

LM's 2009 State of the Industry

The ultimate Green Industry dashboard

To run your business efficiently, you need real-time performance information in a quick and easy-to-understand format — like your car dashboard displays.

Landscape Management's 2009 State of the Industry — one of our most-anticipated issues of the year — delivers the ultimate Green Industry dashboard, including our exclusive **LM 150** (up from 100), a look at the nation's largest landscape, lawn care, design/build and irrigation contractors.

We provide an unprecedented view inside the Green Industry with:

➤ 11 new **LM Top 25 charts** breaking down revenue leaders by region, customer mix and sector; and

➤ 15 **LM Leader Profiles** — Executives share their keys to success and the greatest opportunities and obstacles facing the industry.

With data culled from *LM's* exclusive survey, we bring unparalleled insight into how more than 680 of your peers are thinking and performing. A bevy of charts, factoids, infographics and quotes give you a quick read on the past, present and future.

We offer our traditional caveat that while bigger isn't always better, bigger commands attention. Whether you rival or revile the companies on this list, in many ways they provide a benchmark for rest of the industry.

With no desire to rest on our laurels, we've been working hard to make the business intelligence we provide even more valuable. To that end, we bring you *LM's* 2009 State of the Industry report, brought to you with the gracious support of John Deere. *LM*

LEGEND * = 2007 revenue; NR = Not reported; + = Satellite locations not included;
 * = Formed in 2008 from Piedmont Landscape and Bio Landscape & Maintenance

Company		2008 Revenue (in millions of U.S. Dollars)
1	The TruGreen Cos.	1,410
2	ValleyCrest Landscape Cos.	990
3	The Brickman Group, Ltd., LLC	680.8
4	The Davey Tree Expert Co.	600
5	USM	480.7
6	Scotts LawnService	311.9
7	Bartlett Tree Experts	170
8	Ambius	123.3
9	OneSource Landscape & Golf Services	117.05*
10	Lawn Doctor	90
11	Weed Man	86.48
12	U.S. Lawns	86
13	Yellowstone Landscape Group ^o	81
14	Gothic Landscaping / Gothic Grounds Management	80
15	Massey Services	77.49
16	Vila & Son Landscaping Corp.	62.575
17	Ruppert Nurseries	57.7
18	Middleton Lawn & Pest Control	57.6
19	American Civil Constructors	56
20	Savatree	55
21	Jensen Corporate Holdings	53
22	ISS Grounds Control	45
23	Clintar Landscape Management	44
24	Tropics North Landscaping	42.5*
25	The Bruce Company of Wisconsin	42
26	Marina Landscape	50
27	Choate USA	40*
28	Landscape Concepts Construction	39.5*
30	The Groundskeeper	38
30	Acres Group	37.6
31	McDonnell Landscape	37*
32	Sierra Landscape Co.	34.7
33	Denison Landscaping	36.2*
34	Nanak's Landscaping	36
35	Chapel Valley Landscape Co.	36
36	AAA Landscape	35.9
37	Teufel Landscape	35.5
38	NaturaLawn of America	35.4
39	Oak Leaf Landscape	35*
40	Mariani Landscape	35
41	Mainscape	35
42	Nissho of California	32.6*
43	Spring-Green Lawn Care Corp.	32.4
44	Mission Landscape Services	33
45	Landscape Concepts Management	31.07
46	The Greenery	30.8
47	Cagwin & Dorward	30
48	Scott Byron & Co.	29.6
49	Ecoscape Solutions Group	29.08
50	Metropolx Garden Design Landscaping LP	28.8

2007 Revenue (in millions of U.S. Dollars)	Employees 2008 Full time / Part time	Headquarters	Locations
1,500	17,725 / 730	Memphis, TN	283
935	11,000 / NR	Calabasas, CA	120
609	4,382 / 5,486	Gaithersburg, MD	160
506.14	7,258 / 326	Kent, OH	NR
352.5	NR	Norristown, PA	NR
291.1	2,132 / 0	Marysville, OH	160
161	1,500 / 200	Stamford, CT	97
126.4	1,242 / 159	Buffalo Grove, IL	NR
117.05	1,122 / 214	Tampa, FL	12
86	55 / NR	Holmdel, NJ	460
78.19	788 / 2,625	Oshawa, Ontario, Canada	110
82	1,577 / 450	Orlando, FL	196
NR*	600 / 300	Plano, TX	9
125	1,158 / NR	Valencia, CA	11
74.34	780 / 0	Orlando, FL	61
64.55	736 / 0	Miami, FL	7
55	550 / 0	Laytonsville, MD	10
54.32	497 / 9	Orlando, FL	28
58	250 / 240	Lakewood, CO	6
50.3	450 / 60	Bedford Hills, NY	20
45.5	354 / 0	San Jose, CA	7
45	750 / 0	San Antonio, TX	6
38	160 / 350	Markham, Ontario, Canada	23
42.5	425 / NR	Homestead, FL	9
45.22	225 / 400	Middleton, WI	3
38	500 / 5	Anaheim, CA	2
40	200 / NR	Carrollton, TX	8
39.5	30 / 260	Richmond, IL	1
38	750 / 0	Tucson, AZ	11
33	102 / 700	Wauconda, IL	5
37	133 / 21	Brookeville, MD	1
34.7	294 / 0	Palm Desert, CA	2
36.2	190 / 180	Fort Washington, MD	1
33	500 / 250	Longwood, FL	5
43	255 / 135	Woodbine, MD	5
38.6	475 / 2	Phoenix, AZ	2
39	312 / 92	Portland, OR	3
33	235 / 21	Frederick, MD	68
35	120 / NR	Anaheim, CA	1
33	100 / 280	Lake Bluff, IL	2
43.4	300 / 120	Fishers, IN	10
32.6	300 / 0	Vista, CA	4
29.6	NR	Plainfield, IL	82
33	530 / 0	Tustin, CA	8
25.28	125 / 470	Grayslake, IL	6
35.6	460 / 41	Hilton Head Island, SC	3
32.02	335 / 50	Novato, CA	14
29.6	63 / 200	Lake Bluff, IL	2
36.6	215 / 0	Charlotte, NC	7
30.4	36 / 36	Dallas, TX	3

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THE TENACIOUS 12

Companies that showed the highest rate of growth from 2007 to 2008

1 Dworsky Services
43.33%

2 Heaviland Enterprises
32.34%

3 Lambert Landscape Co.
28.99%

4 USM
26.67%

5 The Fockele Garden Co.
25%

6 Perficut Lawn, Landscape & Erosion Services
24.81%

7 Marina Landscape
24%

8 DLC Resources
23.32%

9 Environmental Management Services
23.11%

10 Maldonado Nursery & Landscaping
20.83%

11 Heads Up Landscape Contractors
20%

12 PROscape
19.55%



ALL ILLUSTRATIONS/PHOTOS BY: ISTOCK INTERNATIONAL INC.



Competition doesn't have to drive down pricing. Look at all of the gas stations — they are all near uniformity in pricing. The same holds true for the cost of a gallon of milk from one supermarket to the next. Why can't our industry be more open and uniform with its pricing — so we can all work and earn quality livings.

Treat your customers right and they will keep you in business for years with their referrals.

Don't stick your head in the sand. Keep doing the things you need to do to get the work.

“ ”
CONTRACTOR COMMENTS

FROM THE SURVEY

We are only in the beginning stages of an all-out fist fight with each other, and I'm not sure the ones left standing will be able to hold their hands up in victory.

It's a great time to improve systems and procedures and recruit additional talent.

Don't cut quality or professionalism to lower prices.

If you know your niche, times are not that bad.



Company	2008 Revenue (in millions of U.S. Dollars)
51 LJ Thalmann Company dba Chalet	28
52 Dixie Landscape Co.	26.5
53 Cornerstone Solutions Group	26
54 Countryside Industries	25.5
55 Sebert Landscaping	25
56 Lucas Tree Expert Cos.	25*
57 Heads Up Landscape Contractors	25
58 Maldonado Nursery & Landscaping	24
59 McFall and Berry Landscape Management	22.83
60 CoCal Landscape	22.8
61 Shearon Environmental Design	22*
62 Mariposa Horticultural Enterprises	22*
63 Clarence Davids & Co.	22
64 DLC Resources	21.98
65 Complete Landscaping Service	21.91*
66 Dennis' Seven Dees Landscaping	21.9
67 Russell Landscape Group	21.23
68 Girard Environmental Services	21.2
69 Environmental Management Services	21.2
70 Sunrise Landscape	21*
71 David J. Frank Landscape Contracting	21
72 Stiles Landscape Co.	20*
73 Senske Lawn & Tree Care	20
74 Northwestern Landscape Co.	20*
75 Moore Landscapes	20*
76 Artistic Maintenance	20
77 McHale Landscape Design	19.6
78 Christy Webber Landscapes	19.2
79 Hazeltine Nurseries	19*
80 Lambert Landscape Co.	18.66
81 Gachina Landscape Management	18.5
82 Benchmark Landscape	18.5
83 LMI Landscapes	18.2
84 Creative Environments Design & Landscape	18.13
85 Western Dupage Landscaping	18.1*
86 Urban Farmer	18
87 James River Grounds Management	18
88 Realty Landscape Corp.	18*
89 Dora Landscaping Co.	17.84
90 Reyburn Landscape Cos.	17.7
91 Swingle Lawn, Tree & Landscape Care	17.6
92 Meadows Farms Nurseries	17.5
93 Fairco	17.5
94 The Highridge Corp.	17.33*
95 Dobson's Woods & Water	16.8
96 Gibbs Landscape Co.	16*
97 PROscape	15.6
98 Outside Unlimited	15.6*
99 The Dworsky Services	15
100 ArtisTree Landscape Maintenance & Design	14.5

2007 Revenue (in millions of U.S. Dollars)	Employees 2008 Full time / Part time	Headquarters	Locations
28	100 / 150	Wilmette, IL	2
37.25	215 / 0	Miami, FL	5
38	200 / 25	Dade City, FL	NR
26	65 / 280	Wauconda, IL	2
23	60 / 325	Bartlett, IL	4
25	350 / 125	Portland, ME	5
20	350 / 15	Albuquerque, NM	1
19	206 / 3	San Antonio, TX	2
22.6	150 / 260	McLean, VA	5
33	200 / 210	Denver, CO	2
22	NR	Plymouth Meeting, PA	NR
23	420 / 0	Irwindale, CA	3
22	90 / 215	Matteson, IL	3
16.86	345 / 0	Phoenix, AZ	1
21.91	140 / 40	Bowie, MD	2
23.89	300 / 30	Portland, OR	5
18.93	NR	Dacula, GA	NR
17.9	200-250 / 0	Sanford, FL	5
16.3	160 / 310	Plain City, OH	2
21	120 / 0	Tampa, FL	1
20.1	225 / 100	Germantown, WI	6
20	NR	Fort Lauderdale, FL	NR
18	200 / 50	Kennewick, WA	7
20	NR	Puyallup, WA	4
20	46 / 190	Northbrook, IL	3
NR	300 / NR	Lake Forest, CA	6
19.6	200 / 0	Upper Marlboro, MD	4
18.2	245 / 1	Chicago, IL	2
19	155 / 0	Venice, FL	1
13.25	156 / NR	Dallas, TX	1
17.44	270 / NR	Menlo Park, CA	4
22	230 / 0	Poway, CA	3
21.3	225 / 0	Carrollton, TX	4
30.61	300 / 90	Tempe, AZ	2
18.1	32 / 160	Naperville, IL	2
19	350 / 0	Thornton, CO	1
15.55	315 / 1	Glen Allen, VA	6
18	NR	Newtown, PA	4
16.97	100 / 0	Apopka, FL	2
20.2	170 / 0	Henderson, NV	1
18.6	230 / 3	Denver, CO	2
18.2	150 / 250	Chantilly, VA	23
24.5	150 / NR	Scottsdale, AZ	3
17.33	160 / 1	Issaquah, WA	1
20.2	248 / 1	Ocoee, FL	7
16	285 / 50	Smyrna, GA	3
12.55	275 / 1	Orlando, FL	5
15.6	150 / 100	Hampstead, MD	2
8.5	310 / 0	Gardena, CA	6
15	180 / 60	Venice, FL	4

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INVESTING TIME & MONEY

74%

Are increasing personal contact with clients and prospects.

42%

Are increasing their marketing budgets.

MARK-DOWN MADNESS

"Low-ball bids" tied "the down economy" as contractors' top concern.



DOWN THE DRAIN

44%

Project a drop in lawn care customer retention.



Employee training is key. Lifting a person's vision to higher sights is the raising of that individual's performance to a higher standard.

People need to stop talking about how bad the economy is. It only seems to be bad because it was overheated for several years due to too much debt and greed. Now, when things are normal, everybody thinks things are bad.

Quality service remains the flagship to weathering these economic storms.

This down economy is a time for creative thinking, cutting dead weight and getting lean and mean.

I knew for us to prosper in 2009 we'd have to double our marketing investments. So many companies are doing the opposite — cutting back on their advertising. They are the ones who will be really hurting — if they're still around — when this economy rebounds.

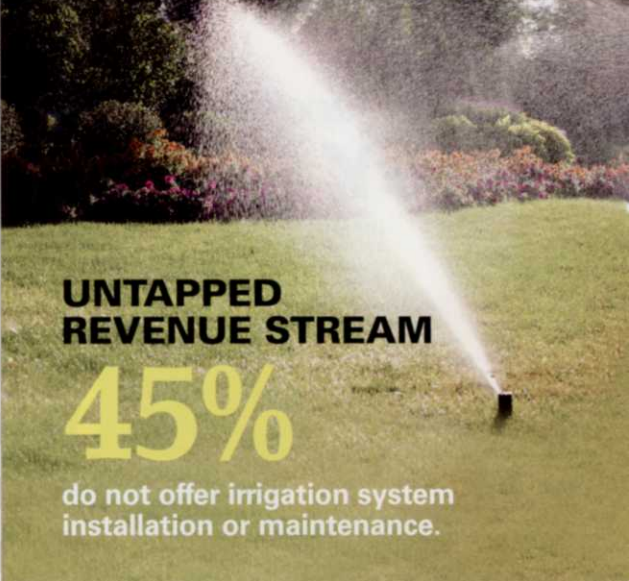
Everyone is pinching pennies. If we don't give them their money's worth, they will find someone who will. Any 12-year-old kid can do much of what we do, but to make the customer proud takes a real caring person.

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	Company	2008 Revenue (in millions of U.S. Dollars)
101	Berghoff Design Group	14
102	Becker Landscape Contractors	14
103	The Spencer Co.	13.55
104	Raymow Enterprises	13.5
105	Precision Landscape Management	13.5
106	Complete Property Maintenance	13.5
107	Perficut Lawn & Landscape	13.3
108	NATURESCAPE	13.22
109	Intermountain Plantings	13.15
110	Luke Brothers Landscape Services	12.8
111	Cleary Bros. Landscape	12.5
112	Florida Landscape Service	12.28
113	Sun City Landscapes	12
114	Parker Cos.	12
115	Kinsella Landscape	12
116	Mickman Brothers	11.8*
117	Santa Rita Landscaping	11.6*
118	Land-Tech Enterprises	11.5
119	Basnight Land & Lawn	11.4
120	Sposato Landscape	11
121	Gardeners' Guild	11
122	Arteka Cos.	11
123	Mill Brothers Landscape	10.8
124	Lied's	10.75
125	HGS, LLC dba Angler Environmental	10.5
126	Heaviland Enterprises	10.02
127	New Way Landscape & Tree Services	9.8
128	McGinty Bros.	9.6
129	Pacheco Brothers Gardening	9.5
130	ILT Vignocchi	9.5*
131	John Mini Distinctive Landscapes	9.15
132	Carol King Landscape Maintenance	8.9
133	Tomlinson Bomberger Lawn Care & Landscape	8.76
134	Greener Landscaping	8*
135	B&L Landscaping	8
136	Angler Environmental	8*
137	Plantique	7.9
138	The Pattie Group	7.85
139	Hoffman Landscapes	7.85
140	Clearwater Landscape & Nursery	7.4
141	Fine Earth Landscape	7.2
142	Rancho West Landscape	7.16*
143	Borst Landscape & Design	7.09
144	Greenscape	7.08
145	Tree Tech	7
146	Southview Design	7
147	The Lawn Ranger	6.9
148	Commercial Scapes	6.88
149	Maffei Landscape Contractors	6.55
150	Jacobsen Landscape Design & Construction	6.5



2007 Revenue (in millions of U.S. Dollars)	Employees 2008 Full time / Part time	Headquarters	Locations
13	155 / 1	Scottsdale, AZ	3
13.25	60 / 140	Indianapolis, IN	2
12.63	217 / 7	Houston, TX	2
13.5	250 / 0	Oldsmar, FL	8
12.4	172 / 242	Dallas, TX	2
13.3	275 / 40	Coconut Creek, FL	3
10	55 / 95	Des Moines, IA	1
12.4	152 / 10	Muskego, WI	18
11	40 / 120	Bluffdale, UT	1
15.98	295 / 1	Holiday, FL	8
13.5	175 / 0	Danville, CA	6
15.8	60 / 0	Orlando, FL	2
21	147 / 0	Las Vegas, NV	1
12.2	150 / 15	Scotch Plains, NJ	NR
10	48 / 65	Blue Island, IL	2
11.8	115 / 215	Ham Lake, MN	2
11.6	150 / 150	Tucson, AZ	1
14.36	168 / 35	Warrington, PA	2
12.14	95 / 85	Chesapeake, VA	1
10	120 / 80	Milton, DE	3
12	125 / 0	Richmond, CA	1
10.5	110 / 0	Minneapolis, MN	2
11.23	45 / 100	Fort Collins, CO	1
12.975	150 / 18	Sussex, WI	1
12	80 / 5	Manassas, VA	4
6.78	184 / 0	Vista, CA	4
9.28	0 / 188	San Diego, CA	4
9.6	50 / 45	Long Grove, IL	2
8.9	130 / NR	Hayward, CA	5
9.5	25 / 135	Wauconda, IL	1
8.11	63 / 42	Congers, NY	1
8.35	136 / 42	Orlando, FL	1
8.87	82 / 5	Lancaster, PA	1
8	90 / 0	Lowell, MA	1
6.6	120 / 0	Oak Park, MI	1
8	80 / 4	Manassas, VA	3
7.7	105 / 25	Allentown, PA	2
8.12	50 / 35	Novelty, OH	2
6.4	75 / 0	Wilton, CT	3
8	65 / 4	Ijamsville, MD	1
7.5	60 / 0	Poolesville, MD	1
7.16	75 / 3	Temecula, CA	1
7.4	20 / 55	Allendale, NJ	1
6.9	80 / 57	Holly Springs, NC	2
7	68 / 5	Foxboro, MA	1
9	23 / 50	Inver Grove Heights, MN	1
6.1	19 / 80	Eden Prairie, MN	1
5.75	55 / 3	Bristow, VA	1
7.18	84 / 0	Mashpee, MA	1
6.5	38 / 51	Midland Park, NJ	4

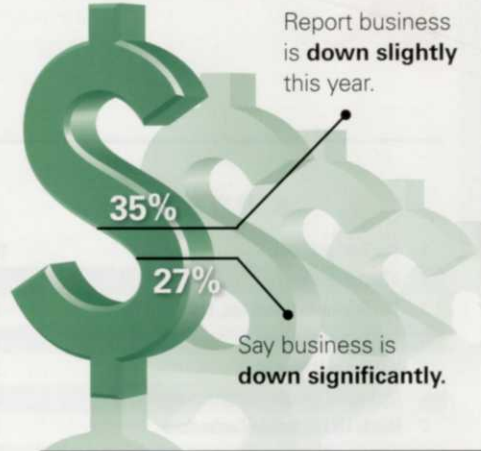


UNTAPPED REVENUE STREAM

45%

do not offer irrigation system installation or maintenance.

DISAPPEARING DOLLARS



TEST OF TIME

When do you expect the economy to recover?

