



TIER IV has officially kicked in, and as a result prices will increase for diesel-powered turf maintenance equipment greater than 25 horsepower. Are you prepared?

By now, most golf course superintendents should have heard of the EPA's Tier IV diesel engine emission reduction mandate and how it will impact their budgets. The mandate took effect on Jan. 1, 2013, and impacts all diesel-powered turf maintenance equipment greater than 25 horsepower. The good news? All Tier IV-compliant turf equipment manufactured after Jan. 1, will be better for the environment and healthier for everyone. The bad news? The equipment will cost more.

But there's more good news. According to Grant Young, director of marketing of the Commercial Division at The Toro Co., turf maintenance is one of the last categories of diesel-powered products to go through the major stage of Tier-IV compliance.

"Because of this, many of our customers have already seen the pricing (and technology) implications of achieving compliance, keeping in mind that the technology drives the cost," says Young.

Young cites over-the-road trucks,

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OR NOT**

By Jason Stahl



certain power ranges of tractors, tub grinders, construction equipment and forestry as examples of equipment that has already experienced the major “jump” in price associated with the stiffest tiers of compliance.

“So, comparatively, the price of compliance isn’t terribly surprising to anyone who has had experience in one of the other categories, OTR trucks probably being the closest to most,” Young says. “That said, it’s never easy delivering a message of price increase to customers. In the end, it’s a mandatory regulation that has a price associated with it.”

Young expects prices to go up 10 to 20 percent, a number that has been consistent with price increases in other power classifications that have gone through Tier IV.

Reaction from customers so far has been mixed, says Young, depending on their knowledge and awareness of Tier IV.

“Those who have already experienced something around Tier IV due to buying an OTR truck



The technology changes are nearly imperceptible, with most of the changes occurring under the hood.

for their fleet (or even personal use), for example, aren’t really phased by it,” he says. “Those who have little or no awareness are more surprised. I would say this is the main reason why we’ve been out trying to message the

issue and what it means. The worst thing for the industry is to have ‘surprised’ people as of Jan. 1, 2013.”

Toro has been spreading that message for the last 18 months through industry associations,

conferences, electronic and printed materials, distributors and individual customer visits.

“Because this is a major change to turf maintenance equipment, and because capital purchase schedules are usually planned years out, we feel creating awareness to the change and its implications is critical to being a good partner with our customers,” says Young.

Toro’s message has been in four parts: What is Tier IV? Why is it happening? When is it happening? And what does it mean to me (in terms of product performance, pricing, capital budget implications, the environment, etc.)?

Mark Ford, marketing manager of John Deere Golf, says his company has not released pricing for its Tier IV compliant products yet but is sensitive to the concerns in the marketplace that Tier IV could have on pricing.

“With that in mind, John Deere has been focused on bringing maximum value to our customers with new product features and benefits, while meeting all regulations,” says Ford.

Prepping your ownership

Like a lot of things in life, it comes down to knowledge, preparation and planning. That’s exactly the strategy superintendents should take when it comes to informing their bosses about the Tier-IV price increases.

“Capital planning should be a multi-year process,” says Grant Young, director of marketing of the Commercial Division at The Toro Co. “And knowing what’s coming and what your options are will help superintendents and all stakeholders make the best agronomic and financial decisions for their facilities.”

Proactive approaches are often recommended for managing turf diseases, but it’s also the way to go when handling situations your ownership might have issues with.

“Look ahead,” says Mark Ford, marketing manager of John Deere Golf. “Start talking with your ownership now about the long-term needs of your course and your equipment budget. This will help determine what changes, if any, are needed for your near-term product replacement life cycle.”

Jacobsen also emphasizes preparation as the key to superintendents avoiding giving course ownership sticker shock when Tier IV products are

released to the market.

“There will be a larger investment in service capabilities with the new engine and filtration technologies. The best way to overcome these obstacles is to prepare for them,” says Rachel Luken, product manager for Jacobsen. “Therefore, start educating all levels within the property about the upcoming federally-driven product change. All information needs to be reviewed in order to prepare an accurate equipment replacement plan.”

As capital equipment budgets are developed for new or replacement equipment needs, Luken says superintendents should consider the following options:

- Buy on regular routine. When a capital equipment plan calls for new equipment and/or existing equipment’s useful life ends, buy what is available and pay market price.
- Buy ahead. Prices are forecasted to rise when Tier-IV compliant equipment is released, so postpone the purchase of higher priced equipment and buy in advance of a regular replacement cycle.
- Buy environmentally friendly. Despite the expected higher prices, actively seek out and purchase the greenest Tier-IV product.
- Buy used. Since equipment is compliant based on the year of engine manufacture, buy equipment that is already in use.

Adds Mike Koppen, group marketing manager of golf products for John Deere: "We're adding value and additional features to our new Tier IV machines that will increase performance, productivity and operator comfort. We've undertaken Tier IV as an opportunity to redesign our machines from the ground up to provide an overall better machine that is, at the same time, Tier IV compliant."

Ford speculates that there may be some short-term sales fluctuations, but in the long term, he expects sales to be largely unaffected.

Koppen says that end-user reactions, in more often than not, are being driven by uncertainty because they largely haven't seen what a Tier IV-compliant piece of equipment can do.

"When they come face-to-face with a Tier IV piece of equipment, they're pleasantly surprised by new standards

in performance, productivity and operator comfort," he says.

John Deere has been getting the word out on Tier IV mostly through its dealer channel.

"We have an enormous amount of experience in smoothly transitioning to new emissions standards," Ford says. "And we have found our best method of communicating changes like this is through our well-trained dealers. They have done very well in so many other regulatory transitions in communicating these changes to our customers."

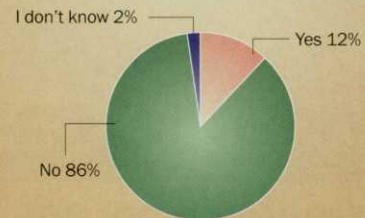
Like Toro, Rachel Luken, product manager for Jacobsen, predicts a 10- to 20-percent price increase for Tier IV-compliant products.

"Of course, customers don't want to pay more, especially when we're talking about increases as high as 10 to 20 percent for higher horsepower, Tier IV-powered products,"

Cost factor

Equipment manufacturers did a solid job educating end users about the nuts and bolts of Tier IV and what it would mean for new model technology. It wasn't a stretch to realize these changes would also mean price increases. Many insiders speculated that these expected price hikes could result in a spike in spending in 2012. However, this turned out not to be the case. The majority of superintendents (86 percent) say Tier IV regulations and the associated costs increases for the technology did not play a factor into 2012 equipment purchasing decisions.

Did you purchase equipment in 2012 specifically because of Tier IV regulations that go into effect in 2013?



Source: GCI State of the Industry research

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— Grant Young, The Toro Co.

says Luken. “But for equipment manufacturers, distributors and end users, this is a ‘must-do’ in order to comply with federal regulations – the choice is how and when you make that equipment transition and replacement.”

Jacobsen is working on alleviating the higher costs, though, via technological innovation.

“In addition to Tier IV final engine and equipment modi-

fication solutions with high pressure common rail and exhaust after-treatment systems, Jacobsen is exploring innovative, non-conventional approaches – where technically feasible – to deliver lower emissions and meet compliance,” Luken says.

As a precursor to the more conventional solutions, Jacobsen has launched the LF510, a new addition to its line of lightweight

fairway mowers. Luken describes it as an alternative, simple Tier IV final solution for 100-inch width of cut applications.

“The market also told us it wanted an affordable fairway mower that provides a superior quality-of-cut. We answered that need by putting Jacobsen’s True-Set cutting units with Classic XP reels on an easy-to-use, easy-to-maintain tractor,” says Luken.

“In addition, technicians don’t have to worry about additional exhaust after-treatment filtration devices, technology or service because the LF510’s rugged and reliable Kubota engine is compliant with Tier IV emission regulations.”

Jacobsen has chosen to communicate its Tier IV message through its dealer network using sales and technical training sessions where flyers are handed out as education and reference pieces.

In addition, the company is participating in regional/local GCSAA organization meetings, trade shows and conferences, customer roundtable events. GCI

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