

Australian Turf Industry Snapshot Report 2016/17

This snapshot report highlights industry aggregate and production benchmark statistics for the Australian turf industry, collected through the Hort Innovation funded Turf Industry Research and Statistics 2016/17 (TU16001) project. The project was commissioned to address a fundamental gap in turf industry data and statistics. The Western Research Institute (WRI) was engaged by Hort Innovation to lead industry engagement and deliver data insights.

The results are based on a successful industry-wide engagement of over 100 turf growers. The data collected will assist the industry in data driven decision making, resource prioritisation, investment evaluation and strategic planning activities.

Further detail, including the Hort Innovation final report can be downloaded from <http://horticulture.com.au/grower-focus/turf/>.

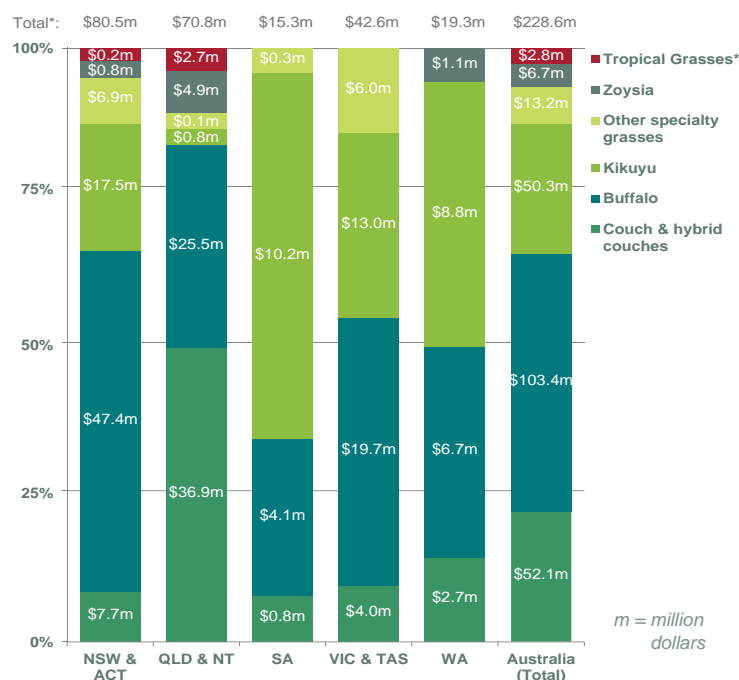
Turf Industry Aggregate Data: This section presents survey data aggregated to national level for 2016/17.

\$228.64 million

Farm Gate Value of Turf Production in Australia

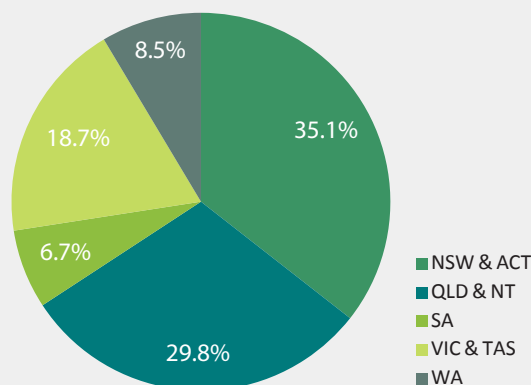
38,541,132 Sqm

National Australian Turf Production

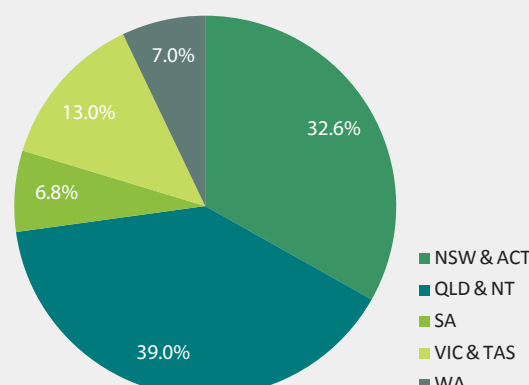


*Totals may not add due to rounding. **Tropical grasses includes both Paspalum, Blue couch and other tropical varieties.

Value of Turf produced by State



Volume of Turf produced by State



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Turf Industry Average Benchmark Data: This section presents benchmark averages at the farm level!

Average turf production (sqm) per farm

Species	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
Buffalo	61,436	72,751	40,198	75,345	168,784	30,344
Couch and hybrid couch	74,027	20,761	152,925	17,020	57,531	25,478
Kikuyu	50,655	53,707	2,246	274,882	164,987	73,926
Zoysia	4,996	1,508	10,189	-	-	4,315
Paspalum and others	1,370	-	3,567	-	-	-
Blue Couch	2,147	-	5,253	-	-	-
Other speciality grasses	8,217	10,255	-	5,207	63,529	-

Note: Averages have not been calculated for jurisdiction/species with very low production.

Average farm gate turf revenue per farm

Species	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
Buffalo	\$534,005	\$599,963	\$349,452	\$581,016	\$1,793,951	\$336,376
Couch and hybrid couch	\$270,772	\$97,748	\$506,136	\$114,883	\$361,693	\$134,695
Kikuyu	\$249,238	\$221,905	\$10,394	\$1,450,469	\$1,179,854	\$442,405
Zoysia	\$34,315	\$9,844	\$66,996	-	-	\$53,228
Paspalum and others	\$5,294	-	\$13,779	-	-	-
Blue Couch	\$9,666	-	\$22,705	-	-	-
Other speciality grasses	\$69,601	\$87,329	-	\$43,326	\$541,606	-

Average farm gate price (\$/sqm) per farm

Species	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
Buffalo	\$8.86	\$8.25	\$8.69	\$7.71	\$10.63	\$11.09
Couch and hybrid couch	\$3.71	\$4.71	\$3.31	\$6.75	\$6.29	\$5.29
Kikuyu	\$5.22	\$4.13	\$4.63	\$5.28	\$7.15	\$5.98
Zoysia	\$7.09	\$6.53	\$6.57	-	-	\$12.33
Paspalum and others	\$3.86	-	\$3.86	-	-	-
Blue Couch	\$4.47	\$6.85	\$4.32	-	-	-
Other speciality grasses	\$8.47	\$8.52	\$4.00	\$8.32	\$8.53	\$8.30

Average volume of turf delivered per farm

Average	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
Average volume delivered (%)	75%	76%	75%	41%	85%	81%
Average volume delivered (Sqm)	27,756,389	9,596,627	11,723,896	2,063,799	2,207,414	2,164,653

1. Due to the low number of turf producers in SA, VIC + TAS and WA, estimates in these jurisdictions have a margin for error (at the 95% confidence level) exceeding +/-30% and should be used with caution

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Average % of turf sales by sales channel

Sales channel	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
Retail	33%	33%	32%	12%	39%	35%
Turf resellers	16%	15%	11%	70%	23%	-
Landscapers & Installers	34%	32%	38%	9%	32%	46%
Government	8%	6%	10%	-	6%	17%
Wholesale	10%	14%	9%	8%	-	3%
Total	100%	100%	100%	100%	100%	100%

Employment benchmarks

Average	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
Number of Businesses*	190	79	73	7	11	20
Total Wage Cost	\$59,491,973	\$21,491,296	\$20,936,394	\$1,501,500	\$9,457,800	\$6,104,983
Total FTE Employment	1171	422	454	30	172	93
Average Wage per FTE	\$50,799	\$50,944	\$46,082	\$50,471	\$54,881	\$65,746

*Based on data from the Department of Agriculture and Water Resources. FTE: Full Time Equivalent employment

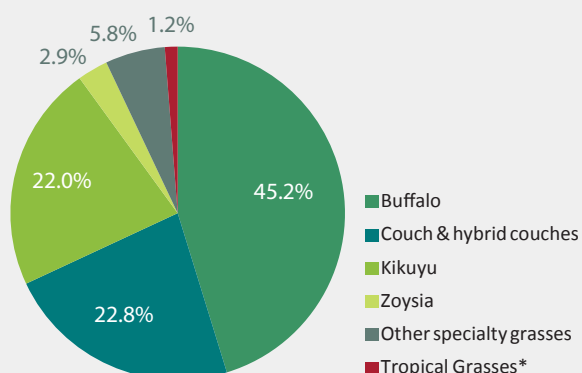
Business confidence

Average*	Australia	NSW & ACT	QLD & NT	SA	VIC & TAS	WA
The economy continuing to grow in the current (2017/18) financial year?	6.5	7.0	6.1	5.5	7.3	5.0
Your business's current financial position?	6.7	7.1	6.2	6.3	7.2	6.4
Your business's future financial position?	7.2	7.3	7.1	5.8	8.3	6.9
Likely to invest in your business.	7.4	7.3	7.6	5.8	8.2	7.4

*On a scale of 1 to 10.

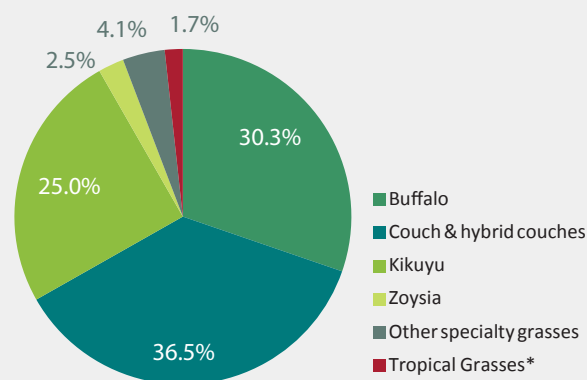
Value

of turf produced by species



Volume

of turf produced by species



The graphs above present survey data aggregated at the national level.

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National Snapshot

104

Respondents
to the survey

20

Average years of
business
ownership

75%

Turf delivered
nationally

About this research

The Western Research Institute (WRI) was engaged by Hort Innovation to undertake this research project. This project has been funded by Horticulture Innovation Australia Limited using the turf research and development levy and funds from the Australian Government. (TU16001 - Industry Research and Statistics 2016/17).

A summary of project activities, outcomes, outputs and an evaluation of project strengths and areas for improvement are included in the full survey report. The full survey results and reporting can be downloaded from the Hort Innovation website <http://horticulture.com.au/grower-focus/turf/>.

If you have any questions about this snapshot report, please contact WRI on 02 6333 4000. All care has been taken to ensure the confidentiality of respondents.

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Research and development (R&D) projects levy funding

This project has been funded by Horticulture Innovation Australia Limited using the research and development turf levy and funds from the Australian Government.

Acknowledgements

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