



# Executive Summary



CONCRETE  
**MASONRY &  
HARDSCAPES**  
ASSOCIATION

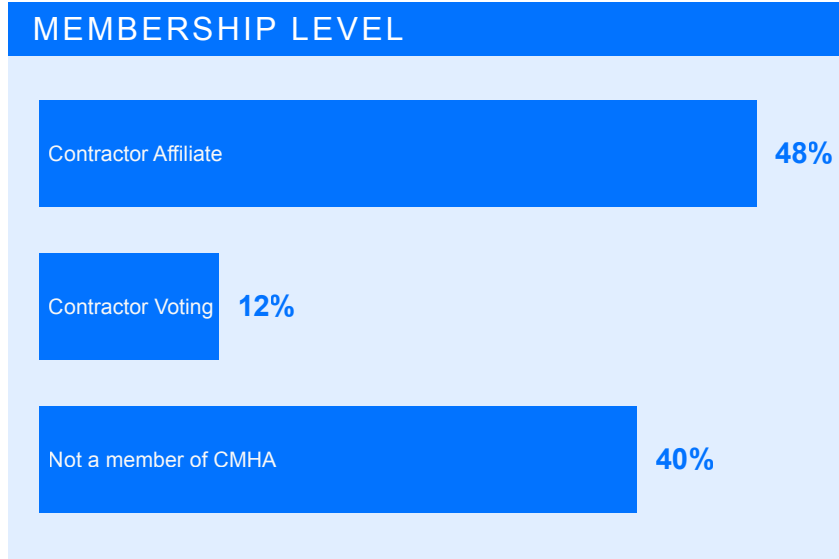
## Executive Summary

In January 2025, Industry Insights (on behalf of CMHA) emailed a link to a strictly confidential questionnaire to CMHA contractor members and non-members. A sample of the survey is provided in the Appendix. The primary intent of this survey was to collect benchmarking statistics from hardscape service companies by specific data aggregates which will allow CMHA to provide better tools and services to meet the needs of contractors.

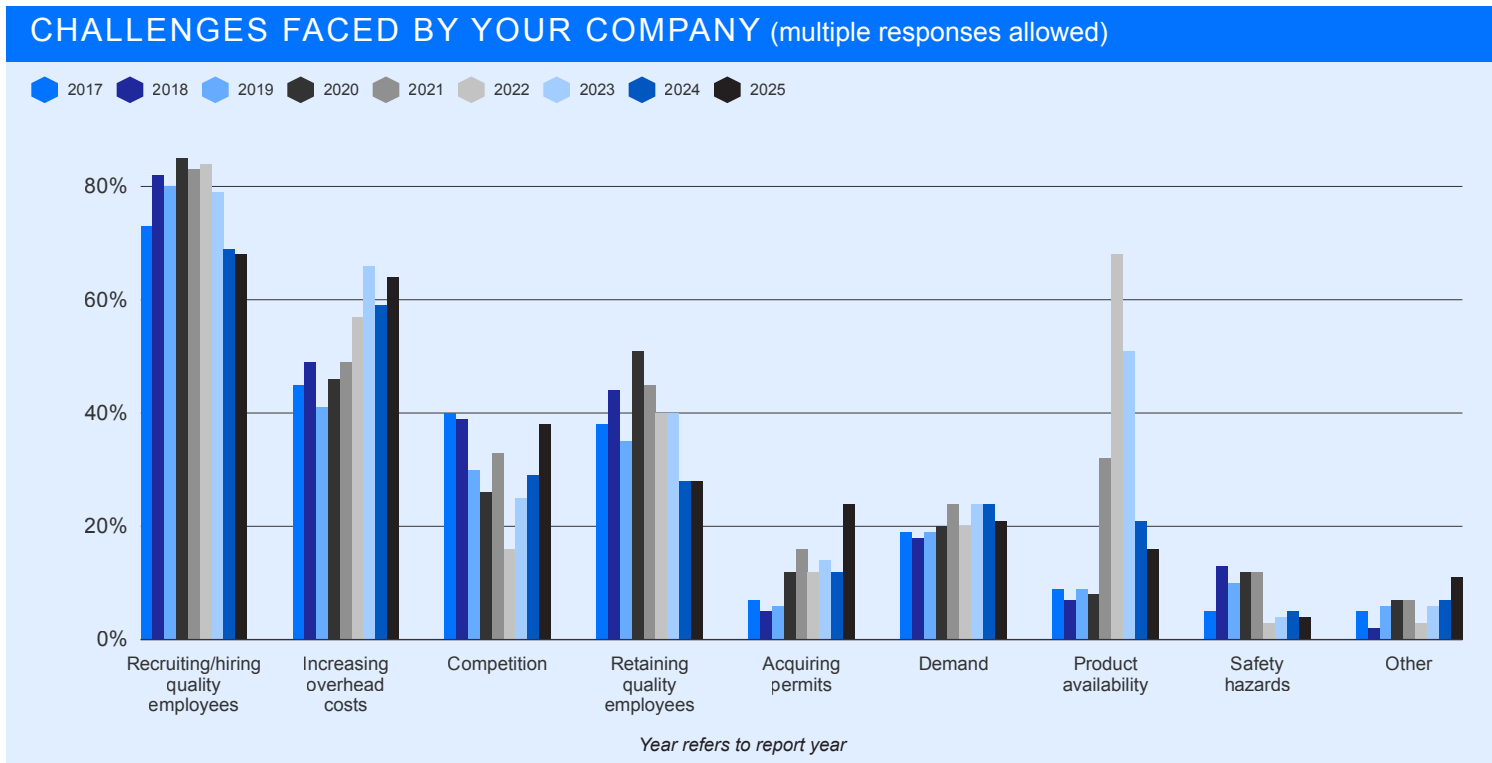
The data collected is presented in Trend Results tables showing the trends from 2017 through 2025 starting on page 11. The Detailed Survey Results are then presented grouped by Gross Sales, starting on page 22, by Market Segment starting on page 32 and then by Country starting on page 42.

The statistical information contained in this report is believed to be representative of the companies responding to the survey and the industry in general.

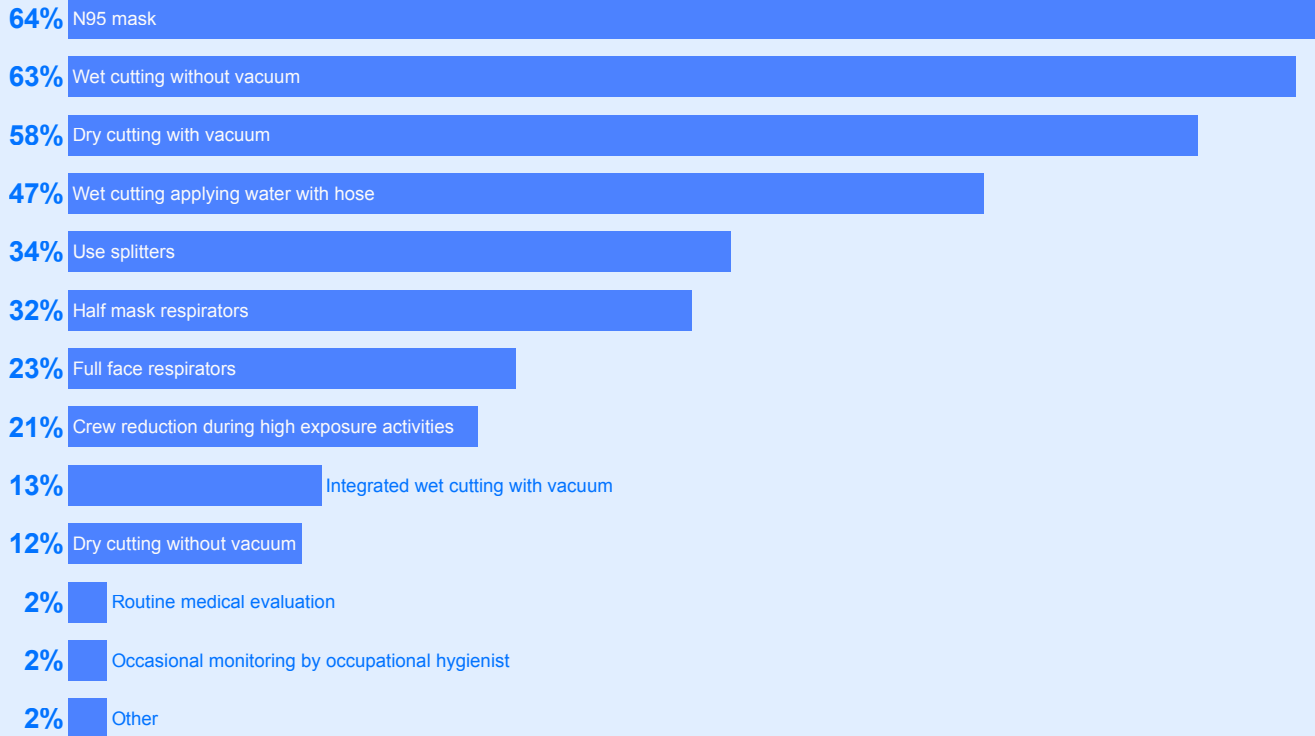
The membership level of those who responded was 61 Contractor Affiliate (48%), 14 Contractor Voting (12%) and 51 Not a Member of CMHA (40%).



## General Operational Information



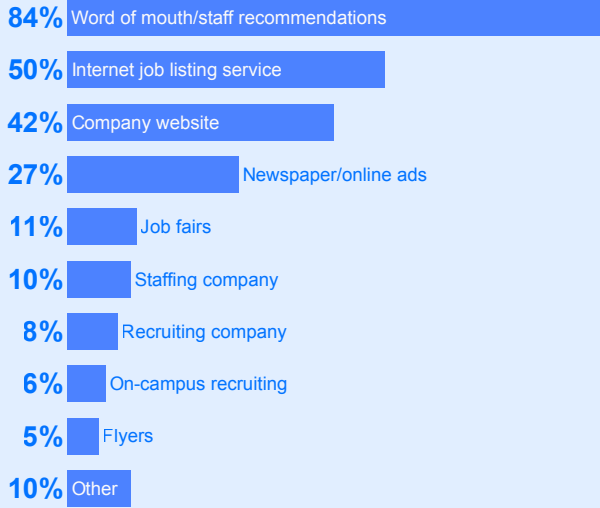
## SYSTEMS USED TO MONITOR AND REDUCE THE EXPOSURE TO RESPIRABLE SILICA (multiple responses allowed)



## Staffing

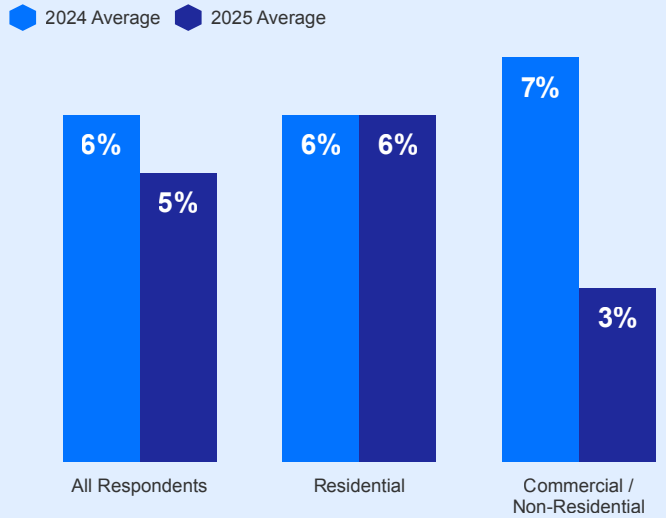
	All Respondents	GROSS SALES				
		Less than \$200,000	\$200,000 to \$499,999	\$500,000 to \$999,999	\$1 Million to \$2 Million	\$2 Million or Greater
Typical number of employees during construction season	14	5	10	11	18	30
Typical number of hardscape installation crews during construction season	2	1	1	2	2	5
Typical size of crew	3	3	3	3	3	4

### METHODS USED TO RECRUIT EMPLOYEES (multiple responses allowed)



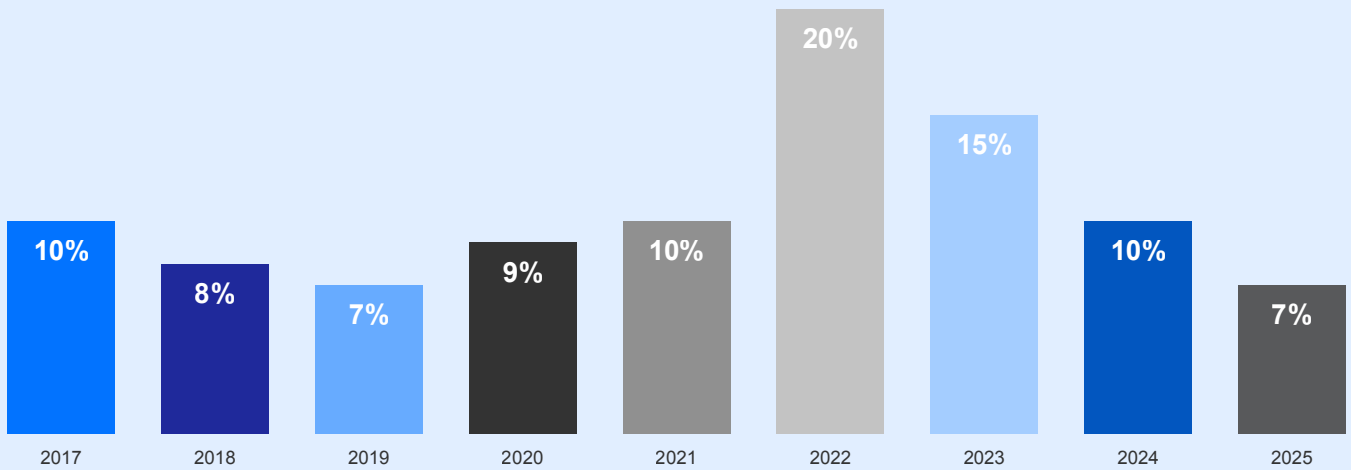
\*Other methods include H2B and social media.

### WAGE/SALARY INCREASE IN 2024 AND 2025 (Forecast)



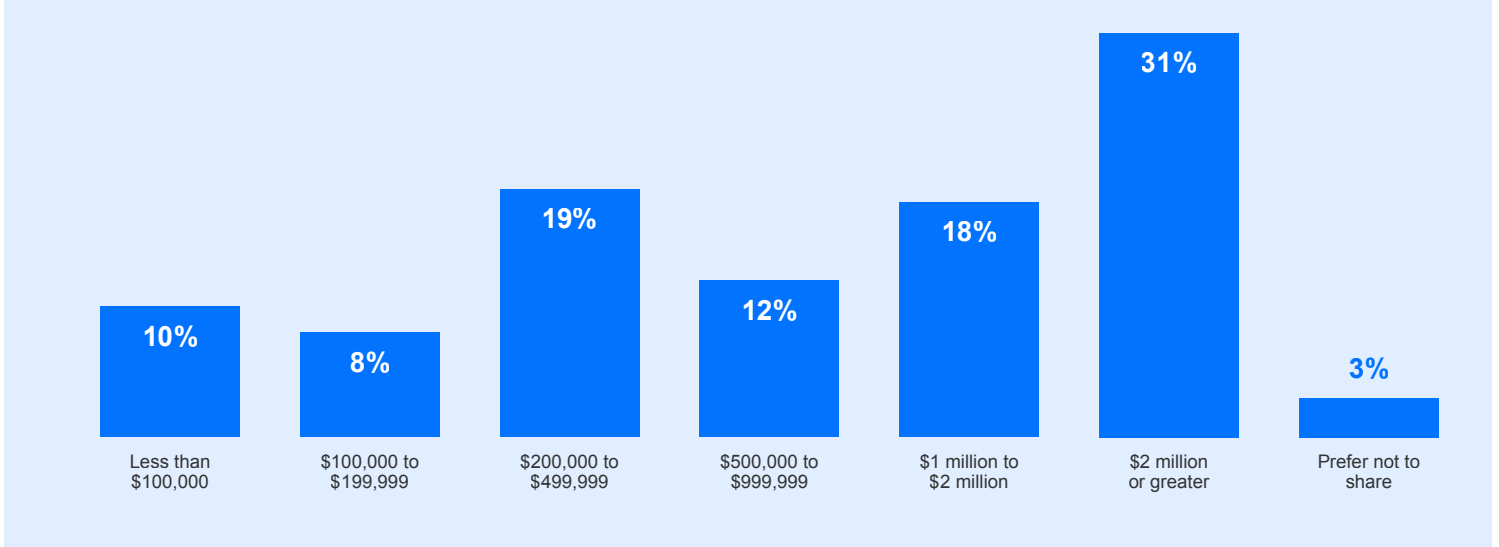
## Financial Information & Services

### YEAR-OVER-YEAR SALES GROWTH IN GROSS HARDSCAPE SALES (Medians)

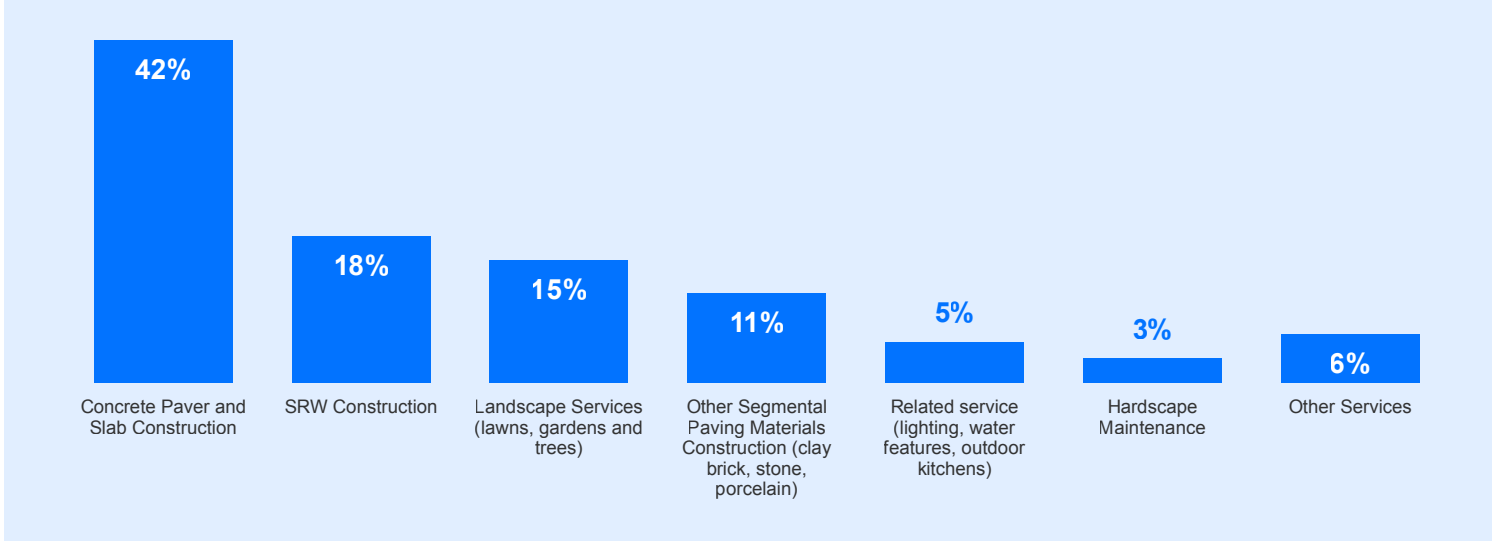


Graph labels refers to report year. Year over year growth is for the previous fiscal year (e.g., 2025 column shows the 2024 sales growth).

## 2024 HARDSCAPE GROSS SALES



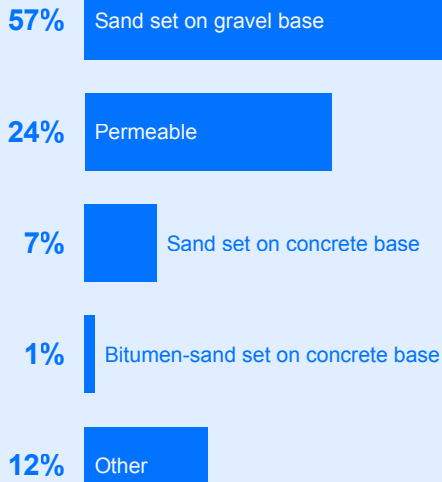
## 2024 HARDSCAPE GROSS SALES BY TYPE



## SQUARE FEET INSTALLED IN 2024 (Median)

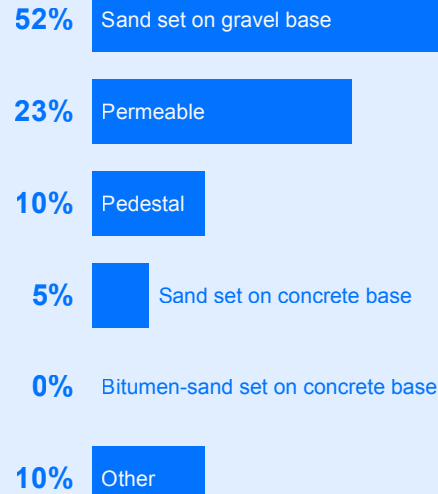
	All Respondents	Gross Sales				
		Less than \$200,000	\$200,000 to \$499,999	\$500,000 to \$999,999	\$1 Million to \$2 Million	\$2 Million or Greater
Concrete Pavers	10,000	2,000	5,000	12,000	10,000	180,000
SRWs	1,860	300	1,600	1,200	2,800	5,000
Concrete Slabs	2,000	500	1,000	3,500	1,500	15,000

### CONCRETE PAVER INSTALLATIONS BY CATEGORY



\*Other categories include pedestal, hybrid, and open grade.

### CONCRETE SLAB INSTALLATIONS BY CATEGORY



\*Other categories include hybrid base, gator base, and crushed gravel on gravel base.

## PERCENTAGE OF WORK DONE BY MARKET SEGMENT (2017 TO 2025)

