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Columbia Car



Yamaha Motors

THE GOLF CAR GAME

An improving economy and the maturing 'Baby Boomer' generation create a growing need for golf cars. The industry has responded.

The game continues to grow, but the players leave.

Sale of golf cars is rising at a 7-8 percent clip per year. Two years ago, there were seven manufacturers. Alas, today, there are but five.

"When they first came out, everybody built them," observes Eric Sauvey, president of Columbia Car. "But, like most markets, as it matured, fewer people manufactured them."

The players: Columbia, Club Car, E-Z-Go, Melex USA, and Yamaha.

Estimates on market growth range from 6 percent to 10 percent annually on 600,000 total units now in use. Areas of growth include industrial use, individual use, and golf course use.

More large businesses are using golf cars than ever before.

"There's a bigger emphasis than before on industrial uses," notes Sauvey, "but it still hasn't been exploited as much as it can be."

And more Sun Belt residents are purchasing golf cars through the dealer-distributor network than ever before—especially in retirement communities.

"We have a lot of retired people using them as personal vehicles," says



Club Car



E-Z-Go



Melex USA

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U.S. GOLF CAR POPULARITY, 1986

TYPES OF COURSES	TYPES OF COURSES				
	Resorts	Private clubs	Daily fee	Municipal	Executive, par 3
Facilities with golf cars	96%	97%	94%	94%	96%
Cars per 18 holes	70	50	48	38	27
Average age in years of cars	3.5	3.6	4.2	3.4	4.0
Inventory value (\$1,000s)	67.5	50.0	30.0	40.0	30.0

Courtesy of The National Golf Foundation

Cary Rivers, national sales manager for Club Car. "These are the vehicles that people like to dress up a little bit with optional features."

And the golf course market? With more golf courses, resorts, and country clubs being built as the economy

bounds, more golf cars are needed.

"Golf courses are also finding more applications for their golf cars," says Rivers.

"We've seen a slight trend in personal golf car use, but there's been a particular increase in the industrial

vehicle market," says Bryan Taylor, marketing representative for Melex USA. "I believe we are the only manufacturer who can convert its golf car into a utility vehicle."

Melex USA has begun a stronger

With more golf courses, resorts & country clubs, more golf cars are needed.

marketing campaign this year with emphasis on its conversion kits which attach to either of its models. The kits will convert the car into a four-passenger vehicle, a platform without sides, a platform with steel sides, or a platform with wooden sides.

With post-war Baby Boomers now reaching middle age, more people than ever will be playing golf in the coming years. And, in this age of affluence, more of those Baby Boomers will be reaching early retirement age during the early part of the next century. The result? A larger demand for golf cars.

And the golf car industry appears ready to meet that demand. **WT&T**

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SOME WORKERS DON'T

GOLF CAR GUIDE

Manufacturer	Model	Engine	Payload	Notes
Club Car P.O. Box 4658 Augusta, GA 30907 (404) 863-3000	DS Electric	electric	750 lbs.	4-wheel
	DS Gas	4-cycle	750 lbs.	4-wheel
	DS Villager	electric	1,000 lbs.	4-wheel
	DS Villager	4-cycle	1,000 lbs.	4-wheel
	DS Carryall I	electric	1,000 lbs.	4-wheel
DS Carryall I	4-cycle	1,000 lbs.	1,000 lbs.	4-wheel
Columbia Car P.O. Box 1 Deerfield, WI 53531 (608) 764-5474	G3T	2-cycle	615 lbs.	tiller, 3-wheel
	G3S	2-cycle	615 lbs.	steer, 3-wheel
	E3T	electric	523 lbs.	tiller, 3-wheel
	E3S	electric	523 lbs.	steer, 3-wheel
	G4S	2-cycle	716 lbs.	4-wheel
E4S	electric	716 lbs.	4-wheel	
E-Z-Go P.O. Box 388 Augusta, GA 30913 (404) 798-4311	X440	electric	500 lbs.	3-wheel
	X444	electric	500 lbs.	4-wheel
	GX440	2-cycle	500 lbs.	3-wheel
	GX444	2-cycle	500 lbs.	4-wheel
Melex USA 1201 Front St. Raleigh, NC 27609 (919) 828-7645	152	electric	500 lbs.	3-wheel
	252	electric	500 lbs.	4-wheel
Yamaha Motors 6555 Katella Ave. Cypress, CA 90630 (714) 761-7300	G1-AM5	gas	1,000 lbs.	4-wheel
	G1-EM5	electric	1,000 lbs.	4-wheel
	G2-A5	4-cycle	1,000 lbs.	4-wheel
	G2-E5	electric	1,000 lbs.	4-wheel
	Sun Classic	electric	1,000 lbs.	4-wheel
	Sun Classic	gas	1,000 lbs.	4-wheel



Meet the E-Z-GO work force. Tough guys who work down to dusk and never take a break.

Built to E-Z-GO's demanding standards, you can expect years of durable performance from these 3 and 4-wheel, gas or electric-powered turf vehicles. Plus lower maintenance costs and little to no downtime.

For every job you've got, there's an E-Z-GO designed specifically to handle it—quietly, efficiently and with the least amount of labor. With carrying capacities up to 1,500 pounds, a complete range of trailers, and adaptability to virtually any accessory, they're a team of superbly versatile workers.

E-Z-GO. Nobody builds them better.

KNOW WHEN TO QUIT.

THE LAWN CARE CRISES

Chemical lawn care companies face pressure from media and law-makers. But their friendly insurance agent might pose the most urgent problem.

Bill Schaeck's Chem-Green business was up for sale. The reason? His insurance premiums were about to triple.

George Meeley of Chem-Turf in Anaheim, Calif., bought Chem-Green—Meeley's insurance policy doesn't expire for another year.

Meeley hasn't decided what he'll do if his premiums drastically increase.

When the problem crosses his mind, he slowly shakes his head and whispers, "I just don't know."

That is the state of the lawn care

industry as it looks toward the 1987 season: a collective shaking of heads as lawn care operators face crisis upon crisis.

Lawn Care Industry magazine's annual survey revealed that 89 percent of the nation's LCOs feel insurance is a "major concern." Eighty percent of the respondents reported an increase in premiums for the current year.

According to Jim Leatzow of Financial Guardian Insurance, Lombard, Ill., the trend will continue for two or three more years.

And that's just half the problem. The other half is that pollution liability clauses are being excluded in 1987 from general liability policies, according to the Insurance Services Organization.

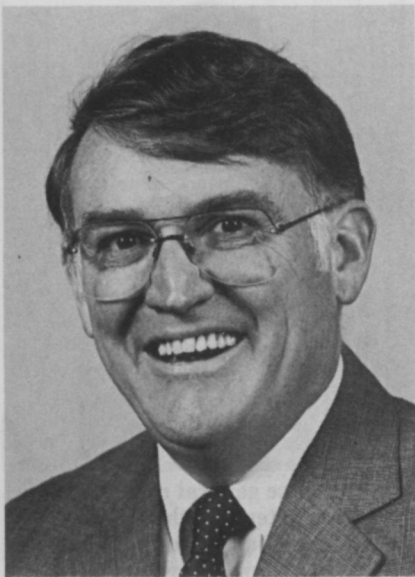
"Pollution liability is not available, so people are being more careful and thinking, 'if anything happens, I just close up shop,'" observes Jim Brooks, executive vice-president of the Professional Lawn Care Association of America.

Other problems being encountered by the industry include biased reports from media giants CBS-TV, ABC-TV, and *Home Mechanix* magazine; and new sign-posting laws in various communities.

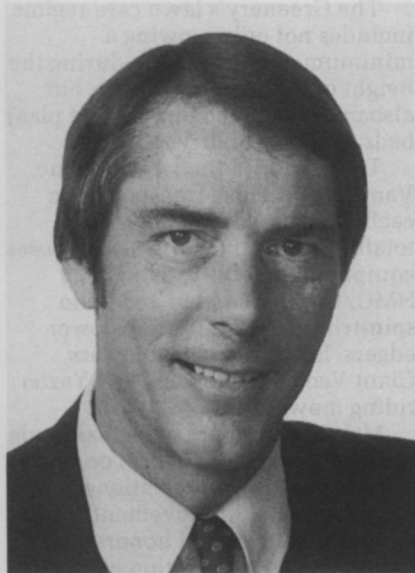
The troubles are being felt in all quarters. ChemLawn, the largest chemical lawn care company in the country, lost 28,000 customers during its fiscal third quarter. A

In 1986, what do you predict your expenditures will be for:

Chemicals, supplies	% Sample purchasing	Average per purchaser	Projection to LCI readership	% Change since 1985
Granular fertilizer	78	\$12,708	\$113.0 million	+18.5
Pre-emergence herbicides	69	8,608	67.9 million	+36
Liquid fertilizer	35	12,926	51.7 million	+16.8
Insecticides	73	4,844	40.5 million	+27
Grass seed	69	3,909	30.8 million	+19
Post-emergence herbicides	69	3,605	28.5 million	+20
Soil amendments	30	2,860	9.9 million	+4
Fungicides	47	1,810	9.7 million	-14
Plant growth regulators	17	670	1.3 million	+28
Equipment				
Tractors	20	14,264	32.6 million	+22
Walk-behind mowers	42	3,963	19.0 million	+27
Riding mowers	13	10,687	15.9 million	-4
Spray tanks	27	3,940	12.2 million	-50
Sprays, pumps, hoses, etc.	47	2,103	11.3 million	-21
Irrigation equipment	12	5,651	7.7 million	-200
Aeration equipment	30	1,958	6.7 million	-3
String trimmers	35	1,138	4.5 million	+20
Tree care equipment	27	1,403	4.3 million	-86
Spreaders	46	538	2.8 million	-187
Predicted totals:			470.3 million	+11.65



Chemlawn president Jack Van Fossen says "there is still a large potential for lawn care service" despite recent problems.



Jim Brooks, president of the PLCAA, says the lawn care industry will have to "stand up and fight. It's just never done that before."

press release attributed the loss, at least partially, to "negative, inaccurate, and incomplete media stories about the safety of lawn care products, both on national and selected local television and in the press." The negative coverage, the release continued, caused an increase in cancellations and a decrease in new customer inquiries.

"We believe the slowdown is a reflection of shifts in both consumer

attitudes and spending patterns," says ChemLawn chairman/CEO Jack Van Fossen. "There is still a large potential for lawn care service. But the rapidly changing marketplace requires greater emphasis on quality performance and value added to meet consumer needs."

ChemLawn, too, announced this year that it would post a sign on every lawn after chemical treatments. Other LCOs are slowly, hesitantly following suit.

"We'll get through it all, but there are a lot of potholes," says Brooks. "The industry will have to stand up and fight. It's just never done that before."

Despite all the problems, the

industry continues to thrive.

According to the *Lawn Care Industry* report, chemical lawn care revenues grew from \$832 million in 1984 to \$932 million in 1985. Median growth was 20 percent per company.

Overall, purchases of chemicals, seed and equipment were predicted to increase 11.65 percent this year with dramatic increases in the purchases of pre-emergence herbicides and plant growth regulators (see chart).

In 1984, the average LCI reader had 724 lawn care accounts. That number increased to 1068 (32 percent) in 1985, yet another indication that the industry continues to be a viable—and profitable—one. **WT&T**

LAWN CARE... CAREFULLY

Hilton Head's veteran landscape management company exercises extra care when applying chemicals to the island's fragile environs.

It's a resort...a retreat...a retirement community.

Hilton Head Island is many things to many people, but its main attraction is the serenity of its ocean-surrounded landscapes.

Hilton Head has 10 plantations, each with homes, villas, and commercial properties which must follow strict architectural guidelines. The landscaping throughout the island follows a similar conservative pattern, though it rarely wavers from Hilton Head's "paradise island" blueprint.

Maintaining that beauty has been anything but serene for the island's lawn care and landscape professionals. Three harsh winters, including snow on one occasion, and the severe drought last summer have made the job a challenge to even the island's best landscape managers.

Only three chemical lawn care companies work on Hilton Head. Because of the wealth on the island, most homeowners can afford to hire landscape contractors for combined turf and landscape care.

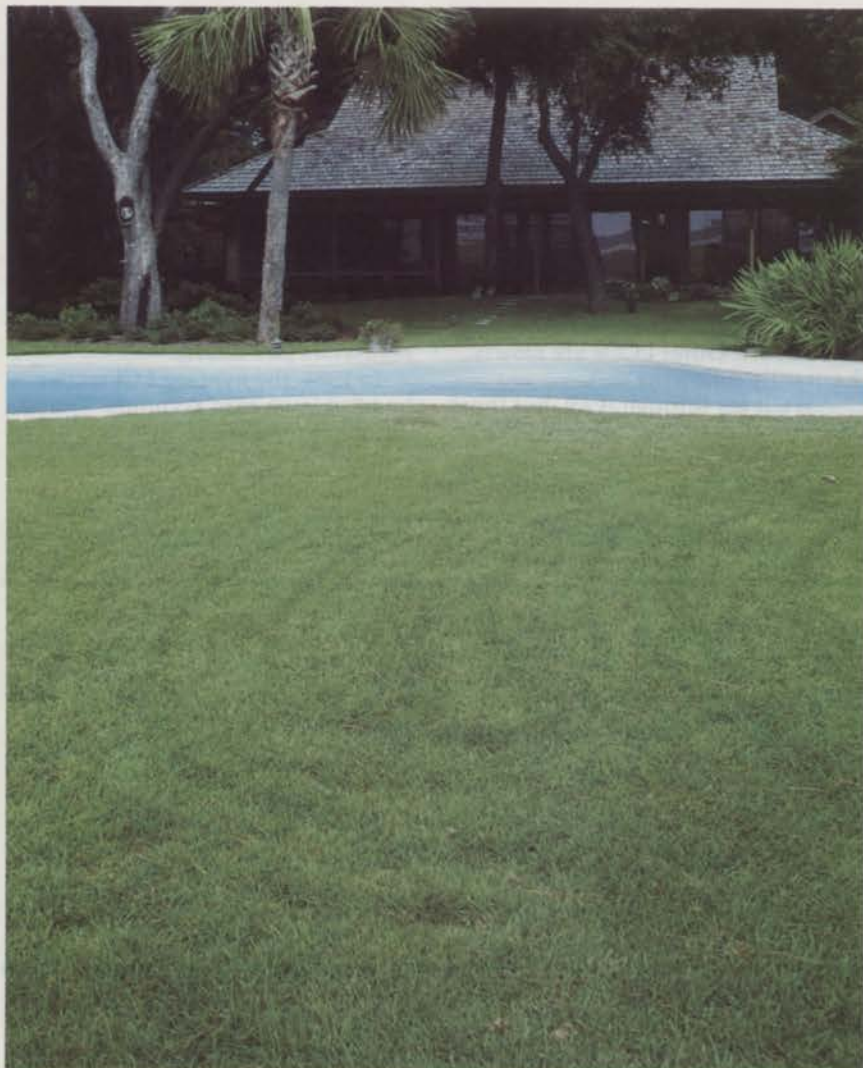
The award-winner

The Greenery, an award-winning design/construction/maintenance landscape company, handles about 300 residential and commercial maintenance accounts on Hilton Head. Founded by Berry Edwards in 1973, the Greenery is one of the oldest landscape companies on the island.

With age comes experience and a lawn care philosophy that differs from the newer, strictly chemical lawn care companies.

"Some of the turf/lawn care companies have a program to come in and spray whether it's needed or not," says Tom Van Hise, the Greenery's general manager for maintenance. "They may provide a better product in the long run, but with these recent comments on chemicals, our philosophy will be safer."

The island is concerned with chemicals running into the marshes or ocean and damaging the fish. But most of the controversy focuses on



The Greenery's lawn care regime involves not only mowing the lawn, but edging around flower beds and pools.

the island's 20 golf courses, since they generally use more chemicals than the landscape companies.

The Greenery's program includes pre-emergence herbicides used throughout the growing season. Fungicides and insecticides are applied in the spring, with follow-up treatments only when necessary.

Fertilization works the same way. Each spring, the Greenery applies a slow release, 15-0-15 fertilizer and repeats applications as needed.

Turf on the island is primarily centipede grass, and is almost always sodded, rather than seeded. "Centipede grass does not require as much fertilizer," Van Hise says. "It's more drought resistant than either St. Augustine or bermudagrass, and it's come back after three winters of cold weather."

Drought duress

Although the harsh winter weather damaged many plant materials on the island, the drought caused more trouble for lawn care specialists. With only about a half inch of rainfall in three months, lawns needed extra irrigation. "One unusual problem was that we used a lot more herbicides this year because a lot washed off with the irrigation," Van Hise says.

His crews had to irrigate as often as seven days a week in some cases. Several customers complained about high water bills. During the peak of the drought, however, irrigation was cut back to twice a week in an effort to conserve water.

Van Hise also blames the drought for the severe insect and fungus infestations this year. "The drought stressed the plants, making the



Maintenance general manager Tom Van Hise notes that the Greenery sprays insecticides and fungicides in the spring, then follows up only as needed.

infestations rampant," he says. "It's much worse this year than in past years."

The Greenery's lawn care regime includes not only mowing a minimum of once a week during the height of the growing season, but also mechanical edging around plant beds, walks, and drives.

To make sure the jobs get done, Van Hise provides transportation each morning for his 12 crews, totalling 34 workers. He also chooses equipment carefully, using only HMC/Green Machine and Echo spin-trimmers, Trail-Mate power edgers, Echo backpack blowers, Giant Vac push blowers, and Yazoo riding mowers.

Making that extra effort has made the Greenery the only firm on the island to earn several National Environmental Improvement Awards, and national honors from the American Association of Nurserymen. Some of the awards were for architectural design and construction, including building decks, fountains, and formal gardens.

In fact, maintenance is only a small part of the Greenery's operations. But it's the part which is visible when the island's population swells from about 30,000 to 70,000 each summer.

And, as long as Hilton Head's erratic weather continues, lawn and landscape maintenance will also be one of the Greenery's biggest challenges. **WT&T**

—Heide Aungst

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