

STATE OF THE HARDSCAPE MARKET

**CONCRETE
INFORMATION**
about how the
hardscaping
industry thrived
last year.

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THE RIGHT MIXTURE OF OLD AND NEW

“**T**he more things change, the more they remain the same.” – Jean-Baptiste Alphonse Karr

In an industry that must stay on the cutting edge to appease ever-changing trends, new technology, and consumer tastes, it’s refreshing at times to know that many of the latest and greatest entries into the market are not necessarily new at all.

Mother Nature is the top supplier of hardscapes, and she’s hard to beat. Travertine, porcelain, granite, quartz: these beautiful materials bring a level of awe to any application. Even more mystifying, however, is probably the concrete paver technology that can produce that same level of awe, but with other features that natural materials just can’t match. Regardless of naturally occurring or factory-produced products, hardscape options abound for any project or budget, and they are plentiful.

Hardscapes are a fixture in almost any landscape application, and for good reason. The variety of materials, shapes, colors, textures and sizes are hard to beat in other offerings, and the ability to customize to get that show-stopping look your customer desires makes hardscapes the go-to for many designers, architects and installers.

Beyond mere aesthetics is the inclusion of features that promote water conservation, easy maintenance and wear-resistance, among others.

In fact, as more and more communities across the country embrace the idea of water conservation and xeriscaping, it’s no surprise that hardscape sales have seen double-digit growth over the past few years. Pio-

neer, specifically, has seen an increase in hardscape sales of over 30% in the last two years alone.

While the idea of being “water-wise” is not a new idea in the Southwest, after being hit with drought conditions year after year, we have never seen as many options, or the level of innovation coming out of hardscape suppliers as we are witnessing today.

Good thing, too! We know our customers aren’t satisfied with only what we’re prepared to sell them. They want more. They want options. They want innovation, and they want the WOW factor.

While many will ultimately and happily purchase the hardscapes we typically stock, knowing that we have access to permeable pavers, high-end materials and textures, custom sizes, and leading-edge technology is what sets us apart from our competition. Instead of just connecting with suppliers that are constantly pushing the status quo, we as a landscape materials supplier can be a better partner to our customers – professionals and amateurs alike.

Years ago, we knew that investing in hardscapes was the right choice. The breadth of assortment we see today means we’re able to find a solution for every need, and we cannot wait to see what our suppliers come up with next!

Thank you,

PAUL TUDOR

President

Pioneer Landscape Centers



STRONGER THAN **SOLID GROUND**

The hardscape market was booming in 2020 for contractors and 2021 looks just as good, according to the State of the Hardscape Market survey. More than 60% of contractors would categorize consumer confidence in the market as “strong” while only 4% said weak and 35% said average. Backlog is also solid with 25% saying theirs is six weeks or more. See how you compare by combing through the data on the following pages.

PHOTO COURTESY OF BLUE CLAW ASSOCIATES
Note: More than 200 hardscape contractors took the State of the Hardscape Market survey in mid-January. Not all percentage totals will equal 100%.

Matt Caruso
owner, Decra-Scape,
Sterling Heights, Michigan

It's been a record start for Decra-Scape, Caruso says.

"We may have the biggest backlog in our 31-year history coming into this season," he says. "The residential sector has exploded since travel/vacations have greatly minimized and with so many working from home, it seems they are doing what they can to fix things up. Even as far as turning their yards into an oasis of sorts."

Hardscaping is the only service Decra-Scape provides, and Caruso says while residential is doing very well, commercial "was quieter than usual for us." He adds that he's not sure how 2021 will end revenue wise.

"The second half I'm not so certain about," he says. "It seems to me uncertainty is looming, and we are not out of the woods just yet. I can only control what I can control so we are busy getting after it and excited for the season to get under way."

Kevin McHale
owner of McHale Landscape Design,
Upper Marlboro, Maryland

Hardscape work has always been consistent for McHale Landscape Design, McHale says, but he expects revenue to increase by 20% this year.

He says that scheduling and finding qualified subs have been a couple of their toughest challenges. "We handled the challenge by creating a masonry division which employs 15, two-man masonry crews," he says. "These are true stone and brick masons that report direct to the job and work eight hours per day, which is typical of that industry."

Justin White
CEO, K&D Landscaping,
Watsonville, California

"Hardscaping is one of the most commonly requested type of projects we receive," White says. "I think our clients are wanting low-maintenance yards and areas to gather outdoors, especially now that they are spending more time at home."

Compared to planting, irrigation and other softscapes, White, whose company services central California, says hardscape has seen a larger spike in demand over the last 6-12 months.

"The low water/low maintenance mentality on the west coast has fueled this trend," he says. Even though finding qualified workers and getting products on time due to COVID delays in the supply chain are challenges, White says it will still be a positive 2021 for hardscaping services.

"I believe it will be a great year for all residential outdoor services. Hardscaping will be near the top of that list, just below outdoor kitchens," he says. "I think people have adapted to spending more time in their own backyard and less time at the local pub or restaurant. Hardscaping is a great solution to create usable space and reduce maintenance of the yard."

Residential vs. Commercial:

66% of respondents said 76%-100% of their hardscape business comes from residential customers while almost 80% said less than 25% came from commercial customers.

What is your company's overall gross revenue for 2020?



What is your company's hardscaping revenue for 2020?



What's the average price for a hardscaping job for your company?



Image Credit: Cody Isaman



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Bob Wambach
landscape design and sales,
Proscapes, Madison, Wisconsin

Proscapes has been on a steady growth pattern in terms of total revenue of approximately 15% annually, but last year was nearly 30%. Wambach attributes the increase to people working from home because of COVID.

He says the average job size has doubled from \$30,000 to \$60,000 with many more in the \$100,000 range. The average client has changed in the last few years from 55 to 35 years of age.

Wambach doesn't see an end in sight. "I know I have completed more proposals and designs this year than any other winter," he says. "We are also booked out further than I have ever been going into the season." He adds the goal in 2021 isn't more sales, it's more net profit. "We are likely to space out the calendar more," he says. "We will be taking on less work overall, but the projects so far are larger and high-end."

Jennifer Chaplin
CEO, Botanica
Yuba City, California

Chaplin says she has seen an increase in residential customers who are looking for concrete or pavers, and more commercial projects call for decomposed granite as mulch in planters.

"In 2020, our hardscape sales were twice what they were in either 2018 or 2019," she says.

Chaplin says a cement shortage due to COVID-19 was her toughest challenge, especially when ordering large quantities.

"We immediately made changes to our crew schedules to accommodate the delays, and we made changes to how we bid future projects to account for projected price increases and delays," she says.

She foresees an increase in hardscape sales for residential projects in 2021.

"I believe we will see an increase in sales of patios, outdoor kitchens, fire pits and seating walls in 2021," she says. "People are trying to make the best of it, and I hope we can help them do that."

Ian McCarthy
president, Blue Claw Associates
Osterville, Massachusetts

McCarthy says he has seen an influx of people looking to buy property on the Cape and Islands, and those looking to convert a summer home to a year-round residence. With that influx comes more construction and renovation work, and thus more landscape and hardscape projects.

"The current era of buyers are more sophisticated with their wants than those in the past," he says. "Decades ago, a simple brick patio or walkway would suffice, but now clients are looking for outdoor kitchens, fire pits and fireplaces, outdoor lighting, swimming pools and spas, waterfalls and extensive terracing and walls."

The materials have become more interesting, McCarthy says, like utilizing different granites and wall stone and more custom fabrication, as well as concrete products looking much more like real stone.

"We are expecting a 50% increase in revenue in 2021 due to these demands," he says "With the events of 2020 creating this influx of activity, the lack of spending on vacations has enabled clients to spend more money on their hardscapes." **L&L**

What are the most popular hardscape elements your customers are requesting?



What is your backlog for hardscaping projects going into the 2021 season?



How does that compare to this same time last year?



How would you categorize customer confidence in your market?

