



CONCRETE
MASONRY &
HARDSCAPES
ASSOCIATION

2024 CMHA Hardscape Production Report

(BASED ON PRODUCTION DATA FROM CALENDAR YEARS 2022 AND 2023)

EXECUTIVE SUMMARY

2024 CMHA Hardscape Production Report EXECUTIVE SUMMARY

The 2024 CMHA Hardscape Production Report offers an in-depth exploration of production trends for segmental concrete paving and segmental retaining wall (SRW) products in the U.S. and Canada. Drawing from survey responses by 51 participating companies, representing an estimated 71% of paver production and 54% of SRW production, this report provides valuable insights into the current state and future directions of the hardscape industry. Conducted in mid-2024, the survey captures a snapshot of industry-wide trends, challenges, and growth drivers, helping stakeholders understand shifts in demand, production capabilities, and strategic opportunities. This report also highlights how evolving consumer preferences, economic forces, and innovations are shaping the landscape of hardscape production.

Industry-Wide Production Trends

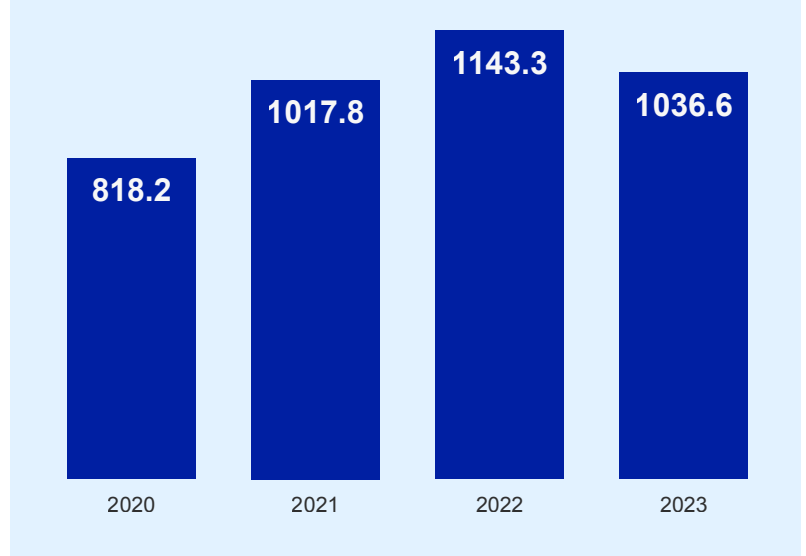
In 2023, the hardscape industry saw mixed results across its major product categories. Both segmental concrete paving and SRW products experienced a decline in production compared to the record highs of 2022. This recalibration reflects broader economic pressures, such as rising material costs and fluctuating consumer spending, following the surge in demand during the pandemic years. However, overall production levels remained notably higher than pre-pandemic years, underscoring the resilience of the industry and ongoing demand for hardscape products across residential, commercial, and infrastructure sectors. The shifts observed in 2023 may indicate a stabilization phase as the industry adjusts to a new economic landscape.

Trends and Insights in Segmental Concrete Pavement

The segmental concrete pavement market has demonstrated substantial growth over recent years, despite facing challenges in 2023. Total production reached 1,036.6 million square feet in 2023, reflecting a 9.3% decline from the record high of 1,143.3 million square feet in 2022. However, the market remains significantly larger than in 2020, when total production was 818.2 million square feet—representing a 26.7% increase over the last three years. This growth underscores the enduring demand for segmental concrete pavement products, driven by their versatility and widespread applications in construction and landscaping projects. While the 2023 contraction suggests an adjustment following the pandemic-driven boom, the market’s sustained size highlights its critical role in meeting infrastructure and urban development needs. The total production levels illustrate an industry adapting to economic pressures while maintaining a strong foundation for future growth. Notably, production on a per capita basis has also increased since 2019, further emphasizing the market’s expansion and relevance.

SEGMENTAL CONCRETE PAVEMENT

Historical Production Trends – Total Square Footage Manufactured¹
 (In Millions of Square Feet)

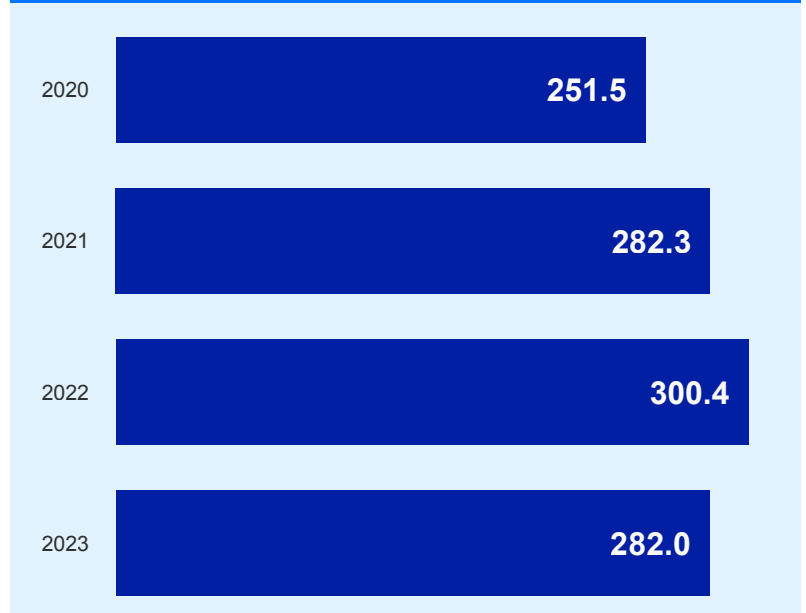


Trends and Insights in Segmental Retaining Wall (SRW) Products

The segmental retaining wall (SRW) market has demonstrated resilience and sustained demand despite experiencing a decline in total production in 2023. After reaching a peak of 300.4 million square feet in 2022, total SRW production declined slightly to 282.0 million square feet in 2023, representing a 6.1% decrease. However, the market remains significantly larger than in 2020, when production was 251.5 million square feet—a growth of 12.1% over those three years. On a per capita basis, production has continued to expand since 2019, suggesting that demand for SRWs in structural and landscaping applications remains strong.

SEGMENTAL RETAINING WALL (SRW)

Historical Production Trends – Total Square Footage Manufactured²
 (In Millions of Square Feet – U.S. and Canada combined)



While the 2023 decline reflects ongoing adjustments to economic pressures, such as rising costs and shifting market dynamics, the market’s size underscores the importance of SRWs as a critical component of the hardscape industry. With production levels maintaining strength above pre-pandemic benchmarks, the SRW segment is well-positioned to adapt to future challenges while continuing to support diverse construction needs across residential, commercial, and public infrastructure applications.

¹Sales data (2020) is used alongside production data (2022–2023) to illustrate long-term market trends. While sales data reflects actual demand, production data highlights manufacturing output. Sales data from the preceding 10 years allowed for meaningful comparisons with recent production changes. The 2021 data figure was extrapolated based on market changes observed in related industries.

²Production data from 2022–2023 is based on actual industry figures, while the 2020 and 2021 data were extrapolated using market trends and changes observed in related industries, as well as known production data from 2019 and prior years.

Outlook and Future Directions

Looking ahead, the hardscape industry is cautiously optimistic about the next few years. For 2024, over 75% of companies expect production levels to remain the same or improve compared to 2023, while less than 25% anticipate any decline. Confidence rises further for 2025, with nearly 90% of companies projecting production to outpace 2024 levels and fewer than 11% expecting a decrease. This broad optimism reflects an industry that is adapting to challenges while capitalizing on opportunities for growth.

Key factors influencing future production include the ongoing drive toward sustainable solutions, such as permeable paving, and innovation in design to meet evolving consumer preferences. Labor availability and material costs remain challenges, but manufacturers are responding by investing in efficiency and exploring new product offerings. The demand for durable, aesthetically appealing, and environmentally friendly products is expected to shape production and product development efforts in the coming years, as manufacturers align their strategies with market trends.

INSIGHTS

Additional Insights Available in the Full Report

The 2024 CMHA Hardscape Production Report includes a wealth of detailed analysis beyond this Executive Summary, offering valuable insights such as:

- **Production Projections by Company Size**
 Gain a detailed breakdown of production trends by small, medium, and large manufacturers, revealing how market dynamics impact producers differently.
- **Product-Specific Trends**
 Explore in-depth analyses of key product categories, such as Permeable Interlocking Concrete Pavers (PICP) and Engineered SRWs, as well as production insights for the U.S. and Canada.
- **Sustainability and Long-Term Growth**
 Learn how trends in sustainability, design innovation, and regulatory changes are shaping the industry’s future while reviewing historical growth patterns and benchmarks.

The full report also includes comprehensive data visualizations, industry benchmarks, and actionable insights to help stakeholders align their strategies with market trends and opportunities.

Conclusions

The 2024 CMHA Hardscape Production Report underscores the resilience and adaptability of the hardscape industry in the face of shifting economic pressures and evolving consumer demands. While production levels have adjusted following pandemic-era peaks, the industry demonstrates strength through its focus on innovation, sustainability, and responsive design.

For readers seeking deeper insights, the full report includes detailed projections by company size, in-depth analyses of product and regional trends, and a closer look at emerging sustainability and innovation drivers. These additional findings provide actionable data to help stakeholders align their strategies with future opportunities in the hardscape market. To purchase a copy of this report, please email publications@masonryandhardscapes.org or call the Publications Department at 703-713-1900.

