

SOD INDUSTRY SURVEY

a comprehensive study of
U.S. sod production and
marketing practices

Cultivated sod is now a \$100 million crop in the United States. That's the wholesale price at the field. Not only are growers producing and selling more sod than previously thought, they've had more years in business than most in the industry would have guessed.

These and other new facts about sod came to light in a comprehensive study of the industry by WEEDS TREES AND TURF magazine staff members. This magazine study with the help of officials of the American Sod Producers Association has been able to pinpoint the current number of growers in the U.S. at about 900.

WTT's circulation lists include almost 1200 readers who categorize themselves as sod growers. These include, however, a number of larger farms where foremen and partners also receive the magazine. This list further includes about 40 who are primarily large grass seed producers. The WTT survey was sent to 1196 (see Table 1) growers. It

Table 1. Results of survey among all sod producers on WEEDS TREES AND TURF circulation lists.

Survey Questionnaires Mailed*	1196
Questionnaires Returned	256
Returns	21.4%

*Only Owner-Operators Asked To Complete Survey Questions

asked them to not return the questionnaire unless they were an owner-operator. The idea was to eliminate all duplications.

A total of 256 surveys were returned. This amounts to almost 30 percent of the estimated 900 growers in the nation. Thus the results proved to be excellent and the data are highly reliable.

New Market Facts

The 256 growers who reported their cultivated sod acreage said they were growing 45,967 acres. (see Table 2). Projected (3½ times 256 equals the approximate 896 growers in the nation and the same formula can be applied to their acreage), this

Table 2. Report of growers on the number of acres of cultivated sod produced yearly in the United States.

Question: How many acres of sod do you have under cultivation?

Answers: 256

Total Acreage: 45,967

Average Acreage Per Farm: 179.5 acres

Projected (896 growers): 160,884 acres

Table 3. Report of growers on the number of acres of sod marketed yearly in the United States.

Question: How many acres of sod do you market each year?

Answers: 251

Total Acres Marketed: 20,990

Average Acreage Per Farm: 83.6 acres

Projected (896 growers): 74,905 acres

Table 4. Average number of years experience in growing sod among U.S. growers.

Question: How many years have you been growing sod?

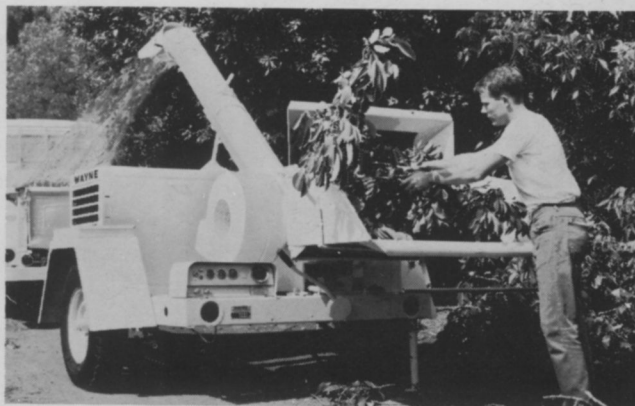
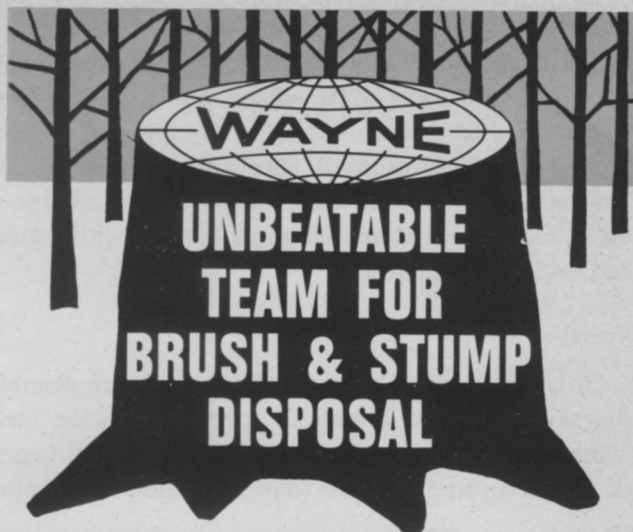
Answers: 251

Average: 9.6 years per grower

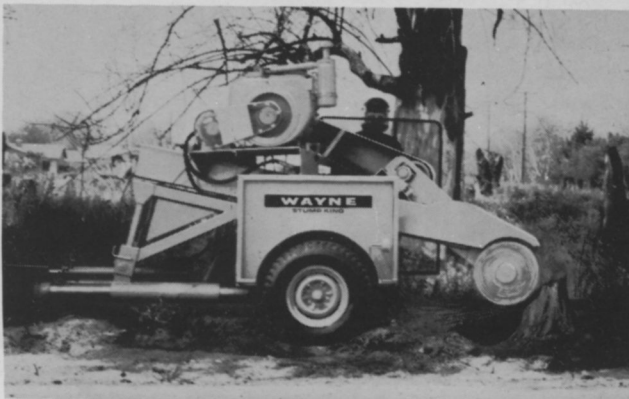
indicates a total sod acreage in the country of 160,884. This amounts to 179.5 acres per farm, again on the basis of almost 900 growers.

On the market side, growers report they are selling 83.6 acres of mature sod each year on a per farm basis. The 256 actually reported selling almost 21,000 acres in 1968. (see Table 3). When projected the actual figure is 74,905 acres marketed yearly. Selling prices of sod at the field vary from area to area, and there is even greater variation in field prices of speciality varieties. Even so, when the going field prices of sod are applied to the almost 75,000 acres being sold each year, the \$100 million estimated for the total crop becomes a reliable barometer of growth in this phase of the industry.

Growers have been in the business longer than WEEDS TREES AND TURF, March, 1969



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anticipated. The 251 reporting their experience show an average of 9.6 years per grower. (see Table 4). Sod farms vary greatly in size as expected (Table 5) and will likely continue to do so. Interesting is the fact that nine percent of all operators have more than 500 acres each of cultivated sod under production.

Varieties Grown

Only about nine percent of the growers reporting say they grow blends or special varieties. (see Table 6). But for those who do, these special types of sod account for more than half their own total

Table 5. Size of sod farms as reported by U.S. growers.

Size of Operation	Number Reporting	Projected*	Percent
Acreage 500 or more	23	81	9.0
300-499	22	77	8.6
100-299	74	259	28.9
50-99	58	202	22.7
25-49	29	102	11.3
Less than 25	50	175	19.5
Totals	256	896	100.0%

*Based on 896 growers (No. reporting x 3½)

Table 6. Growers report on the number who grow blends or special varieties of sod.

Question: Do you grow blends or special varieties?

Answers: 23 yes

Percent of Total Acreage Grown	54.7% (blends)
Total Acreage Reported	1260 acres
Projected (80 growers)	4410 acres
Total Growing Blends (896 growers)	Approximately 9.0%

Table 7. Varieties of cultivated sod now being grown in the U.S.

Question: What varieties of sod do you produce?

Variety	Answers	Acreage	% of Crop
Merion	144	17,455	38.0
Fylking	41	415	0.9
Windsor	28	825	1.8
Park	32	1,580	3.4
Newport	19	782	1.7
*Other	161	16,154	35.1
Unreported	—	8,757	19.1
	425	45,967	100.0%

*Pennlawn, Bahia, Centipede, St. Augustine, Bitter Blue, Zoysia, Tifgreen, Bermuda, Prato, Northrup-King, Penn-cross, Kentucky Blue, Delta, Buffalo, Tifdwarf, Tifton, Emerald, Warrens, Seaside, Gulf Brand, Miscellaneous Blends

Table 8. Methods of handling sod as reported by growers.

Question: How do you handle sod?

	Number Reporting	Percent
Rolled and loaded by hand	114	37.6
Folded on pallets	48	15.9
Rolls on pallets	47	15.5
Rolled and loaded by elevator	37	12.2
*Other	57	18.8
Totals	303	100.0%

*steel pallets; slabbed on pallets; harvester; rolled by machine and loaded by customers; hand shovel and hand load; sod pluggers and verticut; uncut and contracted

Table 9. Grower response as to where sod is delivered.

Question: Do you deliver to point of sale?

199 yes—77.7% of growers

Do you sell for pick-up at field?

192 yes—75.0% of growers

Both Practices—135 yes—52.7% of growers

production. Merion remains by far the dominant variety of cultivated sod (Table 7) though new varieties are making inroads in the market.

Despite the growth of cultivated sod, new methods of handling are lagging. More than one grower in three (some reported more than 1 method of handling) indicate they are still rolling and loading sod by hand. A number roll by machine and leave loading to customers. Still others sell their crop uncut and on a contract basis. Added up, the study indicates that more than half (see Table 8) of all growers are still doing much of the heavy labor required in sod production by hand.

More than half of all growers sell both at the field and also deliver sod. A total of 52.7 percent

said they used both methods (Table 9) in moving their crop. As to who buys the crop, the survey proved very revealing (see Table 10). More than 40 percent goes to landscapers. But one of every four acres sold goes direct to homeowners.

Selling Helps

More and more salesmen are being employed by growers to move their crop on a regular basis. A total of 39 growers of the 256 returning questionnaires said they employed one or more salesmen. (see Table 11). This on a projected basis would indicate that almost 300 are now employed in moving sod.

In the field of advertising, the WTT study indicates that many growers are hesitant to use many of the advertising opportunities open to them. For example, less than half, only 47.4 percent, use telephone book yellow pages. (see Table 12). Fewer

Table 10. Report of growers on purchasers of cultivated sod in the U.S.

Question: Where do you market sod?

Answers: 247

	Percent of Crop Sold
Landscapers	40.7
Direct to Homeowners	25.6
Industry	7.4
Garden Centers	6.9
Golf Courses	3.9
Other Sod Growers For Resale	3.5
*Other	12.0
	100.0%

*state and city governments; retail sod haulers and truckers; general contractors, builders and developers; cemeteries; schools; parks; utilities

Table 11. Number of salesmen employed by sod producers in marketing their cultivated sod.

Question: Do you employ salesmen?

Answers: 39 yes 217 no

Percent using salesmen: 15.2%

Total Salesmen employed: 82

Projected (total salesmen, 896 growers): 287

Table 12. Types of advertising used by growers in developing a market for cultivated sod.

Question: Do you do any advertising besides personal contact?

Answers: 171 yes 82 no

Types of advertising	No. answers	Percent
Yellow Pages	120	47.4
Newspapers	112	44.0
Direct Mail	51	20.0
Radio	23	9.0
Magazines	20	7.9
Television	2	.7
*Other	18	7.0
Totals	346	139.0%

use local newspaper ads and even fewer use any form of direct mail.

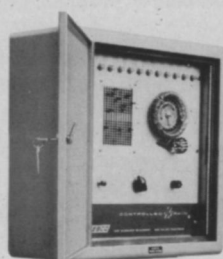
By contrast, growers have made significant strides in improving efficiency. A big 68 percent

WEEDS TREES AND TURF, March, 1969

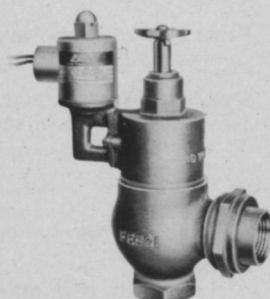
ALL YOU ADD IS WATER

THE COMPLETE LINE

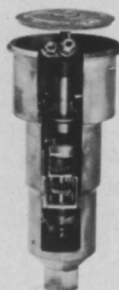
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Table 13. Methods employed by growers to improve efficiency in handling and marketing sod.

Question: What steps have you taken to improve efficiency?

	Number Reporting	Percent
New Equipment	162	68.0
Changed Varieties	38	16.0
Advertised	18	7.6
Irrigated	14	5.9
*Other	6	2.5
Totals	238	100.0%

*Changed personnel; invented equipment; fertilized more; changed handling and marketing methods; better seed

Table 14. Major problems of sod growers in producing and marketing cultivated sod.

Question: What do you consider the major obstacles for growers in sod production and marketing?

	Number Reporting	Percent
Labor (cost, shortage, turnover)	89	54.5
Price (low, high, pricecutting, greediness, control)	39	23.9
Consumer Education	17	11.0
Collecting	12	7.4
Over production	10	6.1
*Others	6	3.7
Totals	163	100.0%

*bad seed; diseases; competition; lack of product promotion; rising costs; fly-by-night installers

Table 15. Report of growers on the 1968 sod production business.

Question: How was your business in 1968?

	Number Reporting	Percent
Increased	133	53.9
Stayed about the same	94	38.0
Decreased	20	8.1
Totals	247	100.0%

Table 16. Business outlook of growers for 1969.

Question: What do you expect businesswise for 1969?

	Number Reporting	Percent
Better year	147	61.0
About the same	90	37.3
Worse than '68	4	1.7
Totals	241	100.0%

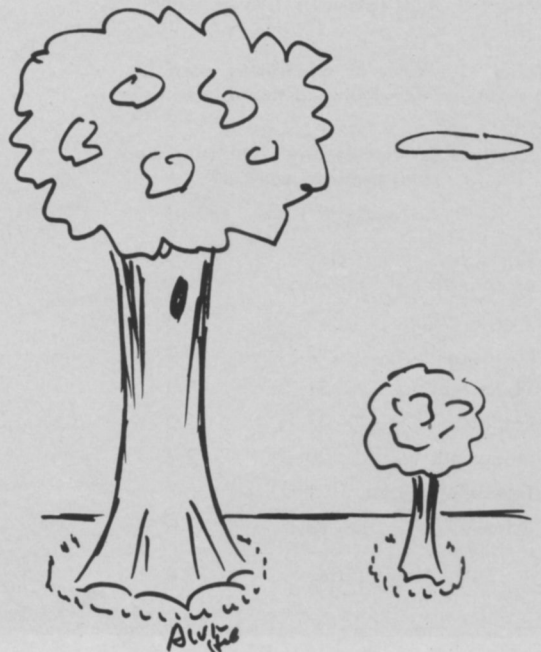
report they have added new equipment during the last few years to improve management. (see Table 13). More than one in seven have changed varieties in an effort to improve their operations.

Major problems in growing and selling the crop would appear to be labor and pricing. More than half the growers said costs, shortages, and turnover of labor constituted their major problem. (see Table 14). Almost one of every four reporting listed pricing of the crop as the key problem area. Still others feel that consumers (homeowners and users generally) need to be made aware of the value of sod. Collecting, as expected, continues to be a problem in marketing.

Business Outlook Optimistic

Growers generally enjoyed a good year in 1968. More than 90 percent said business was as good or better than the previous season. (see Table 15). Significant is that more than half — 53.9% — said business increased.

For 1969, growers are especially optimistic. (see Table 16). More than six of 10, (or 61 percent) expect a better year than 1968 which was in itself a year of increasing business. Some 37.3 percent expect a year of about the same. Less than 2 percent — 1.7% — believe business will be down. These growers expectations — based on the experience of many veteran growers would indicate that an extremely strong market for sod will be the norm for 1969.



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