The turfgrass industry contributes substantially to the economy of Florida. In 1974, a survey showed that grass maintained on all user classes of property covered 370,000 ha (Florida Dept. of Agriculture and Consumer Services, 1976). In that calendar year, $450 million was spent for turf maintenance. This sum represented 24% of Florida farm receipts for all agricultural commodities. Today, if one accounts for a near doubling in the state’s population and adjusts to current dollars, maintenance expenditures would likely reach several billion dollars.

The turfgrass sod industry consists of at least five distinct economic stages: a) input suppliers; b) turfgrass (sod) producers; c) distributors; d) wholesale/retail firms, brokers, and landscape contractors, and e) landscape maintenance. This industry can be conceptualized as pyramid-shaped (with input suppliers at the top and the maintenance sector at the bottom), where the number of firms and economic value of the industry increases significantly with each succeeding economic stage.

As suppliers of the grasses purchased by various user groups, sod growers play a major role in this industry. First, in terms of economic value of the industry in- stances. A related factor involves the legal perishability once harvested and the prohibitive costs of shipping sod over long distances. A related factor involves the legal restrictions limiting interstate shipping of certain grasses for fear of concurrent importation of harmful organisms. Public- or private-sector researchers who import new cultivars must first submit the cultivar to an agency (Florida Dept. of Agriculture and Consumer Services) and from data in the 1987 sod survey (Cisar et al., 1988)]. In spite of its significance as a major activity in the Florida economy, little economic information is available on the turfgrass industry. Turfgrass producers are currently faced with a growing number of production and market-related problems. An absence of current information limits the effectiveness of decisions at both the corporate and, more recently, the industry level. In 1987, an extensive survey was conducted to ameliorate this situation, focusing on sod production, agronomic and cultural practices, marketing, and perceptions of industry problems (Cisar et al., 1988). Earlier information was limited to an extensive 1968 study by Smith and Brewster (1968) and less coverage in the 1974 Florida Turfgrass Survey (Florida Dept. of Agriculture and Consumer Services, 1976).

Our report discusses major concerns of sod growers, based on survey findings, and highlights issues that are influencing them to alter their independent behavior in favor of more cooperative approaches to solving industry-wide problems.

The sample for the 1987 Florida sod survey (Cisar et al., 1988) was constructed from the membership list of Turfgrass Producers of Florida (TPAF). A total of 119 questionnaires were mailed and 73 were returned, providing a 62% response rate. However, 24 of the 73 survey instruments were incomplete, as the respondents were either vendors, consultants, or former producers. These were eliminated from the sample, as were three additional respondents who were producers of potted plugs and not representative of the cut sod industry.

Turfgrass producers fell into two categories: 1) regular growers who harvested their sod annually and 2) growers who harvested on a periodic basis. The latter group were limited to bahiagrass (Paspalum notatum Fluegge) production and, as a rule, entered the market only when the economic returns exceed those from alternative sources, usually livestock production. Consequently, we believe that the sample of growers surveyed constituted the majority of sod production in Florida.

Respondents were asked to rate the importance of seven problem areas (5 = very important, 3 = somewhat important, and 1 = not important) as they affect turfgrass production. Specifically, these issues were: 1) water management—supply and demand, 2) government regulation, 3) production efficiency, 4) release of improved grass cultivars, 5) soil subsidence and removal, 6) nutrient and pesticide runoff, and 7) marketing. Grower ranking of these issues are shown in Fig. 1.
Turfgrass producers were generally concerned with most issues. In category 5, production efficiency and marketing received the highest rankings, while soil subsidence, nutrient and pesticide runoff, and government regulation were viewed as the least important. Assuming sod producers are accurate in their assertions of increasing competition, inadequate prices, and declining profit margins, the greater concern for production efficiency and marketing is not surprising. This would also explain their desire to obtain improved grasses that can be used as marketing tools by promoting them as new and better products.

A useful analysis is to evaluate grower perceptions by their relative economic position in the industry. Depending on the nature of the industry problem, one might expect small sod operations to be affected differently than very large ones. For instance, this disparity could stem from an "economies of size" advantage that large-scale growers may have over their smaller counterparts. However, when applied to production efficiency and improved grasses, no substantial differences were present across farm size, ranging from small (<200 ha) to very large (> 800 ha).

Marketing as an industry concern did vary across farm size categories. A significant negative correlation was found between a sod operation’s size, and the degree of concern for marketing; producers from large sod farms have over their smaller counterparts. However, when applied to production efficiency and improved grasses, no substantial differences were present across farm size, ranging from small (<200 ha) to very large (> 800 ha).

Marketing as an industry concern did vary across farm size categories. A significant negative correlation was found between a sod operation’s size, and the degree of concern for marketing; producers from large sod farms were more ambivalent about marketing issues than were small-farm operators. Using a Fisher’s exact test (useful when conditions were present across farm size, ranging from small (<200 ha) to very large (> 800 ha).

Results from this study indicate that sod growers place greater emphasis on activities that improve their short-term economic position at the expense of addressing longer-term issues, such as government regulatory actions or the effects of diminishing soil reserves. These issues must be dealt with eventually. Currently, a decision to delay action until the last possible moment is both a risky and, in all likelihood, a very costly strategy. Finally, it is important to emphasize that all segments of the turfgrass industry, not just sod producers, will be affected by these ongoing developments. As users of the same product, or as suppliers of inputs for that product, the welfare of the allied sectors will move in tandem with that of sod producers. Therefore, addressing these problems effectively will require that: first, the effort be industry-wide and second, it be initiated today to mitigate or avoid economic adversity tomorrow.

Literature Cited


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