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Acquisitions, Consolidations and Mergers, OH MY!

Once upon a time, there were hundreds of companies to choose from for products and services. There were big companies, middle-sized companies and small companies abounding! Some companies specialized in service, others in product innovation and still others in marketing know-how. Some companies brought low prices to the table but provided little support. What a beautiful market it was! Ask your father, grandfather or even great-grandfather how it used to be. Those times have changed. Forever . . .

Remember Eastern Airlines, Pan-Am, AMC cars, International Harvester, Amoco Oil, Bethlehem Steel or Illinois Bell, Stauffer Chemical, Burroughs Computers, Douglass Aircraft, Fairchild Chips, etc.? Companies that once were large, venerable names in everyday industries, today are names of the past! Companies that we grew up with were gobbled up through acquisitions, consolidations and/or mergers.

How has this madness in other industries affected the golf business? At the mention of what names will your children and children's children look at you with dazed confusion?

With the support of a few knowledgeable, seasoned, senior members of MAGCS and old copies of *the Bull*

Sheet, I will try to present a picture . . . of how things used to be. How things look today. And where are things going in the future?

As with most matters, change seems to impact certain industries more than others. In some industries, the players seem to change from year to year, while in others the names become synonymous with the industry. In some cases, the industry has simply disappeared.

Let's start with a little quiz! Do any of these names look familiar: W.A. Cleary Corporation, Dearie and Strud Inc., Armour Agricultural Chemical Company, American Liquid Fertilizer Company, Inc., Rokeby Chemical Company, Swift & Company Agricultural

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Congratulations to the Midwest's more senior superintendents, suppliers and history buffs. I am sure these names are familiar to them. A special thank-you should be offered up to these companies. They were the original advertisers, supporters and suppliers to the turf industry. They helped underwrite the cost of *the Bull Sheet* and were the earliest supporters of the MAGCS. Other than the last three, these companies have disappeared like the "dinosaur." Whenever the others have been absorbed or dissolved, "Thank you for your support."

Without a doubt, the industry that has seen the most PAST and PRESENT changes is the chemical industry. To learn more about the chemical industry, I went straight to one of the most knowledgeable "Chemical Men" around, Walter W. Fuchs, now co-owner of Chicagoland Turf. "Wally, tell me about chemicals (fungicides, insecticides and herbicides). Don't leave a stone unturned." This was definitely the wrong question to ask Wally. To make things easier for me, I asked him for the Cliff's Notes version and asked him to start from the middle of the century (that is, the 20th).

Before I knew it (12 pages of notes and one hour later), I had a better understanding of who the previous and current manufacturers were and where they are today. We started with Upjohn and TUCO, fix-

tures in the 1950s and '60s. After some consolidations, NORAM and American Herst appeared in the picture. They soon disappeared when Rhone-Poulenc took over. Rhone-Poulenc consolidated with Chipman, NORAM and American Herst. Bayer (the aspirin people) became a player and Rhone-Poulenc went in another direction. Zeneca and CIBA appeared on the map and

tomorrow? Don't ask me or W.A. Cleary, Rokely Chemical, DuPont or Mallinckrodt, etc. We don't have the answer! But someone will be there. The products the future companies will sell will be better, safer and more expensive.

Thank goodness for local contacts. National and regional chemical distributors come and go, but the salespeople never change. They just

move from company to company. Business change filters down to the regional level, where sole proprietorship and family-owned businesses either get gobbled up by bigger companies or retrench to reappear at a later point in time. Companies such as Midwest Turf & Garden Supply and Smith Equipment & Supply Company are no longer with us today. Yet new companies appeared: national suppliers Lesco, Simplot Partners and United Horticultural Supply as well as regional suppliers BOJO Turf Supply, Arthur Clesen and Chicagoland Turf. Who will be here tomorrow? One thing is almost assured—20 to 30 years from now, the names of the companies will not be the same, but there is a good chance that many of the faces will.

The major changes on the fertilizer side occurred during the 1960s and '70s, when fertilizer companies started to migrate away from being by-products of the meat-packing business. Key suppliers in the '50s and '60s were Borden, Armour Agricultural Chemical Company and Swift & Company Agricultural Chemical Division. In most cases, these companies sold off these portions of their business and concentrated on their core meat-packing business. New players on the block became Lebanon, ParEx,

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before we knew it Syngenta replaced them. Whew! "Wally, let me catch my breath." What about DuPont, Monsanto and Dow Chemical? They were never key players in the fungicide business.

So today, there are two main manufacturers of fungicides: Bayer and Syngenta. But there are some new players on the horizon, looking for a larger piece of the pie: BASF, Regal and Griffin. Who will be there

Anderson and Vigoro. And today, these suppliers and brands still control the fertilizer business.

Once chemicals became more widely accepted, the need for peat moss “au naturel” was not as important. Amongst other things, chemicals were easier to store and apply. Bye-bye to Melburn Peat Moss and Frazer Illinois Compost Corporation.

One thing I noticed looking at the earliest editions of *the Bull Sheet* was that most distributors were vertically integrated. They sold anything and everything to the golf courses—maybe the beginning of one-stop shopping. In the 1950s, George A. Davis Inc. sold tractors, mowers, grass, sprinklers, fertilizers and fungicides. Illinois Lawn Equipment sold equipment, sprinklers and fertilizers. Midwest Turf & Garden Supply sold everything but the kitchen sink. Rarely today do you find the full-service, “one-stop” house. Today is the day of the specialist: equipment, chemicals, golf supplies, etc. The industry wants someone who knows the products they are selling and can bestow a portion of that expertise on them. We are in the age of the “specialist.”

Sod companies were some of the best supporters of the earliest issues of *the Bull Sheet*. Many were family-owned businesses located down the street: Warren’s Turf Nursery, Worth, IL; Dearie and Strud Sod Nursery, Elgin, IL; H & E Sod Nursery, Tinley Park, IL; and Dunteman Turf Farms, Batavia, IL. Some have stayed the course and are still supplying quality turf to the golf course industry. Others have found that developers made offers they couldn’t refuse. The original farms were in the midst of ever-expanding suburbia. Business continuation from generation to generation sometimes became problematic.

The growth of suburbia has also affected nurseries, for instance, Timber Creek and Schroeder’s Nursery. Once strong, vibrant companies,

these companies are no longer amongst us under their original names. Industries and businesses have been gobbled up by sheer development.

Turf equipment was always a two-player game: Toro and Jacobson. The distributors may have changed, but the equipment was always “the name of the game.” Toro has been around

missed opportunity that needed exploration. Enter John Deere. John Deere went full steam ahead in the golf industry. They have become a key manufacturer and supplier of golf course equipment. Move over, Toro and Jacobson. Who is next on the horizon? Kubota or Honda? Do the Japanese ever leave a market untapped? Only time will tell.

Another core sector that seems fairly stable is the irrigation equipment market. The primary players have been around a long time: Hunter Irrigation, Rainbird and Toro. Is there anyone chomping at the bit to move in? One popular name that seems to be poised and ready to go is John Deere.

What would we do without golf carts! Without them, it would be pretty difficult for the superintendent to reach the perimeter of the course and everywhere in between. How would they make sure all the projects are being completed?

And what about the golfers? Would 40-, 50-, 60-year-old golfers be playing more than once a week if not for carts? Would the design of golf courses be totally different? Would distances from tee to green take walking into consideration? Golf carts have made a huge impact on the game and the industry. The key players are Club Car, EZ-Go (Textron) and Yamaha. Did you know that Harley-Davidson used to be in the golf cart industry? It sure is difficult to picture the maker of the “Hog” and all the leather apparel providing a

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for more than 100 years and Jacobson, more than 75 years. The names are synonymous with high-quality turf equipment. Other companies, such as Bunton Equipment, tried to make it in the equipment business only to disappear by the early 1990s.

In the late 1980s, a company that had been around for over 100 years making agricultural equipment decided that the turf business was a

quiet, slow-moving machine to the country clubs of the world. Thank goodness things have changed.

Meanwhile, the very evolution and growth of the golfing industry has created new industries and companies: golf construction companies, golf course architects, chemical storage and protection, aquatic management, irrigation and pumping systems, migratory bird/nuisance animal management, mosquito management, lighting and shelter protection. The companies in these industries will play a key role in the future evolution of the golf course industry. What will be the companies and industries that appear over the next 20 years?

Finally, we must acknowledge the companies that have weathered Father Time: businesses advertising from the first few years of *the Bull Sheet* to the most recent *On Course* magazines. Companies passed on from generation to generation to generation. Companies that avoided the goals of larger companies to acquire, consolidate and merge. Companies strengthened over time and with a tighter grasp of their market share.

These companies were around yesterday and will be remembered tomorrow: Roseman Tractor Equipment, Illinois Lawn Equipment, H & E Sod Nursery, Toro Lawn Equipment, Jacobson Equipment, Davey Tree Experts, Arthur Clesen, Nadler Club Car, Lemont Paving, Nels J. Johnson Tree Experts and Henry Frenzer Top-dressing, to name a few.

Change is a part of life! The individuals and companies that stay ahead of the game are willing to grasp, understand and accommodate change. They keep an open mind and have a willingness to accept the inevitable. Change is good! It is an integral part of our business and life in general.



REFERENCES

Old issues of the Bull Sheet and On Course

Holly Gilmour, J.W. Turf

Walter W. Fuchs, Chicagoland Turf



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