

Larry Tomaszewski AXA Advisors, LLC

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

(continued on page 22)

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Chemical Division, Milburn Peat Moss, Wilson & Company, Alliance Hose & Rubber Company, Chicago Fence and Equipment Company, Frazer Illinois Compost Corporation, Roseman Tractor Equipment Company, Nels J. Johnson Tree Experts, Illinois Lawn Equipment.

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." Wherever 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 Duntelman 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

(continued on page 25)

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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



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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 Topdressing, 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

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six raccoons, several squirrels, three red-tailed hawks, a baby crow, a porcupine, a coyote, a deer, a bobcat, a barn owl, a turtle, two wolf pups and another fawn. She explained that business really picks up come spring-time with so many young. These animals will be nurtured and cared for with as little human influence as possible and will be returned to the wild in the fall.

I departed this tranquil setting inspired by Vicki's commitment and dedication and awed even more with her explanation that on her part, there is a financial commitment as well. The K.A.R.E. organization functions only on private donations, which last year meant that Vicki spent \$10,000 of her own money to keep up with costs. Upon hearing that, I explained to her about our Midwest

organization and how we can help each other. The Board has decided to aid in her fundraising bid by sponsoring a betting hole at either the July or August MAGCS event. Your participation and generosity is much appreciated and will be going to a truly just cause, an organization and a person that are going out of their way to make a difference.



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The MAGCS Editorial Committee and Board of Directors thank you for your feedback!

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the Bull Sheet

John Gurke, CGCS
Contributing Editor

DATES TO REMEMBER

July 3-6 — Western Open at Cog Hill Golf & Country Club in Lemont, IL, **Ken Lapp** host.

July 8 — MAGCS monthly meeting at Foxford Hills Golf Club in Cary, IL, **Tom Jauch, CGCS**, host.

July 15-17 — Floyd Perry Show in Tinley Park and Palatine, IL, and Racine, WI. If this is confusing, you'll find more information below.

August 7 — University of Illinois Field Day in Urbana, IL.

August 9 — MAGCS Kane County Cougars outing at Elfstrom Field in Geneva, IL. More information will be in your mail shortly (if not already).

August 11 — MAGCS monthly meeting at Bartlett Hills Golf Course in Bartlett, IL, **Kevin DeRoo** host.

September 6-7 — GCSAA's Chapter Delegates Meeting at the Kansas City Airport Marriott in Kansas City, MO.

Conserv FS will be sponsoring three workshops this month featuring Floyd Perry, nationally renowned professional groundskeeper and 1997 Sports Turf Manager of the Year as named by *Sports Turf* magazine. These events, called Athletic Field and Sports Turf Workshops, will be held on the following dates at the following locations: July 15 - The Tony Bettenhausen Recreation Center in Tinley Park, IL; July 16 - Harper College in Palatine, IL; July 17 - Washington Bowl in Racine, WI. All begin at 7:30 a.m. and end

at 3:00 p.m. For more information on these seminars, contact Elizabeth Morgan by e-mail at emorgan@conservfs.com or by phone at 800-300-4887.

Several local golf courses have been the hosts of some very high-profile tournaments lately, with **Dan Sterr** and Stonebridge Country Club in Aurora, IL kicking off this high-powered summer of professional golf with the LPGA's Kellogg-Keebler Classic; **Tom Prichard** and The Glen Club hosting the Nationwide Tour for the LaSalle Bank Open; **Dave Ward** and **Kevin West**, and Olympia Fields Country Club, showcasing the 103rd United States Open; and most recently, **Ken Lapp** and Cog Hill's Dubsdread holding the 100th Western Open (perhaps even as you read this). The Kellogg-Keebler Classic was contested among a swarm of media who caught a ride on the Annika Train subsequent to her appearance in the (men's) PGA Tour event, The Colonial, in late May. Sorenstam did not disappoint, repeating as titlist in the tourney's second year. Our August issue will feature much more detail on the results of these big events in Chicagoland golf; we extend our congratulations now to these superintendents and their staffs for the excellent job they have done to prepare their respective courses for all to enjoy.

Just recently, the Glen Erin Golf Club opened its doors to the public. Why, you ask, is this of note? Glen Erin, located in Janesville, WI, is owned by **Dave Nadler** (Nadler Golf Car Sales, Inc.), its superintendent is MAGCS director **Dave Braasch** and it was designed by architect **Greg Martin** (Martin Design Partnership Ltd.), all longtime MAGCS members. The (public) grand opening took place on June 23, following three days of ribbon-cutting ceremonies attended by several MAGCS members, local

dignitaries, family members and vendors. Congratulations on this momentous event, and we look forward to experiencing firsthand the fruits of your labors in June of next year when Glen Erin is set to host the MAGCS for a golf meeting.

Our June 2003 monthly meeting was held on the 16th at Prestwick Country Club with **Tim Anderson, CGCS** hosting. Again, this event will be covered completely in the August issue, but MAGCS expresses its deepest gratitude to the people at Prestwick, our education speakers and our generous sponsors—Nadler Golf Car Sales, Turf Professionals Equipment Company, Palatine Oil, Golf Creations, Illinois Lawn Equipment, Lemont Paving, John Deere/Hunter Golf, Commercial Turf and Tractor and Simplot Partners—for making the day a success. This event also featured the 2003 Dom Grotti Award, presented to the superintendent-assistant team with the combined lowest net score. The inaugural Dom Grotti Award took place at the ITF Annual Golf Day 18 years ago. And who was Dom Grotti? **Domenic Grotti** began his illustrious career at Sunset Ridge Country Club in 1933 as assistant superintendent, was hired as superintendent in 1940 and retired in 1978. He was remembered as a mentor and an innovator who was one of the first MAGCS members to encourage assistants to be actively involved in the Association and attend monthly meetings. In fact, the foresight of his philosophy is evidenced to this day by the recent formation of the Class C Advisory Council—a committee comprised of assistant superintendents and represented at all MAGCS Board of Director meetings quite ably by **Erwin McKone** of River Forest Country Club. The Dom Grotti trophy is on permanent display at the Midwest Golf House in Lemont, and this year's winners' names will be added to it. Congratulations and thanks to these folks.

ON THE MOVE:

Sylvia Lima, formerly of TPEC, is now field service representative for Leibold Irrigation, Inc.

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Nick Hongisto of TPEC has been named their Northern Territory irrigation sales representative.

Mario Godinho, an experienced golf course equipment technician, is seeking a position in the Chicagoland area—he can be reached at 630-264-1431.

Congratulations and best of luck to these friends.



Carl Hopphan.

As mentioned in our recap of the ITF Spring Golf Day (see page 32), this year's festivities featured the presentation of the Charles Bartlett Award to **Carl Hopphan**. For a little background on this prestigious award, I asked its founder, **Dudley Smith**, for some background. It seems that in 1966, when an inter-collegiate golf meet was being held at Silver Lake Country Club, the *Chicago Tribune* sent its golf reporter, Charlie Bartlett, to cover it. Dudley was able to grab a few minutes of Mr. Bartlett's time in the cocktail lounge (where else?) to discuss matters of golf and the superintendent's unsung role in the game. Bartlett, the *Tribune* columnist responsible for the Sunday feature "The Locker Room" and member of the Golf Writers Hall of Fame, told Dudley that the golf pros were stealing the spotlight from superintendents, and that we as a group had to shuck our coveralls, get out of the barn and take up residence in our grill rooms where we could get our message out. In 1967, when Dudley was MAGCS president, he took the ball and ran

with it, establishing the Charles Bartlett Award to be presented not annually, but as merit dictated, to the individual who best exemplified leadership in oratory, journalistic or public relations skills as they pertained to our industry. That also marked the first presentation of the award—to Paul Voykin, who had written the book titled *A Perfect Lawn the Easy Way* and been published by Rand McNally. Other past winners of the "Bartlett" were **Norm Kramer, Ray Gerber, Bob Williams, Julius Albaugh, Ken Zanzig, Oscar Miles (twice), Mike Bavier (also twice), Pete Leuzinger, Tim Kelly and Fred Opperman**—a who's who list of renowned Chicagoland superintendents. The latest name on the trophy is Carl Hopphan, former superintendent of Aurora Country Club and Evanston Golf Club, who was chosen by the committee of past winners for his exemplary public relations work with ITF and CDGA. Congratulations to Carl on this great honor!

Congratulations to Midwest member **Bruce Williams, CGCS**, of Los Angeles Country Club. Son of Bob and a past president of the MAGCS from 1990-91 and the GCSAA in 1996, Bruce was elected vice president of the Southern California GCSA at that chapter's annual meeting on May 8.

FOR SALE: By bid only, Klope Construction Co./Dave Klope offer a Case 460 trencher. Used on two small jobs, has a D100 backhoe and bucket, 4' heavy-duty boom with rock and frost chain, gear-reduction chain drive, backfill blade and four-wheel steer. Does not show any wear. Inspect the trencher between 7 a.m. and 3 p.m. Monday through Friday at 1325 Spaulding Rd. in Elgin; fax your offer to 847-697-1729. Bids will be reviewed at noon each Friday until sold.



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