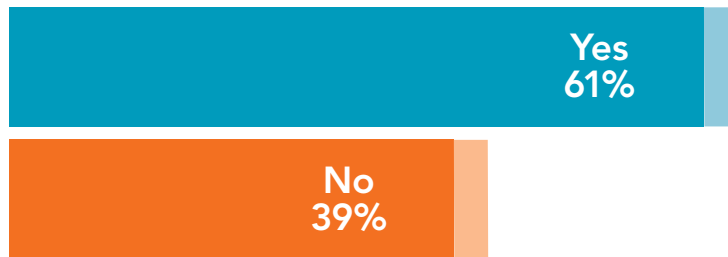


# FINDING

With input from 300 participants, results from the 2011 Lawn & Garden Retailer/OFA Pulse of the Industry survey provided us with a glimpse into an industry that faced a spring parade rained on by a tough economy and, of course, poor weather conditions.

## the pulse

DO YOU HAVE A POS SYSTEM?



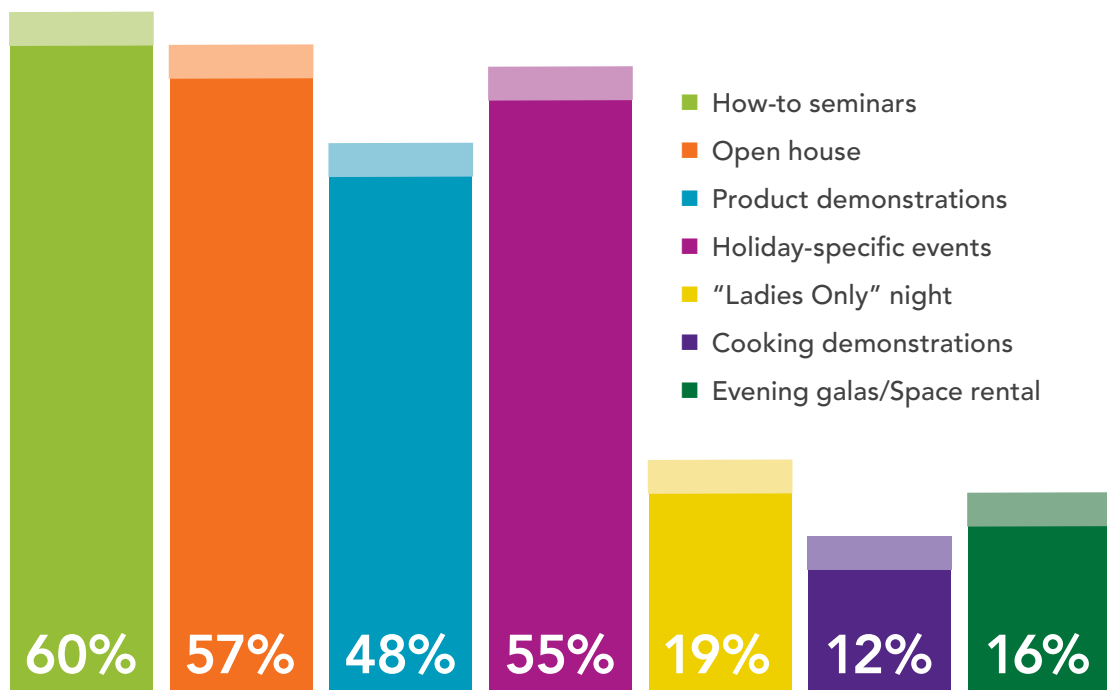
DO YOU THINK THE INDUSTRY WILL BE BETTER OR WORSE IN THREE YEARS?

BETTER

56%

“Edibles in our industry will continue to grow. Annuals and perennials will only grow if we push container gardening. Fewer and fewer people are planting annuals in the ground — more seem to be using patio containers with some even in their landscapes and not just on their porches.”

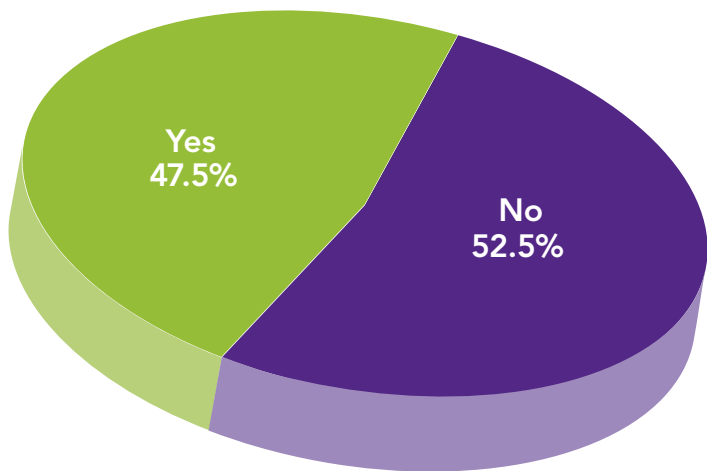
WHICH OF THE FOLLOWING EVENTS DO YOU OFFER?



“If we can upgrade our industry and become technologically savvy, I think the industry will be better. However, most garden centers in my area and the customers we currently service are not interested in the new technology. Bringing in the young consumers is proving challenging.”

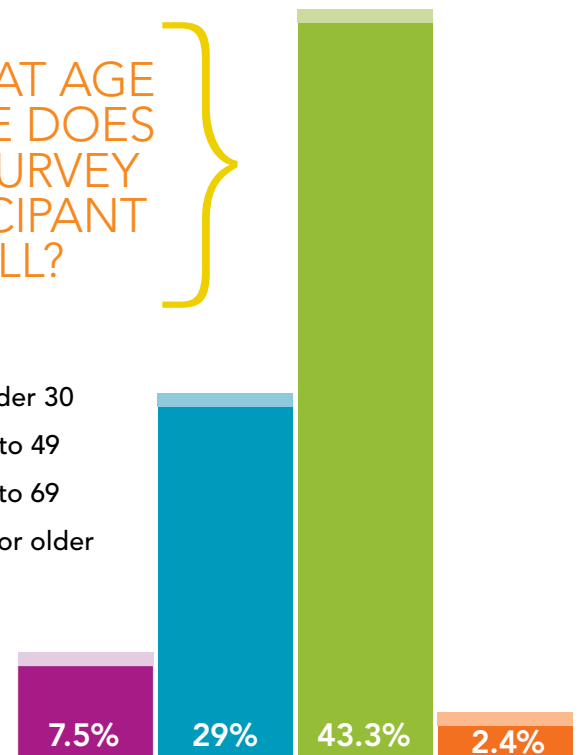
“The industry will be what we make of it if we are proactive. There is no reason in today’s economy that every garden center shouldn’t be running 25 percent plus gains. The business is out there if we just wake up and get it.”

HAVE YOU PARTNERED WITH OTHER LOCAL BUSINESSES IN YOUR COMMUNITY FOR EVENTS?

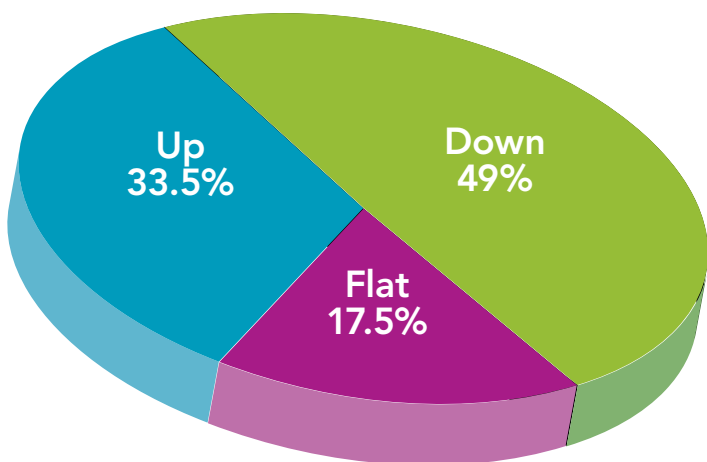


IN WHAT AGE RANGE DOES THE SURVEY PARTICIPANT FALL?

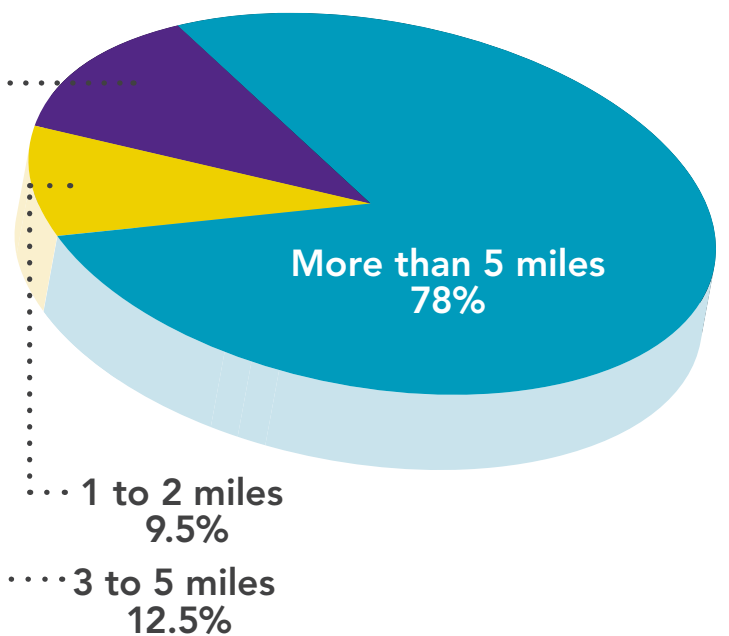
- Under 30
- 30 to 49
- 50 to 69
- 70 or older



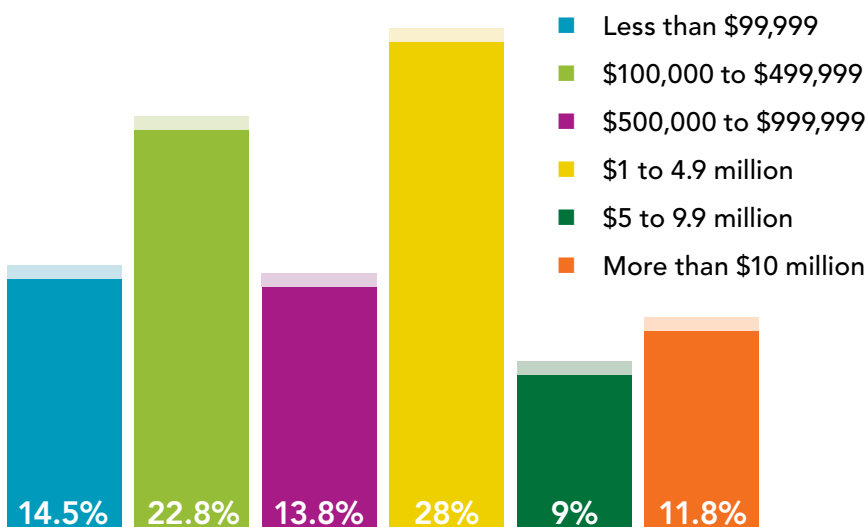
HOW WERE YOUR SALES FOR THE FIRST FIVE MONTHS OF 2011? (YEAR TO DATE)



HOW LONG HAVE YOU BEEN COMPETING WITH THE NEAREST BIG BOX RETAILER?



WHAT WERE YOUR COMPANY'S TOTAL SALES IN 2010?



“The independent garden center model will be worse going forward. There are more and more temporary outlets for our product every spring — not only within box stores but within a community that has a stagnant population. There is an overabundance of product, which causes a price war of sorts with little concern for quality.”