

# Weather, Not Economy, Remains the Primary IGC Success Factor

After the economic meltdown this fall, many in the industry waited with bated breath to see what the effect would be on the independent garden center industry. While there was a knee-jerk reaction among some to hunker down and await "the end," many IGCs have taken the temporary slowdown to improve their stores and their business practices.

This was the setting we faced as we compiled this year's *Nursery Retailer* IGC 100 report, the industry's premier ranking. We strive with this research project to identify and rank the *crème de la crème*. Instead of dubiously subjective "revolutionary" listings, *Nursery Retailer's* IGC 100 report is the "take it to the bank" study. These are the facts, compiled and analyzed to provide meaningful insights into our IGC market and the state of our industry. The IGC 100 is the definitive standard that *Nursery Retailer* has been proud to compile with you for 25 years.

Overall, this year we are reassured by our findings. While there was some softness, and in some cases declines, many IGCs held their own in 2008 and maintained their local marketshare.

We share the outlook of many of our surveyed firms that, given decent spring weather, IGCs will do just fine in the current recessionary environment. With consumers staying home and seeking more affordable comforts, interest in gardening will grow. IGCs are ideally positioned as locally owned businesses to capitalize on this demand in 2009.

Congratulations to the IGC 100 garden centers, the true leaders of the industry! You shine as a bright light for all of us.

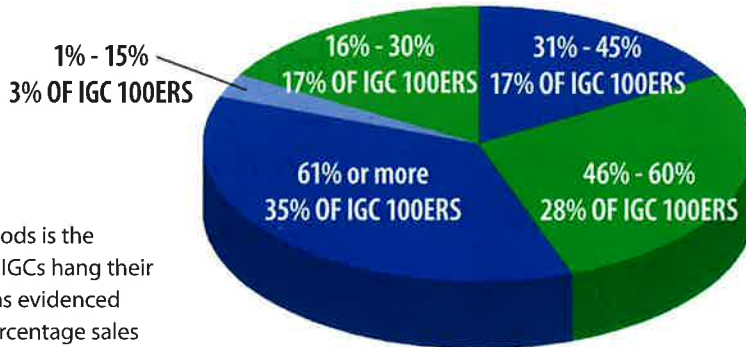
These firms and their principals will be invited to participate in a special IGC 100 recognition event at the 2009 Independent Garden Center Show, August 18-20 at Chicago's Navy Pier. - *Jeff Morey, Publisher*



**The First and Only  
Annual Ranking of  
Independent Sales -  
25 Years of Leadership**

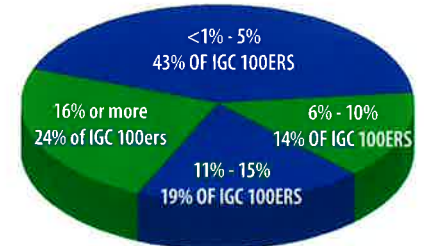
# Category Comparison among IGC 100ers

## Green Goods

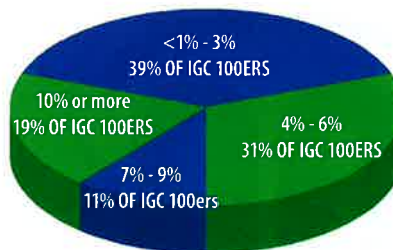


Green goods is the category IGCs hang their hats on, as evidenced in this percentage sales breakdown among IGC 100ers. For more than half of the nation's leading independents, green goods account for 50 percent or more of overall sales. Landscaping comes in next as the No. 2 money-maker.

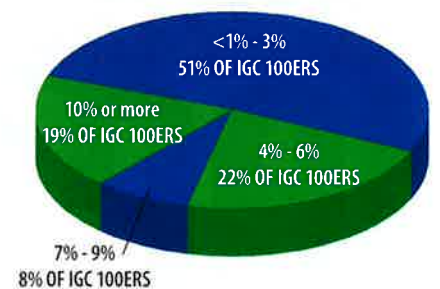
## Landscaping



## Fertilizers

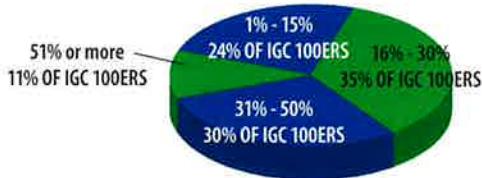


## Controls

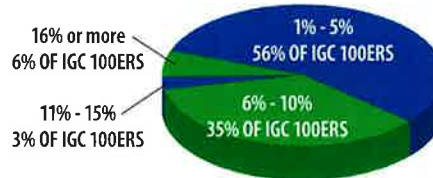


# Bedding Plants No. 1 in Green Goods

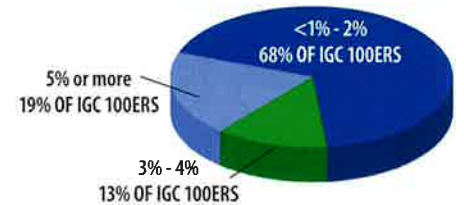
## Bedding Plants



## Foliage/Houseplants



## Bulbs



Bedding plants are the biggest sellers in green goods among IGC 100ers. Next up is foliage, which has seen a resurgence in popularity in recent years. Bulbs come in quite lower, perhaps because they're considered more of a specialty in this age of instant-results gardeners.

# Containers/Planters No. 1 in Accessories

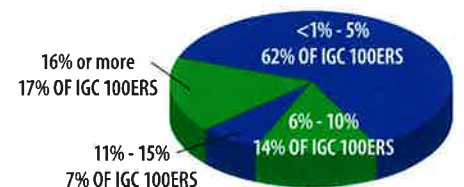
## Containers/Planters



## Gifts/Decor/Lawn Decor



## Water Features



It's close, but Containers/Planters edge out Gifts/Decor/Lawn Decor in the accessories category. Water features check in a distant third.

Rank	Company	\$Million Sales	'08 Rank/ % Sales Change	Total Stores	Website Address	Main Office/Store Locations/Comments
1.	Armstrong Garden Centers/Pike Nurseries	\$123.0	2/46%	49	www.armstronggarden.com / www.pikenursery.com	CA/CA, GA/Acquired Pike Nurseries
2.	Stein Gardens & Gifts	\$74.8	3/2%	15	www.steingardensandgifts.com	WI/WI
3.	Star Nursery	\$68.0	4/-3%	11	www.starnursery.com	NV/AZ, NV, UT/*
4.	Meadows Farms Nurseries	\$49.9	5/-8%	23	www.meadowsfarms.com	VA/MD, VA, WV
5.	Calloway's Nursery	\$44.3	6/-5%	18	www.calloways.com	TX/TX
6.	The Bruce Company of Wisconsin	\$44.0	7/-1%	1	www.bruceco.com	WI/WI/*
7.	Petitti Garden Centers	\$43.1	14/NA	7	www.petittigardencenters.com	OH/OH
8.	Green Thumb-Green Arrow	\$39.0	8/-3%	7	www.supergarden.com	CA/CA/*
9.	Earl May Seed & Nursery	\$35.0	11/0%	34	www.earlmay.com	IA/IA, KS, MO, NE
10.	Gertens	\$34.1	12/0%	1	www.gertens.com	MN/MN/*
11.	Bordine Nursery	\$33.0	10/-6%	4	www.bordines.com	MI/MI/*
12.	SummerWinds Garden Centers	\$32.2	9/-13%	12	www.summerwindsgc.com	ID/AZ, CA, MO
13.	Mahoney's Garden Centers	\$31.4	15/-5%	8	www.mahoneysgarden.com	MA/MA
14.	Stauffers of Kissel Hill	\$30.1	23/35%	8	www.skh.com	PA/PA/Acquired Country Market Nursery
15.	Bachman's	\$28.7	17/-6%	8	www.bachmans.com	MN/MN
16.	Chalet	\$26.9	18/-6%	1	www.chaletnursery.com	IL/IL/*
17.	Adams Fairacre Farms	\$25.9	20/1%	3	www.adamsfarms.com	NY/NY
18.	Homestead Gardens	\$24.4	19/-8%	1	www.homesteadgardens.com	MD/MD
19.	Gale's GC/Donzell's Flower and GC	\$23.7	22/-3%	5	www.galesgarden.com / www.donzells.com	OH/OH
20.	Roger's Gardens	\$23.0	21/-6%	1	www.rogersgardens.com	CA/CA
	Strader's Garden Centers	\$23.0	25/5%	6	www.straders.net	OH/OH
	Waterloo Gardens	\$23.0	13/-32%	3	www.waterloogardens.com	PA/PA/Closed one store/*
23.	English Gardens	\$22.8	16/NA	7	www.englishgardens.com	MI/MI/*
24.	Oakland Nursery	\$22.3	24/1%	3	www.oaklandnursery.com	OH/OH
25.	Suburban Lawn & Garden	\$21.0	26/0%	2	www.suburbanlawnandgarden.com	MO/MO
26.	Mariani Gardens	\$19.9	28/5%	1	www.marianigardens.com	NY/NY/Includes high-end custom landscaping
27.	Martin Viette Nurseries	\$18.5	29/0%	1	www.martinviette.com	NY/NY
28.	Alsip Home & Nursery	\$18.4	27/-7%	2	www.alsipnursery.com	IL/IL, IN
29.	Prairie Gardens/Jeffrey Alans	\$17.5	30/-3%	5	www.prairiegardens.com	IL/IL/*
30.	Sloat Garden Centers	\$17.4	31/0%	9	www.sloatgardens.com	CA/CA
31.	Porter's Nurseries	\$16.7	49/NA	2	NA	FL/FL/*
32.	Molbak's	\$15.0	32/-9%	1	www.molbaks.com	WA/WA/*
33.	American Plant	\$14.0	34/-3%	3	www.americanplant.net	MD/MD/*
	Hicks Nurseries	\$14.0	33/-4%	1	www.hicksnurseries.com	NY/NY/*

Survey Methods: Leading garden retailers were contacted for operational data. Only independent garden centers were considered for the listing - no big boxes, mass merchants/discounters or catalogers were included. These sales figures and related data were provided by the retail firms. For firms electing not to participate in the survey, an estimate was made based on various trade and financial sources; all such estimates are noted with an asterisk (\*) in this ranking.

## Alpha/State Listed Firms Company/State, Main Office ... Rank/\$Million Sales

Adams Fairacre Farms/NY.....17/\$25.9	Armstrong Garden Centers/ Pike Nurseries/CA ..... 1/\$123.0	Calloway's Nursery/TX..... 5/\$44.3
Al's Garden Center/OR ..... 35/\$13.5	Ash's Flower Farm/NJ ..... 90/\$5.2	Chalet/IL ..... 16/\$26.9
Alsip Home & Nursery/IL..... 28/\$18.4	Ashcombe Farm & Greenhouses/PA ..... 87/\$5.4	DeHaven Home & Garden
American Plant/MD..... 33/\$14.0	Bachman's/MN..... 15/\$28.7	Showplace/OH ..... 67/\$7.8
Anderson's Home & Garden	Behnke Nurseries/MD ..... 40/\$11.5	DeWayne's Home & Garden
Showplace/VA..... 94/\$4.9	Berns Garden Center/OH ..... 74/\$6.8	Showplace/NC ..... 98/\$4.6
Arapahoe Acres Nursery/CO..... 74/\$6.8	Bob's Garden Center/NJ ..... 95/\$4.8	Dundee Nursery/MN ..... 90/\$5.2
Armstrong Brothers Capital Nursery/CA ..... 51/\$9.7	Bordine Nursery/MI..... 11/\$33.0	Earl May Seed & Nursery/IA ..... 9/\$35.0
		Echter's/CO ..... 88/\$5.3



Rank	Company	\$Million Sales	'08 Rank/ % Sales Change	Total Stores	Website Address	Main Office/Store Locations/Comments
35.	Al's Garden Center	\$13.5	35/-4%	3	www.als-gardencenter.com	OR/OR
36.	Fruit Basket Flowerland	\$13.0	36/-6%	3	www.myflowerland.com	MI/MI
37.	Pasquesi Home and Gardens	\$12.8	37/-6%	2	www.pasquesi.com	IL/IL
38.	Green View Companies	\$12.0	NA/NA	5	www.greenview.com	IL/IL/*
	Hewitt's Garden Centers	\$12.0	82/NA	8	www.hewitts.com	NY/NY/*
40.	Behnke Nurseries	\$11.5	42/-8%	2	www.behnkes.com	MD/MD
	Vinny's Home & Garden Showplace	\$11.5	43/-4%	2	www.vinnysshowplace.com	CT/CT/*
42.	McDonald Garden Center	\$11.4	39/-12%	3	www.mcdonaldgardencenter.com	VA/VA
43.	Sid's Greenhouses	\$11.3	41/-10%	2	www.sidsonline.com	IL/IL
	Valley View Farms Garden Center & Nursery	\$11.3	43/-6%	1	www.valleyviewfarms.com	MD/MD
45.	Gethsemane Garden Center	\$11.2	45/-3%	1	www.gethsemanegardens.com	IL/IL
46.	TLC Florist & Greenhouses	\$10.9	48/3%	2	www.tlcgarden.com	OK/OK
47.	Young's Nurseries	\$10.4	47/-7%	2	www.youngsnurseries.com	CT/CT
48.	Louisiana Nursery Home & Garden Showplace	\$10.2	50/-1%	4	www.louisiananursery.com	LA/LA
49.	Navlet's Garden Centers	\$10.0	60/NA	4	www.navletsgardens.com	CA/CA/Closed Fremont store/*
50.	Southern Homes & Gardens	\$9.8	51/-2%	2	www.southernhomesandgardens.com	AL/AL/*
51.	Armstrong Brothers Capital Nursery	\$9.7	46/-14%	3	www.capitalnursery.com	CA/CA
52.	Mulhall's	\$9.2	54/-1%	1	www.mulhalls.com	NE/NE
53.	Milaeger's	\$9.0	38/NA	2	www.milaegers.com	WI/WI/*
	Natorp's	\$9.0	53/-4%	2	www.natorp.com	OH/KY, OH/*
55.	Frank Otte Nursery & Garden Center	\$8.9	56/-1%	7	NA	KY/KY
	Houston Plants & Garden World	\$8.9	52/-9%	3	NA	TX/TX
57.	Hoerr Nursery	\$8.8	56/-2%	1	www.hoerrnursery.com	IL/IL/*
58.	Hawks Nursery	\$8.6	61/0%	1	www.hawksnursery.com	WI/WI
	Watson's Garden Center	\$8.6	55/-5%	1	www.watsonsgarden.com	MD/MD
60.	Portland Nursery	\$8.5	61/-1%	2	www.portlandnursery.com	OR/OR
61.	Trax Farms	\$8.4	61/-2%	1	www.traxfarms.com	PA/PA/*
62.	Tagawa Gardens	\$8.3	68/5%	1	www.tagawagardens.com	CO/CO
63.	Swansons	\$8.1	64/-5%	1	www.swansonsnursery.com	WA/WA/Excludes cafe & gift shop
	Walter Andersen Nurseries	\$8.1	56/-10%	2	www.walterandersen.com	CA/CA
65.	Russell's Garden Center	\$8.0	59/-5%	1	www.russellsgardencenter.com	MA/MA
	Sky Nursery	\$8.0	65/-2%	1	www.skynursery.com	WA/WA/*
67.	DeHaven Home & Garden Showplace	\$7.8	79/22%	2	www.dehavenshowplace.com	OH/OH

### Alpha/State Listed Firms Company/State, Main Office ... Rank/\$Million Sales

English Gardens/MI.....	23/\$22.8	Hall's Nurseries & Super GCs/FL.....	85/\$5.5	Mariani Gardens/NY.....	26/\$19.9
Evergreen Nursery/CA.....	72/\$7.0	Hawks Nursery/WI.....	58/\$8.6	Martin Viette Nurseries/NY.....	27/\$18.5
Feeney's/PA.....	99/\$4.5	Heartland Nursery/MO.....	97/\$4.7	McDonald Garden Center/VA.....	42/\$11.4
Frank Otte Nursery & Garden Center/KY.....	55/\$8.9	Hewitt's Garden Centers/NY.....	38/\$12.0	McNaughton's Gardens/NJ.....	79/\$6.0
Fruit Basket Flowerland/MI.....	36/\$13.0	Hicks Nurseries/NY.....	33/\$14.0	Meadows Farms Nurseries/VA.....	4/\$49.9
Gale's GC/Donzell's Flower and GC/OH.....	19/\$23.7	Hillermann Nursery & Florist/MO.....	79/\$6.0	Menne Nursery/NY.....	81/\$5.8
Gertens/MN.....	10/\$34.1	Hoerr Nursery/IL.....	57/\$8.8	Milaeger's/WI.....	53/\$9.0
Gethsemane Garden Center/IL.....	45/\$11.2	Holdridge Home & Garden Showplace/CT.....	92/\$5.1	Molbak's/WA.....	32/\$15.0
Glover Nursery/UT.....	81/\$5.8	Homestead Gardens/MD.....	18/\$24.4	Mulhall's/NE.....	52/\$9.2
Green Thumb-Green Arrow/CA.....	8/\$39.0	Houston Plants & Garden World/TX.....	55/\$8.9	Natorp's/OH.....	53/\$9.0
Green View Companies/IL.....	38/\$12.0	Johnson's Garden Centers/KS.....	70/\$7.1	Navlet's Garden Centers/CA.....	49/\$10.0
Greenbrier Nurseries/VA.....	93/\$5.0	Louisiana Nursery Home & Garden Showplace/LA.....	48/\$10.2	Neighbors Home & Garden Center/PA.....	100/\$4.4
		Mahoney's Garden Centers/MA.....	13/\$31.4	Nicholson-Hardie Nursery & Garden Center/TX.....	69/\$7.3

Rank	Company	\$Million Sales	'08 Rank/ % Sales Change	Total Stores	Website Address	Main Office/Store Locations/Comments
68.	Patuxent Nursery	\$7.4	69/-5%	1	www.patuxentnursery.com	MD/MD
69.	Nicholson-Hardie Nursery & Garden Center	\$7.3	76/6%	2	www.nicholson-hardie.com	TX/TX
70.	Johnson's Garden Centers	\$7.1	71/0%	3	www.johnsonsgarden.com	KS/KS
	Orchard Nursery & Florist	\$7.1	65/-13%	1	www.orchardnursery.com	CA/CA
72.	Evergreen Nursery	\$7.0	40/NA	3	www.evergreennursery.com	CA/CA/Retail sales only/*
73.	Ray Wiegand's Nursery & Garden Center	\$6.9	65/-16%	1	www.wiegandsnursery.com	MI/MI
74.	Arapahoe Acres Nursery	\$6.8	72/-3%	1	www.arapahoeacres.com	CO/CO
	Berns Garden Center	\$6.8	72/-3%	1	www.bernsgardencenters.com	OH/OH/*
76.	Sam Bridge Nursery & Greenhouses	\$6.7	72/-4%	1	www.sambridge.com	CT/CT
77.	Paulino Gardens	\$6.5	78/0%	1	www.paulinogardens.com	CO/CO
78.	Skillins Greenhouses	\$6.3	70/-16%	3	www.skillins.com	ME/ME
79.	Hillermann Nursery & Florist	\$6.0	80/-5%	1	www.hillermann.com	MO/MO
	McNaughton's Gardens	\$6.0	85/-2%	2	www.mcnaughtongardens.com	NJ/NJ/Philadelphia metro area
81.	Glover Nursery	\$5.8	80/-8%	1	www.glovernursery.com	UT/UT
	Menne Nursery	\$5.8	87/2%	1	www.mennenursery.com	NY/NY
83.	Teas Nursery	\$5.6	93/10%	1	www.teasnursery.com	TX/TX
	Watson's Greenhouse & Nursery	\$5.6	82/-9%	1	www.watsonsgreenhouse.com	WA/WA
85.	Hall's Nurseries & Super Garden Centers	\$5.5	86/-5%	2	NA	FL/FL
	Wight's Home & Garden	\$5.5	72/-21%	1	www.wights.com	WA/WA
87.	Ashcombe Farm & Greenhouses	\$5.4	90/-2%	1	www.ashcombe.com	PA/PA
88.	Echter's	\$5.3	88/-6%	1	www.echters.com	CO/CO/*
	Village Green	\$5.3	88/-5%	2	www.villagegreenrockford.com	IL/IL
90.	Ash's Flower Farm	\$5.2	77/-22%	3	NA	NJ/NJ
	Dundee Nursery	\$5.2	NA/NA	2	www.dundeenursery.com	MN/MN
92.	Holdridge Home & Garden Showplace	\$5.1	90/-7%	3	www.holdridgegarden.com	CT/CT
93.	Greenbrier Nurseries	\$5.0	94/0%	2	www.greenbriernurseries.com	VA/VA, WV
94.	Anderson's Home & Garden Showplace	\$4.9	92/-5%	1	www.andersonsshowplace.com	VA/VA
95.	Bob's Garden Center	\$4.8	NEW	1	www.bobsgardencenters.com	NJ/NJ/*
	Under the Sun Garden Centers	\$4.8	100/4%	8	www.underthesungardencenters.com	OK/OK
97.	Heartland Nursery	\$4.7	96/-4%	1	www.heartlandnursery.com	MO/MO/*
98.	DeWayne's Home & Garden Showplace	\$4.6	94/-8%	1	www.dewaynes.com	NC/NC
99.	Feeney's	\$4.5	96/-8%	1	www.feeneys.com	PA/PA
100.	Neighbors Home & Garden Center	\$4.4	100/-4%	1	www.neighborsgarden.com	PA/PA

Oakland Nursery/OH .....24/\$22.3  
 Orchard Nursery & Florist/CA..... 70/\$7.1  
 Pasquesi Home and Gardens/IL.....37/\$12.8  
 Patuxent Nursery/MD.....68/\$7.4  
 Paulino Gardens/CO.....77/\$6.5  
 Petitti Garden Centers/OH .....7/\$43.1  
 Porter's Nurseries/FL .....31/\$16.7  
 Portland Nursery/OR ..... 60/\$8.5  
 Prairie Gardens/Jeffrey Alans/IL .....29/\$17.5  
 Ray Wiegand's Nursery &  
 Garden Center/MI ..... 73/\$6.9  
 Roger's Gardens/CA.....20/\$23.0  
 Russell's Garden Center/MA..... 65/\$8.0  
 Sam Bridge Nursery &  
 Greenhouses/CT..... 76/\$6.7

Sid's Greenhouses/IL .....43/\$11.3  
 Skillins Greenhouses/ME..... 78/\$6.3  
 Sky Nursery/WA..... 65/\$8.0  
 Sloat Garden Centers/CA .....30/\$17.4  
 Southern Homes & Gardens/AL .....50/\$9.8  
 Star Nursery/NV ..... 3/\$68.0  
 Stauffers of Kissel Hill/PA ..... 14/\$30.1  
 Stein Gardens & Gifts/WI.....2/\$74.8  
 Strader's Garden Centers/OH.....20/\$23.0  
 Suburban Lawn & Garden/MO ..... 25/\$21.0  
 SummerWinds Garden Centers/ID..... 12/\$32.2  
 Swansons/WA ..... 63/\$8.1  
 Tagawa Gardens/CO ..... 62/\$8.3  
 Teas Nursery/TX ..... 83/\$5.6  
 The Bruce Company of Wisconsin/WI..... 6/\$44.0

TLC Florist & Greenhouses/OK.....46/\$10.9  
 Trax Farms/PA.....61/\$8.4  
 Under the Sun  
 Garden Centers/OK..... 95/\$4.8  
 Valley View Farms Garden Center &  
 Nursery/MD.....43/\$11.3  
 Village Green/IL.....88/\$5.3  
 Vinny's Home & Garden  
 Showplace/CT .....40/\$11.5  
 Walter Andersen Nurseries/CA..... 63/\$8.1  
 Waterloo Gardens/PA.....20/\$23.0  
 Watson's Garden Center/MD..... 58/\$8.6  
 Watson's Greenhouse & Nursery/WA..... 83/\$5.6  
 Wight's Home & Garden/WA..... 85/\$5.5  
 Young's Nurseries/CT .....47/\$10.4