



"Talk with landscape architects and learn the challenges they are facing on a local basis," Thomas Tavella advises turfgrass producers.

2013 Outlook: The Climb Continues

**By Lynn Grooms
Managing Editor**

The 2013 outlook for the turfgrass industry is not all doom and gloom. But, it is also far from rosy as turfgrass sod producers and their customers continue to struggle with the effects of slow economic recovery and uncertainties over tax increases and budget cuts.

The months ahead will continue to present an uphill climb. But as in mountain climbing, there may be some valuable "hand holds" that turfgrass producers can use to scale that next height, as representatives from major customer segments suggest below.

The Housing Front

First the good news . . . In December, the National Association of Home Builders (NAHB) reported that

permits for new construction rose to their strongest level in more than four years. "Many builders have reported improving conditions in their local housing markets and are increasingly optimistic about the spring buying season, but they are being very careful not to get ahead of demand," said Barry Rutenberg, NAHB chairman and a home builder from Gainesville, FL. "Meanwhile, tight credit conditions are still the chief obstacle to a quicker recovery."

The NAHB estimates that when all the numbers are in, total housing starts will improve by 25 percent in 2012 and continue into 2013. "The fact that the issuance of building permits hit its fastest rate since July 2008 is indicative of the continued, modest growth that we

expect to see in new-home construction through 2013," the NAHB reported.

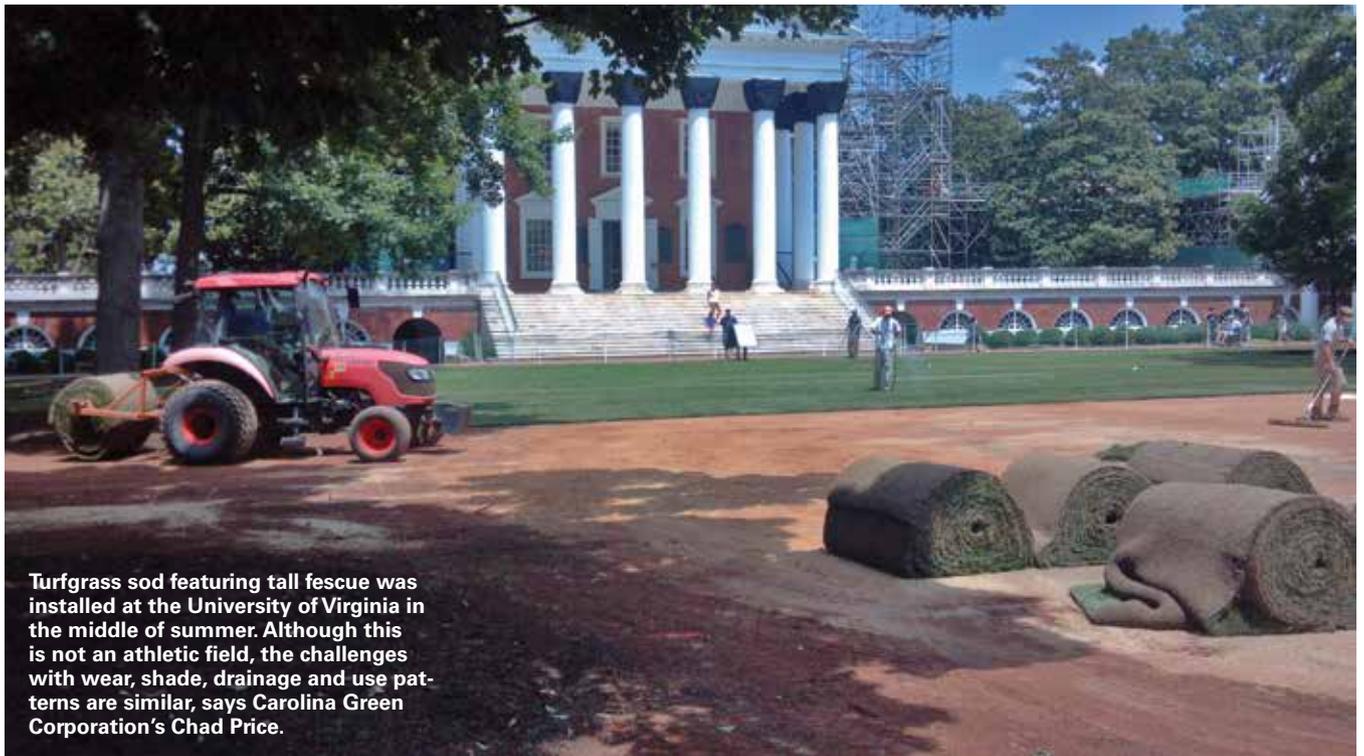
Permits rose in all but one region. Gains of 8.1 percent, 2.9 percent and 5.9 percent were registered in the Midwest, South and West, respectively, while a 6.2 percent decline was registered in the Northeast.

"We've seen improvements in housing starts all around the U.S., but there is a difference in the pace," says Robert Denk, senior economist, NAHB. States

that were hit the hardest in 2009 (Arizona, California, Florida, Nevada and industrial Midwestern states) are recovering at a much slower rate than states like Texas, Oklahoma, Montana and West Virginia where energy and agricultural commodities have provided some buoyancy over the



Robert Denk, NAHB



Turfgrass sod featuring tall fescue was installed at the University of Virginia in the middle of summer. Although this is not an athletic field, the challenges with wear, shade, drainage and use patterns are similar, says Carolina Green Corporation's Chad Price.

general economic slump.

On a regional basis, combined single- and multifamily starts activity was mixed in November. While the Midwest and South posted respective gains of 3.3 percent and 2.9 percent, the Northeast and West posted respective declines of 5.2 percent and 19.2 percent, the NAHB reports.

The Landscape Business

“The general buzz is that things are beginning to pick up,” says Thomas Tavella, president, American Society of Landscape Architects (ASLA); and landscape architect at Fuss & O’Neill, Trumbull, CT, a full service civil and environmental engineering consultant firm. “There has been an uptick in projects. While not huge, the outlook is better than what it has been.”

Tavella agrees with NAHB’s Denk about business being better in certain areas. “The coasts are still struggling.



Thomas Tavella, president, American Society of Landscape Architects

Florida business, for example, is way down.

But, other states like Texas and Minnesota have weathered the storm well.”

There are some other good signs. Landscape architect firms are beginning

to hire again, albeit cautiously, Tavella says. And, excitement is growing about the Sustainable Sites Initiative (SITES), a partnership between ASLA, the Lady Bird Johnson Wildflower Center at the University of Texas Austin and the United States Botanic Garden. SITES has created the first national guidelines and rating system for the design, construction and maintenance of sustainable landscapes.

Last fall, Turfgrass Producers International (TPI) along with numerous green industry organizations and industry professionals provided feedback on the proposed 2013 SITES prerequisites and credits. SITES staff and technical advisors will finalize this information for the *SITES 2013 Reference Guide*, which “will be the definitive resource for project teams to use to thoroughly understand and navigate the SITES rating system.” It is expected to be released in September, at which time open enrollment will also begin for projects to pursue SITES certification.

Input from TPI’s Executive Director Kirk Hunter; and The Lawn Institute Research Committee advisors Mike Kenna, United States Golf Association; Kevin Morris, National Turfgrass Evaluation Program; and Brian Horgan, University of Minnesota, have recently helped improve the SITES ranking for managed turfgrass. For more information, visit www.sustainablesites.org.

SITES will impact the turfgrass industry, says ASLA’s Tavella. Landscape architects are seeing a greater need for low-growing, water-efficient turfgrasses, and are in turn specifying grasses that do not require as much water, he points out. The “perfect lawn” concept is being increasingly replaced by a focus on matching the right grasses to the right areas. Instead of using Kentucky bluegrass on entire project, for example, a landscape architect may now consider using lower maintenance buffalograss in appropriate areas.

Tavella also offers this food for thought. Over the last few years, the irrigation industry has come a long way in terms of fine tuning irrigation specifications for certain regional landscapes, and even microclimates, he says, adding, “We may see more of this being done by the turfgrass industry . . . recommending varieties for given microclimates.”

Tavella’s advice to turfgrass producers is to talk with landscape architects and learn the challenges they are facing on a local basis. He advises attending local meetings and listening to the topics of discussion. “You need to keep pace with trends so that you have the kind of products that we will be including in our specs,” he says. A proponent of test plots, Tavella says, “Explain why you think a particular grass or variety will work for a particular use and show

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us. We're willing to take risk with a turf producer if they provide us information like this."

Sports Field Construction

While landscape projects may be picking up, sports field construction projects are expected to remain flat or decline slightly from 2012 – possibly by as much as 20 percent, says Chad Price, certified sports field manager (CSFM) and certified field builder (CFB), Carolina Green Corporation, Charlotte, NC, a full service athletic field construction company. "Much of the work in 2013 was bid in late 2012, or was at least in discussion. We've seen fewer jobs to bid over the past few months, and those that were on the street were very competitively priced."

"I foresee this year as being flat, and I don't believe there will be a significant change in our industry for the next two years," adds Ron Hostick, CSFM, sports turf manager at San Diego State University.

Due to concerns over rising health care costs, tax increases and the debt crisis, sports field clients will likely be in a "wait-and-see mode" for the first

part of 2013, Price adds. Funding for construction projects, whether public or private, is down and more organizations are requiring projects to be fully funded before construction begins. This has been a trend since 2009, Price says. "Lenders are more reserved and groups are less willing or able to take on debt to push a project through. This isn't always a bad thing. As a contractor, we like knowing the funds are there before beginning a project."

Despite economic concerns, people still want to play, and they want to play on good quality grass, Price says. In fact, some areas have even seen increases in local sports play during the economic slump. "People are staying home and signing up for local leagues. Sod replacement on an annual basis, or even multiple times a year on portions of fields, is becoming more standard," Price says. "As a grower, I would recommend having some portion of very mature sod available for this purpose and letting your customers know that it is available. Consider harvesting sod

with more soil and roots (thick cut sod) than normal for use in emergency replacement areas."

Sand-based fields or fields with drainage systems require turfgrass sod grown in a sand root-zone. This, plus new shade- or wear-tolerant turfgrass varieties, are of interest to sports field builders. "Talk to your local university or park grounds staff, learn what their needs are and try to find a niche," Price advises turfgrass producers.

"It is always a good idea to get to know your customer's maintenance regimen and try to match it if you expect to provide sod for in-season repairs," says Allen Johnson, CSFM, field manager, Green Bay Packers. "The goal is to provide sod that provides adequate stability for the respective sport played on it and to match the portion that remains in the field in color, density and height of cut."

Sod repairs that make a field resemble a patchwork quilt pose a visual hurdle for players to overcome, Allen adds. "If a player has to think about the uniformity of the



Rhett Evans, CEO,
Golf Course Superintendents Assn. of America

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The turfgrass sod being installed here was grown on plastic. This product is designed for emergency repairs or "in season" sod replacement. The dense root zone and extra thickness provide ballast and structure to allow play immediately after installation, says Chad Price, Carolina Green Corp.

surface, then the field impacts their performance. That should never be the case."

Author's Note: All three of these CSFMs are currently or have been board members of the Sports Turf

Managers Association (STMA), which helped in compiling this report.

Golf Course Construction

The concerns about tax increases and spending cuts that affect sports

field decisions also affect the golf course industry. "Should automatic tax increases take place, the effect could be detrimental on all businesses, including golf courses. In general, measures that

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Golf course construction at the East Lake Country Club, Atlanta, GA. Photo: Golf Course Superintendents Assn. of America

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strengthen the economy are good for golf,” says Rhett Evans, CEO, Golf Course Superintendents Association of America (GCSAA).

“There are also some specific actions up for vote, such as conservation easement tax deductions; disaster relief for golf courses; and labor policy that could make hiring temporary or seasonal workers more difficult,” Evans says. “How these go could make life more difficult for golf course operators.

“There are numerous issues in golf that require the industry to be engaged with local, state and federal policymakers,” Evans continues. “GCSAA has been active in the governmental relations arena with a focus on developing appropriate public policy. It would behoove the golf and turfgrass sod industries to continue to work together (along with other related industries) as much as possible and build coalitions.”

The H-2B guest worker program as well as policies that impact fertilizer, pesticide and water inputs are important to the green industry as a whole, Evans says. “It is no secret that there is a movement to develop local, state and national policies that could reduce inputs. That in itself is not necessarily a negative, but golf and turf must be represented and engaged in the process to arrive at a workable end.”

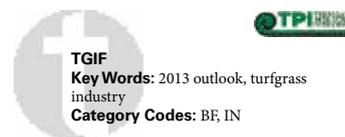
As far as the market outlook, U.S. golf course closures will likely continue to outpace openings, as has been the trend for the last seven years. Last year, there was a record high of 131 course closures. “This market correction has been predictable

and has been seen as necessary as player participation has declined over the same time,” Evans says. “At least for the next few years, golf course closures are expected to surpass openings.”

Outside the U.S., however, the Far East and the Middle East are prime areas for golf course growth. “But, unpredictable economies and government regulation could be hindrances,” Evans says. China has been an area of considerable investment and activity in hopes that its large population and land mass will offer more than incremental growth. “An unknown influence will be the addition of golf to the Olympics in Brazil,” Evans says. “The hope is that this international platform will help not only in South America, but all corners of the world.”

Remodeling Trends

As far as remodeling, golf course architects and builders noted a slight uptick in activity in 2012. “The basis for this was a need for outdated courses to become competitive; a better economic state; and the inability to delay improvements any longer for fear of suffering greater damage,” Evans says, adding that the remodeling trend is likely to continue this year. “Of particular interest to turfgrass producers will be the extent to which golf courses replace cool-season bentgrass with new varieties of Bermudagrass and paspalum.”



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