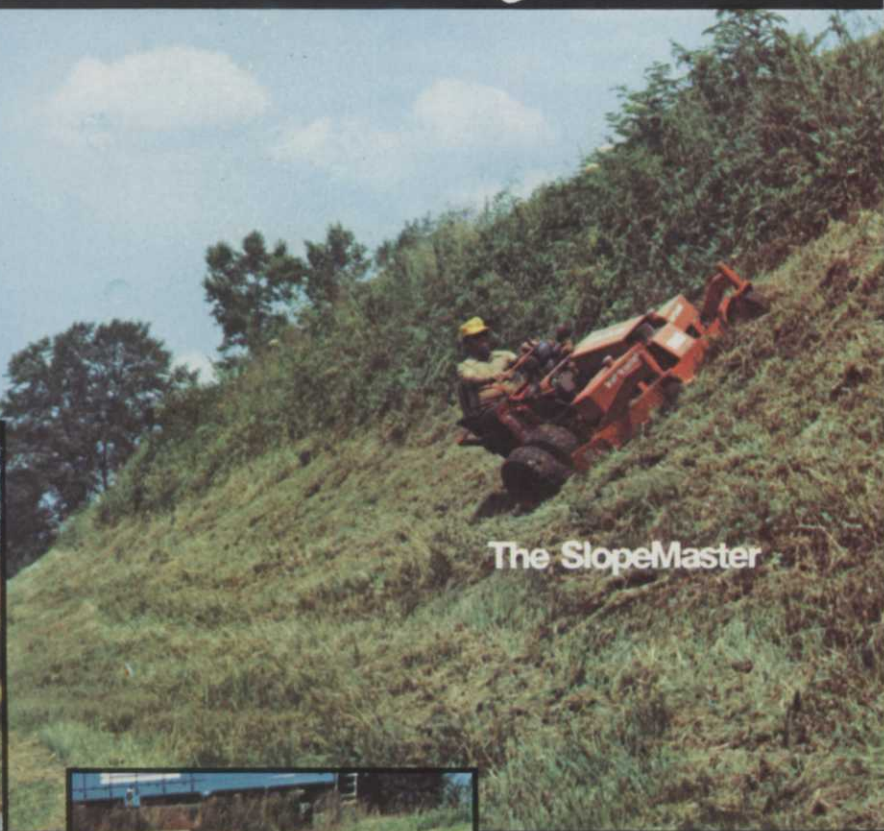


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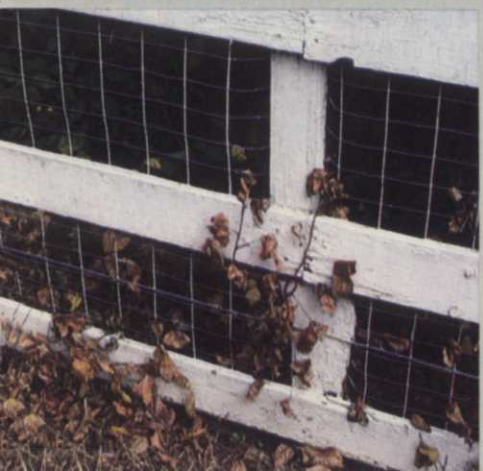
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SEPTEMBER 1984/WEEDS TREES & TURF 11



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UPDATE

Salary extremes between coasts

The latest salary survey of grounds managers by the Professional Grounds Management Society shows grounds managers on the West Coast to be the highest paid, and their counterparts on the East Coast to be the lowest paid, on the average.

The breakdown is as follows:

New England Region: (Mass., Vermont, Rhode Island, New Hamp., Maine, NY, NJ, and Conn.); an average salary of \$22,921.

Mid Atlantic Region: (Penn, Maryland, Wash, DC, Del., Virginia); an average salary of \$25,819.

Southeast: (West Va., Ky., Tenn., NC, SC, GA, Alabama, Fla); an average salary of \$24,101.

Mid-West Region: (North Dakota, South Dakota, Neb., Minn, Iowa, Wisc. Ill., Mich., Indiana and Ohio); an average salary of \$24,249.

Southwest Region: (Kansas, Missouri, Okla., Arkansas, NM, Texas, Louisiana and Miss.); an average salary of \$26,957.

Far West Region: (Alaska, Hawaii, Wash., Oregon, Idaho, Montana, Wyoming, Calif., Nevada, Utah, Colo., Arizona); an average salary of \$27,643.

ASLA down to the wire

By its June 1 deadline, The American Society of Landscape Architects was only \$61,000 shy of its \$400,000 goal to purchase a building to be used as the national headquarters.

The Executive Committee and the Board of Trustees, however, voted to proceed with the purchase of the building and to keep up fundraising efforts, according to Society president Darwina Neal.

ALCA Grand Award to Brickman

A wooden bridge, man-made ponds and extensive greenery are all part of the landscape design developed by Theodore Brickman Co., Long Grove, IL, for a single family home in Barrington Hills, IL, that has won an Associated Landscape Contractors of America Grand Award for Excellence.

Brickman landscape architect Feryl Waldenmyer said the intent was to make the best use of existing vegetation and to provide optimal views of the 10-acre lake on the property.

EPA cracks down on wood savers

Application of three wood preservatives is now restricted to certified applicators following a July ruling by EPA. Certified applicators of pentachlorophenol, creosote, and inorganic arsenicals must wear impermeable gloves in all cases, wear respirators and protective clothing in many cases, and not smoke, eat or drink while handling the materials.

LOFTS from page 10

Rebel II (set to be introduced in a few years)."

Dr. Richard Smiley of Cornell University presented information on fusarium blight. Drs. Reed Funk and Ralph Engel of Rutgers also attended.

Hurley said the number of invitees to the field day is kept to a minimum so that people can ask questions and get problems solved. Those attending represented \$4 million in business to the company.

PESTICIDES

Maine paper companies battle spruce budworm

Maine paper companies, in an effort to protect their woodlands and also the state's largest industry, paid an estimated \$5.5 million to spray 624,500 acres of forests with two chemicals, Zectran and Matacil, and with a natural caterpillar killer called *Bacillus thuringiensis* (Bt) in what has become an annual battle to control the spruce budworm.

Studies indicate the budworm could seriously affect Maine's paper-making capabilities by the turn of the century and the paper companies have responded with what is believed to be the nation's largest forest pesticide-spraying project.

Throughout May and June nearly 40 planes flew over infested areas, spraying chemicals and Bt. The Maine Pesticides Control Board said the spraying poses no danger and the chemicals will cause no lasting problems because dozens of support personnel were used to pinpoint the spraying thus avoiding populated areas.

EQUIPMENT

Exmark enlarging manufacturing plant

Expansion of Exmark Manufacturing Company's product lines as well as "a dramatic increase" in growth are the reasons for the 18,000-sq.-ft. addition under construction at the company's Beatrice, NB, plant. Exmark is a manufacturer and marketer of lawn and turf care products.

"We recently completed our new facility in Beatrice, and product demand by our distributor organization and their customers necessitates the immediate expansion of our facility," Robert Martin, the firm's president, says. "The acceptance of the

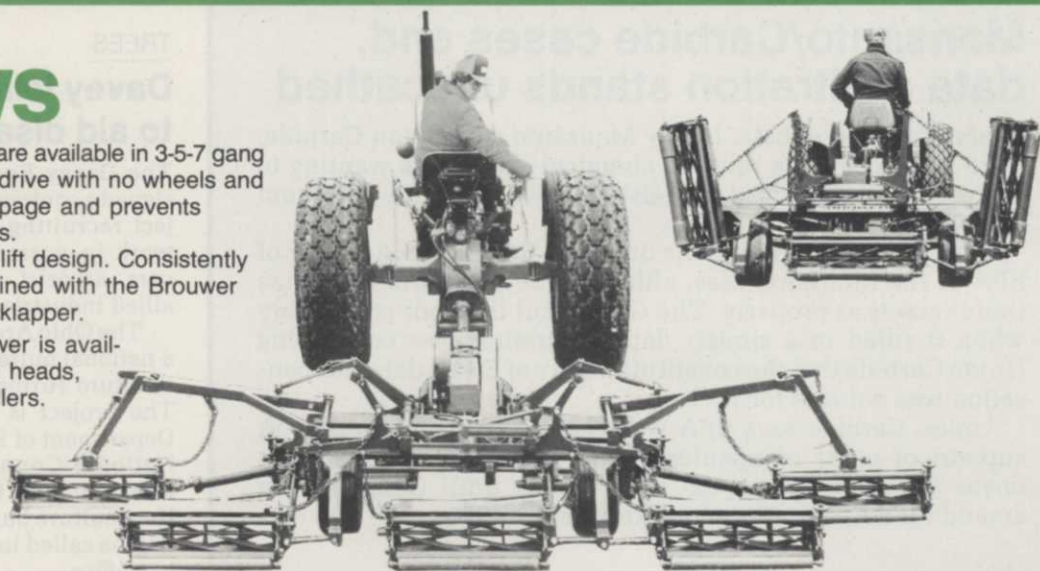
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The Fairway mower is available with floating heads, front and rear rollers.



Rolls

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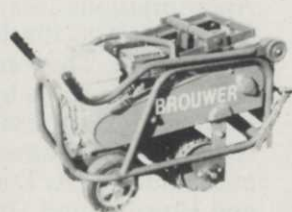
MODEL 230



MODEL 130

Cuts

Brouwer Sod Cutter's simple design makes operation, adjustment and repairs easy. Equipped with folding handles and kickstand for compact, stable transport and storage. Stripper blade available to help shred and cut old sod for easy lawn renovation. Also dethatcher blade for removing thatch.



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UPDATE

Monsanto/Carbide cases end, data arbitration stands unscathed

Years of heated debate, led by Monsanto and Union Carbide, have produced little relief to chemical companies wanting to protect secret data used to register a pesticide with EPA from competitors.

In August, we reported the Supreme Court ruled in favor of EPA in the Monsanto case, although the Court did recognize trade secrets as property. The Court shut the door completely when it ruled in a similar data arbitration case concerning Union Carbide that the constitutionality of EPA's data compensation was not ripe for review.

Union Carbide says EPA will again start using its data in support of other companies' registration applications. This opens the door for me-too registrations until Congress can amend FIFRA, something unlikely before 1985.

Chemigation regulations eminent

Federal and state pesticide regulatory officials are pressing for new rules to prevent groundwater contamination and accidental poisoning caused by chemigation, application of pesticides through irrigation systems. Posted warnings, restrictions by soil type and water table, and allowing only products specifically labelled for chemigation are the leading proposals for regulations. Expect restrictions by the end of 1985.

Other topics raised during a meeting of these officials in July, which could result in additional regulations, include using pesticides at less than label rates, standards to judge groundwater contamination, additional label warnings for fumigants, and possible elimination of the restricted use classification for pesticides.

Civil servants fight contracting out

Park Service employees are strongly influencing U.S. House Appropriations Interior subcommittee members to attach an amendment to the Park Service's 85 budget to prevent contracting out. The Park Service hoped to save \$15 million over the next two years by contracting out maintenance and repair services. It contracts \$90 million in work each year to private concerns. Other agencies seeking to save money by contracting out include EPA, Transportation, Health and Human Services, and Housing and Urban Development. Once contracting out issues are settled, government bid work should vastly increase.

Meanwhile, the American Association of Nurserymen are accusing the U.S. Forest Service for unfair competition for selling overstock from its tree nurseries to the customers of private nurserymen. AAN says private nurserymen can't compete with the subsidized prices of the Forest Service and that overstock would not occur if the government nurseries were well-managed.

Exmark product line and our entire line of Ranger walk-behind mowers resulted in the decision to expand our facility at this time."

TREES

Davey joins effort to aid disabled

The Davey Environmental Services signed a contract to operate a new project recruiting disabled workers for work in nursery, landscaping, lawn care, arborist, groundskeeping, and allied industries.

The Ohio Area Office will be part of a national outreach effort called Horticulture Hiring the Disabled (HHD). The project is sponsored by a U.S. Department of Education grant to the National Council for Therapy and Rehabilitation through Horticulture. Horticulture business leaders in Ohio will be called to support the new project office.

The Davey Environmental Services is a division of the Davey Tree Expert Company, Kent, OH. Davey will be working closely with service and vocational agencies serving disabled persons in Ohio to identify new opportunities for training and employment of physically and mentally disabled workers.

Tom Hazelwood, operations manager at Davey, says, "We are pleased to be involved in this new project. It will add an extra dimension to our services and provide additional opportunities for employment of disabled persons in Ohio."

Other HHD area offices are located in Upper Marlboro, MD, Lake Worth, FL, and Pleasant Hill, CA.

INDUSTRY

Allied sells liquid fertilizer business

Allied, an energy and chemicals concern based in Morristown, NJ, recently announced the sale of its liquid fertilizer business to members of the business's management and E.F. Hutton & Co. The sale includes plants at Geismar, LA, LaPlatte, NB, and Hopewell, VA. Other details of the transaction were not disclosed.

Late last year Allied revealed the liquid fertilizer market had been unprofitable in recent years and announced that it was selling its operation. Allied said its 1983 profit would be reduced by \$140 million as a result of the sale.

The new liquid fertilizer business will be called Arcadian Corp.

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104	118	132	146	160	174	188	202	216	230	244	258	272	286	300	314	328
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106	120	134	148	162	176	190	204	218	232	246	260	274	288	302	316	330
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108	122	136	150	164	178	192	206	220	234	248	262	276	290	304	318	332
109	123	137	151	165	179	193	207	221	235	249	263	277	291	305	319	333
110	124	138	152	166	180	194	208	222	236	250	264	278	292	306	320	334
111	125	139	153	167	181	195	209	223	237	251	265	279	293	307	321	335
112	126	140	154	168	182	196	210	224	238	252	266	280	294	308	322	336
113	127	141	155	169	183	197	211	225	239	253	267	281	295	309	323	337
114	128	142	156	170	184	198	212	226	240	254	268	282	296	310	324	338

SEPTEMBER 1984

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0050 Cemeteries/memorial gardens
0060 Military installations & prisons
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0070 Multiple government/municipal facilities
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- 0105 Landscape contractors (installation & maintenance)
0110 Lawn care service companies
0125 Landscape architects
0135 Extension agents/consultants for horticulture
 Other contractor or service
(please specify) _____

C. SUPPLIERS:

- 0205 Sod growers
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Changing, Even in Good Times

Competition causes manufacturers and distributors to rethink the Green Industry's marketing chain.

by Bruce F. Shank, executive editor

After a slow start this spring, Green Industry distributors and manufacturers have rebounded making 1984 a considerable improvement over the past three years.

The number of products and product lines available to distributors continues to expand. Competition between product lines and between distributors is increasing.

The landscape manager and golf course superintendent benefit from this healthy situation. However, distributors in some areas are concerned. Credit problems leftover from the recession, increased competition, and changing distribution patterns are shaking out a few distributors and may eventually cause long-term adjustments to product distribution.

Distribution patterns

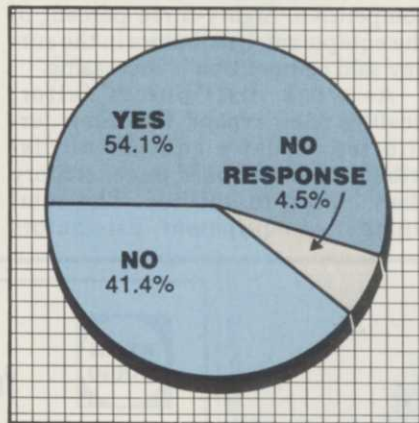
Manufacturers and distributors are taking a hard look at distribution chains. Forty-three percent of chemical and equipment distributors want more protection from other distributors in their territory. They also want to eliminate unnecessary layers (and commissions) in the distribution chain.

A variety of distribution arrangements exist. A chemical distributor often carries a number of competing brands and is not protected by a territory to the same degree as an equipment distributor. For this reason, manufacturers are less inclined to promote the distributor as well as the product.

Many equipment distributors (31 percent) carry chemicals to provide full service to their customers. Large regional distributors, such as LESCO, The Andersons, Lebanon, and United Agri-Products; are expanding their reach and are now competing with small regional chemical suppliers.

Vastly increased competition results. More than 90 percent of the distributors in the survey said excessive competition and price cutting are problems. Many small chemical sup-

As primary manufacturers expand their lines, are they pressuring you to replace equipment lines you carry with theirs?*



* Answers based on 133 equipment suppliers

pliers complain they can't compete on bids with the large regionals due to lower volume. They say profit margins are slipping dangerously and formerly loyal customers are taking the lower price of the large regional over the service of the small local supplier. Seventy-five percent think increased competition will force out a number of small chemical suppliers.

Chemical manufacturers are enjoying the purchases by large regional suppliers, reformulators, and large buyers like ChemLawn. Chemical product managers can plan production based on a few large orders rather than speculating on the purchases of many small buyers.

In some cases, chemical manufacturers can make a safe profit by selling technical or bulk chemicals to large national reformulators such as O. M. Scott, PBI Gordon, and Mallinckrodt. A few manufacturers, like Stauffer, prefer to sell to reformulators than to sell to hundreds of distributors. In the future, large chemical companies may

be inclined to leave selling the end user up to large reformulators.

Forty-two percent of the chemical distributors report increased demand by customers for bulk chemicals and custom blending. Distributors with reformulating ability have a definite advantage in these cases.

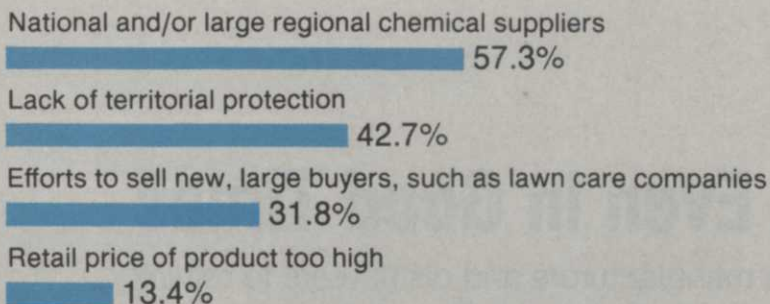
One possible scenario for future chemical distribution is the large reformulator supplying bulk products and the small local supplier supplying small quantities, much like the grocery store and the convenience store. Forty-eight percent of the suppliers said this is happening already. Forty percent indicated local distributors will stop trying to compete with larger suppliers and raise their prices to or near suggested retail.

Equipment distributors receive territorial protection because they need it. The investment in parts, inventory, service department, and labor is sizeable. For every three chemical distributors, there is one equipment distributor. For example, Jacobsen has roughly 50 U.S. professional turf distributors and SDS Biotech has about 150 turf chemical outlets.

Equipment distributors are loyal to one primary line, such as Toro, Jacobsen, and Ransomes; and usually carry a number of secondary lines, such as National, Cushman/Ryan, and Bunton that don't compete. Therefore, manufacturers of primary lines are willing to promote their products and the distributor.

Changes in equipment distribution are coming about for two main reasons. First, primary manufacturers have begun to make products which compete with secondary lines, such as walk-behind rotary mowers. For example, a Toro distributor who carried Bunton as a secondary line had competing products on his showroom floor this year. To make it a little more exciting, Bunton started importing a greens mower. Another example is Bobcat (Wisconsin Marine) which

What are the main reasons for price cutting?



was a common secondary line until Ransomes bought Bobcat.

The distributor is up tight because he is mainly dependent upon the primary manufacturer. The primary manufacturer is up tight because he is providing considerable support to a distributor who now carries a competitor's product.

Fifty-four percent of the distributors said primary manufacturers are pressuring them to replace secondary equipment lines with theirs.

Some distributors indicate the walk-behind rotary business is too competitive with John Deere and Exmark, as well as the primary manufacturers, entering the race. This may discourage primary manufacturers from expand-

ing with products where short liners can undercut them.

The second major reason for changes in equipment distribution is the 20 to 25 percent distributors pay dealers. In certain areas, such as the Northwest and the Mid-Atlantic, distributors often have dealer networks. Distributors are seeking ways to save the dealer cut so they can be more competitive. Eighty-three percent of the equipment distributors in the survey said competition is increasing.

As weak distributors falter, healthy ones expand into their territories. Today's equipment distributor seems to need more territory than before to survive. The total number of equipment distributors

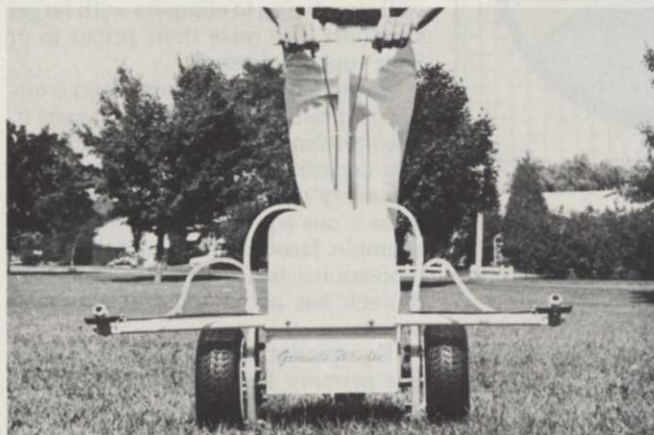
may drop in the future as a result.

Instead of maintaining a complete inventory at many locations, the distributor of tomorrow may have a central warehouse and small sales and service outlets in branches. In this way, the distributor receives the advantages of volume buying without the overhead of separate full branches.

The service truck may replace the branch service department as well. Nearly 70 percent of the distributors responding now offer job-site service. A customer's mechanic can talk to the distributor's mechanic by phone to correct many problems and the service truck can arrive at the customer's location at the same time parts arrive.

Advanced factory parts delivery systems are enabling forty percent of the distributors to reduce their parts inventories. Computerization at the distributor and manufacturer level will increase the efficiency of parts departments.

Thirty percent of the distributors reported their service departments were a break even or losing proposition. It also takes them an average of five days to turn around a piece of



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