NEW LUSTRE FOR IRON COUNTRY

Manufacturers expand commercial turf equipment market and rebuild distribution in the wake of Deere.

by Bruce F. Shank, executive editor

Competition has made the commercial turf equipment market better than most experts thought it could be two years ago.

Once considered mature, or even stagnant, the commercial mower market appears to be gaining a lasting strength, defying the predictions of doubtful analysts.

The amazing walk-behinds

For example, five years ago only five companies manufactured walk-behind commercial rotary mowers (32-inch and up): Bobcat (Ransomes), Bunton (Goodall), F. D. Kees, Sensation, and Yazoo. Today, 14 companies make them and all seem to be going strong. The new list includes the big manufacturers, John Deere, Ford, Jacobsen, and Toro, as well as Exmark, a company recently created to capture part of the expanding walk-behind market. Scag recently announced it has entered the walk-behind market.

Dick Lehman, vice president of Ransomes, is impressed with the continued growth of the walk-behind rotary market. "We expected the huge increase in competition (in the walk-behind market) to hurt our veteran Bobcat line, but it hasn't," Lehman told Weeds Tree & Turf. "Orders keep pouring in and we keep expanding our plant. It's amazing!"

Stan Byers, president of Bunton, the original manufacturer of walk-behind commercial mowers, is equally impressed with the strength of the market. "We know from replacement sales that there must be more than 70,000 commercial mowing contractors in the U.S.,” claims Byers. “We also know from our distributors that sophisticated hobbyists are buying commercial walk-behinds when

Brouwer 5-gang with verticut blades.

The Cushman Front Line
they used to buy lawn tractors. Certainly the market is far from saturated."

Deere liked Bunton's expertise in this rapidly growing market so much it bought 20 percent of the company. Bunton supplies Deere with walk-behind mowers and Deere makes its own riding rotaries. Byers hopes to manufacturer more products for Deere.

**Today's turf tractor**
The other hot market is the riding out-front rotary, called turf tractors in the trade. These highly maneuverable, three or four-wheel mowers cutting from 48 to 72 inches, are rapidly gaining popularity with both commercial and institutional buyers who up to now have been buying tractor-mounted belly rotaries.

Turf tractors cut the grass ahead of the wheels, reduce the amount of trim work following mowing, and are faster and more maneuverable than standard tractors or out-front rotaries with sulkies.

Toro's Groundmaster and Jacobsen's Turfcat established this market but the competition is getting stiff. Companies like Excel, Howard Price, and Grasshopper attribute much of their growth to turf tractors. Bunton, Cushman, Deere, Heckendorn, Kut-Kwik, Ransomes, Scag, Sensation, Smithco, Steiner, Walker, and White also have entries in this market.

Howard Price, saying the commercial cutter market is growing 'by leaps and bounds', has his engineers working on ways to make his turf tractors more reliable than his competition by incorporating hydraulics and a new direct drive system to eliminate belts.

**Multipurpose tractors**
The turf tractor, combined with hydraulics, is spawning a third market, the multipurpose landscape tractor.

Quick detach couplings and hoses allow landscape managers to switch a turf tractor from rotary to flail or reel, to a brush or snowthrower, and, in the future, to a vacuum, aerifier, or verticutter. The possibilities are vast, allowing the landscape manager to get more out of his investment, and take away some of the advantages of the less efficient standard tractor.

**International connections**
The multipurpose turf tractor is getting much of its impetus from technology already existing in Europe and the U. K. When Ransomes purchased Bobcat it brought some of these concepts to the U.S. Since then, Bunton has purchased 85 percent of JL Tractor in Denmark, Jacobsen has imported its G4x4 from Switzerland, and Sensation now imports a West German turf tractor. Deere has plants in Mannheim, Germany, and Toro has signed trade agreements with companies in Australia and South America.

Ransomes, the oldest mower manufacturer in the world, has vast experience in the reel market in Europe and England. The U.S. park and athletic field market resembles the European market more each year making Ransomes' experience more valuable.

Jacobsen's imported G4x4 has a low center of gravity for stability on slopes and four-wheel steering to reduce tire wear on turf. Front and rear PTO attachments permit a wide variety of uses.

Sensation previewed its new import at the Golf Course Superintendents Show in Washington, D.C., in February. It is also maneuverable and features easy implement changeover. International ties provide more than new technology, they are a fulcrum for exchange rates. U.S. mower manufacturers export as well as import. The high dollar makes U.S. products comparatively expensive to...
foreign buyers. This has crimped exports by some U.S. companies.

If the dollar weakens the export market should improve, but then imports become more expensive. The only way for companies to have a hedge for both a strong or weak dollar is to be an international company like Ransomes, Bunton, and Deere. Expect to see more international deals in the next few months.

Testing the upper limits

Turf equipment manufacturers, while battling each other in the highly competitive walk-behind and turf tractor markets, are also testing the upper limits of the market. Price tags over $30,000 are no longer restricted to agricultural equipment.

Five companies, not including the highway market, have turf products breaking the $30,000 mark today; Bunton/JL, Howard Price, Jacobsen, Ransomes and Toro. These entries, like Jacobsen's HF-15 and Toro's HTM-175, are seven-gang, hydraulic reel units designed for golf courses and parks. They can be purchased with all the comforts of an agricultural tractor and are also multipurpose.

Herb Bunton said the large, multipurpose turf tractor developed when the agricultural market in Europe became depressed in the mid-70's. Manufacturers started seeking other markets for their equipment. Bunton/JL's tractor features cutting height adjustment from inside the tractor, quick implement conversion, and greater operator comfort.

"We've discovered you don't sell these units on the first call," says Byers. "But, in time, they sell themselves despite the high price tag. Golf courses and parks see the benefit of a large, multipurpose machine."

Other up and comers

The popularity of walk-behind rotaries and turf tractors extends to reels. Triplex greens mowers spend more time on fairways than they do greens today. The majors (Jacobsen, Ransomes, and Toro) are sharing new sales in this area with Bunton's Japanese imports, Locke, National, and Howard Price.

Tee mowers are seen today in the trucks and trailers of lawn care companies. National and Locke are attacking this expanding market as well. Reels cut prestige turf better than rotaries and are more popular in warm season markets, especially California.

Jacobsen is wandering from the pack slightly with a soon-to-be-announced emphasis on fine-cut flail mowers. Jake vice president Tom Car-
Toro is carefully rethinking its distribution to serve both the big equipment buyer and the commercial cutter. "It's really a market by market decision," says Brown. "We recognize the need for more representation in certain locations, such as rural areas or cities with a high number of small commercial cutters."

Brown indicated one-step distributors are preferable to two-step dealers where practical. This has been especially apparent in distribution of chemicals to cost sensitive markets such as lawn care. The second markup for the dealer can lose the sale in many instances. It is yet to be determined how price sensitive these same lawn care companies will be as they expand into mowing.

As the Toro name was dropped from the last formerly company owned distributor this year, Bunton was buying one of its distributors in New Jersey.

"Sales increased more than 20 fold after we took control," Byers pointed out. "It's really a matter of putting a motivated individual in charge of the distributorship, and who is more motivated than the manufacturer?" Bunton is also its own distributor in its home territory, Louisville.

Another off-target prediction the past two years is the demise of the short-line distributor. "Short-line distributors have never had as many products to sell as they do today," claims Howard Price. "Some consumer dealers are upgrading to distributors. Dealerships abandoned by our competitors and agricultural manufacturers (International Harvester and Case) are anxious and equipped to handle commercial equipment."

Ransomes is very satisfied with its 31 distributors carved out after Ransomes bought Bobcat. The Bobcat line was carried by an assortment of Toro and Jacobsen distributors prior to the addition of the Ransomes reel products. "Our sales have increased dramatically with both our new and old distributors," boasts Lehman.

**Quest for full lines**

Once the distributor or dealer is established, turf equipment manufacturers want to provide a full line of products.

Howard Price has made this its primary mission for commercial products. Although the company was not willing to announce its new products before it notifies its dealers this September, it would say the number of introductions will set a record for the company.

Howard Price is rounding out his rotary line with reel models (Rosenau units). Toro is wrapping up a deal with an aerifier manufacturer from Australia and has added six new products in as many months. The products are keyed to the way Toro will approach sales to various market segments.

Ransomes has products in England it hasn't yet introduced in the U.S. as well as a busy bunch of engineers in Johnsons Creek, WI. One product being tested is a new concept in aerification, a slitter rather than a corer.

Bunton is clearly after the golf course and park market with Bunton JL. Excel is broadening its selection of engines and choice of attachments for its QuickAttach models. Excel is also readying a line of "light commercial" mowers for its distributors.

Gravely is focusing on full service lawn care companies according to Lee Bouldin, marketing services manager. "The commercial business is the fastest growing segment of this company," says Bouldin. "The commercial mower wants reliable equipment that could do more than one thing."