$594 million (or 6.9%) from 2016.

The Top 100 list generates a lot of data: annual revenue, percentage changes from last year, percentage changes for next year, seasonal and full-time employee head counts, service breakdowns.

It's a lot. But multiply all the data we collect from each of the 100 companies by 20 years of publishing the list, and you get a whole lot more.

The Lawn & Landscape team has spent the better part of the year so far compiling and sorting through not just this year's Top 100 data, but information from all the lists since we started publishing them in 1998. We wanted to give you even more context for what the list – and the companies on it – mean to the industry.

But the Top 100 and the companies that make it up are much more than just numbers. Each of the firms is made up of people – sometimes a few dozen, and sometimes more than the population of a small U.S. city.

So we've highlighted those people as well. We've gathered stories on what they're doing right, what they've done wrong and how they've responded to challenges both personally and professionally to continue to grow.

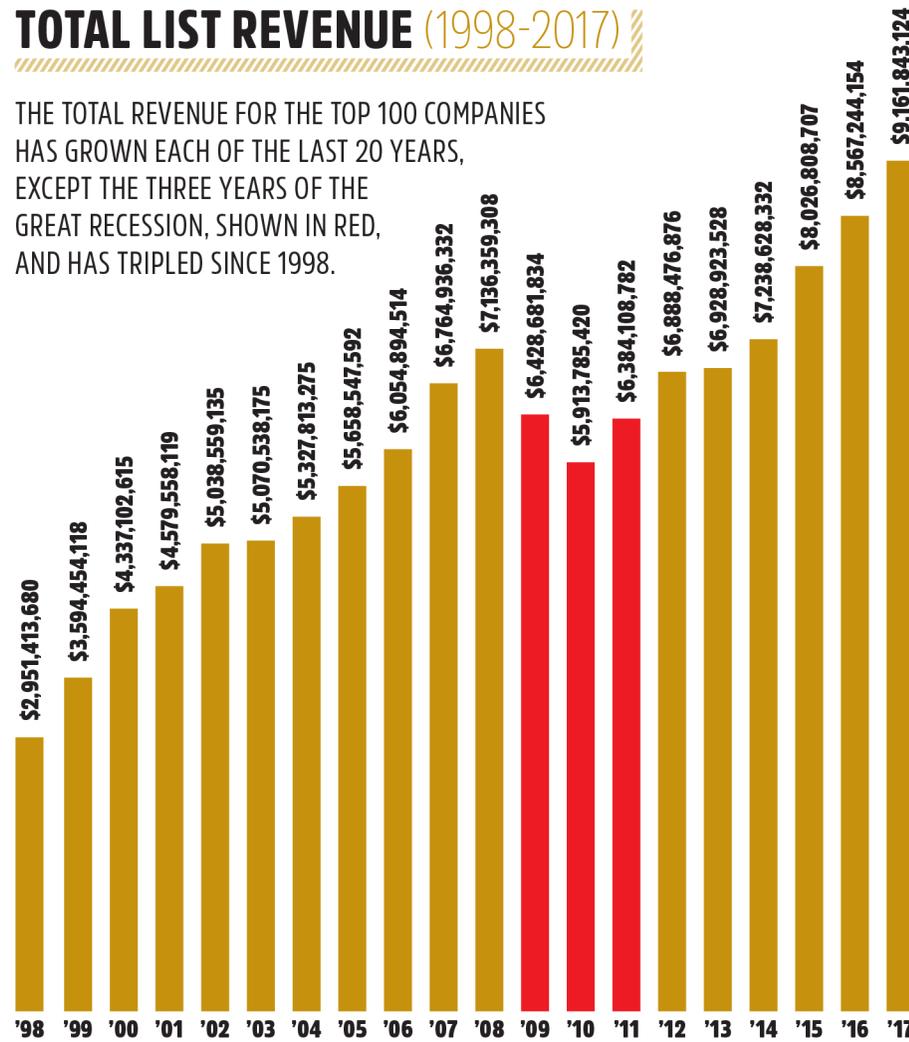
Read on and learn how they did it, and how you can, too. – *Chuck Bowen*

20 YEARS OF TOP 100

WE ANALYZED TWO DECADES OF DATA TO GIVE YOU EVEN MORE INSIGHT INTO THE INDUSTRY'S BIGGEST FIRMS.

TOTAL LIST REVENUE (1998-2017)

THE TOTAL REVENUE FOR THE TOP 100 COMPANIES HAS GROWN EACH OF THE LAST 20 YEARS, EXCEPT THE THREE YEARS OF THE GREAT RECESSION, SHOWN IN RED, AND HAS TRIPLED SINCE 1998.



TRUGREEN COMPANIES X16

VALLEYCREST/BRICKMAN (NOW BRIGHTVIEW) X4

IT'S LONELY AT THE TOP WHILE THE BOTTOM OF THE LIST CHANGES EVERY YEAR, THE TOP COMPANY HAS REMAINED PRETTY CONSISTENT. TRUGREEN PLACED FIRST 16 OUT OF 20 YEARS. BRIGHTVIEW AND ITS LEGACY COMPANIES GRABBED THE OTHER FOUR.



2 STATES

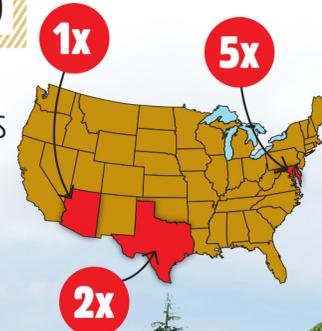
HAVE DOMINATED L&L'S TOP 100 LIST, WITH CALIFORNIA CLAIMING THE MOST SPOTS 15 TIMES IN THE LAST 20 YEARS, AND ILLINOIS WITH 5.

THE OTHER STATE AT THE TOP?

Florida, which has been either 2nd or 3rd all 20 years.

THREE FOR THIRD

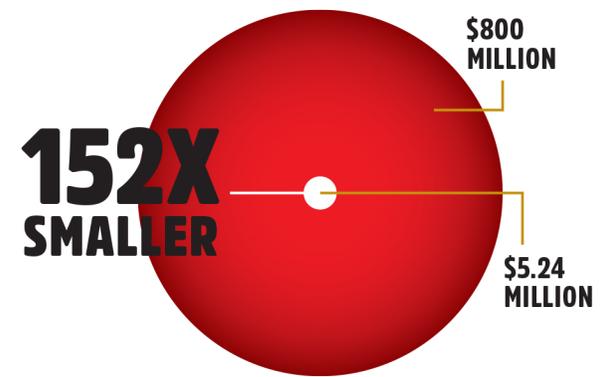
THREE STATES HAVE BEEN TIED FOR THIRD FOR SEVERAL YEARS WITH EIGHT OR NINE TOP 100 COMPANIES EACH: **TEXAS** TWICE (2001 AND 2016), **MARYLAND** FIVE TIMES (2005, 2006, 2008, 2013 AND 2016) AND **ARIZONA** ONCE (2016).



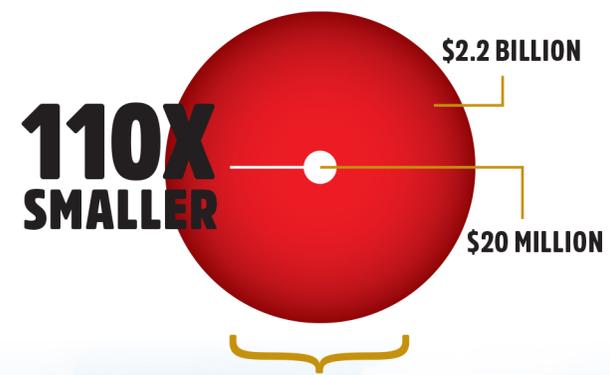
TOP TO BOTTOM

EVEN ON THE TOP 100, THERE'S A WIDE GAP BETWEEN THE LARGEST AND SMALLEST COMPANIES.

1998 HIGHEST VS. LOWEST GROSSING



2017 HIGHEST VS. LOWEST GROSSING



HIGHEST GROSSING **↑ 275%** LOWEST GROSSING **↑ 382%**

IN THE LAST 20 YEARS, THE HIGHEST-GROSSING COMPANY HAS INCREASED BY **275%** AND THE LOWEST-GROSSING COMPANY BY **382%**.



ABOUT THIS LIST

THE LAWN & LANDSCAPE TOP 100 is based on 2016 revenue from landscape profit centers. Most information is reported by each company listed, and supplemental data are sourced from public records and reporting by L&L staff.

- ▶ A * Indicates revenue estimated based on data from the 2016 Top 100 list.
- ▶ Companies on this list earned a combined revenue of \$9,161,843,124 in 2016, which is an increase of \$594,598,970 or 6.9 percent, over 2015. Companies on the list also reported total employment of 95,125. Based on the data, the average growth expected in 2017 is 9.9 percent.
- ▶ This year's list includes companies from 26 states and four firms in Canada. The states with the most Top 100 companies are California (13), Illinois (10) and Florida (8).
- ▶ Companies that reported revenue in Canadian dollars have been converted to U.S. dollars using the 2016 average conversion rate of 0.76.
- ▶ The youngest company on the list is Five Seasons Property Management/Asplundh, founded in 2015 with the acquisition of Reliable Property Services (listed at 48 last year) and T.R. Gear.

- ▶ Baytree Landscape Contractors reported 60 percent growth, the largest jump on the list.
- ▶ Angler Environmental was acquired by Resource Environmental Solutions in September of 2016. RES is part of KKR, the same private equity company that owns BrightView.
- ▶ BrightView acquired the maintenance division of Marina Landscapes in early 2016. Its revenue does not include U.S. Lawns revenue, but does include franchise payments.
- ▶ Yellowstone Landscape acquired Ecoscape Solutions in December 2016.
- ▶ Merit Service Solutions was acquired by Eureka Capital in December 2016.
- ▶ TruGreen's revenue includes Scotts LawnService, which it acquired in April of 2016.
- ▶ Davey does not separate its landscape management revenue from its overall revenue.

Abbreviations

- %MT:** Maintenance
- %CLC/F:** Chemical Lawn Care/Fertilization
- %LD/B/I:** Landscape Design/Build/Install
- %II/MT:** Irrigation Installation/Maintenance
- %IL:** Interior Landscaping
- %CR:** Commercial Revenue
- %RR:** Residential Revenue
- N/A:** No Answer/Unknown

* INDICATES NEW TO THE LIST

2017 RANK	COMPANY	2016 RANK	2016 REVENUE	HEADQUARTERS	EMPLOYEES	% CHANGE FROM 2015	% CHANGE EXP. FOR 2017	% MT	%CLC/F	%LD/B/I	%II/MT	% IL	%CR	%RR
1	BrightView	1	\$2,200,000,000	Plymouth Meeting, Pa.	22,000	10%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
2	TruGreen Cos.	2	\$1,317,054,000	Memphis, Tenn.	11,444	2%	7%	2%	86%	0%	0%	0%	14%	85%
3	The Davey Tree Expert Company	3	\$845,678,000	Kent, Ohio	8,600	3%	5%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
4	Bartlett Tree Experts	5	\$244,000,000	Stamford, Conn.	1,650	8%	10%	0%	0%	0%	0%	0%	25%	65%
5	U.S. Lawns	7	\$168,000,000	Orlando, Fla.	2,000	0%	5%	70%	3%	16%	3%	0%	100%	0%
6 (t)	LandCare	6	\$160,000,000	Frederick, Md.	4,000	-10%	0%	N/A	N/A	N/A	N/A	N/A	100%	0%
6 (t)	Five Seasons Property Management/Asplundh	*	\$160,000,000	Philadelphia, Pa.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
8	Park West Companies	10	\$150,745,000	Rancho Santa Margarita, Calif.	1,615	18%	14%	37%	0%	62%	0%	0%	100%	0%
9	Ruppert Landscape	12	\$149,000,000	Laytonville, Md.	1,275	21%	5%	41%	0%	52%	0%	0%	100%	0%
10	Weed Man	9	\$148,826,630	Mississauga, Ontario	4,050	4%	10%	0%	100%	0%	0%	0%	5%	95%
11	Ferrandino & Son	8	\$145,000,000	Farmingdale, N.Y.	350	-3%	7%	35%	0%	0%	0%	0%	100%	0%
12	Yellowstone Landscape	13	\$137,500,000	Bunnell, Fla.	1,900	17%	10%	60%	10%	15%	10%	0%	100%	0%
13	Gothic Landscape	11	\$130,000,000	Valencia, Calif.	1,500	5%	15%	30%	0%	55%	15%	0%	100%	0%
14	Lawn Doctor	15	\$112,000,000	Holmdel, N.J.	1,350	7%	5%	0%	90%	0%	0%	0%	5%	95%
15	Ambius	14	\$106,281,790	Reading, Pa.	975	2%	3%	0%	0%	3%	0%	97%	100%	0%
16	Merit Service Solutions	16	\$98,000,000	Malvern, Pa.	440	N/A	20%	N/A	N/A	N/A	N/A	N/A	90%	0%
17	SavATree	17	\$89,700,000	Bedford Hills, N.Y.	695	6%	8%	0%	17%	0%	1%	0%	20%	80%
18	Massey Services	19	\$74,692,678	Orlando, Fla.	1,892	8%	15%	0%	26%	1%	4%	0%	12%	88%
19	Mainscape	18	\$74,019,000	Fishers, Ind.	1,000	4%	0%	68%	7%	6%	8%	0%	100%	0%
20	The Grounds Guys	22	\$72,480,000	Waco, Texas	600	25%	20%	50%	10%	13%	1%	0%	50%	40%
21	The Groundskeeper/Greater Texas Landscapes	20	\$68,000,000	Tucson, Ariz.	1,200	3%	3%	50%	0%	42%	6%	0%	100%	0%
22	Terracare Associates	29	\$62,422,947	Littleton, Colo.	1,200	30%	11%	67%	0%	21%	7%	0%	46%	54%
23	Denison Landscaping	24	\$60,150,000	Fort Washington, Md.	580	13%	10%	5%	0%	85%	8%	0%	98%	2%
24	The Greenery	34	\$60,100,000	Hilton Head Island, S.C.	890	39%	0%	75%	2%	20%	2%	0%	86%	12%
25	Garden Design	25	\$58,900,000	Farmers Branch, Texas	66	23%	5%	2%	0%	98%	0%	0%	35%	65%
26	Clintar Landscape Management	23	\$57,000,000	Markham, Ontario	900	-5%	2%	33%	0%	10%	2%	0%	99%	1%
27	NaturaLawn of America	26	\$56,042,988	Frederick, Md.	561	8%	8%	0%	99%	0%	0%	0%	3%	97%
28	Metco Landscape	30	\$56,000,000	Aurora, Colo.	500	18%	n/a	10%	0%	40%	40%	0%	99%	1%
29	Spring-Green Lawn Care	28	\$53,832,000	Plainfield, Ill.	548	9%	10%	0%	97%	0%	1%	0%	1%	99%
30	Juniper Landscaping	42	\$49,000,000	Ft. Myers, Fla.	500	40%	25%	18%	2%	64%	16%	0%	99%	1%
31 (t)	Acres Group	27	\$48,000,000	Wauconda, Ill.	920	-8%	15%	39%	3%	25%	3%	0%	95%	5%
31 (t)	Lucas Tree Expert Co.	32	\$48,000,000	Falmouth, Maine	610	3%	4%	0%	3%	0%	0%	0%	96%	4%
33	Jensen Landscape	33	\$46,500,000	Campbell, Calif.	360	2%	+/-5%	35%	0%	65%	0%	0%	65%	25%
34	Heartland	*	\$45,000,000	Kansas City, Mo.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
35	Mariani Landscape	31	\$44,258,000	Lake Bluff, Ill.	509	-6%	12%	56%	0%	42%	0%	0%	11%	89%
36	ABM Landscape & Turf Services	35	\$44,000,000	Tampa, Fla.	N/A	5%	0%	N/A	N/A	N/A	N/A	0%	100%	0%
37	Cagwin & Dorward	36	\$42,000,000	Novato, Calif.	475	8%	9%	59%	0%	26%	5%	0%	75%	25%
38	Christy Webber Landscapes	37	\$40,300,000	Chicago, Ill.	435	0%	15%	45%	0%	47%	0%	0%	59%	41%
39	Girard Environmental Services	39	\$39,170,853	Sanford, Fla.	470	9%	7%	75%	0%	25%	0%	0%	100%	0%
40	Mission Landscape Cos.	44	\$38,930,547*	Irvine, Calif.	N/A	N/A	N/A	80%	0%	12%	0%	0%	100%	N/A
41	Sebert Landscape	45	\$38,700,091	Bartlett, Ill.	365	5%	5%	34%	1%	19%	2%	0%	100%	0%
42	Chapel Valley Landscape Company	43	\$38,200,000	Woodbine, Md.	500	12%	10%	65%	0%	20%	10%	0%	90%	10%
43	Rotolo Consultants	41	\$38,000,000	Slidell, La.	425	7%	25%	40%	5%	40%	15%	0%	85%	0%
44	CleanScapes	40	\$37,000,000	Austin, Texas	599	-3%	38%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
45	Dixie Landscape Co.	46	\$35,973,000	Medley, Fla.	305	5%	5%	5%	0%	80%	15%	0%	95%	5%
46	Maldonado Nursery & Landscaping	63	\$35,458,508	San Antonio, Texas	425	37%	7%	30%	0%	57%	13%	0%	45%	10%
47	Pierre Landscape	*	\$34,500,000	Inwindale, Calif.	225	25%	10%	8%	92%	0%	0%	0%	77%	23%
48	Choate USA	38	\$33,800,000	Carrollton, Texas	170	N/A	10%	0%	0%	49%	50%	1%	80%	20%
49	Somerset Landscape Maintenance	47	\$32,000,000	Palo Alto, Calif.	700	3%	15%	45%	15%	15%	15%	0%	90%	5%
50	Gachina Landscape Management	51	\$30,990,487	Menlo Park, Calif.	379	5%	5%	56%	0%	35%	9%	0%	N/A	N/A
51	Bemus Landscape	49 (t)	\$30,679,000	San Clemente, Calif.	400	4%	16%	64%	0%	2%	10%	0%	99%	1%
52	Greenscape	53	\$30,000,000	Raynham, Mass.	370	7%	10%	43%	0%	33%	0%	0%	100%	0%
53	McFall and Berry Landscape Management	52	\$29,682,000	Annandale, Va.	350	2%	N/A	58%	6%	20%	1%	0%	100%	0%
54	Landscape Workshop	55	\$29,560,000	Birmingham, Ala.	493	15%	10%	54%	0%	12%	5%	0%	95%	5%
55	AAA Landscape	65	\$29,100,000	Phoenix, Ariz.	385	13%	10%	55%	3%	36%	3%	0%	97%	3%
56	Environmental Management	79	\$28,900,000	Dublin, Ohio	300	15%	10%	28%	3%	53%	6%	0%	98%	2%
57	Landscape Concepts Management	57	\$27,942,000	Grayslake, Ill.	258	2%	2%	37%	0%	31%	6%	0%	97%	3%
58	Bearly Landscaping	70	\$27,794,000	Lockport, Ill.	275	15%	11%	40%	3%	25%	4%	0%	85%	15%
59	Teufel Nursery	69	\$27,433,000	Hillsboro, Ore.	450	6%	10%	18%	0%	50%	32%	0%	100%	0%
60	Chalet Nursery, Landscape and Garden Center	58	\$27,400,000	Wilmette, Ill.	350	0.5%	2%	40%	4%	55%	0%	0%	0%	100%
61	Ryan Lawn & Tree	59 (t)	\$27,202,653	Overland Park, Kan.	250	3%	10%	0%	60%	0%	15%	0%	1%	99%
62	Merchants Landscape Services	80	\$27,000,000	Santa Ana, Calif.	440	23%	15%	90%	5%	0%	5%	0%	0%	0%
63	Complete Landscaping Service	90 (t)	\$26,816,398	Bowie, Md.	286	34%	20%	47%	4%	26%	5%	0%	100%	0%
64	Southern Botanical	73	\$26,262,471	Dallas, Texas	250	10%	15%	23%	4%	55%	14%	2%	40%	60%
65	Angler Environmental	62	\$26,240,295	Warrenton, Va.	159	25%	10%	5%	0%	70%	25%	0%	20%	20%
66	Senske Lawn & Tree Care	49 (t)	\$26,240,000	Kennewick, Wash.	450	7%	8%	17%	53%	0%	3%	0%	30%	70%
67	R.P. Marzilli & Company	66	\$26,201,974	Medway, Mass.	150	4%	0%	18%	0%	77%	0%	0%	9%	91%
68	The Bruce Co. of Wisconsin	68	\$26,195,414	Middleton, Wis.	329	4%	5%	18%	0%	44%	6%	0%	80%	20%
69	EarthTones Design	*	\$26,100,000	Midlothian, Texas	165	39%	10%	2%	3%	65%	25%	0%	85%	10%
70 (t)	Schumacher Companies	61	\$26,000,000	West Bridgewater, Mass.	245	-2%	0%	25%	2%	66%	3%	0%	54%	46%
70 (t)	Yard-Nique	64	\$26,000,000	Morrisville, N.C.	450	2%	N/A	70%	0%	30%	0%	0%	99%	1%
72	James River Grounds Management	67	\$25,952,083	Glen Allen, Va.	395	3%	5%	68%	0%	17%	4%	0%	100%	0%
73	Shearon Design	56	\$25,500,000*	Plymouth Meeting, Pa.	N/A	N/A	N/A	30%	10%	30%	10%	5%	70%	30%
74	Naturescape	76	\$25,096,897	Muskego, Wis.	265	10%	10%	10%	80%	0%	0%	0%	5%	95%
75	Baytree Landscape Contractors	*	\$25,000,000	Chamblee, Ga.	240	60%	40%	30%	0%	70%	0%	0%	100%	0%
76	Benchmark Landscapes	75	\$24,700,000	Austin, Texas	425	8%	1%	60%	0%	26%	11%	0%	98%	2%
77	Caretaker Landscape and Tree Management	72	\$24,500,000	Gilbert, Ariz.	288	2%	11%	29%	0%	62%	3%	0%	100%	0%
78	Scott Byron and Co.	59 (t)	\$24,245,000	Lake Bluff, Ill.	205	-8%	6%	35%	7%	58%	0%	0%	5%	95%
79	Russell Landscape Group	77	\$24,176,000	Dacula, Ga.	360	16%	5%	43%	10%	15%	4%	0%	100%	0%
80	The Loving Group	*	\$24,017,257	Charlotte, N.C.	150	35%	30%	N/A	N/A	N/A	N/A	N/A	0%	100%
81	Swingle Lawn, Tree and Landscape Care	78	\$23,896,549	Denver, Colo.	275	6%	7%	0%	19%	4%	2%	0%	31%	69%
82	David J. Frank Landscape Contracting	87	\$23,820,000	Germantown, Wis.	320	21%	8%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
83	Dennis' 7 Dees Landscaping	*	\$23,551,220	Portland, Ore.	334	26%	22%	22%	0%	60%	0%	0%	50%	32%
84	Gibbs Landscape Co.	74	\$23,500,000	Smyrna, Ga.	N/A	2%	2%	69%	9%	17%	5%	0%	57%	43%
85 (t)	Kline Bros Landscaping	83 (t)	\$23,000,000	Ship Bottom, N.J.	140	10%	-4%	10%	0%	70%	10%	0%	25%	75%
85 (t)	Parker Interior Landscape	*	\$23,000,000	Scotch Plains, N.J.	135	N/A	N/A	1%	1%	5%	0%	93%	100%	0%
87	Benchmark Landscape	81	\$22,244,108	Poway, Calif.	270	1%	0%	50%	0%	50%	0%	0%	N/A	N/A
88	TBG Landscape	54	\$22,040,000	Whitby, Ontario	155	-12%	-12%	1%	0%	94%	0%	0%	N/A	N/A
89	Stay Green	92	\$21,430,500	Santa Clarita, Calif.	335	9%	25%	55%	1%	29%	2%	0%	99%	1%
90	SiteWorks	89	\$21,325,000	Chandler, Ariz.	143	13%	20%	30%	0%	60%	5%	0%	100%	0%
91	Designs by Sundown	*	\$21,300,000	Littleton, Colo.	200	24%	12%	20%	3%	68%	6%	0%	10%	90%
92	High Tech Landscapes	88	\$21,084,711	Branchburg, N.J.	362	5%	6%	58%	5%	15%	7%	0%	60%	30%
93	Berghoff Design Group	90 (t)	\$21,000,000	Scottsdale, Ariz.	300	5%	5%	40%						