

NEWS, NOTES & QUOTES



National Newsletter of the Mulch & Soil Council

DECEMBER 2023

Seasons Greetings



On behalf of the Board of Directors and staff of the Mulch & Soil Council, we want to **THANK YOU** for your participation and support this past year. Without your membership, we would not be able to work with Federal and State agencies, provide industry education and training, respond to industry issues or develop industry guidelines to help protect and advance your business opportunities. We look forward to continuing to be of service to you and representing the industry's interests for 2023.

###

HOLIDAY CLOSING

With predictions for millions of people traveling over the next few weeks, we encourage everyone to drive safely. The MSC office will be closed December 23 and reopen January 2. We look forward to serving you in the coming year.

###

COUNCIL NEWS

JANUARY COMMITTEE MEETINGS

The next meetings of MSC committees will be held in Tampa, FL, on Wednesday afternoon, January 24, 2024, starting at 1:00pm. The *tentative* schedule of events include:

1:00pm-2:30pm – MSC All-Natural Certification Sub-Committee

2:45pm-4:00pm – Bulk Measure Committee

4:15pm-5:00pm – MSC Legislative & Regulatory Committee

Unless otherwise announced, all meetings of the Mulch & Soil Council are open to any member in good standing; however, a committee may call an executive session on advice of counsel to discuss sensitive issues when necessary. Participation of observers in discussions is determined by the committee chair. If you plan to attend any or all committee



meetings, we would appreciate your letting the office know in order for us to allow for sufficient seating space for everyone. Contact membership@mulchandsoilcouncil.org to reserve your seat.

###

**JANUARY
BOARD
MEETING**



The MSC Board of Directors will convene its next meeting on Thursday, January 25, at 8:00a.m.-12:00p.m. in Tampa, FL. If any member has an issue they would like the Board to consider, please submit your topic to Executive Director Robert LaGasse at execdir@mulchandsoilcouncil.org no later than 5:00p.m. Central Time on January 4th.

All meetings of the MSC Board of Directors are open to any member in good standing; however, the Board may call an executive session on advice of counsel to discuss sensitive issues when necessary. Participation of observers in discussions is determined by the Board president. If you plan to attend, we would appreciate your letting the office know in order for us to allow enough seating space for everyone. To reserve your space, contact membership@mulchandsoilcouncil.org to register.

###

**CONSUMER
SURVEY
REPORT**

**NATIONAL CONSUMER SURVEY REPORT
ON LAWN & GARDEN SOILS**

In the Spring of 2023, the Mulch & Soil Council (MSC) commissioned Technometrica Market Intelligence (TMI) to conduct a national consumer survey to determine how much mulch is bought annually by households in the U.S. The purpose of that survey was to update mulch market data originally collected in 2012. The results of that study were published in the August 2023 NNQ Newsletter and showed the consumer household mulch market had grown from ~71MM cu yd in 2012 to ~97MM cu yd in 2023 representing an overall growth of 36.6% or an average of 3.3% / year.

While the data on mulch usage was based on actual consumer survey responses, estimates of the soils market were based only on industry anecdotal guestimates placing the market for consumer household soil purchases at ~28.4MM cu yd / year. In November, the MSC Industry Statistics Committee conducted a national consumer household survey on the purchase and use of soil products. TMI was again commissioned to assist the committee and conduct the survey.

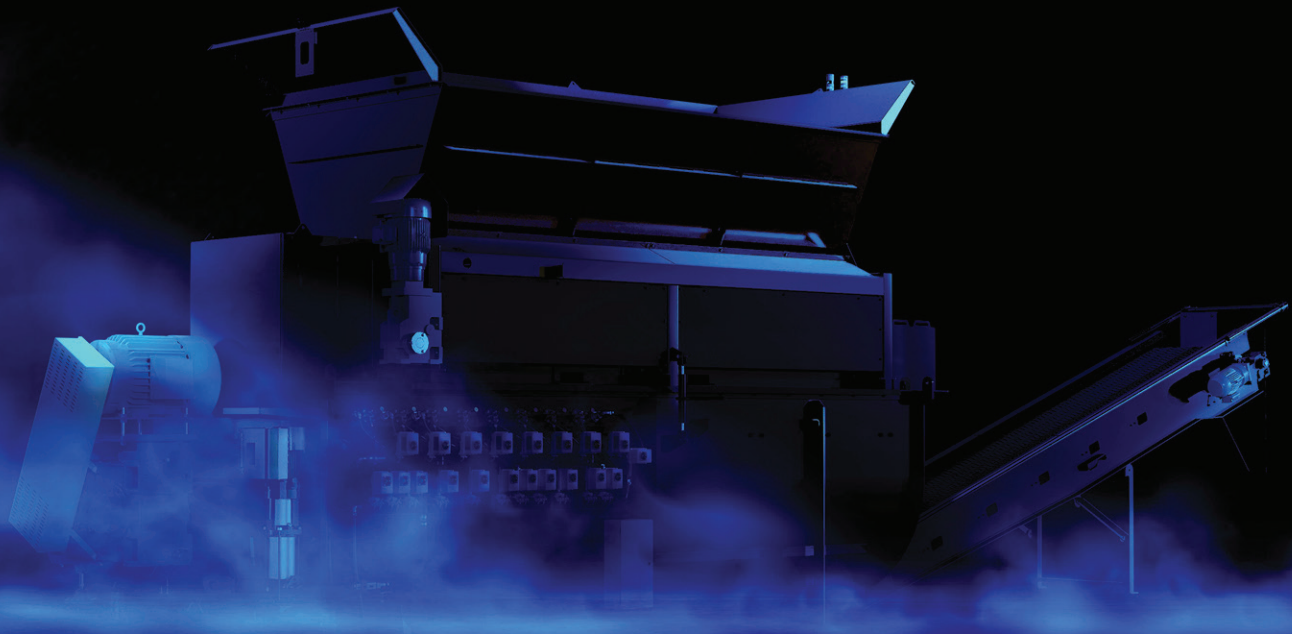
The survey was done on November 1 – 3, 2023. A total of 1,400 responses were received giving a credibility interval of +/- 2.7% at 95% confidence.

HIGHLIGHTS:

- 75% of American households have a yard or garden.
- 56% of gardeners purchased soil in 2022. Soil purchase was most common in the Northeast and the South
- Most gardeners (53%) bought or plan to purchase soil this year. Similar to 2022, the Northeast and the South led soil purchases in 2023.
- 47% of gardeners are stable soil buyers, having bought soil in both years. Northeast and South have the largest shares of stable buyers.
- Bags are the preferred method of purchase. The median purchase is 6.9 bags a year. The median bulk purchase is 11.4 cubic yards.
- Garden/landscape soil is the most-purchased soil type, followed by potting soil and topsoil.
- The data shows a three-way tie in terms of usage, with roughly one-half using soil for three purposes: indoor and outdoor containers (54%), raised garden beds (53%), and general landscape (49%).



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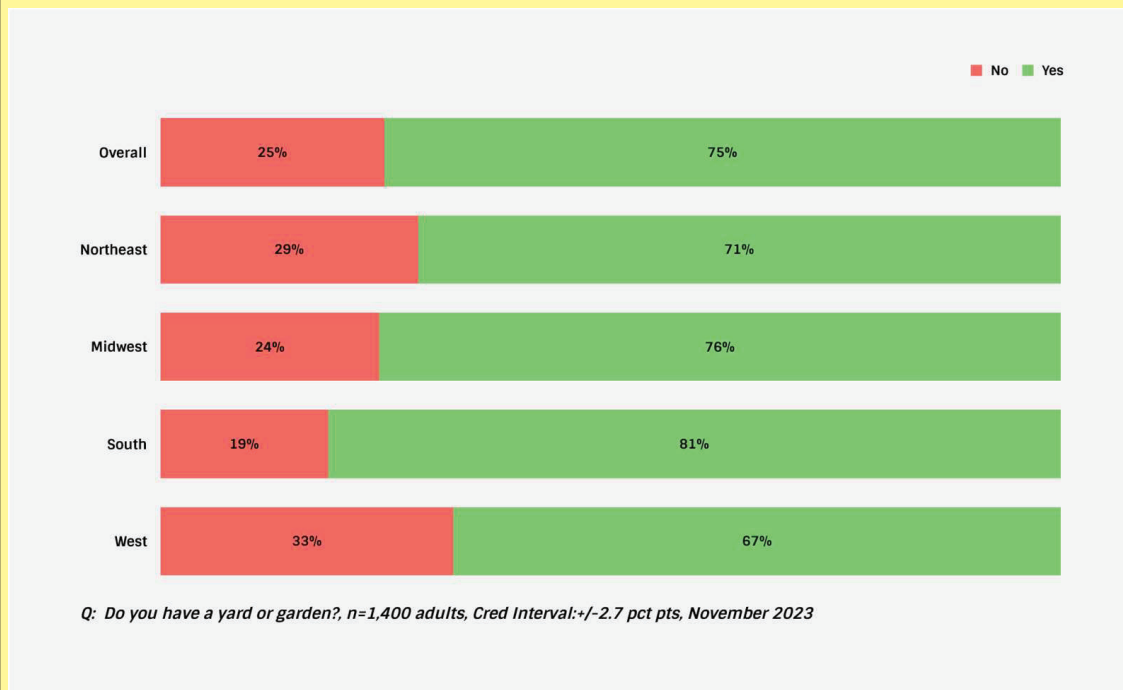
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Question #1: Do You Have A Yard or Garden?

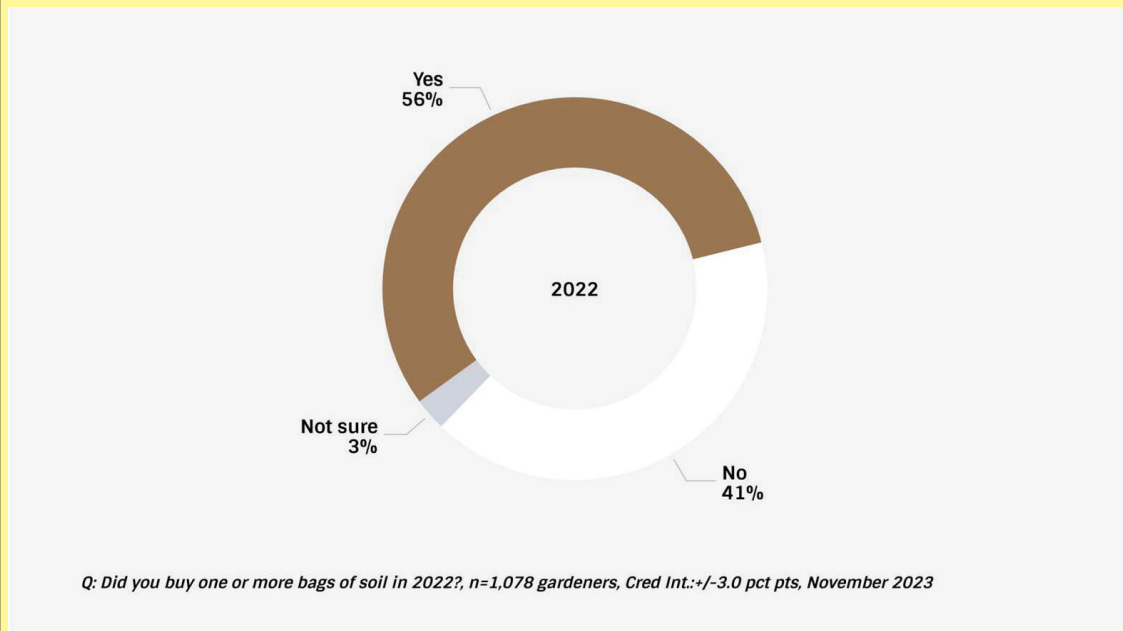
Our first question identifies who among the 124MM households in the 2022 U.S. Census are potential buyers of soil products because they have a yard or garden. Overall, we found that 75% of households have a yard or garden representing a potential consumer market of 93,008,244 **HOUSEHOLDS** (not people).

- Garden/yards are most common among Southerners(81%) and Midwesterners (76%).
- Nearly three-fourths (71%) of Northeasterners and 67% of Westerners have a yard or garden.



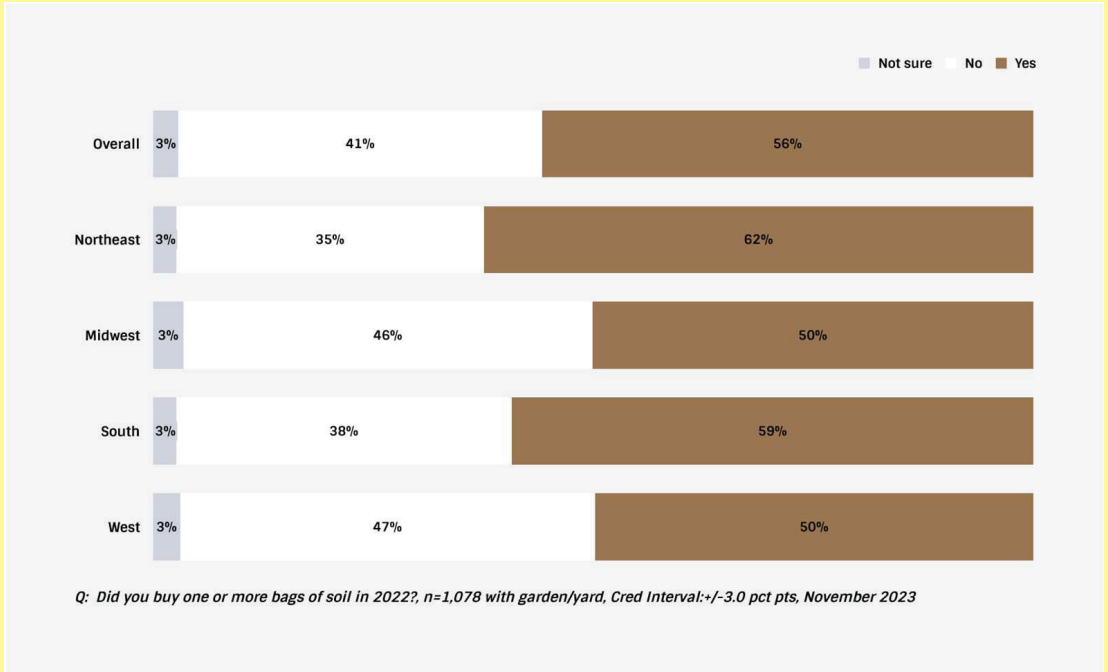
Question #2: Did You Buy One Or More Bags Of Soil In 2022?

- More than half (56%) of households with a yard or garden bought soil products in 2022. That would mean ~52MM households.



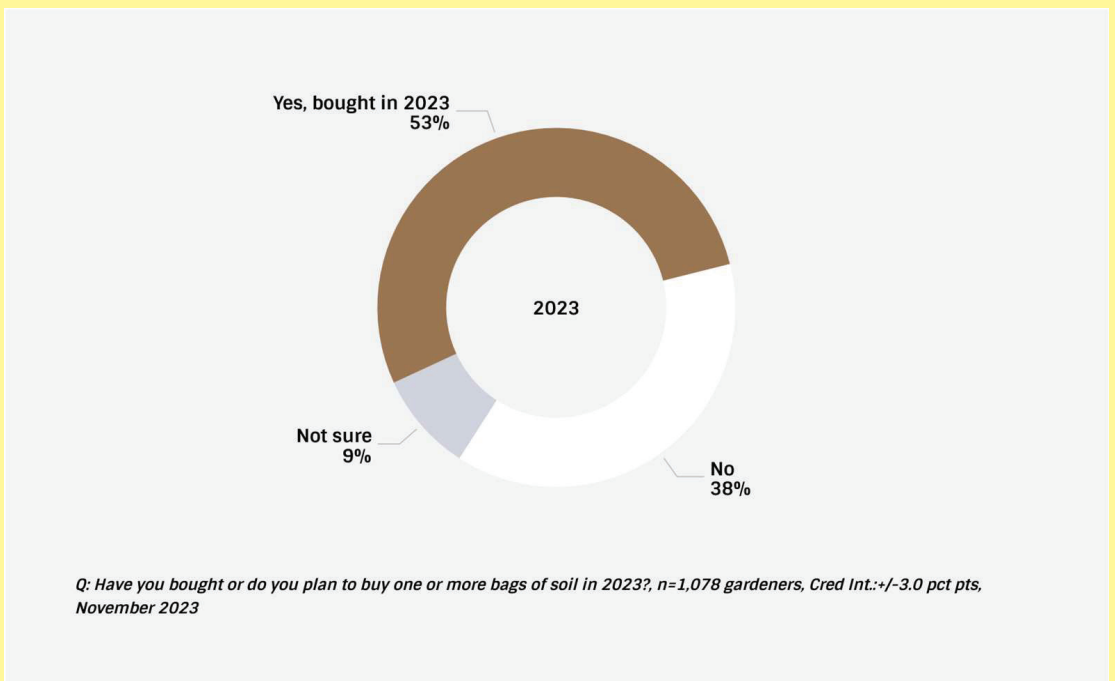
CONSUMER SURVEY REPORT

- Northeast was the highest at 62%, followed by the South at 59%.
- Both the West and the Midwest posted 50%.



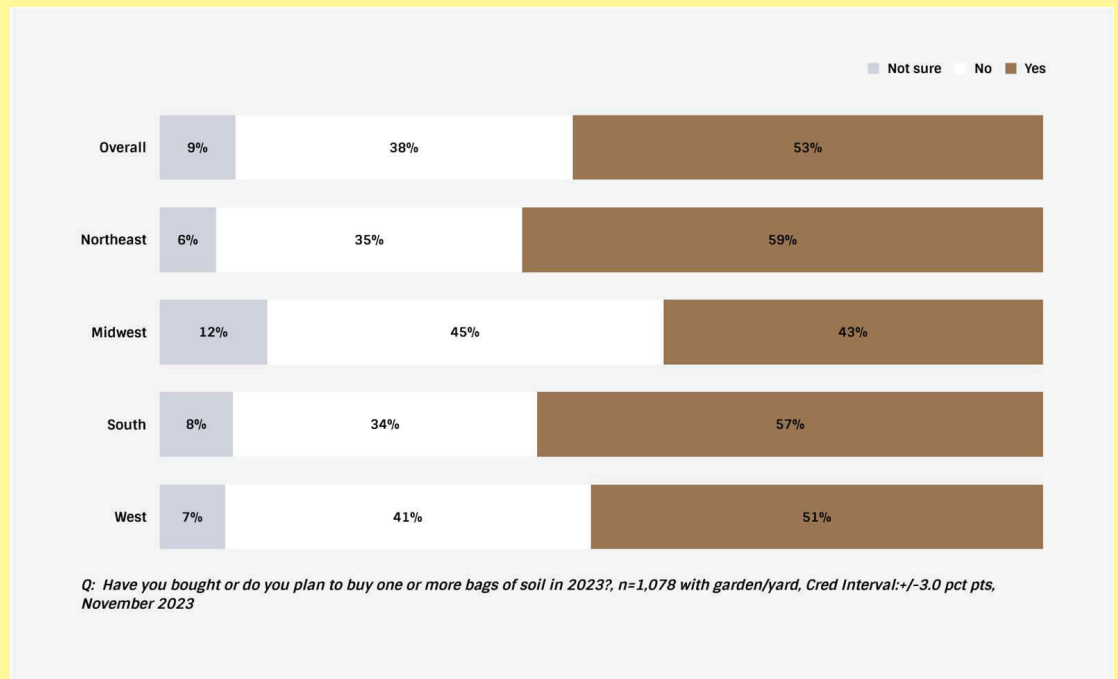
Question 3: Have You Bought Or Do You Plan To Buy One Or More Bags Of Soil In 2023?

- Compared to 2022 (56%), almost the same number of gardeners (53%) bought/plan to buy soil in 2023 — another ~49.3MM households.



- In 2023, the rate of soil purchase is 59% in the Northeast, 57% in the South, 51% in the West, and 43% in the Midwest.

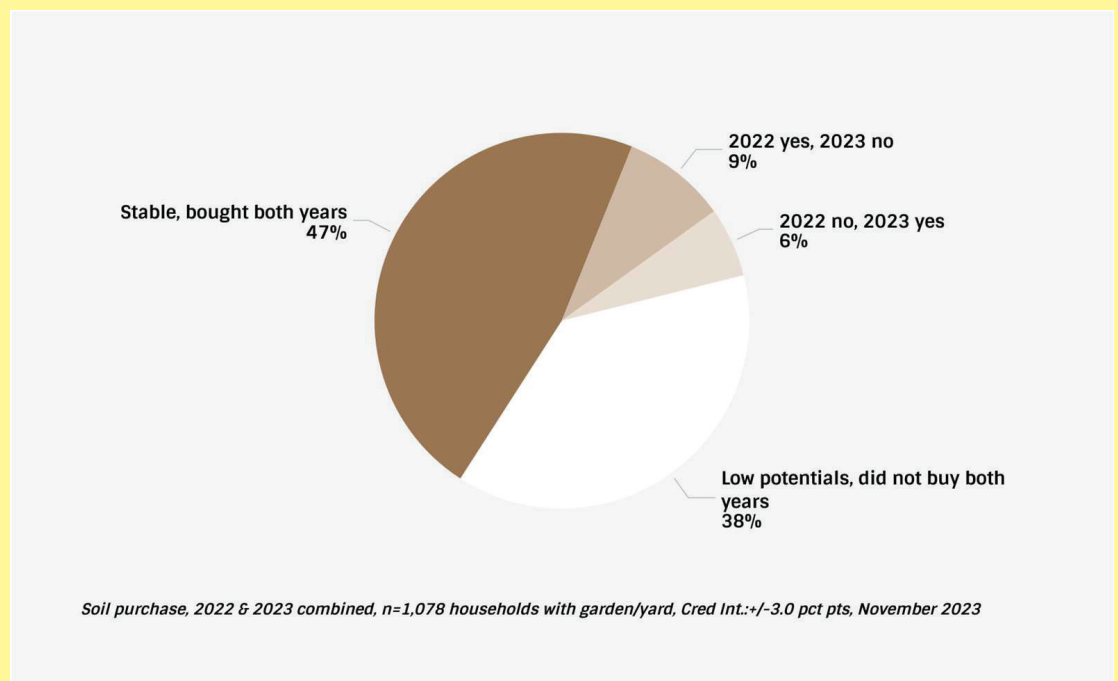
CONSUMER SURVEY REPORT



Comparing purchase responses for 2022 and 2023:

- 47% of gardeners are stable buyers who bought soil in both years.
- Another 9% bought in 2022 but not in 2023.
- A smaller share of 6% did not buy in 2022 but bought in 2023.
- 38% are low potentials who did not buy in 2022 and 2023

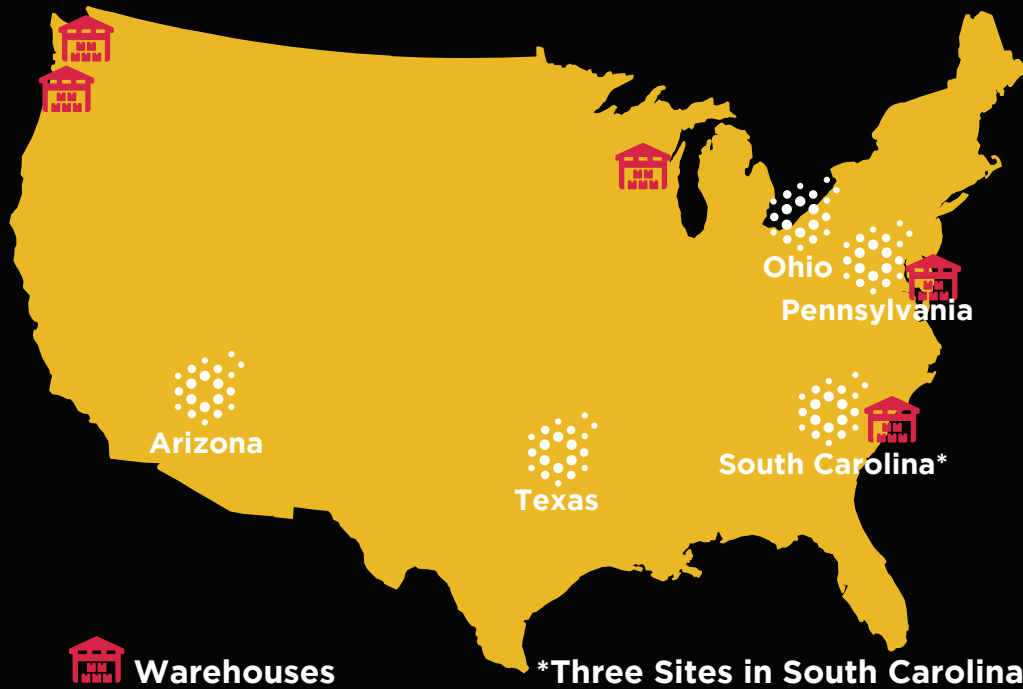
If we take the 47% of consumer households who buy soil products every year and add only half of the 15% who buy soil every other year, we can determine with reasonable certainty that the stable buyers of soil every year is 54% of households with a yard or garden or ~ 50.2MM households.



- Northeast (54%) and South (51%) have the biggest shares of stable buyers.
- West (42%) and the Midwest (38%) have the lowest shares of regular buyers.



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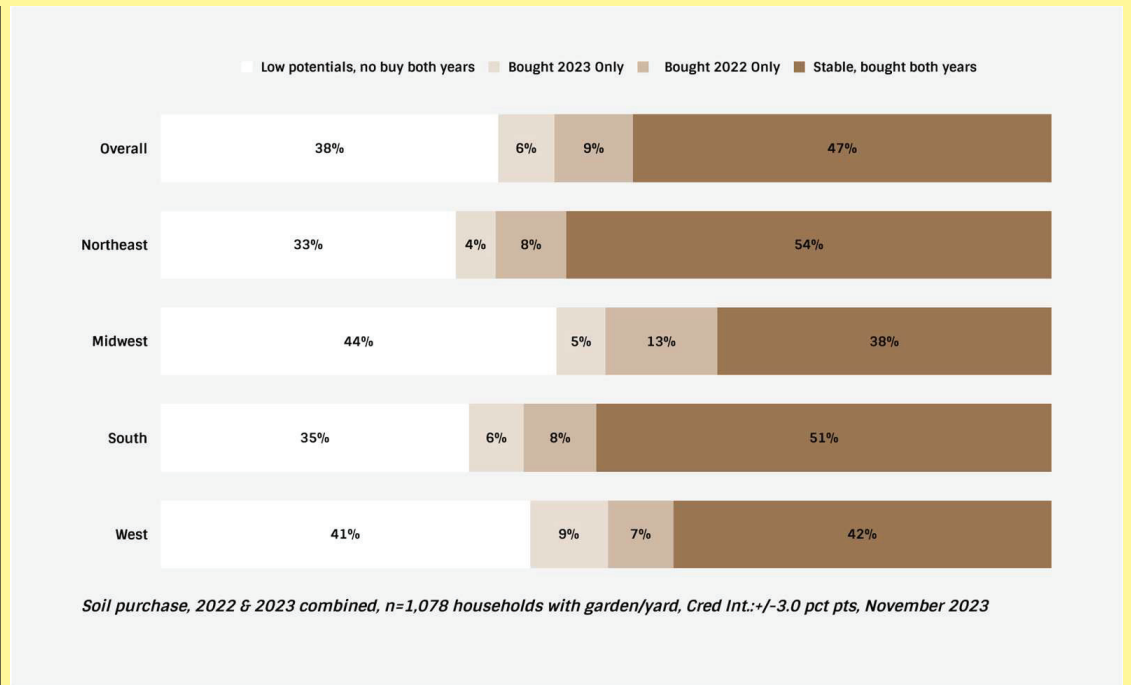
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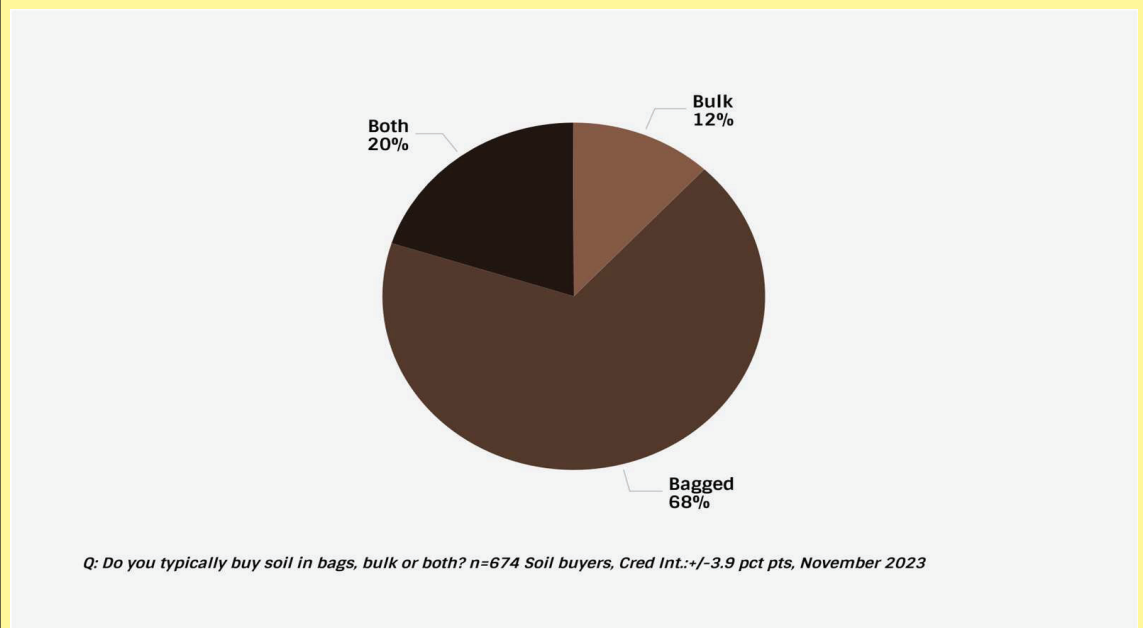
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Question 4: Do You Buy Soil In Bags, Bulk Or Both?

- Over two-thirds (68%) buy bagged soil.
- A much smaller share (12%) buys bulk soil.
- Meanwhile, one-fifth (20%) prefers both.

If we split those who buy both bagged and bulk in half and allocate them to each category, we have 78% of households with a yard or garden buying bagged soil and 22% buying in bulk.



Question 5: On Average, How Many Bags Of SOIL Do You Purchase Each Year?

- Seven in ten (71%) buy ten or fewer bags.
- While 42% buy one to five bags, another quarter (29%) buy six to ten bags.
- A quarter of bagged soil buyers (26%) buy more than ten bags.
- The **AVERAGE** number of bags purchased annually per household is 8 while the **MEDIAN** is 7 bags.



HAMER Brand Model 2090

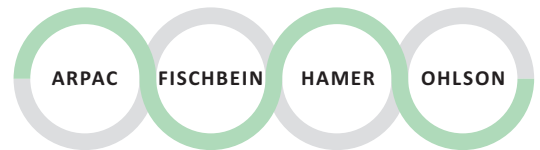


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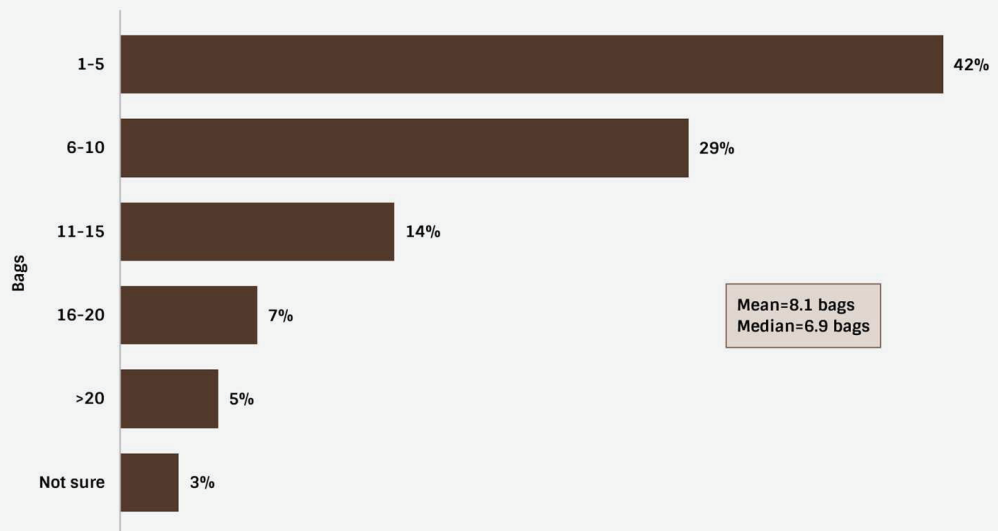
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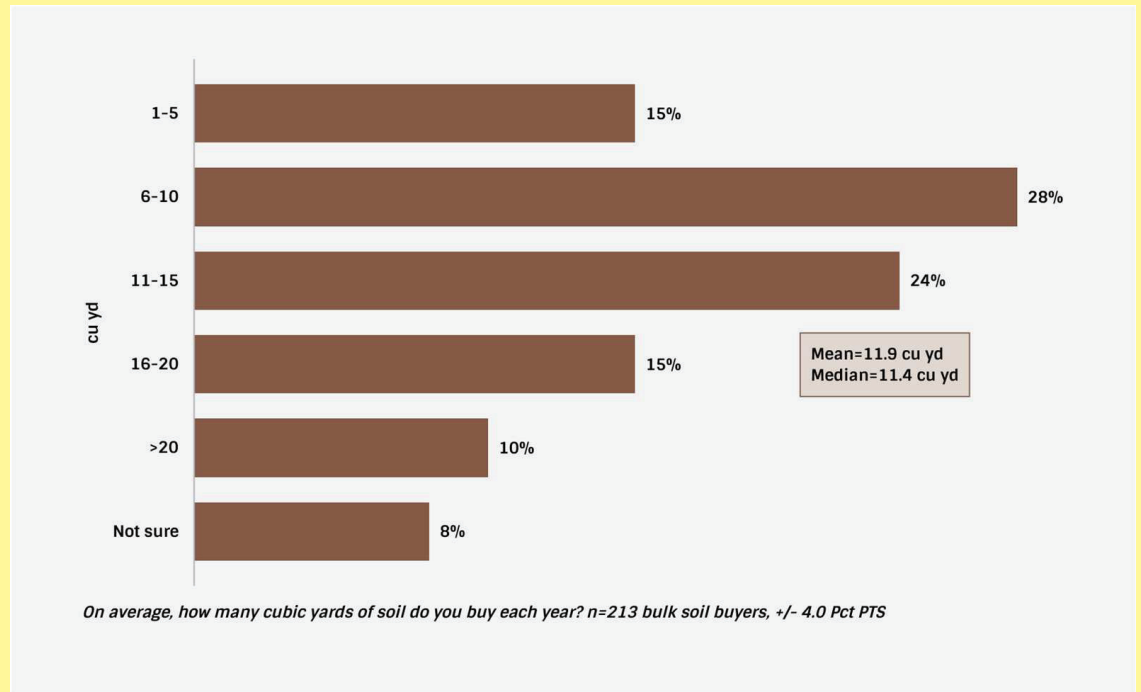
CONSUMER SURVEY REPORT



On average, how many bags of soil do you purchase each year? n=606 bagged soil buyers, +/- 4.0 Pct PTS

Question 6: On Average, How Many Cubic Yards Of Bulk SOIL Do You Buy Each Year?

- Four in ten (43%) buy ten or fewer cubic yards of soil.
- While 15% buy one to five cu yds, another quarter (28%) buy six to ten cu yds.
- Roughly one-half (49%) of bulk soil buyers buy more than ten cubic yards.
- The **AVERAGE** annual bulk soil purchase is 11.9 cubic yards, and the **MEAN** is 11.4 cu yd.



Question 7: Considering All The Soil Products You Purchase In A Year, How Would You Divide Them By The Following Product Categories

- Garden/landscape soil takes the top spot because it is most-purchased by 31% and second-most purchased by another 43%.
- Potting soil took the second spot, while topsoil finished third. Please note that both these soil types have very similar data



Question 8: How Did You Use The Soil Purchased This Year?

- Interestingly, the data shows a three-way tie, with roughly one-half used for three purposes: indoor and outdoor containers (54%), raised garden beds (53%), and general landscape (49%).
- Another 43% reported using the soil for filling holes



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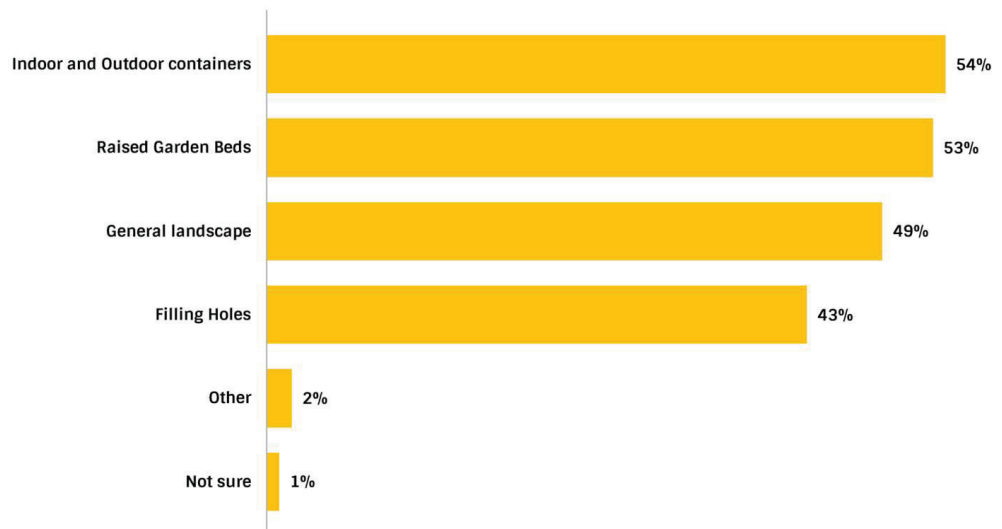


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Q. How did you use the soil you purchased this year? (please select all that apply), n=674 soil buyers, November 2023

MARKET ESTIMATE

- Our data shows that 75% of the 124MM U.S. households have a yard or garden. That means the potential consumer household market for soils is ~93MM households.
- Our data further shows the number of stable buyers who purchase soils every year is 54% of the ~93MM households with a yard or garden or ~ 50MM households.

CONSUMER SURVEY REPORT

- From the 50MM regular buyers, we have 78% buying bagged products and 22% buying bulk which results in ~39MM buying bagged and ~11 MM buying bulk.

Estimated Consumer Household Bagged Soils Market

- Our survey reports that the average number of bags of soil purchased annually is 8 bags/household for ~39MM households with a yard or garden which results in ~312MM bags of soil.
- Assuming the average soil purchase is a 2 cu ft bag, the total volume of bagged soils purchased annually by consumer households is ~624MM cu ft or ~23.1MM cu yd.

Estimated Consumer Household Bulk Soils Market

- Our survey also reports that the average annual bulk soil purchase is 11.9 cu yd per consumer household with a yard or garden times 11 million households buying bulk results in ~131 cu yd.

Total Estimated Consumer Household Soils Market

- Total market estimate for consumer household soil products is ~154MM cu yd annually.

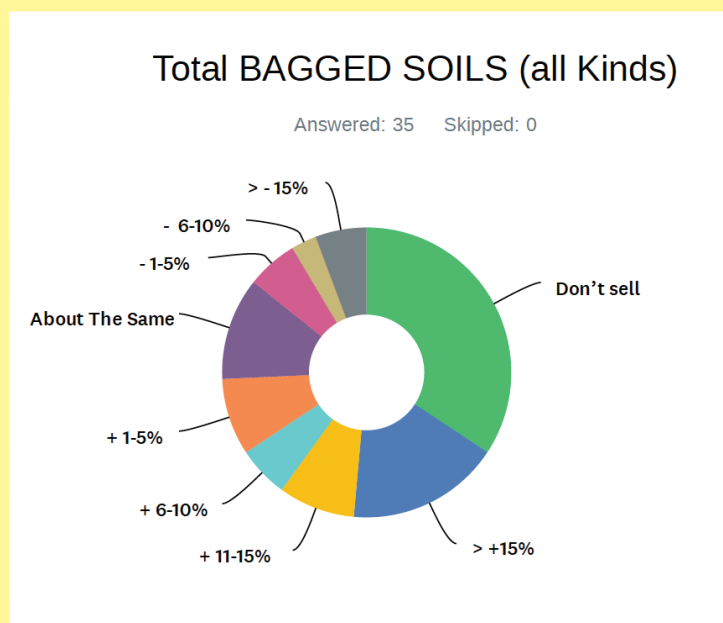
2023 SALES GROWTH SURVEY REPORT

Mulch & Soil Council 2023 Sales Growth Survey

In October, the Mulch & Soil Council surveyed its membership to determine the relative growth in high-season sales for January 1 - June 30, 2023 compared to the same period in 2022. This time period represents an estimated 60% of total industry sales each year. Industry sales are divided into 4 main categories which are Bagged Mulch, Bulk Mulch, Bagged Soils and Bulk Soils. Here are the results of the Year-Over-Year Sales Growth Survey for 2023 survey compared to the 2022 product sales for the same period.

BAGGED SOILS

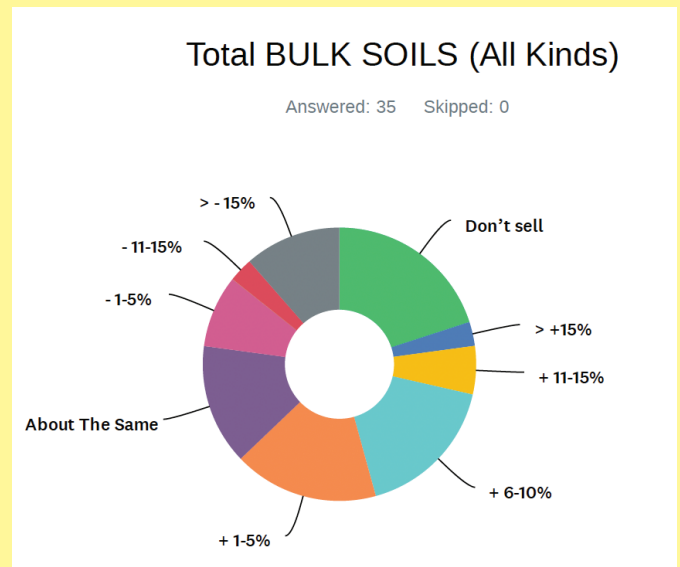
Council members who reported seasonal bagged soils sales as “About The Same” in 2023 as in 2022 represented 11% of survey respondents. A total of 14% of members reported a decline in bagged soils sales for the period while 40% reported an increase in sales. The greatest increase came among the 17% who reported > 15% sales growth over 2022, followed by 8% reporting +11 – 15% and 14% reporting 1 - 10% sales growth.



2023 SALES GROWTH SURVEY REPORT

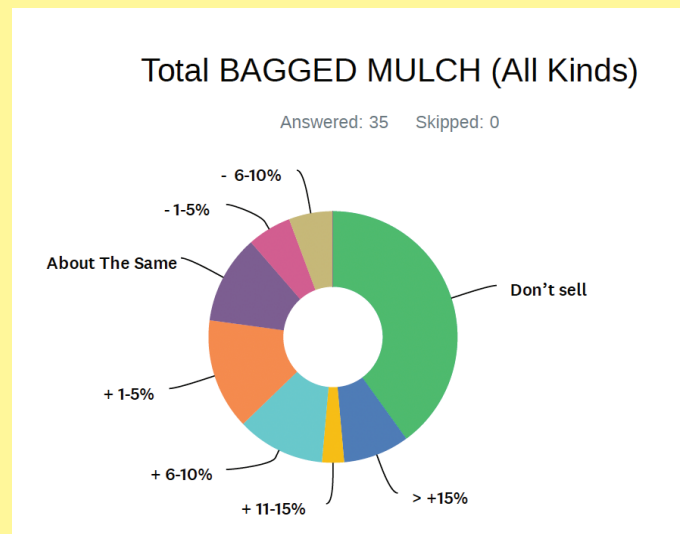
BULK SOILS

Looking at sales reports for bulk soils in 2023, a total of 14% reported sales remained “About The Same” compared to 2022. Almost 23% reported a decline in bulk soils sales with the largest portion (11.4%) reporting a decline of >-15%. Increased sales were reported by 43% of survey respondents with 34% signaling growth in the 1 – 10% categories.



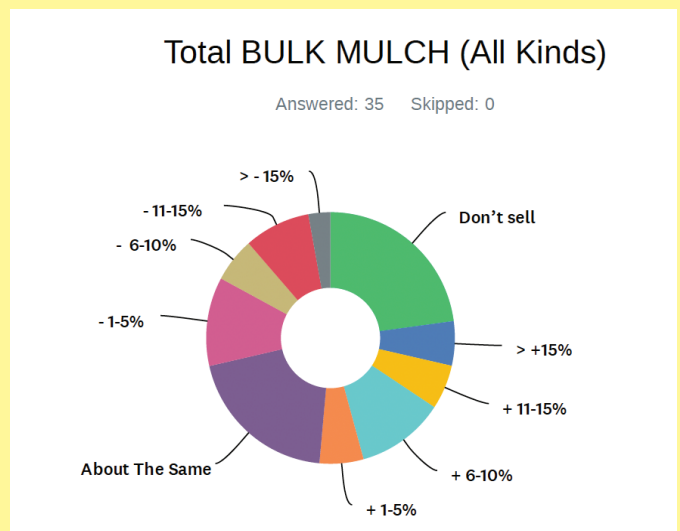
BAGGED MULCH

Only 10% of respondents reported a negative growth in bagged mulch sales and all were less than -10% lower than 2022. Another 11% were “About The Same” in 2023 as in 2022 and 35% reported positive sales growth. The largest growth category was the +1 – 5% at 14% followed by the +6 – 10% category at 11%, the +11 – 15% category at 3% and the >15% category at 9%.



BULK MULCH

One in 5 members (20%) reported bulk mulch sales as “About The Same” in 2023 as in 2022. A total of 28% reported negative sales growth for bulk mulch with most of that (11%) in the -1-5% category followed by 8% in the -11-15% category, 6% in the -6 – 10% category and 3% reporting sales declines of >-15%. On the growth side, 26% reported increases in sales for bulk mulch with the greatest growth reported in the 6 – 10% category at 11% while the remaining 6% each went to the 1-5%, 11-15% and >15% categories.



2023 SALES GROWTH SURVEY REPORT

MARKET FORCES

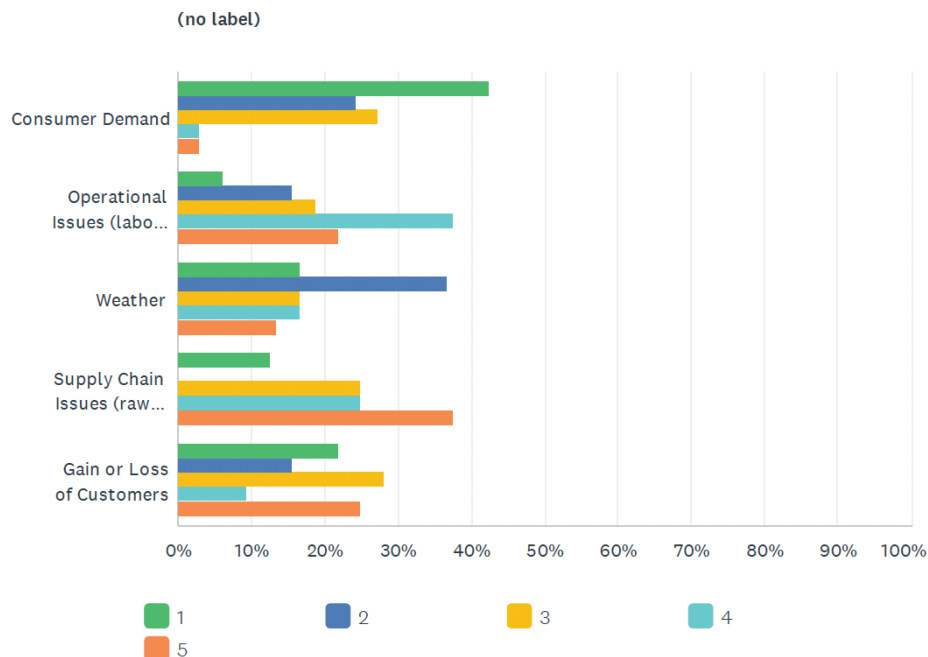
Survey participants were asked to rank each of a series of market forces based on their perceived significance and impact on their product sales for 2023. The results were as follows in ranked order:

1. **CONSUMER DEMAND:** According to 42% of all survey participants, the #1 greatest impact on 2023 sales was consumer demand. In 2022, consumer demand declined slightly in the post Covid19 period as the market settled back to its historic sales volumes.
2. **WEATHER:** Over 36% of participants ranked the weather as the 2nd most significant impact on sales for 2023.
3. **GAIN OR LOSS OF CUSTOMERS:** According to over 28% of participants, gains and losses in customer bases were the 3rd most significant impact on company sales growth for the year.
4. **OPERATIONAL ISSUES:** A total of 38% of survey participants ranked operational issues (labor, freight, equipment issues, etc.) as the 4th most significant impact on industry sales in 2023.
5. **SUPPLY CHAIN ISSUES:** Raw materials shortages, parts availability and machine/equipment backlogs were some of the supply chain issues that over 37% of survey participants ranked as the 5th most significant impact on 2023 industry sales growth.

Rank the following based on the impact it had on your sales.

(1 = Most Significant, 5 = Least Significant)

Answered: 33 Skipped: 2



We appreciate the time and effort from all member companies that participated in our annual sales growth surveys and shared their information for the benefit of the industry. Anyone who has a question about the survey data should send their question to Shelli Williams at membership@mulchandsoilcouncil.org or call the Council office at 806.832.1810.

LEGISLATIVE & REGULATORY NEWS

IRS E-FILE REQUIREMENT



As the 2023 tax season draws near, businesses must take note of a pivotal IRS update requiring that most businesses file all information returns electronically. This significant shift underscores the need for businesses to gear up in preparation for the upcoming reporting period to ensure compliance and adapt seamlessly to the electronic filing landscape.

New Electronic Filing Threshold for Information Returns

The Internal Revenue Service has updated the requirements for electronic filing of information returns. Historically companies had to file in excess of 250 information returns before they were required to file those information returns electronically. The new threshold requiring electronic filing has been lowered to 10 or more information returns.

Who Is Impacted by the Change?

This updated rule extends to businesses that issue (in aggregate) ten or more information returns. The types of information forms that must be added together to measure against this ten or more threshold include all forms in the 1099 series, all W-2 wage statements, any Form 1042-S withholding statements, and others. This means that for the tax year 2023, Forms W-2 must be filed electronically by January 31, 2024.

Additional Requirements and Exceptions

Corrections for information returns, such as Forms W-2c, do not contribute to the e-filing threshold. However, consistency is key: corrected forms must be filed in the same manner as the original form. For example, if you originally filed your W-2s electronically, corrections must follow suit, and thus any corrected W-2c would also need to be filed electronically.

You'll also need to do your homework in advance. The electronic filing of the various information returns may be submitted in different places. For example, a company may need to e-file its W-2s through the [Social Security Administration's Business Services Online](#) while that same company files its Form 1099 series forms through the [IRS's Information Returns Intake System \(IRIS\)](#).

What Employers Need to Do

Transitioning to mandatory electronic filing could present challenges for businesses that are accustomed to paper submissions. Because of this change, it's important for businesses to develop a plan that ensures compliance with the new electronic filing requirement. Businesses need to allocate additional resources to coordinate this e-filing process, including ensuring you have the correct online access set-up in the correct systems. Even after approval in the various e-filing platforms, people will need to validate the underlying data as well as ensure it is formatted

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and submitted correctly, making the process daunting for many.

Don't get caught unprepared! [Contact your CRI tax advisor](#) to ensure your team is ready to understand the nuances of the updated e-filing requirements. Our team of experts is ready to help you confidently navigate the complexities of the tax landscape, ensuring your tax filings are compliant and carried out with utmost efficiency.

NOTE: This article is for general information and is not legal advice. Before taking action, consult with your legal counsel or professional tax advisor.

INDUSTRY NEWS

HPTA UPDATE



The Humic Products Trade Association (HPTA) reports its ongoing efforts for the humic product industry include advocating for a definition of nutritional chemicals under FIFRA. Originally enacted in 1954, FIFRA's missing definition poses challenges for farmers and suppliers. HPTA has petitioned the EPA for clarity, strategically addressing the existing FIFRA segments related to nutritional chemicals. This move aims to expedite progress while preserving efforts for the Plant Biostimulant Act of 2023. HPTA remains dedicated to regulatory clarity, ensuring easy access to humic and fulvic acids nationwide.

###

USDOT ORDERS STATE METRICS



The U.S. Department of Transportation recently announced a deadline for states to establish emission-reduction goals and report them by Feb. 1. Transportation Secretary Pete Buttigieg highlighted the flexibility for states to set their climate targets with over \$27 billion in federal funding. The Federal Highway Administration (FHWA) introduced performance management measures on greenhouse gas emissions, requiring states to establish emission-reduction targets by Feb. 1 and report progress in state biennial reports. The performance period is retroactive from Jan. 1, 2022, to extend four years. While the estimated cost of implementing the mandate is \$10.8 million between 2023 and 2032, FHWA believes the benefits justify the costs and emphasizes collaboration rather than imposing penalties for missed targets. Targets Must Be Reported to FHWA by Feb. 1



###

Certified Product News

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CERTIFICATION REPORT

Company	Name of Product
New Certified- Mulch	
The Organic Recycler	The Organic Recycler Hardwood Native Mulch
Homer Industries, LLC	Vigoro Premium Black Mulch by Homer Industries
Recertified- Mulch	
The Scotts Company	Nature Scapes Color Enhanced Mulch - Sierra Red
The Scotts Company	Nature Scapes Color Enhanced Mulch - Classic Black
The Scotts Company	Nature Scapes Color Enhanced Mulch - Deep Forest Brown
Phillips Bark Processing Co., Inc.	Gardenese Pine Bark Nuggets
Phillips Bark Processing Co., Inc.	Gardenese Pine Bark Mulch
The Scotts Company	Scotts Nature Scapes Color Enhanced Bark Nuggets-Deep Forest Brown
Garick Corporation	Brown Landscape Mulch

Certified Product News



This product has been registered and tested for conformance to the standards of the Mulch & Soil Council for the indicated product category. The Mulch & Soil standards do not contain a product category for pesticides, and this certification mark does not apply to pesticide claims. For more information, refer to the MSC Web site at www.mulchandsoilcouncil.org.

Recertified- Mulch

Homer Industries, LLC
 Homer Industries, LLC
 Phillips Bark Processing Co., Inc.
 Phillips Bark Processing Co., Inc.
 Phillips Bark Processing Co., Inc.
 Garick Corporation
 Garick Corporation
 Garick Corporation
 Landscapers Pride
 The Mulch and Soil Company
 The Mulch and Soil Company
 The Mulch and Soil Company
 Britton Industries
 Wallace Farm, Inc.
 Wallace Farm, Inc.
 Wallace Farm, Inc.

Vigoro Premium Brown Mulch by Homer Industries
 Vigoro Premium Red Mulch by Homer Industries
 Vigoro Premium Black Mulch by Phillips Bark Processing Co.
 Vigoro Premium Brown Mulch by Phillips Bark Processing Co.
 Vigoro Premium Red Mulch by Phillips Bark Processing Co.
 Vigoro Premium Black Mulch by Garick Corporation
 Vigoro Premium Brown Mulch by Garick Corporation
 Vigoro Premium Red Mulch by Garick Corporation
 Hardwood Mulch
 Vigoro Premium Red Mulch by The Mulch and Soil Co
 Vigoro Premium Black Mulch by The Mulch and Soil Co
 Vigoro Premium Brown Mulch by The Mulch and Soil Co
 Premium Brown Mulch
 Vigoro Premium Wood Mulch Brown by Wallace Farm
 Vigoro Premium Wood Mulch Black by Wallace Farm
 Vigoro Premium Wood Mulch Red by Wallace Farm

Recertified- Premium Potting Soil

Rod McLellan Company
 Miracle-Gro Lawn Products, Inc.

Supersoil Potting Soil 0.03-0.03-0.03
 Nature's Care Organic Raised Bed Soil 0.09-0.08-0.09

Recertified- Landscape Soil & Amendment

Black Gold Compost Company
 Black Gold Compost Company
 Rod McLellan Company
 Scotts Miracle-Gro Products, Inc.
 Scotts Miracle-Gro Products, Inc.

Black Kow Cow Manure
 Organic Brands Mushroom Compost
 Supersoil Enriched Planting Compost 0.09-0.03-0.04
 Miracle-Gro Garden Soil, Trees & Shrubs 0.09-0.05-0.07
 Miracle-Gro Garden Soil Roses 0.10-0.09-0.07

Withdrawn- Landscape Soil & Amendment

Rod McLellan Company
 Miracle-Gro Lawn Products, Inc.

Supersoil Garden Amender 0.03-0.03-0.03
 Miracle-Gro Nourish

Withdrawn- Mulch

Ohio Mulch Supply, Inc.
 The Scotts Company
 The Scotts Company
 The Scotts Company

Golden Trophy Premium Landscape Pine Bark Nuggets 332
 Texas Select Classic Black Mulch
 Texas Select Deep Forest Brown Mulch
 Texas Select Sierra Red Mulch

CLASSIFIEDS

2020 Hamer Side Sealer

Manufacturer: Hamer

Year: 2020

Location: Cumming, GA

Price: \$9,000

Contact: equipment@garick.com

Info: s/n 982040108. Excellent working condition. Only used for 1,000 bags.



CLASSIFIEDS

Hamer Volumetric Feeder Model 300VF

Manufacturer: Hamer

Model: 300VF

Year: unknown

Location: Cumming, GA

Price: \$39,000

Contact: equipment@garick.com

Information: Hardly used.



2006 CBI 6800T Horizontal Grinder

Manufacturer: CBI

Model: 6800T

Year: 2006

Location: Reedsville, Pennsylvania

Price: \$275,00



Company Contact: Logan Metzler, 717-437-3347, logan.metzler@metzlerfp.com

Information: 13,160 Hours, CAT 3412 Engine, 1050 HP, Well maintained, strong unit ready for work.

2019 CAT 938M Wheel Loader

Manufacturer: CAT

Model: 938M

Year: 2019

Location: Reedsville, Pennsylvania

Price: \$235,00



Company Contact: Logan Metzler, 717-437-3347, logan.metzler@metzlerfp.com

Information: 998 Hours, Well maintained low hour loader. Comes with 6.5 Yard CAT Light Material bucket. 6.5 Yard Craig High Tip bucket available for extra cost.

CLASSIFIEDS

Amadas Semi-Automated Palletizer

Model: PL02

Year: 2015 or 2016 (2 available)

Price: \$35k or best offer

Location: Galivants Ferry, SC

Contact: Hackney Parker @ 305-393-4950 or hackney@seasidemulch.com

Information: Bag flattener and conveyors and optional 10 ton press



Lantech Q300 Wrapper

Model: Q300

Serial #: QM029512

Price: \$7.5k

Location: Galivants Ferry, SC

Contact: Hackney Parker @ 305-393-4950 or hackney@seasidemulch.com

Information: 120 V



2006 Morbark 4600XLT

Manufacturer: Morbark

Model: 4600XLT

Serial # 188-1017

Engine Serial # BDT04817

Price: \$275,000

Contact Matt Smith, Smith Creek @ 502-643-3849

Information: Engine has new heads on it from Cat and is good condition. You can come see it run. This is a daily use type of machine. 11,934 hours



*Happy
Holidays
from the
Mulch & Soil Council*

