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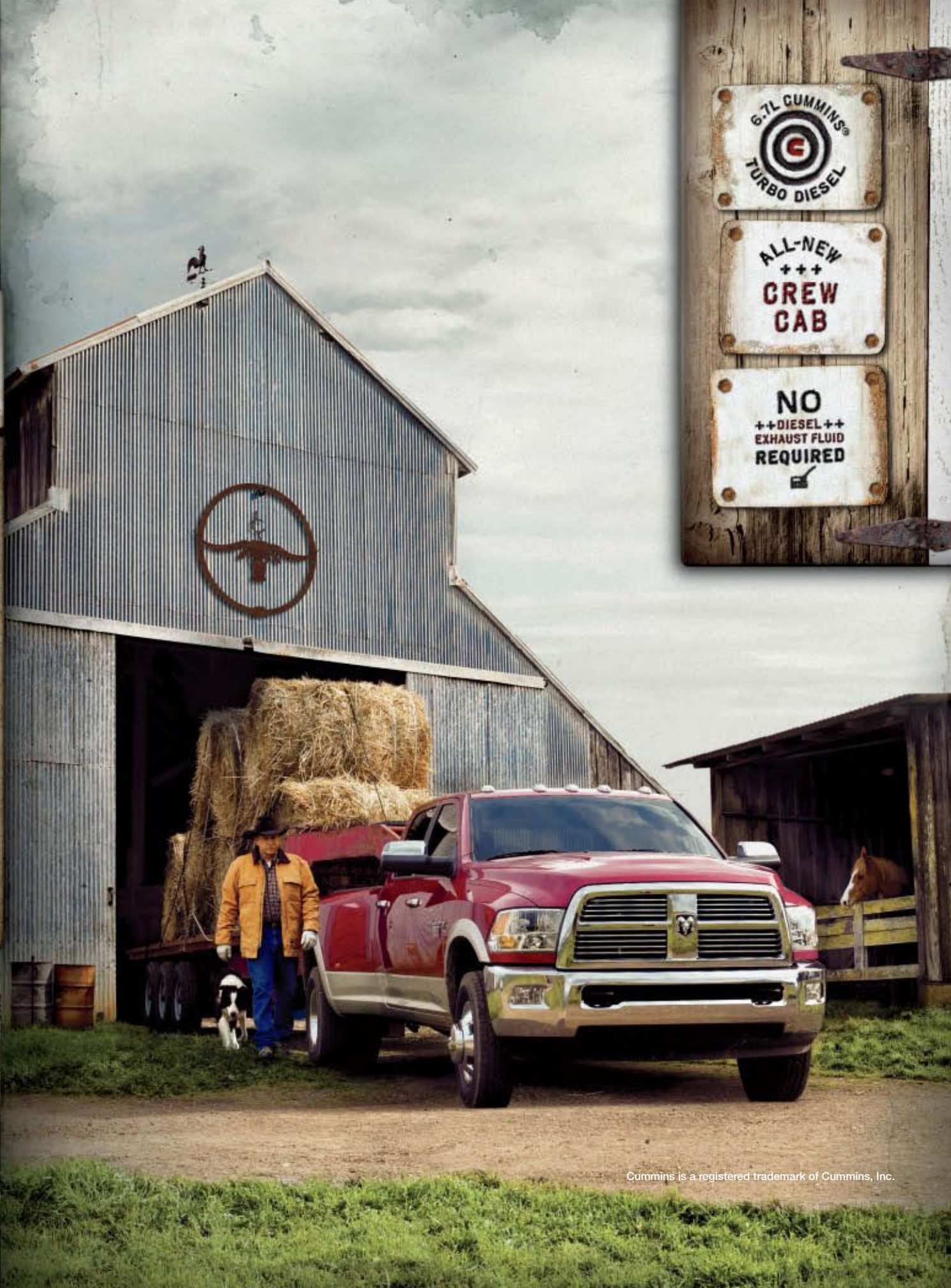


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JUNE 2010
VOL 49, ISSUE 6

S1

SPECIAL SUPPLEMENT



Unwrapped B D/B I LC M

LM reveals its elite list of the 150 largest landscape contractors in the industry. BY NICOLE WISNIEWSKI, HEATHER GOOCH, MARTY WHITFORD AND JULIE COLLINS

LM MARKET MATCH We've made your life a little easier by supplying icons that direct you to stories targeting your core business.

B – Business, **D/B** – Design/Build, **I** – Irrigation, **LC** – Lawn Care, **M** – Maintenance

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Illustration by Carrie Parkhill

Landscape Management

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FIRSTCUT

NICOLE WISNIEWSKI EDITOR-IN-CHIEF

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From the minds of customers

Consumer confidence concerning economic recovery is improving, and their finances are on the mend, according to a new survey of consumer spending and trends from Deloitte. More than half (55%) of consumers think the economy has started to recover from the recession and nearly two-thirds (64%) say their household financial situation is the same or better than one year ago. Nearly the same amount (63%) say they are planning to spend the same or more this year than they did in 2009.

Despite this optimism, consumers are still worried about things that could negatively impact their pocketbooks. More than half (54%) say rising energy prices could cause them to hold back spending, and 45% and 41% say higher taxes and a lack of improvement in the job market, respectively, could do the same. A little more than a quarter of respondents (27%) believe the economy is recovering but is at risk of falling back into recession.

That's the good news.

The bad news is that some of the frugal shopping habits consumers picked up during the recession are sticking. Almost half (45%) of consumers said they shopped with a focus on saving money during the recession, and seven out of 10 (71%) plan to continue to do so even if their financial situation improves.

How can you benefit? Stacy Janiak, Deloitte's vice chairman, says sellers

55% of consumers say the economy is recovering, and 64% report more positive finances.

“should keep a sharp focus on consumer's shopping behavior and invest in areas that may drive loyalty in months ahead.”

The web is also playing a greater role in the customer buying experience with 75% of consumers saying they look online for product, service or price information before reaching out to service providers. More than half (56%) use social networking sites and 43% interact with sellers through these channels. Nearly two-thirds (64%) do so to find out about promotions, almost half (48%) browse products and services and more than one-third (35%) review customer recommendations found on those sites. In fact, half of customers say online reviews have influenced their decision to buy (51%) or not (50%).

Your lesson this month: Pay attention to your customers' buying shifts and be where they are; go where they go. Twitter, Facebook and YouTube are free marketing tools.

As Wayne Gretzky says, “I skate to where the puck will be, not to where it's been.”

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NEWS+VIEWS

GREEN INDUSTRY EVENTS, TRENDS AND TIPS

D/B on the grow?

Despite housing and economic challenges, survey shows there could be hope for design/build/installation contractors. BY NICOLE WISNIEWSKI EDITOR-IN-CHIEF

Nearly 50% of landscape professionals say 2010 sales are already up compared to last year. And 20% of them expect 10% higher sales; another 11% expect 15% higher sales.

The other twist to this plot: The majority of survey respondents were landscape design/build/installation contractors and landscape design firms — companies many industry experts say are suffering from double-digit decreases in growth as a result of the recession and slumped housing market.

Now that we have your attention ...

The survey results were presented during a May 20th webinar conducted by The New American Landscape Outdoor Living Channel (NALOLC).

Though the majority of respondents admit business is improving (30%),

many say they are undergoing challenges and changes as a result of the economy.

“Growth is occurring but at a slow rate reflective of overall trends in economic recovery,” says J. Geio Pensoneault, CEO and host of the NALOLC.

But it's still growth, and that's a positive thing for the industry, webinar panelist and industry consultant Judy Guido says.

Pensoneault also highlighted the economies of three separate states to show varying degrees of progress. California is showing good signs of growth as it emerges out of the recession, he says, citing a recent Wells Fargo Economic Outlook.

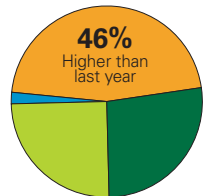
Colorado is also recovering but lagging behind a bit because the oil and gas industry is one of the state's larger

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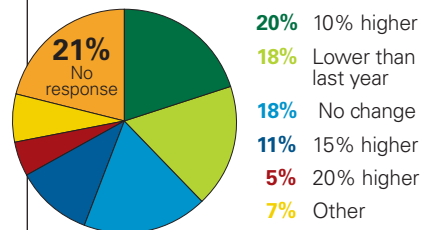
THE STATE OF THINGS

How are your first quarter 2010 sales compared to first quarter 2009?

- 27% Lower than last year
- 25% Same as last year
- 2% No response

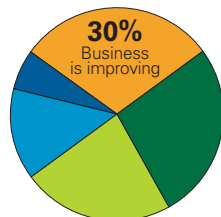


What percent change are your first quarter 2010 sales compared to first quarter 2009?



Describe the state of your business this year.

- 27% Undergoing industrywide changes due to the economy
- 23% Facing difficult challenges
- 14% Doing OK with minor challenges
- 6% No response



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continued from page 6
forces of economic growth.

Florida will be one of the slowest states to come out of the recession. Pensoneault said the Sunshine state's economy has been based on people moving in, but for the first time since World War II, there are more people moving out.

What can landscape professionals do with this information? Pensoneault suggests the following:

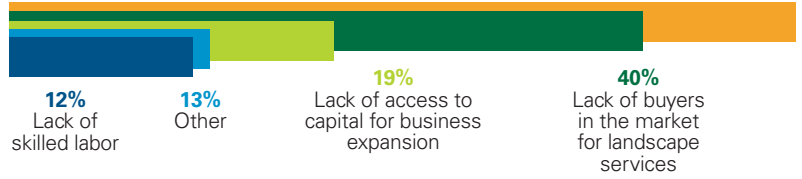
- › Adapt to the realities of business.
- › Maintain a lean and mean approach to operations.
- › Invest in marketing to capture growth as it returns to the marketplace.
- › Demand a return-on-investment approach in all expenditures.
- › Invest in education during this slower business cycle.

Guido adds: "It's pretty interesting that all of the things suggested are things you should be doing regardless of whether it's a good or bad economy."

IN THE WAY OF GROWTH

My main obstacles to growth right now are...

54%
Uncertainty in economy



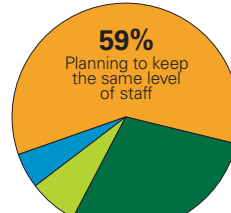
DESPERATELY SEEKING ...

What resources would be most useful to your company right now?



HIRING PLANS

What are your hiring plans this year?



- 29% Planning to hire additional staff
- 5% Planning to reduce the number of staff
- 7% No response



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In search of **FIRE ANTS**

Few things can earn a client's wrath faster than a return of these biting insects. BY DANIEL G. JACOBS



Robby Clemenzi smiles even after being bitten.

later, he finds one, brushes away the mulch from a bed, pokes in a finger and

pulls up a half dozen or so red imported fire ants scurrying furiously across his now-bitten digit.

He begins to pick them off one by one. "Can you imagine a small kid stepping into that?" he asks.

It's scenarios just like that that have lawn care professionals across the south from Virginia to Texas looking for the most effective way to deliver quick and long-lasting fire ant treatments to customers.

There are nearly 40 million people living in roughly 330 million-plus acres of land across the Southeast where

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It's 9 a.m. on a Friday morning, and the Orlando sun is already baking the grounds of the hotel outside the conference room.

"Ever seen a fire ant?" Robby Clemenzi, area sales rep for Bayer Environmental Science, asks the account manager for the public relations firm that helped organize the event. Clemenzi props open a door that leads to the hotel's pool and tennis courts, and begins to scour the well-manicured grass and surrounding area. A few short minutes

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CHANGES IN FIRE ANT TREATMENT

According to Charles Barr, Barr Research & Consulting, the approach to dealing with fire ants has changed over the years. Here's a look at a few of the differences.

OLD WAY

1. Individual mound control
2. Remedial response
3. Speed is most important
4. Product-centered



NEW WAY

1. Broadcast control
2. Proactive response
3. Duration of control and prevention are most important
4. Program-centered



Charles Barr explains the latest fire ant treatments.

continued from page 9
fire ants live, says Dr. Charles Barr, Barr Research & Consulting.

It's believed they arrived in the ballast of ships sometime during the 1920s, and became widespread starting with the rise of the highway system in the 1940s. Hawaii has yet to see them, but is afraid the pests could reach the state's shores.

Internationally, China and Australia also have fire ant problems. New Zealand has spent millions of dollars to deal with the issue, and has found only three mounds.

Research has found that about 15% of humans have a local allergic reaction, which can cause pain and discomfort. Of that population, about 2.5% suffer systemic allergies (anaphylactic shock), Clemenzi says.

Of the more than 300 million fire-ant-infested acres in the U.S., fewer than 500,000 are treated. Until last fall, homeowners treated nearly 75,000 acres themselves using a product called Over 'n Out. But the U.S. Environmental Protection Agency recently pulled the registration of that product — giving lawn care professionals a huge new market, Barr says. The product is still on the shelves and legal to use, but is no longer being manufactured. When it's gone, he points out, there will be no consumer-grade solutions to treat fire ants.

Clemenzi concluded his presentation to “biological service providers” by discussing how lawn care professionals can use science to affect fire ant biology to produce a healthy, safe and beautiful environment — at a profit, of course.

Both Barr and Clemenzi suggest using a combination of products. But, he advises, with about 150 products labeled for fire ant control, lawn care professionals need to sell their professionalism.

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