

Outdoor Landscaping Structures Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented by Type of Structure (Gazebos and Pergolas, Outdoor Kitchens and Grills, Patios and Decks, Outdoor Fireplaces and Fire Pits, Fencing and Privacy Screens, Retaining Walls, Play Structures (e.g., Swing Sets), Water Features (e.g., Fountains, Ponds), Outdoor Lighting) By Installation Method (DIY (Do-It-Yourself), Professional Installation) By End User (Residential, Commercial, Institutional , Industrial, Municipal and Government), By Region, By Competition, 2018-2028

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Abstracts

Global Outdoor Landscaping Structures market has experienced tremendous growth in recent years and is poised to maintain strong momentum through 2028. The market was valued at USD 2.52 billion in 2022 and is projected to register a compound annual growth rate of 6.12% during the forecast period.

Global Outdoor Landscaping Structures market has witnessed significant expansion driven by increasing digital transformation and focus on enhancing outdoor living spaces across residential and commercial sectors. Critical industries recognize the importance of effective tools for ensuring regulatory compliance, optimizing designs and minimizing costs through data-driven insights.

Outdoor Landscaping Structures solutions enable real-time access to centralized monitoring systems, analytics capabilities and personalized project reports. This allows organizations to generate predictive maintenance analysis, automate workflows and ensure structures are installed per specifications. Such solutions help customize installation programs, streamline processes for cost savings and strengthen overall project management.

Leading construction and design firms have partnered with major Outdoor Landscaping Structures vendors to digitally transform their operations management. The integrated solutions improve cross-departmental collaboration, provide mobile visibility into installation progress and facilitate regulatory approvals.

Vendors continue advancing offerings through innovations in areas like IoT, BIM and prefabricated construction. This ensures secure, scalable and customizable solutions for diverse landscape project needs.

Ongoing R&D and adoption of data-driven strategies indicate Outdoor Landscaping Structures solutions will play an increasingly important role in optimizing projects and decision-making under uncertainty. Partnerships and compliance with emerging standards are expected to sustain high growth. The long-term outlook remains positive as organizations recognize business value from proactive performance management and risk mitigation.

Key Market Drivers

Increasing Demand for Outdoor Living Spaces

The outdoor landscaping structures market is being driven by the rising popularity of outdoor living areas. With busier lifestyles and more time spent indoors, consumers are increasingly seeing the value of well-designed outdoor spaces for relaxing, entertaining guests and improving overall well-being.

According to surveys, over 80% of homeowners consider an outdoor living area as an important part of their home's value. This has prompted many to renovate existing yards or invest in new landscaping designs featuring structures like decks, patios, pergolas and fire pits. The growing emphasis on outdoor spaces is reflected in rising material and construction spending over the past decade.

The COVID-19 pandemic further accelerated this demand as people spent more time at

home and looked for ways to comfortably use their outdoor areas. The structural designs went beyond basic functionality to become an extension of indoor living, optimized for activities like cooking outdoors, home offices and children's play areas.

Looking ahead, as lifestyles continue prioritizing wellness, recreation and socialization outdoors, the demand for high-quality, customized landscape structures is expected to remain robust. Various industry reports project over 5-7% annual growth in the outdoor living category through 2030.

Rise of Sustainable and Low Maintenance Materials

Environmental sustainability is a major concern influencing construction material choices. Composite decking and railing systems made of recycled plastic and wood are gaining traction due to benefits like longevity, low maintenance and reduced impact on natural resources.

Composite materials do not require seasonal staining or sealing like traditional wood. They are highly durable, resistant to warping, cracking and rotting even in harsh weather conditions. Low upkeep translates to significant cost savings over the lifetime of installations.

Permeable paving options like gravel, turfstone and eco-pavers are preferred for patios, walkways and driveways to allow rainwater absorption. This supports landscaping with native plants and reduces stormwater runoff.

The growing consumer demand for sustainable yet high-performance products will drive further innovation and adoption of eco-friendly materials across outdoor structure segments. Vendors are expected to invest more in developing new composite formulations using recycled post-industrial waste.

Rise of Custom Home Building

Custom home construction is on the rise globally as buyers demand personalized living spaces tailored to their unique needs, tastes and budgets. This presents opportunities for specialized outdoor living structure designs integrated seamlessly into the overall home architecture.

Custom builders work closely with landscape architects to incorporate bespoke decks, pergolas, outdoor kitchens and fireplaces complementing the home exterior. Indoor-

outdoor flow is an important design consideration to extend living areas and maximize views.

Builders also focus on low-maintenance, high-durability materials, automated controls for lighting and water features, and built-in amenities for comfort and entertainment. Such customized structures add significant property value while enhancing livability.

As disposable incomes rise across major markets, demand for unique, add significant property value while enhancing livability.

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As disposable incomes rise across major markets, demand for unique, one-of-a-kind homes driving the individual outdoor spaces market will continue growing strongly. Vendors are innovating to deliver a wider array of modular, customizable structure solutions supporting the custom building trend.

Key Market Challenges

Raw Material Price Volatility and Supply Chain Disruptions

The outdoor landscaping structures industry relies heavily on various raw materials like wood, metals, plastics and concrete which are prone to price fluctuations based on economic conditions, trade policies and environmental factors. For example, wood prices experienced steep rises in 2021 due to high demand, labor shortages and mill shutdowns during the pandemic.

Supply chain disruptions have also been a major challenge with transportation delays and material shortages impacting construction schedules and budgets. The Russia-Ukraine conflict further exacerbated global supply pressures, raising costs of steel and petroleum-based products.

These unpredictable input price swings squeeze manufacturer margins and force mid-season product price increases, damaging customer goodwill. Substitute sourcing also introduces incompatibility risks. Project delays lead to penalties and reputation issues for contractors.

Mitigating raw material cost and availability risks requires flexible pricing strategies and stronger supplier partnerships. However, smaller players find it difficult to negotiate favorable contracts or absorb rising costs. This acts as a barrier to market entry and expansion.

Skilled Labor Shortages

The outdoor structures industry faces a shortage of skilled carpenters, masons, electricians and other tradespeople with expertise in outdoor construction techniques. An aging workforce and fewer young entrants are exacerbating tight labor conditions across major markets.

The specialized skills required for advanced construction methods like composite assembly, automated control integration and sustainable water feature installation are particularly scarce. Contractors struggle to complete projects on schedule due to delays in sourcing qualified labor teams.

Rising wages put pressure on business margins too. Attracting new talent demands higher pay, training and benefits. But regulatory compliance with minimum wage laws and safety certifications increases operating expenses. Smaller players are impacted more due to limited training budgets.

While automation can help address labor constraints to some extent, outdoor construction will continue requiring human skills and oversight. Coordinated efforts are needed between industry and vocational training institutes to develop workforce pipelines through apprenticeships and certification programs.

Key Market Trends

Rise of Smart Home Integration

The growing convergence of building automation and smart home technologies is opening up new opportunities for outdoor structures. Customers now expect seamless control of landscape lighting, water features, awnings and other installations using smart switches, apps and voice assistants.

Manufacturers are integrating connectivity into modular building materials, making structures conducive for integration into centralized home automation networks.

Advanced lighting solutions offer customizable scenes, schedules and dimming capabilities controlled remotely.

Motion sensors and cameras enhance security by triggering lights and alerts. Automated controls help optimize water and energy usage based on weather conditions. Homeowners benefit from simplified management of outdoor functions from any location.

Vendors partner with leading smart home ecosystems like Amazon, Google, Apple, Samsung and others to ensure compatibility. Over-the-air updates enable progressive feature additions. As IoT adoption grows, integrated outdoor 'spaces' will emerge as a new segment within the smart home market.

Rise of Prefabricated and Modular Construction

To address labor constraints and complete complex projects faster, prefabricated and modular construction techniques are gaining popularity. These methods involve manufacturing large custom structure components off-site in controlled factory environments then assembling them on location.

Precise computer-aided manufacturing allows for intricate, interlocking designs impossible to replicate on-site. Structural elements like arches, roofs and decks are factory-finished for quick assembly. Landscape lighting, water features and built-in furnishings are pre-installed as well.

Modular construction reduces on-site work, minimizing weather disruptions. Contractors can complete more projects simultaneously. Customers benefit from shorter timelines, less disruption and increased durability of sealed, finished components.

Vendors expand modular product portfolios with scalable, reconfigurable and relocatable structure kits. BIM integration enables collaborative 3D design and production planning. The trend will optimize construction productivity while delivering high-quality customized outdoor spaces.

Adoption of Sustainable Practices

With climate change concerns mounting, sustainable practices are becoming mainstream across industries. In landscaping, designers and builders increasingly specify environmentally-friendly structures, materials and processes.

Renewable energy use is rising via solar panels powering lighting and fountains. Structures are designed for maximum passive heating/cooling through landscape placement and material selection. Permeable hardscaping aids on-site water management.

Native and drought-resistant plant selection supports biodiversity. Recycled and reclaimed wood, composites and metals lower embodied carbon. Eco-certifications recognize stewardship efforts. Data-driven tools help quantify sustainability performance.

Consumers are willing to pay premiums for verifiably sustainable structures. Green building codes and incentives are also driving adoption. Over time, sustainable practices will become the new standard for responsible outdoor development..

Segmental Insights

Type of Structure Insights

Patios and decks dominated the outdoor landscaping structures market in 2022, accounting for over 30% of the global revenue. The large share of patios and decks can be attributed to their widespread use across residential and commercial settings for functional and aesthetic purposes. Patios and decks provide an outdoor space for activities like dining, lounging and entertaining guests. They also help increase usable outdoor space and property value. The demand for patios and decks is expected to remain high during the forecast period due to the rising trend of outdoor living and increasing spending on outdoor remodeling and refurbishment projects. Furthermore, ongoing product innovations with low-maintenance and eco-friendly materials will continue supporting the dominance of patios and decks in the outdoor landscaping structures market between 2023 and 2028. Other fast growing segments include outdoor kitchens and grills, driven by the popularity of outdoor cooking, as well as water features and outdoor lighting, benefiting from the increasing focus on landscaping aesthetics and ambiance lighting.

Installation Method Insights

The residential end-user segment dominated the outdoor landscaping structures market in 2022, accounting for over 60% share of the global revenue. The large share of residential end-user segment can be attributed to the rising demand for outdoor living

spaces in both new residential construction projects as well as home renovation and remodeling activities. Homeowners are increasingly investing in outdoor structures like patios, decks and outdoor kitchens to extend their living areas. This growing demand is driven by trends like increasing home values, rising incomes, growing emphasis on outdoor activities and real estate developments with integrated community spaces. Furthermore, the residential segment is expected to continue its dominance during the forecast period owing to sustained growth in residential construction across major regions. Other end-user segments including commercial and municipal/government are also likely to witness healthy growth on account of infrastructure development projects and initiatives to enhance public recreational facilities.

Regional Insights

North America dominated the outdoor landscaping structures market in 2022, accounting for over 35% of the global revenue. The large share of the North America region can be primarily attributed to high consumer spending on outdoor remodeling and renovation activities in the countries of US and Canada. North America has witnessed significant growth in residential construction projects over the past decade, which has translated into rising demand for outdoor structures. Furthermore, the presence of leading market players along with well-established distribution channels and rising adoption of smart home technologies in outdoor applications have been driving the North America outdoor landscaping structures market. The region is expected to continue its dominance during the forecast period as well, led by ongoing infrastructure development projects and initiatives to enhance public recreational spaces. Asia Pacific is also expected to witness substantial growth owing to increasing construction activities and growing consumer preference for outdoor living in countries like China, India and Japan.

Key Market Players

TREX COMPANY, INC

UFP INDUSTRIES, INC

FIBERON LLC

Lowe's Companies, Inc

Home Depot Product Authority, LLC

Anderson Plywood Company

Westlake Royal Building Products

Universal Forest Products, Inc

SUNDEK INTERIO PRIVATE LIMITED

Koppers Inc

Report Scope:

In this report, the Global Outdoor Landscaping Structures Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Outdoor Landscaping Structures Market, By Type of Structure:

Gazebos and Pergolas

Outdoor Kitchens and Grills

Patios and Decks

Outdoor Fireplaces and Fire Pits

Fencing and Privacy Screens

Retaining Walls

Play Structures (e.g., Swing Sets)

Water Features (e.g., Fountains, Ponds)

Outdoor Lighting

Outdoor Landscaping Structures Market, By Installation Method:

DIY (Do-It-Yourself)

Professional Installation

Outdoor Landscaping Structures Market, By End User:

Residential

Commercial (e.g., Hotels, Restaurants, Parks)

Institutional (e.g., Schools, Hospitals)

Industrial

Municipal and Government

Outdoor Landscaping Structures Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Outdoor Landscaping Structures Market.

Available Customizations:

Global Outdoor Landscaping Structures Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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