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Circle No. 124 on Reader Inquiry Card

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## AS WE SEE IT

RON HALL, SENIOR EDITOR



### Even from the Arch, Gateway landscape looks like a winner

Going to the top of the Gateway Arch is almost a must for anybody attending the Green Industry Expo in St. Louis.

You climb into this small, white, egg-shaped compartment. It's rimmed with five plastic seats bolted to the wall in, approximately, a semi-circle. You're packed so tightly that everyone's knees form a ring in the center of the pod.

Want to know what the compartment looks like? Remember the "egg" that transported Mork (Robin Williams) to earth in "Mork and Mindy"? Only slightly larger.

National Park Service employees direct the loading of visitors into maybe a dozen of these curious conveyances at a time. When they begin ratcheting their way to the top of the Arch, it doesn't take a lot of imagination to picture them as a string of pearls being dragged through a slightly larger pipe. This is the biggest rainbow-shaped chunk of stainless steel pipe you're ever going to pass through.

There's no other way for you to get to the top. You certainly wouldn't want to climb the zig-zagging steps, glimpses of which you see out the small window of your egg as it rises to the top. For me anyway, the climb would be terrifying, assuming I didn't keel over from exhaustion first.

You're 630 feet above St. Louis, and sometimes above the clouds. Gingerly you walk to the small rectangular windows. Look east and the Mississippi River appears no larger than a muddy creek; look west and the city spreads in all directions.

Unless you're more than moderately frightened of high places—go up in the Arch!

Since I've already paid my \$5 and ridden the egg, I'll confine further explorations to the grounds there.

Earlier this fall I walked the grounds in the Arch's huge shadow. Maybe it was the balmy sunshine of a perfect early autumn

day. Or the hamburger, beer and friendly conversation I'd just had in Dooley's Pub. I was feeling as right as a person can feel.

St. Louis had cooled, and the previous week's rain commanded the turfgrass to stand straight and fresh. Rows of ash trees, their leaves getting the first hints of golden color, framed the dark green vista which opened to the Arch. Under the cloudless sky, it sent reflected sunlight dancing in every direction.

Several top landscape business owners in St. Louis told me to telephone and visit Jim Jacobs at the Arch. They described him as an excellent grounds superintendent and a fine person too.

When I returned to Cleveland I telephoned him. That's one reason why I'm eager to return to St. Louis for the 1994 Green Industry Expo. Jacobs says he'll show me around the grounds at the Gateway Arch while I'm there.

Jim and I probably won't be walking the grounds. We'll probably ride in a utility vehicle or something. Jim damaged ligaments and muscles in his leg playing soccer two months ago. He was on the team with the other parents and coaches versus the kids.

"I probably tripped over the ball. I had so many kids on top of me I really don't know what happened," he says over the telephone.

Jim tells me his crew takes care of just over 47 acres of turfgrass and 2650 trees.

I'm also looking forward to learning more about "The Flood" of 1993. The Mississippi River filled the railroad tunnels almost at the Gateway Arch's base.

Ron Hall

# LANDSCAPE MANAGEMENT

**"WE KNOW YOUR TURF"**

NOVEMBER 1994 VOL. 33, NO. 11

## COVER FEATURE

### 8 Lawn care growth: 5.2%

The lawn care industry continued to show slow, steady growth in 1994. While not as fast as the industry's growth in the late 1970s and early 1980s, it remains impressive.

*Jerry Roche*

## FEATURES

### 11 Language barriers

As the country's workforce changes, supervisors must more frequently communicate with employees who do not speak English easily. The key is mutual respect, enthusiasm and effort—on the part of both the employee and the supervisor.

### 12 Leadership qualities

Even if you're not a natural-born leader, you can become one, according to Jim Perrone. Gaining 'four-star buy-ins' from employees means being enthusiastic, empathetic and more.

*Jerry Roche*

### 12 Time management

Wasted time equals lost opportunity. Lost opportunity means lost profits. Here are some suggestions on how to maximize your 'minute management.'

### 14 Winterizing sprayers

Doing so can save costly delays from downtime during the next business season.



### 16 Winterizing irrigation

The items needing the highest maintenance on irrigation systems are the pump station, water source, lighting protection, automatic controls and turf rotors.

*Bob Scott*

## GOLF & ATHLETIC TURF

### 1G Environmental considerations

From design to management, Ballantrae Golf and Yacht Club integrates philosophies that keep the surrounding grass, water and air healthy.

*Ed Etchells, Sharon B. Rinehimer*

### 4G Winter golf

Dormant bentgrass doesn't like heavy traffic. Keep an eye on temperature swings, apply extra topdressing, and use temporary greens if possible.

*Terry McIver*

### 8G Rebuilding the fields

Rich Moffitt's in-house staff at St. Louis University makes its ballfields and campus a colorful oasis. When he started rebuilding the baseball field, he didn't know where to start.

*Ron Hall*

## LM REPORTS

### 21 Skid-steer loaders

One of the most expensive—yet most economical—forms of landscape equipment is the skid-steer loader. Because of its power and versatility, you can save 'loads' of labor costs by buying a good one.

*Jerry Roche*

## TECH CENTER

### 28 Soil amendments

Though they come in all shapes and sizes—from sand to superabsorbent polymers, each has specific functions. Here's a long list of such products.

*Jerry Roche*



## 32 Nematodes not harmful

Using nematodes on lawns will not harm beneficial insects, according to Dr. David J. Shetlar of Ohio State University.

*James E. Guyette*

## HOT TOPICS

## 34 Fighting blower laws

Landscape contractors from New York towns and villages in and around Westchester County are protesting increased restrictions on leaf blowers.

*Terry McIver*

## 36 More on certification

The title Certified Turfgrass Professional (CTP) comes with the completion of a special course through the University of Georgia. It's for LCOs, landscapers, golf course supers and athletic field/park managers. And it meets pesticide recertification requirements in 25 states.

*Ron Hall*

## DEPARTMENTS



- 1 As We See It...
- 6 Ask the Expert
- 36 Events
- 37 Info-Center
- 38 Jobtalk
- 39 Product Review
- 41 Ad Index
- 42 Market Showcase
- 43 Classified

**ON THE COVER:** This healthy, green home lawn is maintained nicely by TruGreen/ChemLawn.

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# ASK THE EXPERT

DR. BALAKRISHNA RAO



## New grub control product

**Problem:** We learned recently that there is a new insecticide called Merit for white grub control. How good is this chemical? We would appreciate your comments. (New York)

**Solution:** The insecticide Merit 75 WSP is made by Miles, Inc. The Environmental Protection Agency recently approved registration of Merit 75 WSP for turf and ornamental use in all of the United States, except California and New York where the label is pending.

Merit is a broad spectrum systemic that consists of a new active ingredient called imidacloprid. This product works on an insect's nervous system, resulting in death.

The product is reportedly effective at low rates (0.3 lb. ai/acre) and helps manage insect pests by ingestion and contact. It has a CAUTION signal word.

Merit 75 WSP is labeled for use on residential and commercial turfgrass, golf courses, cemeteries, parks, playgrounds and athletic fields. It is labeled to manage white grubs, billbugs and annual bluegrass weevils in turfgrass.

Merit is available as 75 WSP product in one-quart-per-acre packets sealed in foil pouches. A granular formulation and an insecticide/fertilizer combination should be available in the future.

In your area, particularly in sandy soils, European chafers would be the primary white grub. You may also find other white grubs such as Japanese beetles and northern masked chafers. According to Miles, an average of 95 to 98 percent control of these white grubs can be achieved.

To improve treatment efficacy, you must water the area after treatment. Thatch in excess of 1/2-inch should be managed for better movement of the product.

Miles representatives have indicated that an application made on the first of April should be sufficient to manage the grub problem until October. Treatments made from the first of April through mid-August can be expected to achieve more than 85 percent control. However, for 95 to 98 percent control, they suggest applying it during May to July.

In states where Merit is registered, read and follow label specifications for best results.

## Galls on spruce trees?

**Problem:** We have had poor results controlling the galls which form at the base of small spruce branches. We have used Sevin insecticide in the past around late July and early August, and haven't had good luck. When is the best time to control this pest, and what do I use? (Michigan)

**Solution:** Spruce trees get two different types of galls caused by tiny insects called adelgids. Though commonly referred to as spruce gall aphids, they are not true aphids.

It is important to identify the type of adelgid to provide proper treatment at the proper time.

The Cooley spruce gall adelgid produces galls about 2 inches long by 1/2-inch wide at the tips of twigs. To manage this problem, treatments should be made after the galls open in late July or early August, or before buds start to break in the spring (about early April).

Another kind of gall is called Eastern spruce gall adelgid. The galls are about one inch in diameter. This insect produces galls at the base of small branches. It has a slightly different activity period, which may explain why you have had problems in managing these galls. To manage Eastern spruce gall adelgids, treat the plants after galls open in middle to late September or before buds start to break in spring.

For both types of gall problems, insecticides such as Dursban or Sevin can be used in the spring. After you identify the type of gall insect you are dealing with, monitor the galls for their opening time. Make sure to apply at the proper time when galls open. Timing is one of the most important factors in many pest management approaches.

Read and follow label specifications for best results.

## Damage from horticultural oils

**Problem:** We have used horticultural oil in the fall and one year we had severe injury on a number of plants such as spruce, yews and pines. It happened only at a certain time of the season. We have used the same oil on other plants, at later dates, without any problem. (Michigan)

**Solution:** In recent years, the horticultural oils have become highly refined and should not present a serious problem, if used according to label specification. Read the label, learn which plants are sensitive to oils, and avoid treating them.

Other possible causes of the injuries: temperature extremes, low soil moisture, high pressure while treating (blasting), sensitive plants, hot mix in the hose not recirculated into the tank prior to treating, and improper mixing.

Reports indicate that another important factor is the plant tissue hardening at the time of oil application. Plant tissues are sensitive to oil injury in late fall. Experts believe that when we get 48 hours of cumulative freezing temperatures, it is somewhat safe to apply oil treatments.

---

*Dr. Balakrishna Rao is Manager of Research and Technical Development for the Davey Tree Co., Kent, Ohio.*

*Mail questions to "Ask the Expert," LANDSCAPE MANAGEMENT, 7500 Old Oak Blvd., Cleveland, OH 44130. Please allow two to three months for an answer to appear in the magazine.*



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# Lawn care industry grows 5.2% in second year of Clinton administration

**Ten percent of top companies do 57% of the business, but small businesses (under \$1 million annual revenues) growing at a 15% clip.**

■ What LANDSCAPE MANAGEMENT magazine defines as the "lawn care industry" continued to show slow, steady growth in 1994, the second year of the Bill Clinton administration. While not as fast as the industry's growth in the late 1970s and early 1980s, it remains impressive.

Revenues attributed to lawn care sales by

LM readers grew from \$2.50 billion in 1993 to \$2.63 billion in 1994. Most of the growth this year came from increased fertilizer and chemical applications to residential lawns, contrasted to last year's growth in mowing/maintenance services, the survey notes.

The survey is based on 201 responses to 966 questionnaires mailed to a cross-section of the 7,366 LM readers who classify themselves as "lawn care companies."

Revenues in the lawn care industry from mowing/maintenance operations declined slightly from \$800 million to \$750 million. But that was more than offset by revenues from fertilizer and chemical applications ("chemical lawn care"), which grew to \$1.88 billion from \$1.70 billion.



## THE LAWN CARE INDUSTRY; WHERE ARE THE REVENUES?

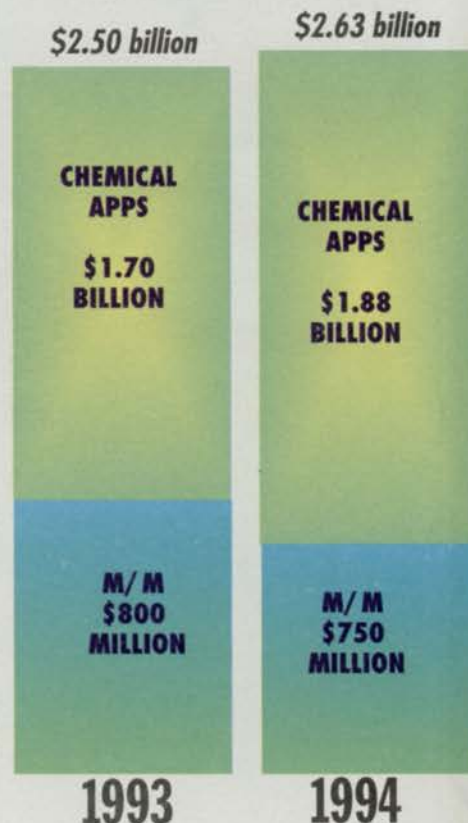
### CHEMICAL LAWN CARE

Company revenues	Total companies	Total Industry revenues
\$0	1878	\$0
\$1-\$49,999	2026	\$50.6M
\$50,000-\$99,999	1105	\$82.9 M
\$100,000-\$199,999	479	\$71.8M
\$200,000-\$499,999	847	\$296.5M
\$500,000-\$999,999	405	\$303.7M
\$1,000,000 or more	350	\$1,073.6M
		<b>\$1.88 BILLION</b>

### MOWING/MAINTENANCE

Company revenues	Total companies	Total Industry revenues
\$0	2320	\$0
\$1-\$49,999	2099	\$52.5M
\$50,000-\$99,999	1436	\$107.7 M
\$100,000-\$199,999	663	\$99.5M
\$200,000-\$499,999	515	\$180.3M
\$500,000-\$999,999	184	\$138.0M
\$1,000,000 or more	147	\$176.4M
		<b>\$0.75 BILLION</b>

## TOTAL LAWN CARE INDUSTRY REVENUES







Most surprising was a growth in the application of fertilizer/herbicide combinations. According to the 1993 survey, LM lawn care readers purchased \$20.8 million worth of such products; in 1994, purchases mushroomed to \$91.9 million. Accordingly (and not surprisingly), purchases of straight fertilizers declined from \$135.8 million to \$99.6 million.

Overall, the "buying power" of LM's lawn care readers increased by 15.5 percent from 1993 to 1994. Last season, they bought

almost \$390 million worth of fertilizers, pesticides, maintenance equipment, turfseed and sod. This season, they purchased almost \$450 million in the same product categories.

Purchases of pre- and post-emergence herbicides, turf insecticides and turf fungicides also showed strong gains: \$82.7 million total in 1993 compared to \$117.7 million total in 1994.

The backbone of the industry remains

*continued on page 10*

## PURCHASING POWER OF LM'S LAWN CARE READERS

PRODUCT CATEGORY	% OF SAMPLE, '94	% OF SAMPLE, '93	MEDIAN DOLLARS	MEAN DOLLARS	PROJECTED TO CIRC. '93	PROJECTED TO CIRC. '94	CHANGE '93 TO '94
Soil aerators	28.1	—	\$2,000	\$1,304	—	\$2,699,500	—
Fert./herb. combos	57.3	31.3	\$3,750	\$21,776	\$20,845,000	\$91,915,000	+
Domestic pick-ups	48.3	51.6	\$14,000	\$17,463	\$65,748,500	\$62,132,500	-
Dry-app. fertilizer	69.7	84.9	\$3,000	\$14,183	\$92,486,500	\$72,817,500	-
Ornamental fert.	42.1	43.2	\$1,000	\$2,965	\$8,613,500	\$9,194,500	+
Liquid-app. fertilizer	27.0	34.9	\$6,000	\$13,496	\$43,255,500	\$26,844,500	-
Post-emerg. herbicides	59.6	62.5	\$1,500	\$5,877	\$23,269,000	\$25,799,000	+
Pre-emerg. herbicides	59.6	63.5	\$2,000	\$7,201	\$21,420,500	\$31,613,000	+
Small mowers	25.3	26.6	\$2,350	\$2,142	\$6,297,000	\$3,992,500	-
Mid-size mowers	25.8	21.4	\$3,650	\$5,211	\$9,264,000	\$9,900,000	+
Large mowers	16.3	15.1	\$5,000	\$7,931	\$9,170,500	\$9,525,000	+
Turfgrass Sod	21.3	26.6	\$1,000	\$2,421	\$5,246,500	\$3,798,500	-
Irrigation/sprinklers	15.2	21.4	\$3,250	\$10,615	\$18,337,500	\$11,889,500	-
Compact tractors	15.2	17.2	\$8,000	\$12,655	\$10,385,000	\$14,174,000	+
Turf fungicides	43.3	36.6	\$900	\$5,188	\$10,957,000	\$16,545,500	+
Turf insecticides	46.1	58.3	\$2,000	\$12,898	\$27,058,000	\$43,800,000	+
Turfseed	59.0	57.3	\$1,000	\$3255	\$15,478,500	\$14,144,500	-
<b>TOTALS</b>					<b>\$387.9 million</b>	<b>\$447.9 million</b>	<b>+15.5%</b>



continued from page 9

the small, independent operator. The statistics show that independent operators outnumber branches and franchisees by about seven to one. Branches amount to just 5.5 percent of LM's lawn care readership and franchisors/franchisees are 7.5 percent. According to our extrapolations, companies with annual revenues of less than \$1 million (which account for 90 percent of the companies in the industry) account for 43 percent of total industry revenues. Taking the extrapolations a bit further, the survey identifies about 350 companies in the U.S. with revenues of at least \$1 million.

Though overall industry growth was 5.2 percent from 1993 to 1994, the average company reported growth of 14.7 percent. (This portion of the survey was not weighted to company size.) Eighty-seven percent of the companies noted positive growth in 1994. Moreover, 93 percent predict positive growth in 1995, an average of 15.8 percent per company.

The statistics also show some indication that independent lawn care operators are finally breaking with tradition and actually raising prices, even in light of an increasing number of low-priced competitors.

Forty-five percent of the respondents to the survey said they raised prices in 1994. Of those LCOs who have decided on 1995 prices, 69 percent will raise them. But since 29.4 percent are still undecided, the number of companies that raise prices in 1995 could be as low as 48.7 percent (still greater than the 1994 figure) and as high as 78.5 percent.

Almost 87 percent of the respondents to the survey were involved in chemical lawn care. The average company's revenues from chemical lawn care were 38.5 percent of total revenues in 1994. Thirty-two percent of the respondents perform chemical lawn care only.

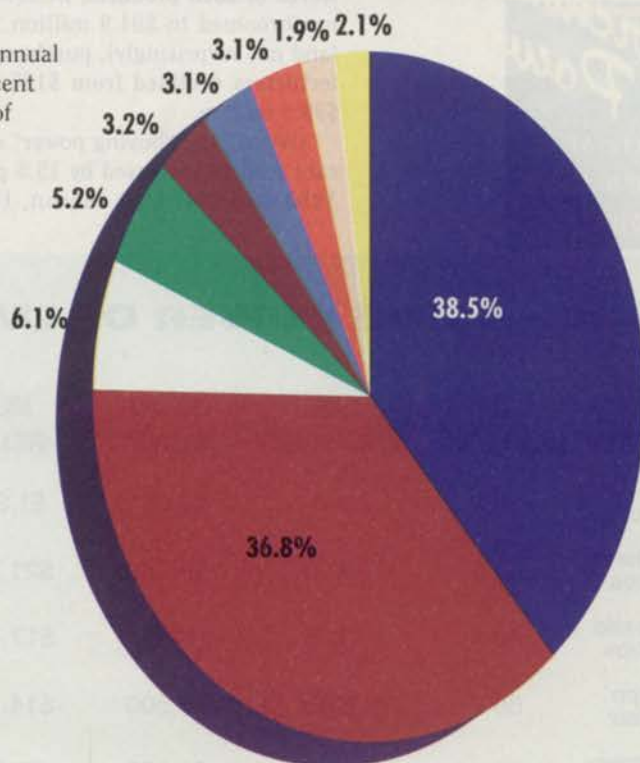
Three of four respondents perform some mechanical maintenance (mowing, aeration, trimming, etc.). The average company's revenues from mowing in 1994 were 36.8 percent of total revenues. One in four companies does not apply chemicals or fertilizers.

Other revenues come from ornamental installation and care, tree care, sodding/seeding/reseeding, aeration, snow removal, and dethatching/renovation. Some isolated companies even offer irrigation services, reel grinding, golf construction, liming, pasture weed control, structural pest control and Integrated Pest Management (IPM) services.

Not surprisingly, 59.8 percent of the respondents remain optimistic about the industry and 32.8 percent consider their feelings "neutral." Only 7.4 percent of the respondents claim to be pessimistic about the industry's outlook.

—Jerry Roche

## REVENUES DERIVED FROM SERVICES PERFORMED



- 1 CHEMICAL LAWN CARE
- 2 MOWING
- 3 ORNAMENTAL INSTALLATION & CARE
- 4 TREE CARE
- 5 SODDING, SEEDING AND RESEEDING
- 6 AERATION
- 7 SNOW REMOVAL
- 8 DETHATCHING, RENOVATION
- 9 "OTHER" (IRRIGATION, LEAF CLEAN-UP, REEL GRINDING, GENERAL LANDSCAPING, LANDSCAPE INSTALLATION, I.P.M., GOLF CONSTRUCTION, LIMING, PASTURE WEED CONTROL, STRUCTURAL PEST CONTROL)

### LM "STATE OF THE INDUSTRY" SCHEDULE

December . . . . . Athletic Fields  
January . . . . . Landscaping  
February . . . . . Golf Courses