



Economic Impact of the Lawn and Landscape Industry

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Professional Lawn Care Association of America

Vice President of Government Affairs





Between 1982 and 1997, approximately 7 million acres of agricultural land and 10 million acres of forest land were converted to residential, transportation, industrial, urban, and other uses.



85 Million households participated in garden activities

- Spent an average of \$466 per household on lawns and gardens
- Total Lawn and Garden Retail Sales \$39.6 Billion
- From 1997-2002 Sales increased \$13 Billion
- People 35-44 men, college grads, 2 person households incomes over \$75,000



Statistics of US Businesses Landscaping

Employment size	Number of Firms	# of Employees	Annual Payroll (\$1,000)
Year 1998	64,584	363,906	
Year 1999	64,683	393,575	
Year 2000	66,331	415,873	9,770,825
Year 2001	72,504	446,000	11,258,488



Non-employer Statistics summarizes the number of establishments and sales or receipts of companies with no paid employees.

Year	Firms	Receipts (\$1,000)
1997	153,414	3,028,391 Billion
2000	172,141	4,313,250 Billion



National Gardening Survey

Questions By the Green Industry

Serv Hired	1997	1998	1999	2000	2001	2002
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
L/L Maint	14.3	13.7	14.9	16.3	17.8	19.4
L/ In Const	2.0	2.4	2.6	2.8	2.9	3.2
L/ Design	1.1	1.2	1.3	1.6	1.8	2.1
Tree Care	5.6	4.1	4.9	5.9	7.1	8.6
Total	22.4	21.4	22.1	22.9	23.8	24.7



Average \$ Spent

\$ Average Spent	1997	1998	1999	2000	2001	2002
	\$	\$	\$	\$	\$	\$
L/L Maint.	\$533	\$581	\$540	\$543	\$547	\$550
L/ In Const	\$1,772	\$2,630	\$2,825	\$3,035	\$3,260	\$3,502
L/ Design	\$889	\$742	\$879	\$1,043	\$1,236	\$1,465
Tree Care	\$434	\$411	\$421	\$431	\$441	\$452
Total Average House	\$647	\$855	\$925	\$1,000	\$1,082	\$1,170



Total \$ Spent

\$ TOL Spent	1997	1998	1999	2000	2001	2002
	Billion	Billion	Billion	Billion	Billion	Billion
L/L Maint	\$7.6	\$7.9	\$9.0	\$9.7	\$10.4	\$10.7
L/In Const	\$3.6	\$6.3	\$7.3	\$8.4	\$9.7	\$11.2
L/ Design	\$1.0	\$0.9	\$1.3	\$1.7	\$2.3	\$3.1
Tree Care	\$2.4	\$1.7	\$2.9	\$3.2	\$3.5	\$3.9
Total Spent Billion	\$14.6	\$16.8	\$20.5	\$23.0	\$25.9	\$28.9



Plan to Hire Professional Landscape, Lawn or Tree Care Services In 2003

	<u>Households</u>	
<u>Professional Services:</u>	%	Mil.
Lawn/Landscape Maintenance	16	17.4
Tree Care	7	7.6
Landscape Installation/Construction	3	3.3
Landscape Design	2	2.1
Don't Know	11	11.9
None	66	71.6
Plan to Hire Services (Net.)	23	24.9



2002 ECONOMIC CENSUS SERVICES TO BUILDINGS AND DWELLINGS

DUE DATE
FEBRUARY 12, 2003

Mail your completed form to:
U.S. CENSUS BUREAU
1201 East 10th Street
Jeffersonville, IN 47134-0001

AS-56105

Please read the accompanying information sheet(s) before answering the questions.

Need help or have questions about filling out this form?

Visit our Web site at www.census.gov/econhelp

Call 1-800-233-6136, between 8:00 a.m. and 8:00 p.m., Eastern time, Monday through Friday.

- OR -

Write to the address above. Include your 11-digit Census File Number (CFN) printed in the mailing address.

(Please correct any errors in this mailing address.)

YOUR RESPONSE IS REQUIRED BY LAW. Title 13, United States Code, requires businesses and other organizations that receive this questionnaire to answer the questions and return the report to the U.S. Census Bureau. By the same law, **YOUR CENSUS REPORT IS CONFIDENTIAL.** It may be seen only by persons sworn to uphold the confidentiality of Census Bureau information and may be used only for statistical purposes. Further, copies retained in respondents' files are immune from legal process.

- Use blue or black ink.
- Do not use pencil.
- Place an "X" inside the box.
- Please center numbers in their respective boxes. Examples:
- Do not put slashes through 0 or 7.

0 1 2 3 4 5 6 7 8 9

The reporting unit for this form is an establishment. An **establishment** is generally a single physical location where business is conducted or where services or industrial operations are performed. For further clarification, see information sheet(s).

1 MONTHS IN OPERATION

Mark "X" if None
2002
Number of months

Number of months in operation during 2002 (if none, mark "X" and go to 2) 0002

2 EMPLOYER IDENTIFICATION NUMBER

Is the Employer Identification Number (EIN) shown in the mailing address the same as the one used for this establishment on its latest 2002 Internal Revenue Service Form 941, Employer's Quarterly Federal Tax Return?

0021 Yes 0022 No - Enter current EIN (9 digits) → 0025

3 PHYSICAL LOCATION

A. Is this establishment's physical location the same as shown in the mailing address? (P.O. box and rural route addresses are not physical locations.)

0021 Yes

0022 No - Enter physical location

0025 Number and street			
0026	0027	0028	0029
City, town, village, etc.	State	ZIP Code	

B. Is this establishment physically located inside the legal boundaries of the city, town, village, etc.?

0041 Yes 0042 No 0043 No legal boundaries 0044 Do not know

C. Type of municipality where this establishment is physically located

0048 City, village, or borough 0047 Town or township 0046 Other or do not know



Kinds of information from new 2002 Economic Census

Sales Shipments, Receipts, or Revenue

Employment (number) and Payroll (amount)

Leased Employment and Payroll

Kind of Business or Activity

Lawn and garden services

Landscaping services

Other landscaping and maintenance services - *Specify*

Landscape architectural services

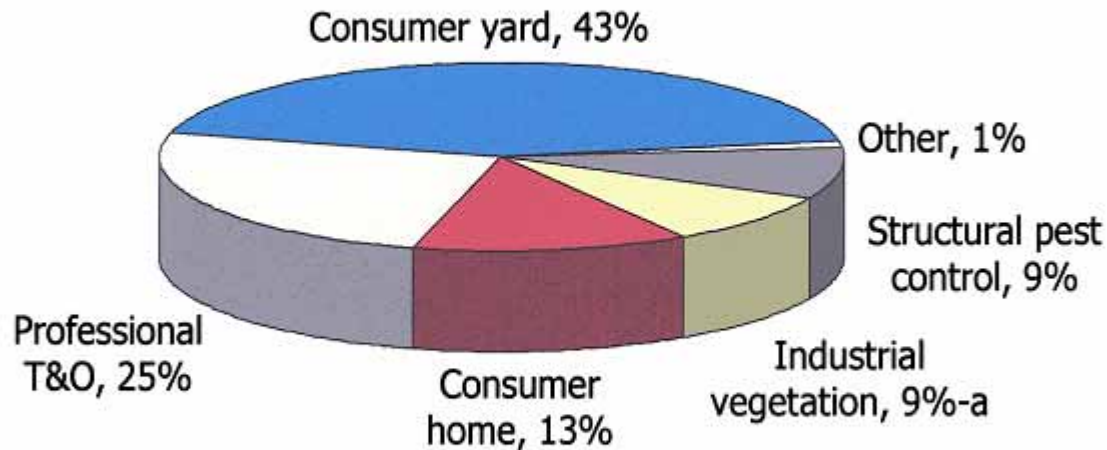
Class of Customer

Business, Individual

Ornamental shrub and tree services

PROFESSIONAL AND CONSUMER PESTICIDE AND FERTILIZER MARKETS

2001-02



Total market: \$4.7 Billion

a- Includes forestry and rangeland.



Quality of Life Benefits

- A. Athletic Fields
- B. Golf courses
- C. Physical and emotional benefits to homeowners who do their own landscape care “do people who garden live longer” horticultural therapy
- D. Heat mitigation (compared with pavement)
- E. Noise abatement (compared with pavement)



Economic Benefits

- A. Turf pesticides sales and advertising
- B. Turf nutrients sales and advertising
- C. Professional lawn care operators: sales employment
- D. Sod Farms: sales and employment
- E. Professional sports/stadiums
- F. Increase in home resale values
- G. Tourism, e.g. parks and grounds around DC mall and similar sites etc
- H. Golf courses: equity enhancements for associated homes and employment



Environmental Benefits

- A. Erosion control (e.g. Conservation Reserve Program)
- B. Cooling in urban areas
- C. Increase in biomass
- D. Oxygen production
- E. Pollutant filtration, with a focus on effluent
- F. Aquifer recharge, with a focus on effluent
- G. Wildlife habitat



Need quantitative assessment of benefits. Could be used to help balance regulatory and legislative actions.

A clean, concise initiative on this is presently impossible. The scope is complicated, data sources are uneven, and the industry is fragmented.

We need a strategy to identify critical factors and data sources. The strategy needs to enable a team to develop a more accurate and precise benefit assessment. It would also suggest how to integrate this information effectively.



Facts for which EPA doesn't have good data

- What application rates do homeowners actually use?
- What is the cost and performance of alternative turf management programs?
- What is the extent of use of bio pesticides by consumers and professionals?
- How does the value of environmental benefits change with different landscapes?
- How much does pesticide and fertilizer use contribute to overall non-point source pollution?



Green Industry/Turf Surveys

- 2004 Wisconsin Green Industry Survey
- 2003 New Jersey Turfgrass Survey (will be reported)
- 2003 New York Turfgrass Survey (to be sent out)
- 2002 Michigan Turfgrass Survey (to be sent)
- 2002 Georgia Golf Courses and Landscape Maintenance
- 2001 Iowa's Turfgrass Industry
- 2001 Illinois Green Industry
- 2001 Florida Economic Impact Survey of Nursery & Landscape Industry
- 2000 Kansas State Horticulture Survey
- 2000 Texas Economic Impact Study of Nursery & Landscape Industry
- 2000 Virginia Turfgrass Industry
- 1999 North Carolina Turfgrass Industry
- 1998 Arizona Green Industry Survey
- 1999 Wisconsin Turfgrass Industry Survey
- 1998 Missouri Turfgrass Economic Impact Survey
- 1998 New England Environmental Horticulture Industry
- 1997 Florida's Environmental Horticulture Industry
- 1997 Oregon Nursery and Greenhouse Industry Survey
- 1997 Louisiana Nursery and Turf Crop Survey
- 1996 Maryland Turfgrass Survey
- 1996 Mississippi Turfgrass Industry
- 1996-97 Washington State Landscape and Nursery Industry Survey
- 1993-97 Industry Information and 1998 Outlook
- 1996 Ohio Nursery Industry Survey
- 1995-96 U.S. Landscape Tree Planting Survey
- 1995 Albuquerque, New Mexico Potential environmental and economic impacts of turfgrass
- 1995 Value of Louisiana's Green Industry
- 1994 Arizona Green Industry Study



Green Industry/Turf Surveys Cont

- 1994 Kansas Turfgrass Survey
- 1994 North Carolina Turfgrass Survey
- 1994 South Carolina Golf Course Study
- 1994 South Carolina Ornamental Horticulture and Turfgrass Study
- 1992/94 Kansas State Horticulture Survey
- 1993 Economic Contribution of Colorado's Green Industry
- 1993 Tennessee Nursery and Floriculture Survey
- 1990 Michigan Nursery and Landscape Industry Survey
- 1989 Ohio Turfgrass Survey
- 1989 Kentucky Turfgrass Survey
- 1989 Pennsylvania Turfgrass Survey
- 1988 Michigan Turfgrass Industry Report
- 1987 Oklahoma Turfgrass Survey
- 1986 North Carolina Turfgrass Survey
- 1985 New Jersey Turfgrass Survey
- 1984 Rhode Island Value of Turf to the Economy
- 1978 Oklahoma Turfgrass Survey
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Lobbying- Education on the “Economic Importance of Lawn/Landscape Industry”





EVERGREEN FOUNDATION

National Campaign

“To raise the awareness of the environmental, economic and lifestyle benefits of landscapes and promote the significance of those who preserve and enhance green spaces at home, work and play”



"More Information"

National Gardening Survey 2002
1100 Dorset Street
South Burlington, Vermont 05403
Bruce Butterfield 800-538-7476

Environmental & Turf Services Inc
Stewart Z. Cohen 301- 933-4700

US Census Bureau
2002 Economic Census Survey

Kline & Company, Inc.
Overlook at Great Notch
150 Clove Road, #410
Little Falls, NJ 07424-0410
Telephone: (973) 435-6262
Fax: (973) 435-6291

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