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LANDSCAPE MANAGEMENT



**PROFILES 1982
Dealers and Distributors**

WEEDS TREES & TURF

DISTRIBUTORS PICK GOLF/LANDSCAPE OVER RETAIL, FARM

By BRUCE F. SHANK

Finding the primary distributors of professional golf and landscape supplies in the United States is not easy. They are among a melting pot of retail garden centers, farm suppliers, general chemical distributors, outdoor equipment dealers, irrigation distributors, and arborist suppliers totally more than 40,000.

Finding the 1,500 businessmen who specialize in professional golf and landscape supplies may be so difficult as to discourage development of products by new manufacturers while protecting current manufacturers. The melting pot is a mixed blessing.

A random sample of *Weeds Trees & Turf's* 1,400 distributor readers in June has provided some needed insight into their business. The profiles following this report show the variety of distributors serving you and the ingenuity they use to meet your needs.

By far the most prevalent type of product sold by professional distributors is chemicals. Offering chemicals is a practical investment

and a service requested by equipment and plant customers. The one-stop approach to marketing professional products is popular, with the possible exclusion of large equipment, plant material, and irrigation supplies. These three items require either special investment or knowledge to sell.

Landscape and golf equipment is sold by half the distributors polled. Irrigation supplies are sold by 40 percent of the respondents and plant material by 32 percent. Large equipment selling requires a service department, replacement parts, and a significant inventory expense. Irrigation distributors require system designers, a specialized sales force, and a significant inventory. Wholesale nurserymen require yards, specialized equipment, and a maintenance staff. To become a distributor of these professional products a commitment beyond handling and sales is required.

More than half the distributors polled sell turf seed. The advent of

improved turfgrass cultivars has "professionalized" the seed business and put it a notch above selling common varieties as was the case in the 50's and early 60's.

Twenty percent said they sold farm equipment. Very large equipment, such as tractors, large trenchers, and small dozers are still the domain of farm equipment and construction equipment dealers. Highly sophisticated mowers for golf courses and landscape maintenance are best sold by turf equipment dealers with their greater interest in our market.

The only way to recognize the key distributors of professional products for the golf and landscape markets is by their target customers. Therefore, we asked them a series of questions on primary and secondary types of customers.

What we found made sense according to the history of the market, but the results indicated a lag in reaction by distributors to serve newer, rapidly growing markets such as lawn care and contract landscape maintenance.

Golf course superintendents, park and school maintenance personnel, and the general public were listed as primary customers by nearly half the distributors. These were the first strong markets to lawn and garden product distributors in the 50's and 60's.

The postwar housing boom brought a tremendous interest by Americans in their own yards and the outdoors in general. Manufacturers such as Toro, Jacobsen, O.M. Scott, and Mallinckrodt first reacted to the attractiveness of the outdoor landscape market in the 20's and 30's. Golf boomed in the 20's as well. The Great Depression and World War II put a damper on the market, but not the research.

TABLE 1.
Distributors Rate Types of Customers.

Type	Primary	Secondary	Not Customer
Golf			
Superintendent	49%	32%	18%
Parks/Schools	53%	38%	9%
General Public	46%	23%	30%
Landscape			
Contractor	26%	60%	13%
Lawn Care	35%	49%	15%
Farmers	30%	20%	49%
Condominiums	17%	62%	20%
Irrigation			
Contractors	15%	18%	66%
Airports	15%	39%	45%
Shopping Centers	13%	34%	52%
Arborists	11%	28%	60%
Sod Producers	9%	41%	49%
Estate Gardener	9%	42%	50%
Hotels/Resorts	5%	52%	41%

When the cloud lifted in the 50's the market took off again with many new products. The Baby boom put new pressure on government for parks and schools.

In the 60's the golf and landscape markets had arrived and many distributors recognized a need for local suppliers to serve them. The formula then, and still today, was golf/schools/parks/homeowner.

The 60's and 70's helped distributors with the growth of tree care, sod production, and landscape contracting. The gardener was slowly being replaced by commercial services who needed a local source for their supplies.

The installation of irrigation systems increased significantly in the period due primarily to golf and parks. The desire for summer turf color in cooler parts of the country made irrigation systems the state of the art. Beginning with simple, quick coupler systems, the market expanded into mechanical and then solid state control with many zones. Regional manufacturers of irrigation supplies grew into national corporations which needed local distributors. Expanding population in the Sun Belt and West expanded that already established market.

According to the survey, 35 percent of the distributors consider lawn care businessmen primary customers and 26 percent consider landscape contractors primary customers. Thirty percent consider farmers primary customers still.

We also asked the distributors about secondary customers and those who were not customers. The significance of lawn care and contract landscaping were bolstered by secondary ratings of 49 percent and 60 percent respectively. Distributors recognize their importance but still see the older, established markets as their bread and butter.

Off the charts, but still valued customers, are condominiums, airports, arborists, estate gardeners, and shopping centers. See Table 1 for more information.

Out of all the various submarkets in our industry, distributors saw landscape contractors, lawn care applicators, condominium staff, and the general public as the mar-

TABLE 2. Increase and Decreases in Business by Customer.

Type	Up	Down	Same
Landscape Contractor	64%	9.5%	26%
Lawn Care	65%	8.0%	27%
Condominiums	62%	5.4%	32%
General Public	62%	12.0%	25%
Estate Gardener	54%	0.0%	45%
Golf Superintendent	50%	2.5%	47%
Parks/Schools	48%	12.0%	39%
Irrigation Contractors	50%	5.0%	45%
Farmers	45%	16.0%	38%
Arborists	42%	0.0%	57%
Hotels/Resorts	44%	4.0%	52%
Airports	33%	11.0%	55%
Shopping Centers	33%	4.8%	61%
Sod Producers	29.4%	17.6%	53%

kets increasing in sales. Golf superintendents, estate gardeners, and hotels were seen as the groups just behind the leaders. The markets seen as having plateaued were sod producers, airports, and shopping centers. See Table 2.

Overall, distributors feel strongly (85 percent) that existing manufacturers adequately serve the market in terms of needs and quality. Just under two thirds feel manufacturers respond well to the needs of their customers.

Distributors anticipate their sales to fall in 1982 after a 13 percent increase in 1981. The average sales volume of our sample for 1981 was \$2.7 million. The most common figure given was \$1 million. The median was \$1.2 million.

Only 15 percent reformulate chemicals for private labels. The reasons for establishing private labels were given as greater profit and better control. Fourteen percent of the distributors owned a landscape service company in addition to the distributor business. The most common type of service was lawn care with industrial weed control as a weak second.

Buyer cooperatives represent a temporary threat only according to the distributors. Only eight percent felt it would cause any permanent damage, even though 40 percent believe such coops are a threat to part of their sales.

Since many distributors also serve the general public and farm-

ers, we asked them to pick which major market is growing the fastest. They selected the golf and landscape market as number one, followed by retail and farmers.

The only thing distributors might hope for is more help from manufacturers with promotion. Nearly 40 percent said they'd like more assistance in promotion. Currently, distributors rely on the following for promotion:

Sales Force	63%
Local Shows	57%
Yellow Pages	55%
Direct Mail	39%
Regional Publications	35%

Forty percent of the distributors said they had reduced inventories and increased reliance upon delivery from the manufacturer. Slightly less than half said their equipment service department is doing a greater business. The same number reported an increase in brand loyalty.

Distributors are adding educational seminars in more than two thirds of the cases reporting. Expanding regional show participation and increasing sales promotion are reported by more than 60 percent.

More distributors report a decrease in delinquent accounts than an increase. No one gave any indication of general dissatisfaction with the golf and landscape market. They appear glad to have specialized as they have. **WTT**

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BECKMANN TURF AND IRRIGATION PROVIDES PRESENT AND FUTURE NEEDS IN THE ST. LOUIS VICINITY

Despite the growing cost of sales calls, Bruce Beckmann, president of Beckmann Turf and Irrigation Supply of Chesterfield, Missouri, expects his sales staff to make seven to eight calls per day when they are not giving demonstrations.

These aren't always sales calls, they are service calls too. "We make frequent calls on the customers," Beckmann says, "to develop a rapport and gain their confidence so that we can recommend products to fit their long-term growth."

To Beckmann, distribution is a one-on-one business. With direct mail advertising and a new catalog that goes out to 1800 landscape managers each year, it is the personal contact that is most productive. "It is probing by the salesman that determines what the customer's needs are," said Beckmann. "Once we have an exchange of ideas we can begin to help satisfy his needs by demonstrating equipment in order to determine its efficiency in comparison to what he already has."

On the day the *Weeds Trees & Turf* visited Beckmann Turf and Irrigation, one salesman had just returned from a demonstration of a Dedoes aerator for the superintendent of a 27-hole municipal golf course. During the course of the demonstration the salesman and superintendent figured out that the Dedoes would cut 75 man-hours from the traditional method of aeration. To Beckmann's sales staff each demonstration is an opportunity to sell.

Once a piece of equipment is sold, Beckmann then concerns itself with three other phases of the transaction: setting the equipment up, servicing it, and educating the customer to get maximum efficiency from it.

In effect, many sales calls are an offshoot of the deep commitment Beckmann feels towards its customers. "The service end of the

business is as demanding as any part," said Beckmann. "Some customers don't have the expertise to continually update their specialty equipment to achieve the productivity demanded by their budgets." He added that while those calls are expensive to make, it is important to satisfy the needs of the customer in order to grow with his maintenance program.

Some recent trends have reinforced Beckmann's philosophy of customer commitment, particularly with irrigation and specialty equipment. Beckmann has watched the distribution of chemicals become the domain of specialists whose expertise lies in low pricing.

Many distributors are shrinking their lines and expanding their marketing region as shipping methods become more sophisticated. Beckmann suggested with products that require little service or follow-up, price is often the definitive factor. Beckmann carries a full line of chemicals and seed as a service to his customers, but there is clearly a concentration on irrigation and specialty equipment.

An important reason for this concentration is the industrial market's need for better-manicured turf.

It can take 7 months to more than a year before a client can get final approval for a piece of equipment.

More and more landscape contractors are serviceing the industrial market," said Beckmann. "Condominiums, apartment projects and industrial complexes are being maintained more like golf courses." While 10 years ago it was accepted that turfgrass had dormant periods, today turf is expected to be maintained 12 months a year.



President Bruce Beckmann.

Although Beckmann's territory lies smack in the middle of the transition zone with its four extreme seasons, the attitude is "it can be done." "With," Beckmann added, "modern irrigation and maintenance equipment, improved chemical products and the ability to apply those products with the new equipment."

Being in the transition zone causes the grass to have two heavy growth periods—March to June, and September to November. Beckmann sales would peak in spring and fall and drop in summer and winter in the past. The growth of the company's irrigation business however, has levelled out the summer trough and extended the fall peak into December or as late as installations are still feasible. Chemicals move well in the summer, largely because the weather has the cool season grasses under stress.

"Budgets at schools and government agencies come due in June and July," said Beckmann. "Most golf course budgets come due in the first quarter. Equipment is now selling on a nine to ten month basis, not just in the spring."

Beckmann's irrigation division has been a prime beneficiary of the trend towards better turf. By his estimate, 70% of keeping good turf is adequate water supply. "For the



Field service representative loads mower for repair at service center.

first five years (of the irrigation division) we had to convince the commercial/industrial market that good turf was attainable," said Beckmann. "Now that it's established, they are opting for improved watering systems to maintain the turf." Manning the irrigation division is a sales manager, an architect/engineer and a designer/contractor.

In the off-season Beckmann sponsors training meetings for selected contractors. They involve marketing, design, advertising, promotion, service, and application of equipment. The residential and light industrial markets have grown significantly over the past six years, according to Beckmann. Improved irrigation systems are increasingly being specified for athletic field and golf course renovations, although new golf course construction has been off.

In line with most successful businessmen, Beckmann sees the tight economic conditions as an opportunity for his staff to exhibit their expertise and commitment to their customers. Beckmann stresses the "life cycle cost" of equipment, not simply the purchase price. "The cheapest piece of equipment is often short-lived and requires high maintenance," noted Beckmann. "Turfgrass managers can't afford down-time." With labor costs being such a large part (50-60%) of maintenance budgets, superintendents are opting for cost-efficient equipment.

"Toro equipment is the best engineered equipment I have ever seen in the industry," exclaimed Beckmann. "They have taken a leadership position. About 10 years ago they redesigned their equipment and came out with a life cycle and

low cost that the industry needs."

"Our specialty equipment is designed for broad applications in maintaining turfgrass," said Beckmann. "To justify the cost of the equipment, you can point to the number of jobs it can perform. We're selling 'greater versatility.'"

Beckmann started out in his family's lawn and garden supply company. It was the model of a two-step distribution system, i.e., receive it in a box and send it out in a box. Accordingly, it was a lot easier to service customers. "The transition from two-step to one-step distribution was difficult because of the increased demand for service after the sale," said Beckmann. "If a customer buys equipment and doesn't use it properly, all

Equipment is now selling on a ten-month basis, not just in the spring.

the investment in time and service goes down the drain."

Beckmann recently hired a field service technician to expedite his customer service. The field service technician makes periodic visits to offer help in structuring preventive maintenance programs and in effect, teach the customer what can be done to extend the life of his machine. As a jack-of-all-trades, the field service technician can fix equipment on site, make an educational service call, or haul damaged equipment back to the shop. Beckmann noted that his next personnel addition will be another field service technician.

Beckmann currently has a staff

of 21: 6 in service, 4 in turf equipment and supplies sales, 3 in irrigation sales, 3 in parts, and 5 in administration. The warehouse facility includes a 12,000-sq. ft. warehouse, 7200-sq. ft. service facility, and an 8000-sq. ft. office/display area. The display area is reminiscent of a lawn and garden store, not an industrial distributor. "People like to look at what they are going to buy," said Beckmann. "Since we have the room, we set up the equipment and let them kick the tires. We're in a marketing business and we have to merchandise the equipment." Beckmann added that it can take seven months to 1-1/2 years before a client can get final approval for a piece of equipment. "So, everytime we can expose him to it helps."

The current trend in the bureaucracies is to let level upon level of management scrutinize big purchases (like specialty equipment). With the frequency of selling equipment somewhat limited by their longevity, Beckmann views each meeting with the customer and corporate structure as another chance to sell the advantages of his product. The sale, however, can be lost at any level, often after a considerable investment of time and salesmanship. Beckmann continually battles the corporate gremlins that simply pick the least expensive piece of equipment.

Beckmann's mixture of customer commitment and service has proven successful, yet demanding. Particularly in a sales territory with a 300-mile radius. Expanding further, while still providing full service, proved to be a problem for the company. A solution came in the form of a return to a modified two-step distribution.

Recently Beckmann has begun setting up a commercial dealer operation in the outlying areas of his territory. This has benefitted the company by providing the Beckmann brand of service and education on a day-to-day basis by an affiliated dealer in the customer's locale. "The dealer network will give full service to outlying areas that were difficult to reach," said vice president Bob Tegethoff. "It is also a way to reach customers that like to spend their money locally." **WTT**

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HYDRO-SCAPE USES SALES SAVVY TO INCREASE IRRIGATION MARKET SHARE IN SOUTHERN CALIFORNIA



Operations Manager Don Larsen.

Sound, modern business practices are the reason Hydro-Scape Products, Inc., of Southern California keeps increasing its share of the irrigation and landscape products market during abundant rain and recession. Bob Tiglio provides the technical expertise with a background in golf course irrigation construction and Art Arns keeps management practices up to date with his manufacturing and sales background.

Operations Manager for the San Diego-based firm, Don Larsen told

Weeds Trees & Turf Hydro-Scape made a major expansion into the Middle East in 1978 under the direction of Arch Humphreys. Today, Hydro-Scape has eight outlets with 3,000 accounts and it is only seven-years-old.

While many view Southern California as the land of opportunity and ever-increasing growth, Larsen noted that business is increasing but at a decreasing rate. "Business has been very good since the '74 recession, but last year was tough," said Larsen. He pointed out that the biggest problem during last year was the hard winter. In Southern California, while it never gets too cold to do contracting, the only thing that can hold up a job is rain and 1981 brought a lot of that. However, Hydro-Scape weathered the winter and in some ways came out ahead. Due to efficient management the company could afford to swallow some contracting downtime. Some of their competition wasn't as fortunate.

"While we see business in gen-

eral increasing slower, we intend to increase our market share," said Larsen. Indeed, in the midst of last year's shakeout, Hydro-Scape bought up a Los Angeles-based competitor. "When the business climate got more severe during the past winter, the company concentrated on controlling purchases, reducing inventory and turning dollars more quickly. "We buy on a month-to-month basis," said Larsen. "One reason is that the cost of borrowing money is better on a month-to-month basis. Another reason is that we try to synchronize our buying periods with our sales periods." Due to Hydro-Scape's

Hydro-Scape uses a Nixdorf computer to manage its more than 3,000 accounts and its inventory.

size, it has the ability to swap materials from one branch to the other when the need arises. Deliveries are made to the branches three times a week, although the company offers 24-hour delivery on pallet-size orders. "Service is very important," noted Larsen. "It is important to have orders ready when the customer needs it."

Service is one of the reasons that Hydro-Scape is more than an irrigation equipment distributor. Their customers demanded that they carry landscape supplies. "They liked the service they got with irrigation supplies, so they wanted us to carry other things," said Larsen. The list of landscape products the company carries has grown to include: decorative bark, edging materials, erosion control materials, fertilizers, fungicides, herbicides, insecticides, lumber, nursery items, outdoor lighting, plant material, seed, sod, soil amendments, tools and equipment.

Expansion into Middle East provides cushion to U.S. sales

While other distributors were figuring out how to expand their territory into another county or state, Hydro-Scape Products expanded into another continent—the Middle East. The company now maintains full time sales representation in two Saudi Arabia offices.

While margins are slimmer, the volume of the projects is significantly larger. "They are building cities from scratch in the desert," said Operations Manager Don Larsen. "It is a status symbol to plan and generate ornamental irrigation in the desert because they've never had it before." The largest job Hydro-Scape has supplied is the

120-sq.mi. airport in Riyadh. Larsen hastens to add that the Mid-East is not quite a plum ready to be picked. "It can be very frustrating," he said. "Time is dragged out. It can take from two to five years to nail down a project and there is a lot of red tape." Larsen added that exporting was foreign (no pun intended) to Hydro-Scape, but they soon learned that if the paperwork wasn't perfect they could lose their shirts.

"There were two reason for us to expand into the Middle East," said Larsen. "We thought it would be profitable and also help average out our domestic business cycles."