

Landscaping Services Market Assessment, By Service Type [Landscape and Garden Design & Construction, Landscape and Garden Enhancement, Landscape and Garden Maintenance & Management, Others], By End-user [Residential, Commercial], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global landscaping services market is projected to witness a CAGR of 6.43% during the forecast period 2024-2031, growing from USD 272.18 billion in 2023 to USD 447.93 billion in 2031. The market remains one of the fastest expanding service markets that incorporates several activities. It is driven primarily by residential and commercial sectors. While younger generations of homeowners are increasingly embracing the need to enhance the beauty of their homes and the utility of the available spaces, businesses and institutions are more concerned with creating enough attractive and well-manicured exteriors for their visitors and customers and a clean and comfortable environment for their employees.

Over the past couple of years, the industry has witnessed a positive shift towards certain practices like water-smart landscaping, water-efficient irrigation systems, and the selection of indigenous plants, which connect to the wider context of environmental concern. There has been progress on the technology front, with the likes of smart irrigation systems, landscape architecture computer programs, and even unmanned aerial vehicles for the surveys of the landscape becoming more common.

The need for landscaping services is quite periodic, peaking in the spring and summer months, with stability provided by year-round maintenance services. The market is characterized by high fragmentation, with a presence of small-scale independent players as well as large-scale national chains. The landscaping services sector is anticipated to experience continued growth due to increasing disposable income, growing real estate developments, urbanization, and consumer inclination towards well-maintained areas. Furthermore, the demand is expected to be enhanced by the commercial real estate sector, which includes office parks, hotels, and shopping malls.

In July 2024, at the Toyota Motor Manufacturing North America Suppliers' Conference in Frisco, Texas, U.S. Lawns of Northeast Mississippi was recognized nationally. The business was honored with the 2024 Supplier of the Year Award for offering commercial

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landscape and commercial lawn care services. The company provides a comprehensive range of landscaping services, including irrigation upkeep, design and repair, care for attractive trees and shrubs, and landscape remodeling and enhancement.

Sustainability and Environmental Awareness to Catalyze Market Expansion

The rampant growth of the landscaping services market in recent years is greatly attributed to sustainability and environmental consciousness, as customers and businesses prefer green alternatives that cause less damage. Given the escalated worries over climatic changes, water security, and loss of biological diversity, a paradigm shift towards the adoption of eco-friendly landscapes has been observed. This has encompassed planting water-efficient vegetation, xeriscaping, and employing plants that require less maintenance and water. For instance, in July 2024, the ground-breaking water-wise landscapes concept was launched by Phoenix Pro Landscaping LLC, a top supplier of complete landscaping services in Gilbert, Arizona. By providing drought-resistant, sustainable landscaping options that complement the area's arid climate and drastically cut down on water usage, this creative project seeks to revolutionize Gilbert's residential and commercial properties.

Moreover, many landscapers are concerned with cutting down on chemical pesticides and fertilizers and are embracing the use of organic chemicals that do not affect soil health and local ecosystems. The use of other green technologies such as solar lighting or rainwater harvesting, helps in creating a balance between landscaping and environmental issues. The emphasis placed by consumers and businesses on sustainability continues to rise, resulting in an increasing demand for landscaping services that adopt eco-friendly measures and facilitate growth in the sector.

Aesthetic and Wellness Trends to Influence Market Growth

The growing appreciation for the use of outdoor spaces for leisure, recreation, and even mental health has impacted the growth of the landscaping services industry owing to aesthetic and wellness trends. There has been an uptick in the needs of people who wish to have pleasant, practical, and soothing spaces outside their homes or places of work. This has led to an increase in landscaping expenditure among home and business owners. Some of these include components like retreat gardens, outdoor verandas, or quiet areas such as Zen gardens.

Moreover, recently, biophilic design has become a prominent architectural trend as it aims to connect people with the outdoors, mainly by using plants and natural materials in exterior spaces. These trends are not solely aimed at aesthetics but also promote health and well-being by providing quiet green areas for relaxation, physical activity, or socializing. As the appreciation of nature increases, so does the craving for its incorporation into architecture and landscaping, forming environments that support these wellness-enhancing goals.

In October 2024, as a strategic development move, A.S. Gardens Ltd started a new landscaping section with the goal of offering customers complete outdoor solutions. The new division aimed to concentrate on turning outdoor areas into beautiful settings that complement their natural surroundings. The installation of terraces, walkways, walls, and decking was supposed to provide hard landscaping services. Using premium materials, the company will seek to design areas that are aesthetically pleasing and useful at the same time.

Commercial Segment to Hold a Significant Market Share

Commercial landscaping services occupy a considerable portion of the market as every business has to maintain a decent-looking, functional, and professional outdoor environment, whether it is an office park, retail center, hotel, or government building. Such structures have to be well-landscaped for better appeal, customer service, and brand appearance. In June 2024, BrightView Holdings, Inc., the Major League Baseball's (MLB) Official Field Consultant, completely refurbished Rickwood Field, the oldest ballpark in the United States. Rickwood's field underwent a complete makeover by BrightView, which included tearing out the old field, installing brand-new clay for the warning tracks and infield, replacing the outfield and infield grass with Tahoma31 Bermuda turf, and installing a new padded outfield wall, foul poles, bullpens, and netting along the foul lines. Additionally, temporary field lighting and new dugouts were added.

Moreover, landscaping is significant as it offers pleasant outdoor spaces for the employees when they need to take a break or meet up with colleagues. In addition, most commercial properties require routine upkeep, seasonal enhancements, and unique services such as hardscaping, lighting, and irrigation systems. As the commercial property market witnesses continued growth with an increasing interest in first impressions, the need for professional landscaping services within this scope remains high, acting as one of the major drivers of market growth.

North America to Dominate the Market Share

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The market for landscaping services is primarily concentrated in North America, which can be explained by the high need for residential as well as commercial landscaping. The United States occupies the largest share, with more curb appeal enhancement of homes by homeowners and professionally done landscaping sought by businesses to attract more customers and enhance the satisfaction of their employees. The commercial sector, including office parks, retail centers, and hospitality properties, greatly fuels the region's market growth.

Moreover, the rising demand for landscaping services is complemented by the increasing focus on sustainable and green landscaping practices such as drought-tolerant landscaping plants and smart irrigation systems. Furthermore, the region is characterized by frequent mergers and acquisitions activities as companies strive to enhance their market share, broaden their range of services, and acquire new technologies. For instance, in August 2024, the landscaping company Platinum Landscape, Inc. was acquired by Toda America, Inc. In California, Platinum is a specialized contractor that works on landscaping projects. Toda aims to increase its business portfolio in California and fortify its business management basis in the United States with the help of this acquisition.

Such mergers and acquisitions assist companies in improving their competitive edge, enhancing operational efficiencies, and entering new markets, thereby propelling growth and reinforcing the leadership of the landscaping services market in North America.

Future Market Scenario (2024 – 2031F)

- Market growth will be fueled by the increasing focus on environment-friendly landscaping, involving the use of native and drought-tolerant plants, efficient watering patterns, and organic substances.
- The implementation of smart technologies, including automated irrigation systems, drones, and landscape designing applications will ensure efficient service delivery to the tech-savvy and modernized clientele.
- With advancing urbanization, more attention will be provided to green spaces, roof gardens, and community parks, thereby creating a demand for creative landscaping in cities.

Key Players Landscape and Outlook

The market for landscaping services generally comprises a mixture of several major national chains, smaller regional companies, and several smaller companies operating on a local level. This includes the designing, installation, and maintenance of landscapes, along with irrigation and hardscaping services. With the expansion in the market, the larger players tend to develop their services through the practice of mergers and acquisitions in order to strengthen their competitive positions, expand their geographic presence, and reach new customer segments. For instance, in October 2024, the Londonderry, Vermont-based Wise Oak, Inc. was acquired by The Davey Tree Expert Company. With the acquisition, Davey and Wise Oak focus on growing their full line of services in southern Vermont by utilizing Davey's advanced arboricultural science and technology.

Furthermore, these companies invest in sophisticated technologies such as smart irrigation, power tools, and landscape design software to enhance service delivery. The small players in the market may fully leverage differentiation factor by offering certain specialized or niche services, such as organic landscaping or sustainable architecture.

The market outlook is bright, fueled by sustained interest from the residential and commercial sectors, city expansion, and a rising emphasis on sustainable outdoor wellness spaces. Additionally, technological advancements and green initiatives are expected to alter market trends in the future.

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