

NEW LUSTRE FOR IRON COUNTRY

Manufacturers expand commercial turf equipment market and rebuild distribution in the wake of Deere.

by Bruce F. Shank, executive editor

Competition has made the commercial turf equipment market better than most experts thought it could be two years ago.

Once considered mature, or even stagnant, the commercial mower market appears to be gaining a lasting strength, defying the predictions of doubtful analysts.

The amazing walk-behinds

For example, five years ago only five companies manufactured walk-behind commercial rotary mowers (32-inch and up); Bobcat (Ransomes), Bunton (Goodall), F. D. Kees, Sensation, and Yazoo. Today, 14 companies make them and all seem to be going strong. The new list includes the big manufacturers, John Deere, Ford, Jacobsen, and Toro, as well as Exmark, a company recently created to capture part of the expanding walk-behind market. Scag recently announced it has entered the walk-behind market.

Dick Lehman, vice president of Ransomes, is impressed with the continued growth of the walk-behind rotary market. "We expected the huge increase in competition (in the walk-behind market) to hurt our veteran Bobcat line, but it hasn't," Lehman told *Weeds Tree & Turf*. "Orders keep pouring in and we keep expanding our plant. It's amazing!"

Stan Byers, president of Bunton, the original manufacturer of walk-behind commercial mowers, is equally impressed with the strength of the market. "We know from replacement sales that there must be more than 70,000 commercial mowing contractors in the U.S.," claims Byers. "We also know from our distributors that sophisticated hobbyists are buying commercial walk-behinds when



Brouwer 5-gang with verticut blades.



The Cushman Front Line



Jacobsen G4X4 with fine cut flail.



Deere's 930 turf tractor.

they used to buy lawn tractors. Certainly the market is far from saturated."

Deere liked Bunton's expertise in this rapidly growing market so much it bought 20 percent of the company. Bunton supplies Deere with walk-behind mowers and Deere makes its own riding rotaries. Byers hopes to manufacturer more products for Deere.

Today's turf tractor

The other hot market is the riding out-front rotary, called turf tractors in the trade. These highly maneuverable,

three or four-wheel mowers cutting from 48 to 72 inches, are rapidly gaining popularity with both commercial and institutional buyers who up to now have been buying tractor-mounted belly rotaries.

Turf tractors cut the grass ahead of the wheels, reduce the amount of trim work following mowing, and are faster and more maneuverable than standard tractors or out-front rotaries with sulkies.

Toro's Groundmaster and Jacobsen's Turfcats established this market but the competition is getting stiff. Companies like Excel, Howard Price,

and Grasshopper attribute much of their growth to turf tractors. Bunton, Cushman, Deere, Heckendorn, Kut-Kwik, Ransomes, Scag, Sensation, Smithco, Steiner, Walker, and White also have entries in this market.

Howard Price, saying the commercial cutter market is growing 'by leaps and bounds', has his engineers working on ways to make his turf tractors more reliable than his competition by incorporating hydraulics and a new direct drive system to eliminate belts.

Multipurpose tractors

The turf tractor, combined with hydraulics, is spawning a third market, the multipurpose landscape tractor.

Quick detach couplings and hoses allow landscape managers to switch a turf tractor from rotary to flail or reel, to a brush or snowthrower, and, in the future, to a vacuum, aerifier, or verticutter. The possibilities are vast, allow the landscape manager to get more out of his investment, and take away some of the advantages of the less efficient standard tractor.

International connections

The multipurpose turf tractor is getting much of its impetus from technology already existing in Europe and the U. K. When Ransomes purchased Bobcat it brought some of these concepts to the U.S. Since then, Bunton has purchased 85 percent of JL Tractor in Denmark, Jacobsen has imported its G4x4 from Switzerland, and Sensation now imports a West German turf tractor. Deere has plants in Mannheim, Germany, and Toro has signed trade agreements with companies in Australia and South America.

Ransomes, the oldest mower manufacturer in the world, has vast experience in the reel market in Europe and England. The U.S. park and athletic field market resembles the European market more each year making Ransomes' experience more valuable.

Jacobsen's imported G4x4 has a low center of gravity for stability on slopes and four-wheel steering to reduce tire wear on turf. Front and rear PTO attachments permit a wide variety of uses.

Sensation previewed its new import at the Golf Course Superintendents Show in Washington, D.C., in February. It is also maneuverable and features easy implement changeover.

International ties provide more than new technology, they are a fulcrum for exchange rates. U.S. mower manufacturers export as well as import. The high dollar makes U.S. products comparatively expensive to

foreign buyers. This has crimped exports by some U.S. companies.

If the dollar weakens the export market should improve, but then imports become more expensive. The only way for companies to have a hedge for both a strong or weak dollar is to be an international company like Ransomes, Bunton, and Deere. Expect to see more international deals in the next few months.

Testing the upper limits

Turf equipment manufacturers, while battling each other in the highly competitive walk-behind and turf tractor markets, are also testing the upper limits of the market. Price tags over \$30,000 are no longer restricted to agricultural equipment.

Five companies, not including the highway market, have turf products breaking the \$30,000 mark today; Bunton/JL, Howard Price, Jacobsen, Ransomes and Toro. These entries, like Jacobsen's HF-15 and Toro's HTM-175, are seven-gang, hydraulic reel units designed for golf courses and parks. They can be purchased with all the comforts of an agricultural tractor and are also multipurpose.

Herb Bunton said the large, multipurpose turf tractor developed when the agricultural market in Europe became depressed in the mid-70's. Manufacturers started seeking other markets for their equipment. Bunton/JL's tractor features cutting height adjustment from inside the tractor, quick implement conversion, and greater operator comfort.

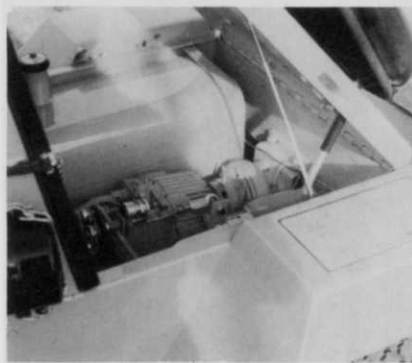
"We've discovered you don't sell these units on the first call," says Byers. "But, in time, they sell themselves despite the high price tag. Golf courses and parks see the benefit of a large, multipurpose machine."

Other up and comers

The popularity of walk-behind rotaries and turf tractors extends to reels. Triplex greens mowers spend more time on fairways than they do greens today. The majors (Jacobsen, Ransomes, and Toro) are sharing new sales in this area with Bunton's Japanese imports, Locke, National, and Howard Price.

Tee mowers are seen today in the trucks and trailers of lawn care companies. National and Locke are attacking this expanding market as well. Reels cut prestige turf better than rotaries and are more popular in warm season markets, especially California.

Jacobsen is wandering from the pack slightly with a soon-to-be-announced emphasis on fine-cut flail mowers. Jake vice president Tom Car-



Direct drive eliminates belts on new Howard Price Turf Blazer.

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ter says flails take less energy to operate than rotaries and represent less of a hazard in pedestrian areas. Mott, Vrisimo, Mathews, Middlesworth, and Vemco have served the flail market up to now. Educating reel and rotary users about improved cutting quality is a mission Jacobsen hopes to achieve.

The multiple use turf tractor is helping the reel gang market. The majors and Roseman have dominated this market for years. But, in the last few years the names Brouwer, Jerry Clipper, and most recently, LESCO can be found on reel gangs on golf courses, sod farms, and highway right-of-ways.

But rotary makers are fighting back by adding wings on turf tractors and boosting horsepower. Excel and Howard Price are especially active in this area. They boast of simplicity, better cut in tall grass, and less equipment maintenance.

All types of mowers are beginning to benefit from hydrostatic drive. "Hydrostatic models will dominate the mower market if the price difference between it and manual shift comes down," claims Howard Day, vice president of marketing for Yazoo. Forward and reverse by a simple foot pedal may be the wave of the future.

Engine choices grow

"Engine options are one of the toughest decisions we have to make," stresses Exmark President Robert

Martin. "We have to consider the serviceability as well as other engine properties."

Briggs & Stratton continues to dominate the small engine market. Its engines are found on more than 80 percent of most small commercial equipment. Kohler, Onan, Tecumseh and Robin are also found on commercial equipment.

Starting a few years ago, Honda mounted a challenge to Briggs and gave other engine manufacturers hope of capturing a bigger piece of the U.S. market. Italian, Japanese and German engine manufacturers are all trying. In the meantime, Briggs has responded to the challenge with significant new models.

Manufacturers typically offer a choice of two engines on smaller equipment, Briggs and Honda. That appears to be changing and a wider selection of engines may be offered in the future.

Tecumseh may have found the back door to the U.S. market with a German company it owns, JLO. The two-cycle JLO offers longer life and better performance on slopes than four cycle engines. Of course, it also requires oil/gas mixture and the exhaust is more visible.

The distributor difference

The most dramatic event in the past two years in the commercial turf equipment industry was Deere's entrance into the commercial turf market with 3,000 dealers. It is causing all manufacturers to reevaluate their distribution.

Deere is educating a vast new group of customers through both its urban and rural dealerships. In reality it is opening up new frontier for its competitors at the same time. As Deere's Bob Tracinski explains, "The Deere dealer is a neighbor, not a travelling salesman. He is part of the community and in touch with his customers on a weekly basis. Add to that the service, parts availability, and availability in case of complaints, and you have something no other company has."

Bunton's Stan Byers and Toro's Denny Brown caution there is a distinction in the case of golf course sales. "You can't have 5 or 10 dealers calling on the same golf course," says Byers. "The superintendent would go crazy!" Brown states, "The upscale consumer and small commercial cutter are being discovered by dealers as new products for them become available. But, in most cases, the dealer can't provide the type of support a golf course or big equipment user needs."

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IRON *continued from page 26*

Toro is carefully rethinking its distribution to serve both the big equipment buyer and the commercial cutter. "It's really a market by market decision," says Brown. "We recognize the need for more representation in certain locations, such as rural areas or cities with a high number of small commercial cutters."

Brown indicated one-step distributors are preferable to two-step dealers where practical. This has been especially apparent in distribution of chemicals to cost sensitive markets such as lawn care. The second markup for the dealer can lose the sale in many instances. It is yet to be determined how price sensitive these same lawn care companies will be as they expand into mowing.

As the Toro name was dropped from the last formerly company owned distributor this year, Bunton was buying one of its distributors in New Jersey.

"Sales increased more than 20 fold after we took control," Byers pointed out. "It's really a matter of putting a motivated individual in charge of the distributorship, and who is more motivated than the manufacturer?" Bunton is also its own distributor in its home territory, Louisville.

Another off-target prediction the past two years is the demise of the short-line distributor. "Short-line distributors have never had as many products to sell as they do today," claims Howard Price. "Some consumer dealers are upgrading to distributors. Dealerships abandoned by our competitors and agricultural manufacturers (International Harvester and Case) are anxious and equipped to handle commercial equipment."

Ransomes is very satisfied with its 31 distributors carved out after Ran-

somes bought Bobcat. The Bobcat line was carried by an assortment of Toro and Jacobsen distributors prior to the addition of the Ransomes reel products. "Our sales have increased dramatically with both our new and old distributors," boasts Lehman.

Quest for full lines

Once the distributor or dealer is established, turf equipment manufacturers want to provide a full line of products.

Deere has made this its primary mission for commercial products. Although the company was not willing to announce its new products before it notifies its dealers this September, it would say the number of introductions will set a record for the company.

Howard Price is rounding out his rotary line with reel models (Roseman units). Toro is wrapping up a deal with an aerifier manufacturer from Australia and has added six new products in as many months. The products are keyed to the way Toro will approach sales to various market segments.

Ransomes has products in England it hasn't yet introduced in the U.S. as well as a busy bunch of engineers in Johnsons Creek, WI. One product being tested is a new concept in aerification, a slitter rather than a corer.

Bunton is clearly after the golf course and park market with Bunton JL. Excel is broadening its selection of engines and choice of attachments for its QuickAttach models. Excel is also readying a line of "light commercial" mowers for its distributors.

Gravely is focusing on full service lawn care companies according to Lee Bouldin, marketing services manager. "The commercial business is the fastest growing segment of this company," says Bouldin. "The commercial mower wants reliable equipment that could do more than one thing." **WT&T**

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