Profile of an Industry

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A SURVEY was conducted by the University of Maryland, Department of Agronomy, and the Division of Marketing of the Maryland Department of Agriculture in December 1973 to determine the market availability of sod in Maryland. Over 80 sod farmers in the state participated in the survey making it the most recent comprehensive acreage survey of the Maryland sod industry. The results of this survey are of value to sod producers as they attempt to anticipate supply-demand pressures and make plans for production and marketing. In the presence of high interest rates and continuing sewer moratoriums, the need to make professional marketing decisions is of utmost importance.

In December of 1973, Maryland sod producers indicated that 5,699 acres of sod would be ready for sale in 1974, 5,555 acres would be in intermediate stages of maturation and 1,896 acres of sod were yet to be planted. This survey indicated that Maryland's total acreage committed to production of cultivated sod for 1974 was approximately 13,150 acres.

Fifteen of Maryland's 23 counties have acreage in sod production. Montgomery, Carroll, Howard and Harford counties are the leaders in sod production with 37.6%, 13.1%, 12.1% and 12.1% respectively (Table 1).

There are many types of sod available to the sod buyer in Maryland including warm-season and cool-season grasses, single varieties, mixtures and blends. The greatest amount of sod produced in Maryland is a mixture of 40% improved Kentucky bluegrass, 40% South Dakota Certified Kentucky bluegrass and 20% Pennlawn red fescue (Table 2). The majority of the acreage is in the Maryland Department of Agriculture Certification Program.

Performance observations made throughout the state indicate that the 30-30-30-10 blends (30% Merion Kentucky bluegrass-30% Improved Kentucky bluegrass-30% Common Kentucky Bluegrass-10% Creeping Red Fescue) are performing well and rapidly rising in consumer and producer desirability.

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Table 1: Total Sod Production Acreage in Counties of the State of Maryland.

County	% of Maryland's Acres	Total Sod Acreage
Caroline	868	6.6
Carroll	1730	13.1
Cecil	480	3.6
Charles	158	1.2
Frederick	195	1.5
Harford	1587	12.1
Howard	1593	12.1
Montgomery	4958	37.6
Prince George's	605	4.6
Queen Annes	749	5.7
Other Counties*	227	1.7

*Allegheny, Anne Arundel, Dorchester, Kent & Worcester County Combined Acreage

Table 2: Sod Available in Maryland in 1974 by Type and % of Maryland's Salable 1974 Sod Acreage.

Type of Sod		% of Maryland's Salable 1974 Sod Acreage
Single Varieties		
Kentucky bluegrass		9.7
Bentgrass		0.1
Bermudagrass		0.5
Tall Fescue		0.9
Zoysia		0.3
	Sub-Total	11.5
Mixes		
40%-40%-20% (K. Blue-K. Blue-Creeping Red Fescue)		41.3
30%-30%-30%-10% (K. Blue-K. Blue-K. Blue-Creeping Red Fescue)		20.4
90%-10% (K-31 Tall Fescue-K. Blue)		9.9
	Sub-Total	71.6
Other Mixes		7.9
Straight Bluegrass Blends		9.1

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The addition of the third variety of Kentucky bluegrass appears to add increased disease resistance and greater multi-season performance potential to this sod mixture.

The agricultural economic impact of the Maryland sod industry continues to increase (Table 3). Neither Maryland nor the USDA tabulate annually the cash receipts from sod production. However, figures were computed using 1971 Maryland State Board of Agriculture estimates.[1] The average value of an acre of sod sold on a cash first sale basis ($1,205), coupled with 1972 estimates of sod acreage sold, illustrates that the sod industry represents an important agricultural product in Maryland on a cash receipt basis. This value for sod production is most likely a conservative estimate as the sod value figures were for 1971 and the acreage figure represented only 75% of the acreage available for sale in 1972.

The 13,150 acres of sod currently in production in Maryland multiplied by the 1971 average installed cost of $3279 per acre[1], illustrates an increase of the Maryland Gross State Product of 43 million dollars. These tangible effects of the sod industry upon the agricultural economy of the State of Maryland are important, but perhaps not as important as the intangible effect of quality sod upon the health, happiness and well-being of Marylanders.

Without question, sod ranks as the most effective soil erosion deterrent. Its dollar value, both as a contributor to soil conservation and to air quality, is beyond measure.

References

[1]Miller, William R., 1972, The Commercial Sod Industry in Maryland 1971, Publication No. 55, Maryland State Board of Agriculture, July 1972, 6pp.

[2]Bookout, Byron R., 1974 Maryland Agriculture Statistics — Annual Summary for 1973, Maryland Crop Reporting Service, Publication 11, June 1974, 68 pp.

Table 3: 1972 Crop Cash Receipts on a Cash First Sale Basis From Farming in Maryland.[1,2]

Crop	1971	1972
Corn	28,039,000	$34,561,000
Tobacco	23,123,000	$23,081,000
Soybeans	19,014,000	$22,070,000
SOD	3,672,000	$ 5,440,000
Wheat	5,005,000	4,379,000
Apples	3,953,000	3,696,000
Snap Beans	2,013,000	2,805,000