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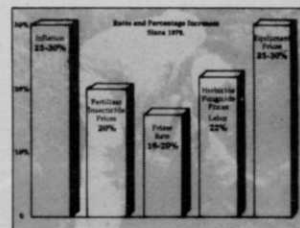
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## STATE OF THE LANDSCAPE INDUSTRIES

# DIVERSITY PROVIDES MEANS TO OVERCOME RECESSION

By BRUCE F. SHANK

Despite interest rate, inflation, and construction problems, the landscape market's diversity has provided a fair amount of insulation from recession. Certain segments and regions of the industry are experiencing significant cutbacks, but overall the landscape industry has adjusted skillfully and faces moderated growth rather than losses. The focus is on cost control.

*Weeds Trees & Turf* conducted seven different surveys to gauge the impact of recession on the various segments of the landscape industry. Data from the National Golf Foundation, the National Landscape Association, and other industry groups were also used in the writing of this State of the Landscape Industry Report. Association officers were polled for their account of the state of their market segments.

The two most common adjustments made to control costs were reduction in staff and delaying equipment purchases. Two thirds of the landscape contractors indicated a reduction in credit use. All segments reported use of lower maintenance plant material and chemical trimming to lower costs. Both golf course superintendents and landscape contractors are switching to larger equipment to cut labor time.

Other cost cutting techniques and conditions of specific land-

scape markets will be covered in the following pages. In general, no drastic changes in operations were reported. The market has made adjustments to control costs, perhaps something it could and should have done before. No one was caught by surprise. Most problems were anticipated and adjustments were made before business health was threatened.

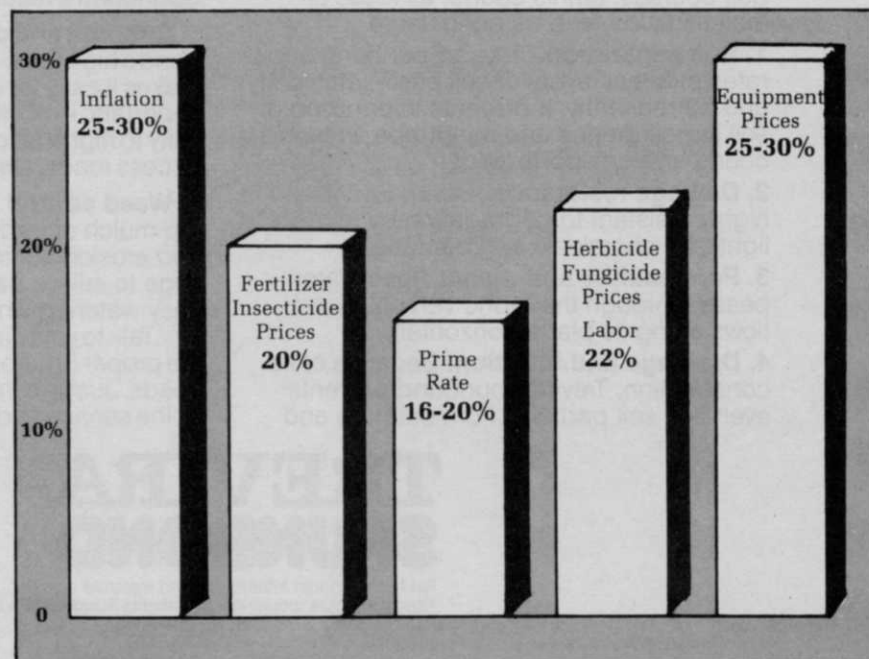
Diversity within the landscape market made adjustment more

practical than single-service markets. Construction oriented landscape firms placed new emphasis on renovation and maintenance. Interior landscaping has offered shelter for some companies.

Persons working from a set budget, such as golf course superintendents and public landscape managers, are evaluating maintenance efficiency. They are challenging the status quo and trying

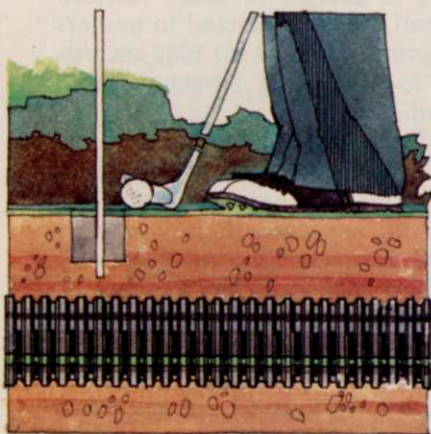
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**TABLE 1.**  
Rates and Percentage Increases Since 1979.



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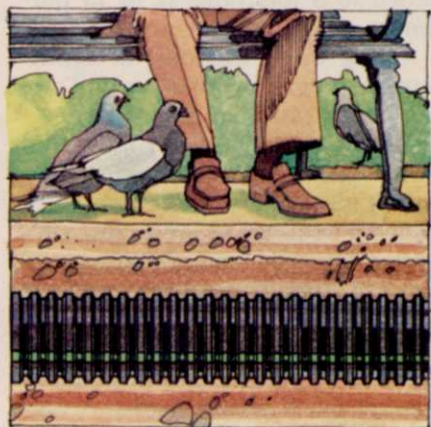
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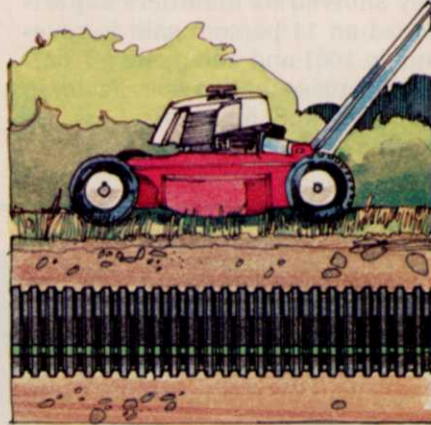
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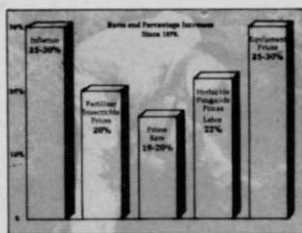
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## STATE OF THE LANDSCAPE INDUSTRIES

methods to cut maintenance costs. Low maintenance plant material, more efficient equipment, and better control of irrigation will pay dividends in the future.

Both landscape and golf course architects are recommending conversion to low maintenance material. Those who maintain the landscape after design changes question the practicality of some of the changes, but have started to incorporate maintenance saving ideas on an increasing scale. The inclination to test the water before diving in is a characteristic of landscape managers which has protected them from serious problems in the past year and a half.

Whereas the sod market is getting hit harder than other landscape markets, the lawn care market continues to chug along at 24 percent growth. Stagnant construction has caused almost a 50 percent decrease in sod sales. Cost control has kept the remainder of the landscape market even or slightly ahead of inflation. The trend is likely through 1982.

### The Business Climate

1982 will mark the second year of very high interest rates and more than five years of double-digit inflation. Landscape businessmen have been aware of these financial facts. What they haven't known is how these factors cause local concerns.

Until construction contracts dried up in late 81, we were dealing with regular, large increases in the cost of labor, equipment and chemicals. We learned to live with those. The landscape market was also adjusting to drought in many parts of the country. That too was handled without major losses.

But, in 1980, when interest rates increased with the Federal Reserve Bank's tight money policy, the credit market started getting out of hand. Not even the bankers were sure what to do.

Today, housing starts are dropping to depression era levels far below the 1.1 million unit mark of 1981. Even the Sun Belt cities, except for Austin and Houston, TX, fell off 1980 levels. Creative financing was unable to make a significant impact on housing starts as mortgage rates remained above 16 percent, quite a shock from the 10 percent rate of early 1980.

Conservative estimates place the prime rate at 14.5 percent by the end of 1982 and 13 percent by the end of 1983. It is currently 16.5 percent. The National Association of Home Builders has announced housing will not recover substantially until mortgage rates come down to a tolerable 12 to 13 percent.

Using these theories, a significant recovery in housing will not take place until late 83 or early 84.

Regional problems in industrial cities where automobile manufacturing and steel are dominant, are causing declines in landscape revenues. Unemployment figures continue to climb beyond the 9 percent mark.

In the midst of this bleak environment, only the sod production market faces severe losses. A National Landscape Association survey showed its members experienced an 11 percent gain in revenue in 1981 and anticipate a 7 percent increase for this year. Factor in inflation, and NLA members are staying even.

Growth has to come from a competitor as new business shrinks. But, no one is willing to play share of market games. The airlines provided a good example of price cutting to gain share of market. After years of inflation-plus price hikes, the thought of freezing prices is hard to accept. In some markets ChemLawn has elected to moderate price increases for 1982 according to Marketing Director Ralph Lund.

After getting in the habit of annual price increases, suppliers may moderate increases at best. Expecting supplies to increase in price, landscape businessmen will have to pass along the increase or cut costs by increasing efficiency.

The landscape market has the advantage of being moderately recession-proof. Companies largely based in agriculture, look to landscaping and golf courses when agriculture goes flat. The low volume, higher profit margin of this industry pays dividends when the high volume, low profit margin of agriculture is threatened. In good times, the landscape market is overshadowed by agriculture. In hard times, the landscape market is a welcome customer.

A recent report by Charles H. Kline & Co., sets the value of chemical products purchased by the landscape industry at \$1.1 billion. Compared to the multi-billion dollar ag-chem market the landscape business may seem small. After considering the better profit margin and increased stability of the landscape market, more chemical companies are establishing specialty product divisions this year to mar-

*Continues on page 41*

**TABLE 2.** Cost Cutting Measures by Market

Area	Percent of Respondents			
	Golf	Landscape	Sod	Parks/Schools
Delay Equipment Purchase	54%	48%	81%	13%
Reduced Labor	50%	—	73%	51%
Increased Trim	—	41%	—	66%
With Chemicals				
Cut Fertilizer Use	30%	—	49%	42%
Cut Herbicides Use	18%	7%	20%	31%
Cut Chemical Inventory	44%	22%	—	—
Add Low Maintenance	—	70%	—	50%
Plant Material				
Use Growth Regulators	—	20%	—	17%
Use Larger Mowers	—	24%	—	77%

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You can control these three major diseases on a wide variety of grasses all season long with Daconil 2787 without having to worry about burning fairway turf even in the hottest weather.

**Easy and economical to use.**

The flowable formulation of Daconil 2787 allows for fast, easy handling because it flows readily and disperses quickly. So there's no clogging of spray equipment.

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When you consider everything Daconil 2787 has to offer, it's no wonder more and more superintendents are making it the basis of their disease control program. On tees, greens, fairways and even ornamentals.

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# HOLLIES OFFER WIDE RANGE WITH BRIGHT FOLIAGE, FRUIT

By DOUGLAS CHAPMAN

Shrub forms of holly may fill a unique niche in the landscape. Three species which are under-used but may be of significant value for not only the Northeast but also throughout the Midwest include Japanese Holly, Inkberry, and Michigan Holly. They show good tolerance to urban conditions and should be tried.

Japanese Holly (*Ilex crenata*) is an extremely dense, twiggy shrub which is somewhat rounded with a height and spread of 6 to 10 ft. The leaf is oblong to round, slightly thicker than boxwood but a dark lustrous, almost blue-green. Its year-round rich dark green color makes it particularly effective as a hedge planting, a specimen, or in mass plantings for large area landscapes. Japanese Holly will grow well in sun or shade but prefers sites protected from March's southwest sun and wind. The soil should be a well-drained loamy sand. Disease and insect problems are almost insignificant with leaf miner causing some blemish. Don Wyman reports that Japanese Holly and Inkberry have great potential as they are extremely tolerant of urban conditions, e.g. air pollution. The only way to purchase Japanese Holly is to know the cultivars and see which one fits your climatic conditions.

*I. crenata* 'Convexa' is one of the hardiest forms. It has a somewhat vase-like to upright mounding habit, reaching 8 to 10 ft. in height with an ultimate spread of 10 to 12 ft. Its dark green shiny leaves are almost waxy-like. 'Black Beauty' Japanese Holly, a selection by Girard Nursery, Geneva, Ohio, is noted for its compact habit, dark green leaves, and its ability to take heavy pruning. It should be noted that all *I. crenatas*, including the species, take well to formal and/or



Michigan Holly is a deep, rich green in the summer, lustrous black after freezing, and with red fruit from August through January.

heavy pruning. Dirr suggests that 'Black Beauty' is the hardiest of all Japanese Holly. 'Green Island' Japanese Holly is a slow growing, low spreading form with bright, almost lime-green foliage. It is somewhat open, being considerably broader than tall and reaching almost 3 to 4 ft. in height.

Inkberry (*I. glabra*) is an extremely hardy native *ilex*. It prefers a sandy or organic-sandy soil with an acid pH (5.0-6.0). Inkberry is native from Nova Scotia to Florida. It must be stressed that provenance plays an important role in the hardiness of this plant; therefore, if you are in the northern area, purchase only from nurseries that are growing plants from northern seed sources or cuttings of same. Inkberry's habit is an upright oval, reaching 6 to 8 feet in height. The mature leaves are a dull green with the new growth being somewhat lime-green in color. When young, this

upright branching habit requires little pruning but as it matures, it becomes open, almost leggy. Therefore, this evergreen requires either frequent pruning or total pruning. The ¼-inch black fruit is not particularly effective but does add some interest in the landscape. Although there are several selections of *I. glabra*, in Central Michigan we feel the straight species is most adaptive. In woody landscape large areas or homes, this shrub is great as a specimen.

Michigan Holly (*I. verticillata*) is perfectly hardy throughout Zone 3. It is a native to Michigan. *I. verticillata* prefers swampy, high organic, wet soils. Its rather twiggy, dense habit makes it outstanding in mass use, for commercial or high-

*Continues on page 38*

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Douglas J. Chapman is a Horticulturist at Dow Gardens, Midland, Michigan

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way plantings, or in naturalized settings for the home landscape. It reaches 7 to 10 feet in height. The foliage is a deep rich green in the summer, becoming a lustrous black after freezing. This deciduous holly could be selected for its outstanding brilliant red fruit which is about ¼-inch in diameter. This red fruit is effective in the landscape from August through January and becomes a secondary fruit for birds—an added bonus in an otherwise dreary northern winter. Davidson at Michigan State University has done some work with Michigan Holly and finds its fruit outstanding. He feels it is exceptional not only for home landscapes but institutions as well. The insect and disease problems are minimal with powdery mildew being significant but not catastrophic.

The blue hollies or X *Meserveae*, *I. aquifolium* and *I. rugosa*, have been reported to do well in sun or shade, adapting well to a wide range of soil conditions while showing good tolerance to winter

burn. One blue holly that has been reported by Orton as hardiest in the northern area is 'Blue Girl.' 'Blue Prince,' a male form, is a good pollenizer for those of Meserve or blue hollies. It has dark shiny green foliage with no berries, reaching 15-ft. 'Blue Princess' is a smaller plant, being somewhat oval, reaching 12-ft. in height. It has dark glossy blue-green foliage and is reported to have a good heavy fruit set. These are probably the hardiest of the blue hollies. 'Blue Angel,' one that seems not to be hardy in northern areas, is somewhat slow-growing and compact with a height of 6 to 8 ft. It has glossy blue-green summer foliage with a purple-green winter foliage. The fruit is a brilliant scarlet.

When considering northern areas, such as Central Michigan, 'Blue Prince' and 'Blue Princess' have shown hardiness even in this most recent severe winter but we have only had two year's experience with these hybrids. At this point in time, we would certainly

suggest trying the blue hollies but stress that landscape architects or horticulturists experiment with the plant in this area first. These plants propagate quite readily and, therefore, are becoming familiar in the nursery trade. These may prove to be some of the most exciting introductions. But only time and your trial will provide this information.

The shrub hollies should be used more efficiently. The natives range from deciduous (Michigan Holly) to evergreen (Inkberry) with foliage color and fruit being outstanding characteristics. Wyman reports that the Japanese Holly and Inkberry thrive in urban conditions. When looking for variety in the landscape, let's try hollies, from the natives to the blue hollies—a chance for diversity and excitement. **WTT**



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