

Shades Of Green

■ OPINION

We lost at least seven members of the Florida golf turf industry last year. I knew four of them fairly well, and three

of the seven died of heart disease.

Their ages ranged from 38 to 52 — far too young to be checking out of this life in my opinion. Their deaths left too many children and loved ones behind to grieve and carry on.

The most recent was Jeff Hayden, 52, whose cause of death was heart failure. His wife, Sandy, sent the members of the Florida GCSA a letter as if Jeff had written it as his final words to his friends. Her letter is the reason for this message.

Jeff was a superintendent for a long time before becoming a territory manager for Golf Ventures. He was a hard worker and fanatically devoted to helping his customers. He was also always ever involved in volunteer activities for the turf industry. He was an overachiever of the best kind and he will be missed. But as Sandy pointed out in the letter, Jeff had one glaring flaw — he didn't take care of himself.

When he died, Jeff hadn't seen a doctor in 24 years. He maintained a hard-driving work schedule with long days and he pushed himself to perform for others. He also smoked, which is a major risk factor for heart trouble.

Superintendents generally have long days and are pressured to perform. Some stress is self-imposed, and some comes from high expectations and criticism from golfers about course conditions. Here is where I begin to see the irony of superintendents taking care of their golf courses more than they take care of themselves.

I can't count the number of times I've heard or seen comments from superintendents about having to beg and plead and rant and rave for enough renovation time to maintain a healthy stand of turf. They go into great detail and cite all sorts of research to demand course down time to aerify and verticut to keep the turf healthy and vigorous. I would like a show of hands of all those who go the same lengths to insure their own physical health.

Superintendents take soil samples, water samples and tissue samples periodically to

It's Time to Attend to Your Health

BY JOEL JACKSON



I SEE THE IRONY OF
SUPERINTENDENTS
TAKING CARE OF
THEIR GOLF
COURSES BETTER
THAN THEY TAKE
CARE OF
THEMSELVES

determine baselines and changes to their golf courses.

But how many are on some program of routine physical exams based on age group to check up on changes of their own bodies? There are reams of research that say you should have regular checkups. But for whatever reason, we who are so quick to cite endless scientific facts about the health of our own turf ignore other scientific facts when it comes to our own health. Trust me, I know this from personal experience.

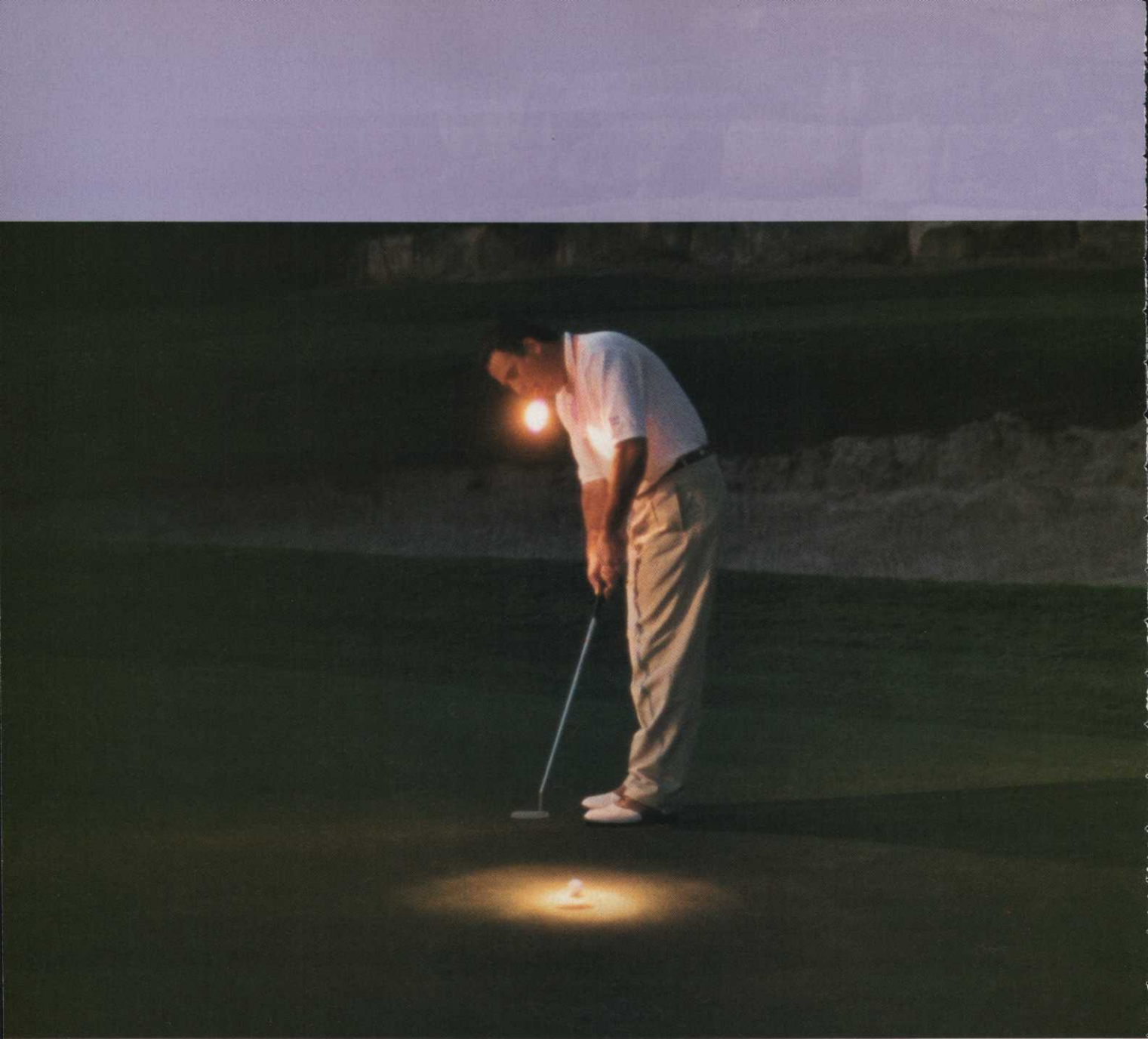
I am a coronary-artery disease patient. I have a 13-year old bypass graft that doesn't work like it is supposed to. I skipped my annual physical last year. I'm human. I've been riding the computer too much lately and not exercising like I should. My diet wasn't outrageous, but I knew I was out of shape. I didn't want to hear any bad news. But I couldn't renew my prescriptions without a checkup. I had to go. It had been five years or more since my last stress test, so they scheduled a follow-up visit.

First, doctors should change the name from "stress test" to "fitness evaluation." I was stressed out just thinking about the possible results.

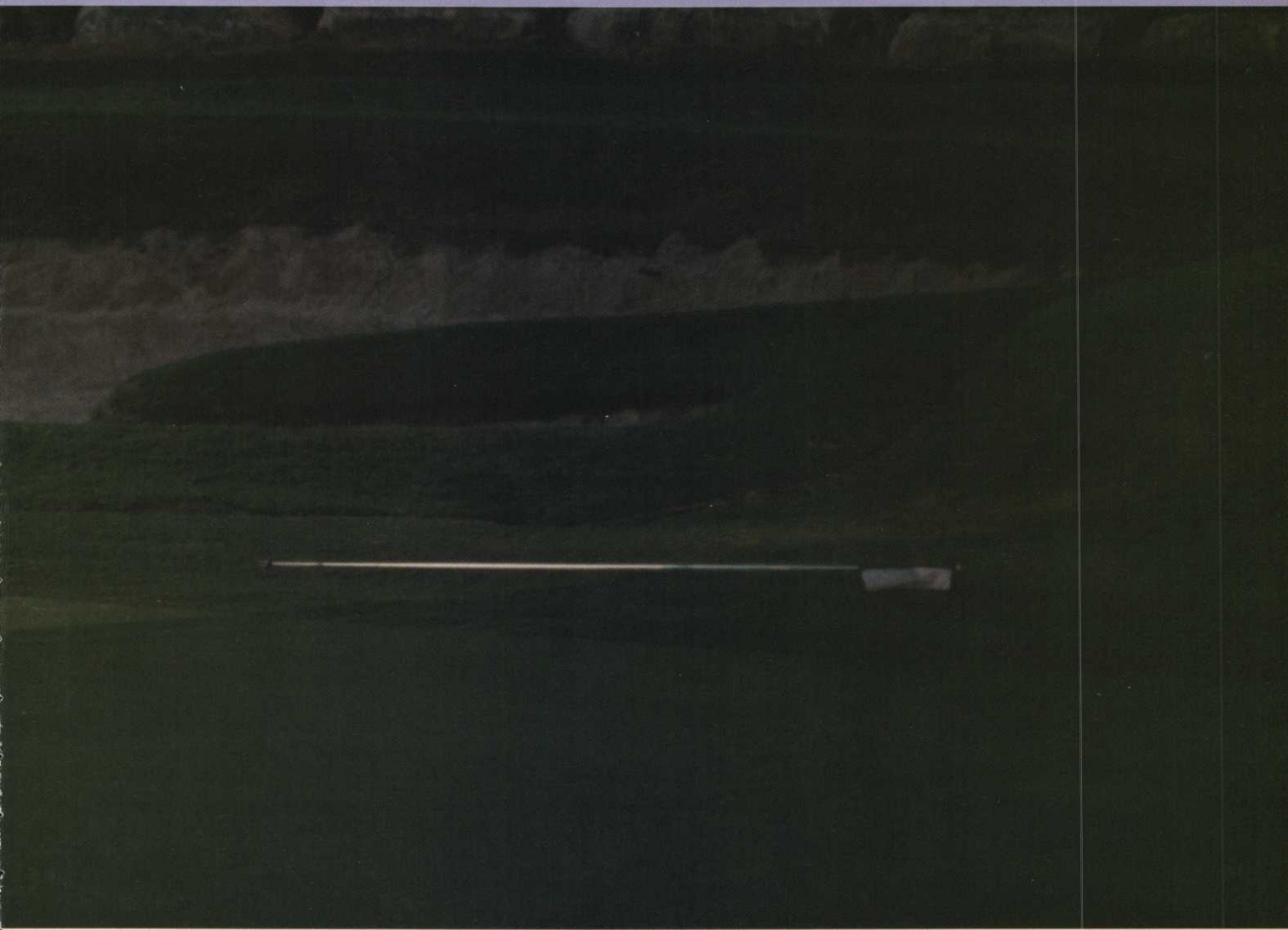
Well, I passed the test. Seems the heart muscle is doing OK. Enough collateral capillaries have formed around the blocked artery to keep the heart healthy, but I have to change my daily routine from coffee maker and computer to Nordic Track and Total Gym first thing in the morning. It's a maintenance decision I'm willing to make.

I don't want to leave my family in the lurch and have my friends crying at a premature memorial service. How about you?

Joel Jackson, CGCS, retired from Disney's golf division in 1997 and is director of communications for the Florida GCSA.



With turf this good, it's hard to quit.



Golfers can't get enough of smooth and uniform turf. It simply plays better. That's why more courses are treated with Primo MAXX®. As a plant growth regulator, Primo MAXX not only slows the vertical growth of grass but also increases lateral spread and turf density—creating a tightly knit cover that better withstands stress. So, even after a day of rigorous use, putts still roll true. To learn more about the wonders of Primo MAXX or our other innovative turf products call your local Syngenta turf sales rep at 1-800-395-8873.



www.syngentaprofessionalproducts.com

Important: Always read and follow label instructions before buying or using this product. ©2001 Syngenta. Syngenta Professional Products, Greensboro, NC 27419. MAXX®, Primo®, and the Syngenta logo are trademarks of a Syngenta Group Company.

CIRCLE NO. 127

The Changing Dynamics of the Chemical Market and How It Affects You

Marketing Molecules

Editor's note: The chemical market is changing faster than you can say "strobilurin." A big reason for the change has to do with the emergence of post-patent pesticides and their impact on the use of branded products. In the following stories, we examine the chemical market on various fronts, including cost and increased competition. We also feature opinions from experts representing brands and post-patents. Jim Davis of Bayer Environmental Science writes about the benefits of brands, and Owen Towne of Griffin LLC writes about the value of post-patent products. We would like to hear what you have to say on this changing market. You can e-mail your opinions to lalward@advanstar.com.

IF

The Cost Factor: Most superintendents say they would try less-expensive generic versions of useful chemical products. But that doesn't mean they'll switch

BY LARRY AYLWARD, EDITOR

a salesman selling an inexpensive post-patent and generic fungicide came knocking on the maintenance facility door at Woodridge Golf & CC, certified superintendent Jim Husting would invite him in his office, give him a chair and a cup of coffee, and listen to what he has to say.

"If it was a comparative product and half the price of a branded product, I'd give it look," Husting says.

So would most superintendents, according to a recent survey by *Golfdom*. In an online poll conducted late last year, *Golfdom* asked superintendents: If a less-expensive generic version of a useful chemical product is available, how likely are you to try it? Forty-seven percent of superintendents said they were "very likely" to try it, and 21 percent said they were "somewhat likely" to try it. Only 6 percent said they "probably wouldn't" try it, and just 1 percent said they "definitely wouldn't" try it.

Economics has something to do with the positive response rate, especially during these penny-pinching times. If an owner or general manager orders a superintendent to slash X amount of dollars from the maintenance budget, the superintendent might consider trying a generic product to save money.

"If the economy and budgets get tighter, I believe most superintendents will look at post-patent alternatives," says Don Naumann, president of Sierra Pacific Turf Supply, a regional distributor in Campbell, Calif.

In its literature for Mefenoxam 2 fungicide, Sipcam Agro USA, a Roswell, Ga.-based manufacturer and supplier of

Husting won't consider it. "I'm not going to try something new just because it's new."

Bruce Rickert, certified superintendent of Medford Village CC in Medford Lakes, N.J., is in the minority, but he says he's "probably not likely" to try a generic product, no matter how much less it costs than a branded product. Rickert says that now because he once tried a post-patent product and had a bad experience with it. The generic chemical wouldn't

dissolve in a vehicle's spray tank. "It cost me 14 man-hours to get the material on the course," he says.

Generics may offer an economical alternative, but Rickert says the cost issue works both ways. The owner of Med-

ford Village CC expects Rickert to watch what he spends, but he doesn't expect him to switch to an unfamiliar generic fungicide to treat anthracnose just because it costs less.

Rickert says his owner realizes there's a chance that such a product could be incompatible with other products and cause major bucks worth of turf damage. "It's just not worth it," Rickert says.

Joe DiPaola, golf market manager for Syngenta Professional Products, says product price is not the major issue among superintendents. He cites company research that reveals superintendents are less concerned about price than other factors. "They're much more concerned about a product's efficacy and performance, as well as service provided by the manufacturer," he says.

Mike Fisher, who heads Fisher & Son Co., a regional distributor in Malvern, Pa., believes economics certainly play a role in superintendents' decision-making, and for that reason they may consider using generic products. But they don't go in with eyes wide shut.

"Most superintendents are cautious about using generic products, especially if they're going to use them on their greens," says Fisher, whose business sells

about 90 percent branded products. "They want to know that the products are safe to use and will perform as well as branded products."

Sometimes that takes time, Fisher adds. Most superintendents want proof — as in university research or other trials — that a product is capable. The rap against some generic manufacturers is they don't test their products as much as branded manufacturers because they don't have the money to fund the tests.

And then there's the service factor. Conventional wisdom says branded manufacturers charge more for products but provide outstanding service, especially if superintendents experience problems with their products. That same wisdom says generic manufacturers can't compete with the brands on the service level.

Fisher agrees that superintendents are more comfortable using branded products because they know they'll usually receive excellent service. "They know that a major supplier is going to be there to guarantee its product and not disappear on them if there's a problem," he adds.

DiPaola says branded manufacturers provide outstanding service simply to protect their product investment.

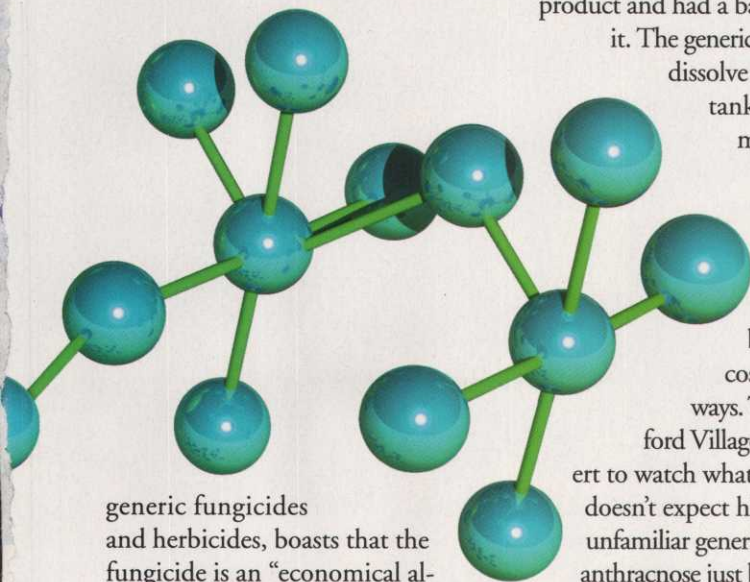
"Once a company has invested about 12 years and \$120 million to put a product in the marketplace, it certainly is going to stand behind that product," DiPaola adds. "Besides, it's the right thing to do."

When Rickert experienced his problem with a generic product, he says he didn't get the service he expected from the company to correct the problem. In the end, the company offered Rickert a free case of the product for his troubles, but it wasn't enough.

"I'm not saying the company is a bad company, but it just doesn't have the overhead or support behind it to take care of its customers when problems occur," he says. "I don't know if generic companies can handle complaints or problems as well as the bigger companies. That's my main concern."

At least one representative of a post-patent and generic chemical manufac-

Continued on page 48



generic fungicides and herbicides, boasts that the fungicide is an "economical alternative to (Syngenta's) Subdue Maxx — with the same active ingredient." Gary Curl, president of Specialty Products Consultants in Mendham, N.J., says superintendents can be swayed by claims like this to use generic products if they cost less and perform well.

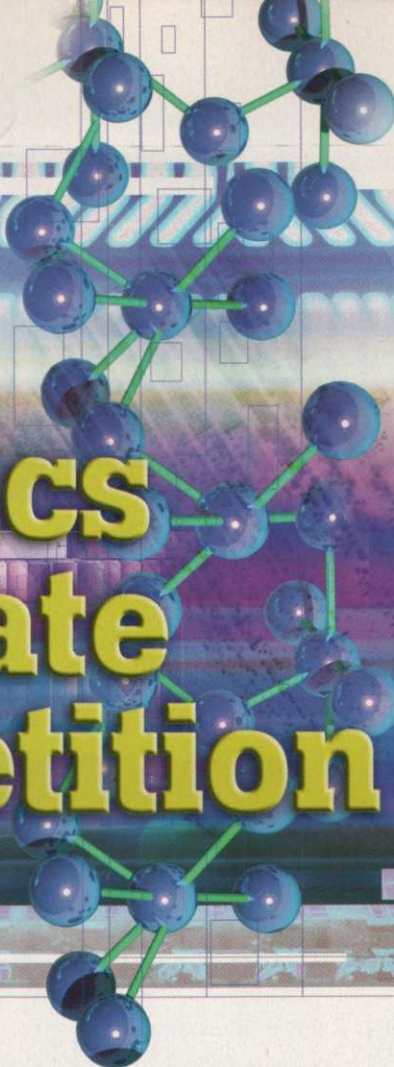
"With all things being equal, most superintendents would choose branded products," he says. "But when there's price sensitivity involved, the loyalty to branded products erodes with many if them."

But trying a generic product doesn't mean switching to it permanently, as Husting points out. While he says he's "very likely" to try a less-expensive generic product, it would only be on his terms, Husting stresses. It's a safe bet other superintendents feel the same way.

"It would have to have the same active ingredient and the same percentage of active ingredient," Husting says, explaining his reasoning behind using a generic product. "It has to be apples to apples, and it has to be cheaper on a cost basis."

If the generic product is anything less,

Generics Generate Competition



More post-patent products mean more market players.
Do branded manufacturers feel threatened?

BY LARRY AYLWARD, EDITOR

Branded vs. Generic. It's not exactly King Kong vs. Godzilla, but this product match-up is making the chemical market much more competitive in the golf course maintenance industry.

More generic and less-expensive post-patent products are on the way. In fact, chemical industry insiders say that 80 percent of the active ingredients in branded chemicals will be available in post-patent products in the next five years. Comparatively, basic manufacturers will not be bringing a hoard of new patented and branded chemicals to the market in the next five years.

So the big question is: Where's the chemical market heading and what impact will it have on the industry and end-users?

Mike Fisher, who heads Fisher & Son

Co., a regional distributor in Malvern, Pa., says branded manufacturers should be concerned that more generic products in the market will mean more competition and perhaps lost market share for them. But increased competition is not such a bad thing, he adds. "It benefits end-users to a certain extent because branded manufacturers then have to look for ways to improve the quality and performance of their products," he says.

From a branded manufacturer's standpoint, the natural response is to feel challenged by the generic competition, says William Strickland, BASF Professional Turf's marketing manager for herbicides and soil fumigants. Strickland realizes that generics have become an integral part of the business model.

"We've branded products, we've cre-

ated a certain amount of value from the market associated to those brands, and we've had to adjust those models for the entrance of generic products," he says.

Strickland, echoing Fisher's philosophy, has nothing against the competition. "Competition in any business at any level makes for better business for the end-user," he says.

Joe DiPaola, golf market manager for Syngenta Professional Products, knows more generic products will be introduced in the next few years, but he doesn't expect Syngenta to be knocked from its perch as one of the industry's top chemical manufacturers. That's because he says Syngenta has the right products, people and technical support in place to serve superintendents. "We're in a good position to serve the marketplace at a level superintendents have come to appreciate," he says.

Bob Yarborough, business manager of turf and ornamental for Sipcam Agro USA, a Roswell, Ga.-based manufacturer and supplier of generic fungicides and

Continued on page 40

WITH TWO HANDS, YOU CAN CARRY TWO BOTTLES OR ONE FULL RACK.



You've only got two hands, but Standard Golf's new Seed and Soil Bottle Rack lets you do more with them. The rack holds two removable crates, with 15 Seed and Soil bottles each.

When it's time to refill, instead of grabbing bottle after bottle, grab a crate of 15 and go! The rack itself is tough, powder-coated steel, and can easily be moved where you need it most. Do you want to know more?

CALL 1-866-SG-EXPRESS

Or contact your Standard Golf Distributor.

**STANDARD
GOLF** COMPANY

Cedar Falls, Iowa USA • www.standardgolf.com

CIRCLE NO. 119

Visit us at GCSAA Booth #2537

Stick to the Brands



BY JIM DAVIS

This time of year, superintendents across the country are sorting through their 2003 chemical management plans. In most cases, a combination of factors influence the selection process, including:

- What are the goals for my operation in 2003?
- What pest pressures will I contend with this year?
- Have I been satisfied with my current options?

Once the agronomic requirements are established, additional questions come into play:

- What specific products should I choose?
- What suppliers should I work with?
- How much will it cost?

Today, superintendents have more options in terms of solutions than ever before. These options run the gamut from name-brand products to off-patent generics, with many viable alternatives along the continuum. What factors play into the analysis of these options? While price is one consideration, we believe that a number of other variables factor into the value proposition and ultimately the purchase decision. For instance:

- What can I learn from my peers about the products they use?
- What are the results of the research trials on the products I'm considering?
- Who is the manufacturer of the product?
- What support do I receive from that manufacturer? Is there anything that stands out?
- Has the manufacturer returned value to me in the last year by supporting meetings or educational seminars?

When considering manufacturer support, what can we tell you about Bayer Chipco that you don't already know? You probably know by now that we recently completed merging and integrating the Bayer Professional Care and Aventis Chipco Professional Products turf and ornamental organizations.

This allows us to have more than 40 field employees in the areas of sales, research and development, and technical service. We supply the market with more than 20 chemical solutions and numerous value-added programs, like Chipco Academy, Accolades and Greenback, just to name a few.

In addition, we have a full regulatory staff in place to manage through the many EPA requirements of product stewardship. The regulatory staff are often unsung heroes, defending products long after patents expire.

Recent examples of this include reregistration work

Continued on page 44

A Valuable Option



BY OWEN TOWNE

When superintendents sit down to crunch their annual budget numbers, they face and evaluate an array of alternatives. These days, one key consideration is choosing between a brand-name product and the equivalent material in the form of post-patent chemistry.

In most cases, post-patent materials offer the better value and are useful alternatives to higher-priced brands. Let's take a look at some of the reasons why an increasingly growing number of superintendents are making post-patent pesticides their products of choice.

For turf managers, the two leading considerations for choosing a specific product are performance and price, in that order. The material must work, and efficacy will always be the chief requirement for superintendents. But in most every case, generic products perform at least as well as the originals. That's because the quality of the active ingredients must be at least equal, but in many cases are superior, to that of existing materials. In fact, the Environmental Protection Agency (EPA) verifies that the technical material or active ingredient of the generic is at least equivalent to that of the original before the product can be marketed.

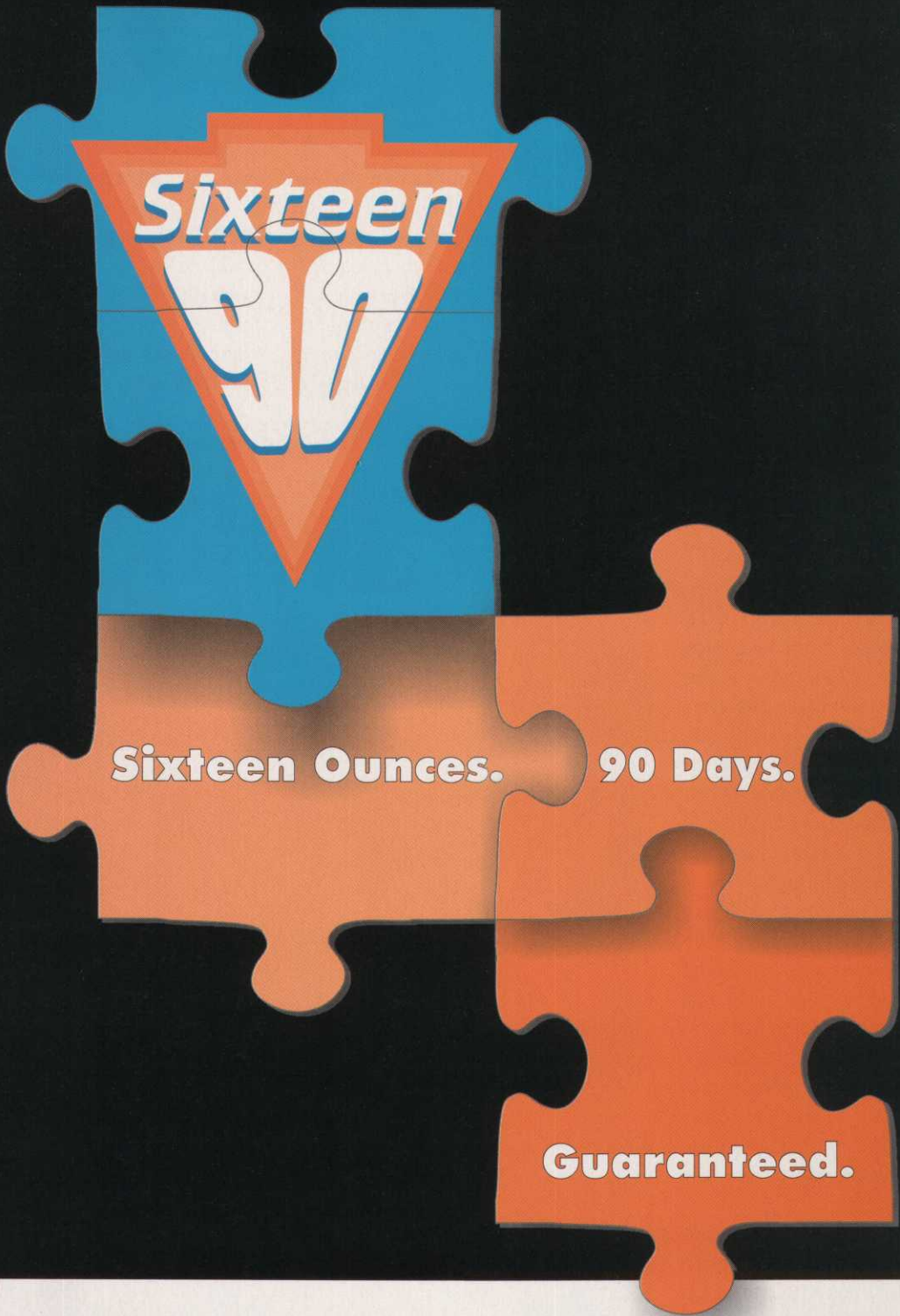
In many cases, post-patent products are manufactured in more up-to-date facilities than the initial products. These newer formulations often take advantage of the most recent technological improvements in manufacturing and can make better, and more efficient use of the raw materials used in the process.

Since generic materials are generally less expensive than brand-name products, they particularly make sense in today's economy. As I talk with turf managers, distributors and others in the supply chain, I keep hearing that the economics of a product are increasingly important to them. Once they appreciate they can get the same bang for fewer bucks, the decision is fairly simple. That's why we've seen a steady growth in the number of superintendents using post-patent products in recent years. It's also why we expect this number to grow annually.

One reason the generic market is growing so quickly is that so many of the major products are post-patent. Most of these are proven performers that make first-rate rotational and tank-mixture partners for the newer chemistries. With even more key active ingredients coming off patent in the next few years, a larger number of generic offerings will be added to the industry's arsenal of pesticides. Superintendents will see value in these products as long as they perform.

Remember that post-patent products aren't only of-

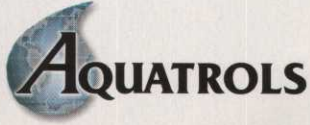
Continued on page 45



Providing Solutions
to the Water
Management Puzzle

You'd like the convenience of a long-term surfactant – if you could find one that really worked. That's why we've developed Aquatrols Sixteen90. This long-term surfactant remains effective in the soil for up to three months, reducing water repellency and promoting turf uniformity. And unlike some "long-term" surfactants, we guarantee that it's safe to use on all fine turf regardless of climate or environmental conditions.

Sixteen ounces. 90 days. Guaranteed.



5 N. Olney Ave. • Cherry Hill, NJ 08003 • USA • (800) 257-7797 • www.aquatrols.com

CIRCLE NO. 120

Continued from page 36

herbicides, says branded manufacturers shouldn't feel threatened by generic manufacturers. He says there's room for both branded and generic products to succeed.

The game

Gary Curl, president of Specialty Products Consultants in Mendham, N.J., says basic manufacturers will be less inclined to invest in research and development for new products if their profits potentially decline at the hands of generic manufacturers.

"As profits go down, the market isn't as attractive and a company invests less to provide a greater return to shareholders," Curl says. "In the long term, you'll see a decline in the number of new products coming into the market from the basic manufacturers."

Curl says it's difficult to define the "long term." But he says an influx of new chemicals in the next five or 10 years is not realistic, especially since manufacturers have to jump through so many hoops and spend millions of dollars to bring them to market. "But there are incentives for the big companies to defend and continue to grow their businesses, especially if there are no new active ingredients in development," he notes.

Curl expects basic manufacturers to put more emphasis on product formulations to give them a leg up on the generic competition, as well as a new angle for marketing.

"There will be more of an emphasis on the handling and formulation characteristics of different products," Curl says. "Improvement doesn't necessarily mean a change in the active ingredient, but it can be a concentrated effort to enhance the properties of the formulation. Maybe the product becomes easier to mix in a tank or easier to apply. Or maybe it can be applied on a 28-day schedule instead of a 21-day schedule because it has better binding characteristics to the leaf surface."

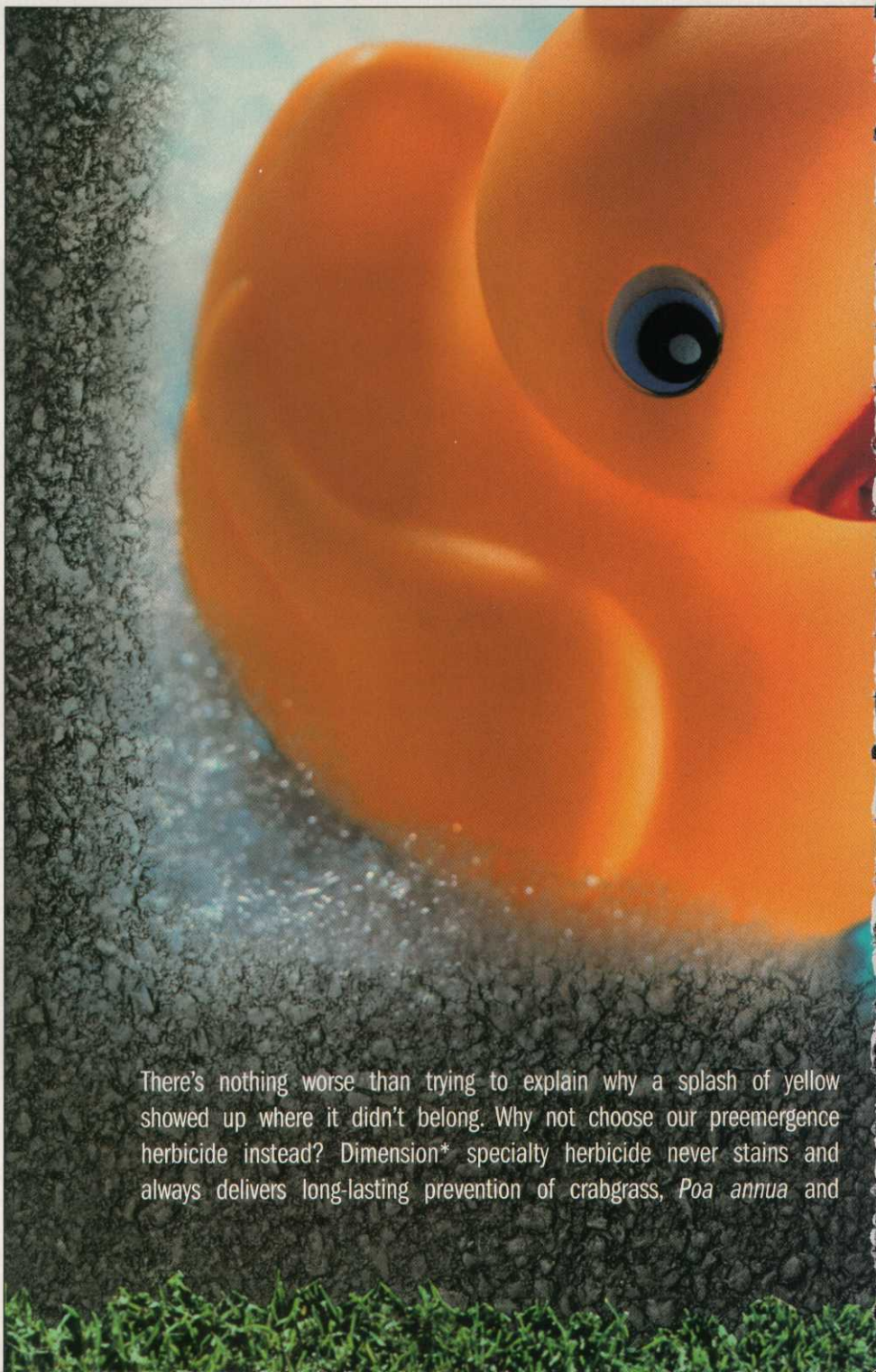
BASF's Strickland acknowledges that basic manufacturers are more targeted in the new chemicals they introduce be-

cause of the substantial investment (in the range of \$100 million, he says) it takes to bring one to the market. But he stresses that BASF will continue to market its products aggressively based on a variety of factors, especially service and ongoing studies to back the products' performances. Strickland believes most generic manufacturers can't match the

service and product research provided by branded manufacturers.

The future

Strickland says he's concerned the chemical market will become driven by economics if generic products continue to secure more market share. If that happens, university studies and customer



There's nothing worse than trying to explain why a splash of yellow showed up where it didn't belong. Why not choose our preemergence herbicide instead? Dimension* specialty herbicide never stains and always delivers long-lasting prevention of crabgrass, *Poa annua* and