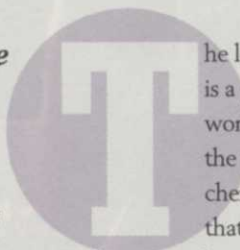


Irrigation's visionaries: Building on the past

Yesterday's smart landscape managers knew that irrigation was critical to landscapes. Today's trendsetters understand how to make it critical to their businesses.

This three-part series explores past trends, today's irrigation contracting business models and tomorrow's technologies

By BRUCE F. SHANK



The landscape industry really is a package of industries working together to provide the plants, hardscape, chemicals and equipment that make our nation green.

Each segment has developed under the leadership of visionary men and women, largely in the last 50 years of the 21st Century.

People like Ben Warren in the sod industry, Dick Duke in lawn care, Harry Gill in sports turf, Eb Steinegger in the golf course superintendent profession, Arden Jacklin in the lawn seed business, O.J. Noer in the fertilizer industry, and turf researchers like Jim Watson, Jim Beard, Bill Daniel and Fred Grau made our industry a multibillion-dollar business. It's time the landscape industry "Hall of Fame" included the leaders in landscape irrigation.

Unlike the lawn care industry, which matured in less than 40 years after Duke started ChemLawn in Columbus, OH, in the 1960s, the irrigation industry has taken nearly a century to develop into a billion-dollar business. Irrigation innovators did not create a common path on which others could build. Instead, they developed the market regionally. Only recently has consolidation started to pave a highway for rapid growth for manufacturers, distributors and contractors.

Learn From the Past

To get a true perspective of how irrigation has grown, we've included some of the people who helped create today's irrigation industry. It is by no means comprehensive, but hopefully, it will inspire you to respect their progress and to make your own legacy in irrigation.

History records that John D. Ross of

Pasadena, CA, in 1904 was the first person to design and sell sprinklers for lawn and garden use. He was followed in 1907 by W. Van Thompson, founder of Thompson Mfg. Co., now located in Ohio. A big name in early irrigation was Charles Skinner, who designed a simple, multi-nozzled, above-ground system in 1908. Lewn Nelson, George Moody, Max Snoddy, W.A. Buckner, Edwin Hunter and Karl Kah were among the inventors who pioneered the permanent subsurface irrigation systems of today.

John R. Brooks was the first recognized landscape irrigation contractor in the country. From an office in Detroit, he designed, constructed and installed irrigation systems for Henry Ford, the Chicago Parks Department and other wealthy industrial barons of the 1920s. Thirty years later, Burt Sperber's Valley Crest Landscape Company installed irrigation for the film industry and the California Transportation Agency.

Every region has its tales and early irrigation stories. Irrigation grew up largely on a regional basis. Some manufacturers remain regional to a large extent, choosing to serve the customers they know best.

From a national perspective, irrigation seemed to gel in the 1950s when Rain Bird, Toro, Hunter, L.R. Nelson, Weathermatic, Buckner and others gained momentum. On the West Coast, manufacturers had to install their own products at first. Irrigation distributors didn't exist until after World War II, but they are the ones who built the foundation that enabled the market to nationalize and take off — people such as Ewing, Hodas, Moffet and Tiglio.

Irrigation in a Nutshell

Today, four United States manufacturers represent more than \$600 million in irrigation sales — Rain Bird, Toro/Irritrol, Hunter and Orbit. This is approximately half of turf and landscape irrigation sales by manufacturers in the United States. There are midsized manufacturers on the move

as well, including Weathermatic, Storm and K-Rain. In addition, some manufacturers do considerable international business.

Three distributors have built substantial chains, doing in excess of \$300 million per year in sales — Century Rain Aid, Ewing Irrigation and United Green Mark. Like manufacturing, acquisition and consolidation in the middle ranks of distribution are also taking place. Meanwhile, retail hardware outlets are selling irrigation components wholesale to contractors in some areas. Service to contractors by distributors and manufacturers selling direct to large contractors are concerns that threaten conventional distribution.

Finally, we have large, multiple-branch landscape firms installing irrigation across the country — Environmental Care/Valley Crest, Brickman Industries and Service-Master's TruGreen-ChemLawn group. So, in a sense, irrigation has caught up with the landscape industries in the past decade.

Yet, most of us know little about irrigation.

Catching Contractors' Attention

Contractors have a sixth sense that alerts them to peculiar things normal people miss, such as lines on a mowing pattern that aren't straight, trees that were pruned improperly, fading color in an annual bed, a lawn suffering from a high grub population or mulch that needs to be refreshed. Contractors are now becoming sensitized to irrigation symptoms, such as dry spots caused by poor uniformity, overspray, wetness resulting from poor scheduling and sprinklers that operate during rainstorms. The fact that irrigation is becoming part of the consciousness of contractors is a significant matter.

Although water shortages should be worrisome enough to generate interest in efficient irrigation to defend our valuable landscapes, they are not the main reason people invest in irrigation. More often, the justification for irrigation is better control and reliability of performance by the land-



The main reason people invest in an irrigation system is to protect and improve their landscapes. Photos courtesy: Rain Bird



Contractors will need to strengthen their understanding of hydraulics and system design as they compete for irrigation business.



Expect the demand for certified irrigation designers to jump in the coming decade. Check with your local distributor about setting up training in your area.

scape as an investment and source of enjoyment, explains Kurt Maloney, director of landscape marketing for Netafim Irrigation Inc.

It's not hard to get our attention when the value of irrigation in a landscape project exceeds 25 percent, according to Jon Ewing, president of LandTrends in San Diego, CA. "You have to take it seriously." LandTrends has an irrigation division for minor design work, installation and maintenance.

Segments of the industry

Contractors — As large contracting firms acquire landscape companies with irrigation divisions, they assume a greater involvement in irrigation. To compete with large national chains, smaller contractors will need to increase their level of involvement in irrigation.

Suppliers — In turn, more contractors will seek services such as technician training and rudimentary design from distributors. Retail outlets mimicking wholesale suppliers won't be able to provide these services.

Experts — Meanwhile, irrigation consultants, the engineers who design complicated irrigation systems, are tempted to focus on the big jobs of large chain contractors. This could leave the midsized and small contractor without the design assistance he or she needs as irrigation grows in popularity. You can expect the demand for certified irrigation designers to jump in the coming decade.

Certification for irrigation contractors can moderate some of the demand for design at the lower levels. Learning how to use AutoCAD isn't enough. Contractors should understand hydraulics and the physical limitations of irrigation compo-

Cover the world

Irrigated Acres in the World:

- ▶ World — 600 million acres
- ▶ China — 123 million acres
- ▶ United States — 70 million acres
- ▶ United Kingdom — 267,000 acres
- ▶ Europe — 62 million acres
- ▶ South America — 24 million acres
- ▶ Japan — 7 million acres
- ▶ Australia — 6 million acres

nents. This will become increasingly important as more irrigation systems mix low-volume irrigation, sprinklers and weather-reactive sensors and controllers. You won't be able to figure it out in the aisle of a mega-hardware store.

Only a handful of states currently license irrigation contractors. Most of these states have used the help of the Irrigation Association when building their tests and requirements. But you don't have to depend upon state licensing to become certified. The classes are taught by the best in the business, and your local distributor can ask the IA to help set up training in your area.

Those who fail to study history are doomed to repeat it is a famous phrase that applies to any business. Many painful lessons can be avoided by talking with those in your area with irrigation experience. Do surveys of your existing customers about irrigation. Hire trained individuals and reward them for performance. Be inventive when necessary. One size fits all doesn't work in irrigation.

There is a rich history to the irrigation industry. It belongs as part of the history of the landscape industry. It's time to make irrigation a valued member of the landscape family.

Next month: Thinking of entering the irrigation business or expanding into larger, more comprehensive accounts? LM will look at two models for success. LM

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