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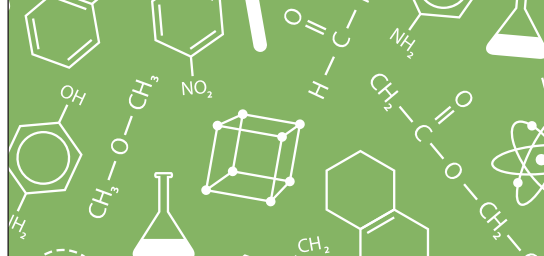


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INDUSTRY SNAPSHOT

THE GREEN INDUSTRY AT A GLANCE



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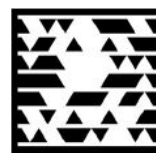
By Brian Mount | FMC

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Brian Mount is the Florida Market Specialist for FMC Professional Solutions.



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MUST SEE VIDEOS



A fun time-lapse video from Stamped Concrete:
<http://www.youtube.com/watch?v=8lxFmtK9HXU>



You've got to love a good tree spade video:
<http://www.youtube.com/watch?v=1rWDO1tP0Q>



Some award winners from the Minnesota Landscape Association:
<http://www.youtube.com/watch?v=RJI3B4h57wc&feature=related>

LANDSCAPING IN THE NEWS

“... if non-native landscaping is installed along phase two of the Expo Line, the MTA will gravely undermine its environmental credibility and will torpedo what could have been a boon to the Los Angeles environment.” — **LISA NOVICK**, Director of Outreach and K-12 Education, Theodore Payne Foundation for Wildflowers & Native Plants, on the Huffington Post blog discussing plans for The Los Angeles Metropolitan Transportation Authority

ON THE RISE

A look at how the industry changed from 2002 to 2007. The data from the 2012 economic census will be published in December 2013.

	2002	2007	% Change
Number of establishments	76,102	93,687	23.1%
Sales (\$ millions)	35,172	53,910	53.3%
Annual payroll (\$ millions)	11,544	17,388	50.6%
Total employment	477,932	596,896	24.9%
Sales per employee (\$1,000)	74	90	22.7%
Employees per establishment	6.3	6.4	1.4%
Sales per capita (\$)	122	178	46.4%
Population per establishment	3,781	3,216	-14.9%

Source: United States Census Bureau



TAKING GREEN TO THE NEXT LEVEL

Green Industry companies explore and explain the value in providing sustainable services.

BY BRUCE K. WILSON

It takes a village of stewards to raise a healthy landscape. Just ask the members of Next Level Network, an executive peer group of progressive, sustainable landscape contractors from around the country who have aligned their companies' strategy and spirit with environmental responsibility.

"It's more than just good business; it's a necessity," says Andrew Key, president of Heads Up Landscape in Albuquerque, NM and a LEED-certified building professional.

While New Mexico is the Land of Enchantment, it's also an arid one — its largest city, Albuquerque, averages only 9 inches of rain per year. Contrast that with the liquid sunshine of Oregon, where it may rain 9 inches in a week, and you might wonder how sustainable best practices work to environmental

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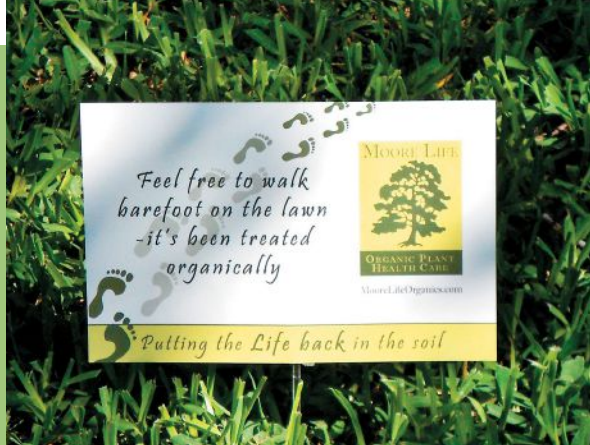


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Heads Up Landscape restored native plants at a housing complex in Albuquerque, NM (above left); Lambert Landscape Co. practices sustainability in the way it treats lawns (top right) and harvests rainwater in a 30,000-gallon cistern (lower right).



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and competitive advantages in such diverse geographic regions and markets.

We thought we'd find out. We asked the Next Level leaders to share examples of how sustainability as both policy and process changed their business, transformed the customer's landscape, and had a positive impact on the communities they serve.

High desert

Drought-tolerant landscapes are a natural for Heads Up, the Albuquerque firm located in the expansive Chichuahuan Desert and founded by CEO Gary Mallory in 1974.

"Our region hosts a fragile ecosystem richly endowed with a variety of plant life," says Key. "The extremes of hot and cold, the varied terrain with altitudes ranging from 2,000 to 10,000 feet, and the fact that it's the most thickly vegetated desert in North America, presents more than its share of opportunities for landscapers to work in harmony with the whims of nature."

Both fans of native desert plants, Key and Mallory are experts in the landscape palette of northern New Mexico. They have worked with their customers to restore many properties to a sustainable desert aesthetic, installing regionally indigenous plants and high-tech water conservation and irrigation systems.

Heads Up's xeriscape conversion program, and its commitment to creating and maintaining sustainable sites ("long before it was a formal

initiative," notes Key), puts Heads Up in the ranks of companies well positioned to become effective partners with architects and developers of commercial properties seeking to achieve energy-efficiency status through LEED. In fact, resource conservation is the prevailing cultural spirit in New Mexico, according to Key. The Albuquerque-Bernalillo County Water Authority recently announced it met its water mandates three years before the state deadline, and saved billions of gallons of water in the process.

"Getting the public on board with environmentally responsible commitments is exciting," adds Key. "It gives us the opportunity to be the go-to resource throughout northern New Mexico for environmentally responsible and energy-efficient landscapes and public spaces. When we collaborate with our customers, it makes us all partners for a green alliance."

Organic eco-nomics

Landscape architect Paul Fields is both Lambert Landscape Co.'s president and sustainability driver. He maintains that deep drought patterns, tough water restrictions and aquifer constraints give his Dallas-based company an opportunity to lead the resource management discussion with its customers on water use and earth-friendly practices.

Founded in 1919, Lambert committed to becoming environmentally conscious in 1986 — and by 1989, it was 100% organic. Today, the firm captures rainwater in an on-site

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FOREVER GREEN

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 harvesting and storage system. The water is collected from the roof of Lambert Landscape Co.'s 6.5-acre facility. From this, the company brews its own "compost tea" — a high-quality, proprietary nutritional product used to enrich and condition clients' soil.

"It's all about the soil," says Fields, noting the company's motto (and business model): "A healthy soil leads to healthy plants and a healthier ecosystem."

In 2011, the company earned a Sustainable Company award from the Professional Landscape Network (PLANET). Fields says that his company is continually improving upon its organic gardening knowledge and uses headquarters and project sites to research and test new products, applications and ways to optimize and improve garden sustainability.

At Pacific Landscape Management's Portland, OR office, the company's sustainability efforts include annual sustainability fairs and rainwater gardens (below).



Texas is known for being one of the driest and hottest regions during the summer, but it's quickly becoming a hub in America's growing rainwater harvesting industry. Lambert

has seen a rise in the demand for cisterns, well water and catchment systems and is active in educating clients about their sustainable benefits.

Liquid sunshine

Bob Grover, CEO of Pacific Landscape Management, has turned perennially damp weather into a teachable moment for his community of Portland, OR. His company hosts annual sustainability fairs to showcase rainwater harvesting technologies, vertical landscapes (green walls), and rainwater gardens at its green-centric corporate facility — a sustainable site where architecture and landscape come together as public space.

"It's a learning lab," he explains, adding that it illustrates the best of what the future holds for energy-efficient environments, inside and out, and an example of how Pacific has re-engineered itself to minimize its impact on the environment.

Named by *Oregon Business Magazine* as one of Portland's Best Green Companies, Grover said Pacific has only just begun.

"Sustainability is not a destination," he says. "It's a process."

Whether it's achieving high standards for recycling or for contributing to reductions in storm water runoff, Pacific Landscape Management is generating more than its own electricity; it's generating ideas and solutions for the region's ecological future.

Progressively green

A week without rain in Oregon may be a drought; an entire winter without rain is normal for most of California, which long has been a leader in passing progressive environmental regulations.

Stay Green Inc. covers the arid San Fernando Valley northwest of Los Angeles. CEO Chris Angelo knows firsthand the impact that environmental issues can have on water-dependent southern California — and in response, he's made sustainability synonymous with his brand.

In 2011, Stay Green announced a program

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WHERE DO WE GO FROM HERE?

If there is a crystal ball that holds the future success of the landscaping industry, it's in the hands of Jim McCutcheon, certified landscape professional and CEO of HighGrove Partners, an interdisciplinary land services company in Atlanta. He's also a landscape architect and chairperson of PLANET's Crystal Ball Committee.

"HighGrove decided a long time ago to integrate progressive water technologies and innovative resource programs into its daily suite of offerings," McCutcheon says. "At the time, we were ahead of trend."

The proactive approach paid off. Georgia has weathered several serious drought cycles, and HighGrove's KnowWater program has achieved measurable results. The program is saving between 20% and 40% water use and maximizing the efficiency of systems for customers who support the program.

According to McCutcheon, environmental responsibility and economic responsibility aren't mutually exclusive.

"We all agree it's the right thing to do," he says. "But why wouldn't you want to? Especially when you can save water, reduce demand and produce financial savings as a return on investment?"

HighGrove makes a strong case for the partnership role landscape firms play in decreasing costs. Building owners and property managers are measuring and reporting energy costs and use by real-time monitoring of building infrastructure systems. Many city managers and urban developers also are looking for savings.

"Water management is where this becomes a formal stewardship effort," he concludes. "If the goal is a measurable reduction of water use over a specified period of time, then we have an ability to make an impact in a significant way. Not only are our efforts as landscape professionals good for the environment, they are just good business." — *BKW*

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geared toward reducing its customers' carbon footprints and raising the bar for environmental leadership.

"In landscape management, sustainable practices are best practices," says Angelo. "Our company has always strived to provide responsible environmental stewardship, and our new emphasis on sustainability practices brings this approach to the forefront of all of our service lines — maintenance, water management, tree care and plant health care. We're saving money and helping the planet at the same time."

Stay Green also is addressing regional air quality with reduced-emission vehicles. It's also recycling customers' green waste, introducing custom soil blends, using organic fertilizers and pest control products and installing high-tech irrigation and water management systems.

"We're doing so willingly to set a higher standard for ourselves and our work," Angelo says. "We expect to see an increase in environmental regulations and incentives from the government in the coming decade, and a lot more companies will be investing in greener strategies. When our customers are ready to do that, we're ready to help them succeed."

Great Lakes Watershed

Mariani Landscape in Lake Bluff, IL, finds its customers easily engaged in the water-smart conversation; metropolitan Chicago abuts to an ecologically rich region that supports a wealth of