

Australian Turf Industry 2018/19 Snapshot Report

TU17005 Milestone 190 **Appendix 5**

This Snapshot Report provides a summary of turf production and grower sentiment for the Australian turf industry for the 2018/19 financial year. Turf Australia was commissioned by Hort Innovation to conduct the research.

Overall, 95 out of a total of 183 Australian turf growers completed the survey either online or via a telephone interview, during August to October 2019.

Interpreting this report

In conducting the survey, Turf Australia emailed the link to the online survey to all 183 turf growers in Australia. Follow-up attempts were made to contact growers about the survey via email and telephone.

The maximum margin of error for the final sample size of 95 growers, is 7% (with 95% confidence)*.

The final maximum margins of error at a 95% confidence interval for each state/territory are as follows:

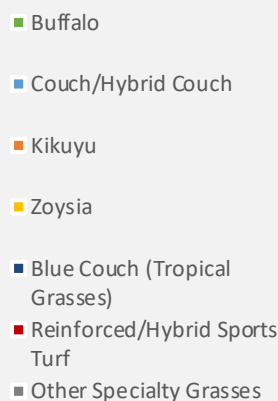
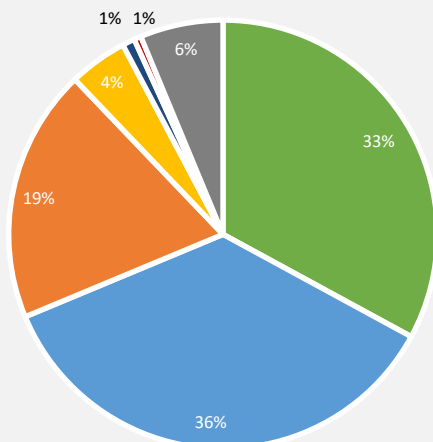
- NSW & ACT - 37 out of 75 surveyed (12% margin of error)
- QLD & NT - 37 out of 68 surveyed (11% margin of error)
- SA - 4 out of 10 surveyed (40% margin of error)
- VIC & TAS - 4 out of 11 surveyed (41% margin of error)
- WA - 13 out of 19 surveyed (16% margin of error)

Total Australian turf production volume and value reported on the first two pages of this report was estimated by extrapolating from mean turf volume and value at the state and quantity level from data provided by survey respondents. The additional results report industry aggregate benchmarks directly from the survey data.

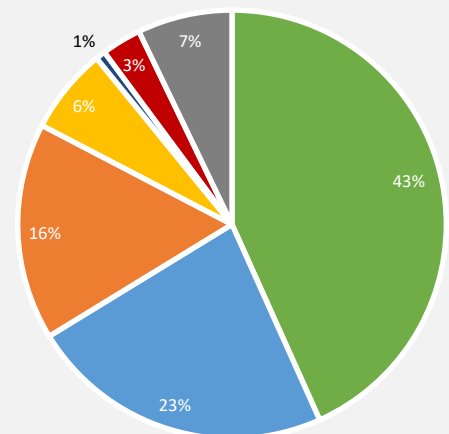
Duration of turf business ownership by the current grower or grower's family ranged from 2 to 55 years, with a mean of 23 years.

*Finite population correction applied.

Volume of turf produced by species



Value of turf produced by species



Percentages calculated from total estimated production volume and value for the 183 turf growers in Australia.

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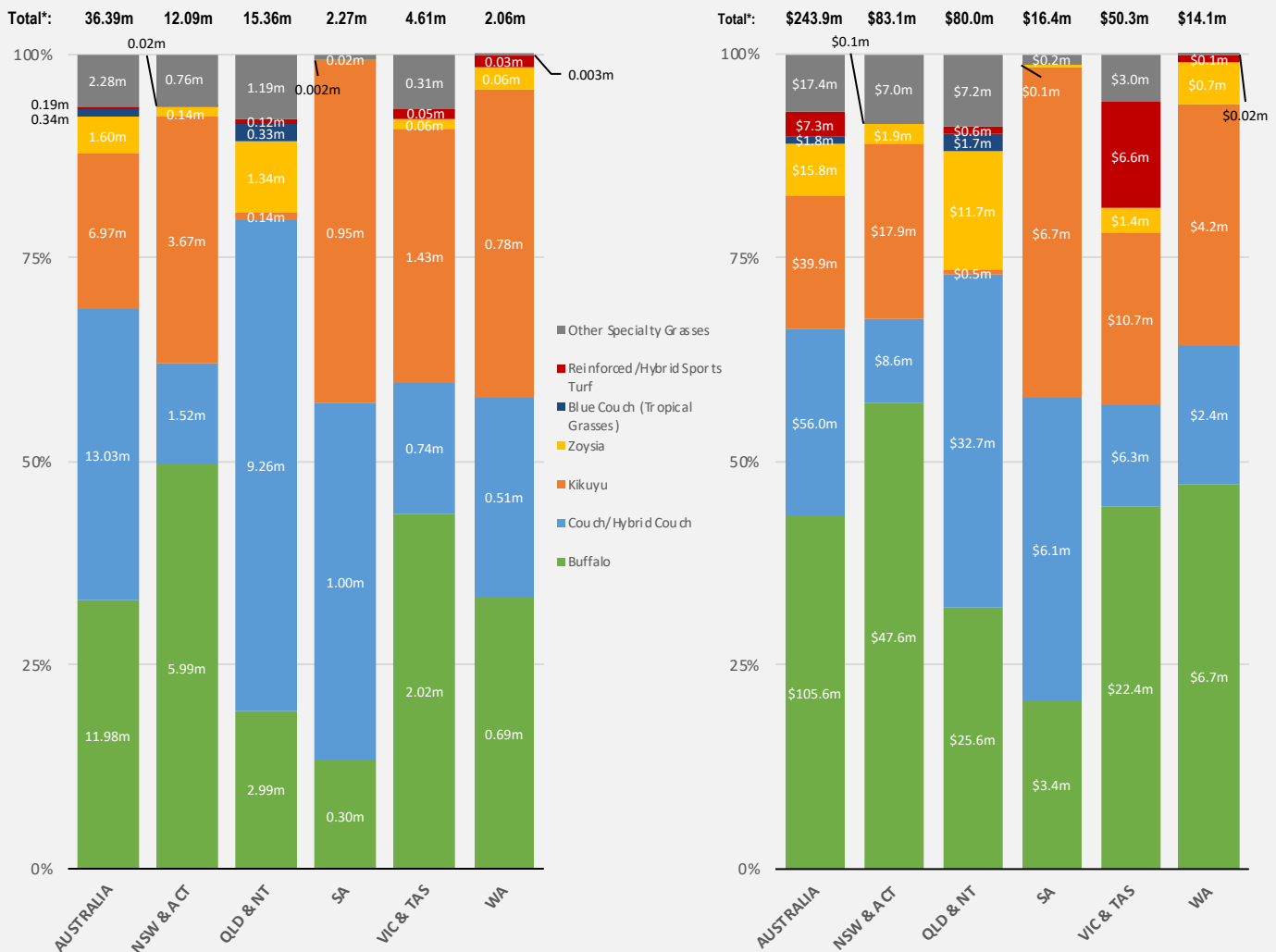
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36,394,436 M²

Estimated Australian Turf Production

\$243,858,209

Estimated Farm Gate Value of Turf in Australia



Total estimated turf production volume and value for the 183 turf growers in Australia was estimated by:

- Calculating mean volume and value at the state and quantity level from data provided by survey respondents
- Multiplying these mean values by the number of growers in each state and turf quantity bracket (as per state levy data)
- Multiplying total extrapolated state volume by the proportion of each turf species grown (as reported by survey respondents)

Across the 93 turf growers surveyed who reported valid turf production volumes, a total of 26,805,338 M² of turf was produced during the 2018/19 financial year.

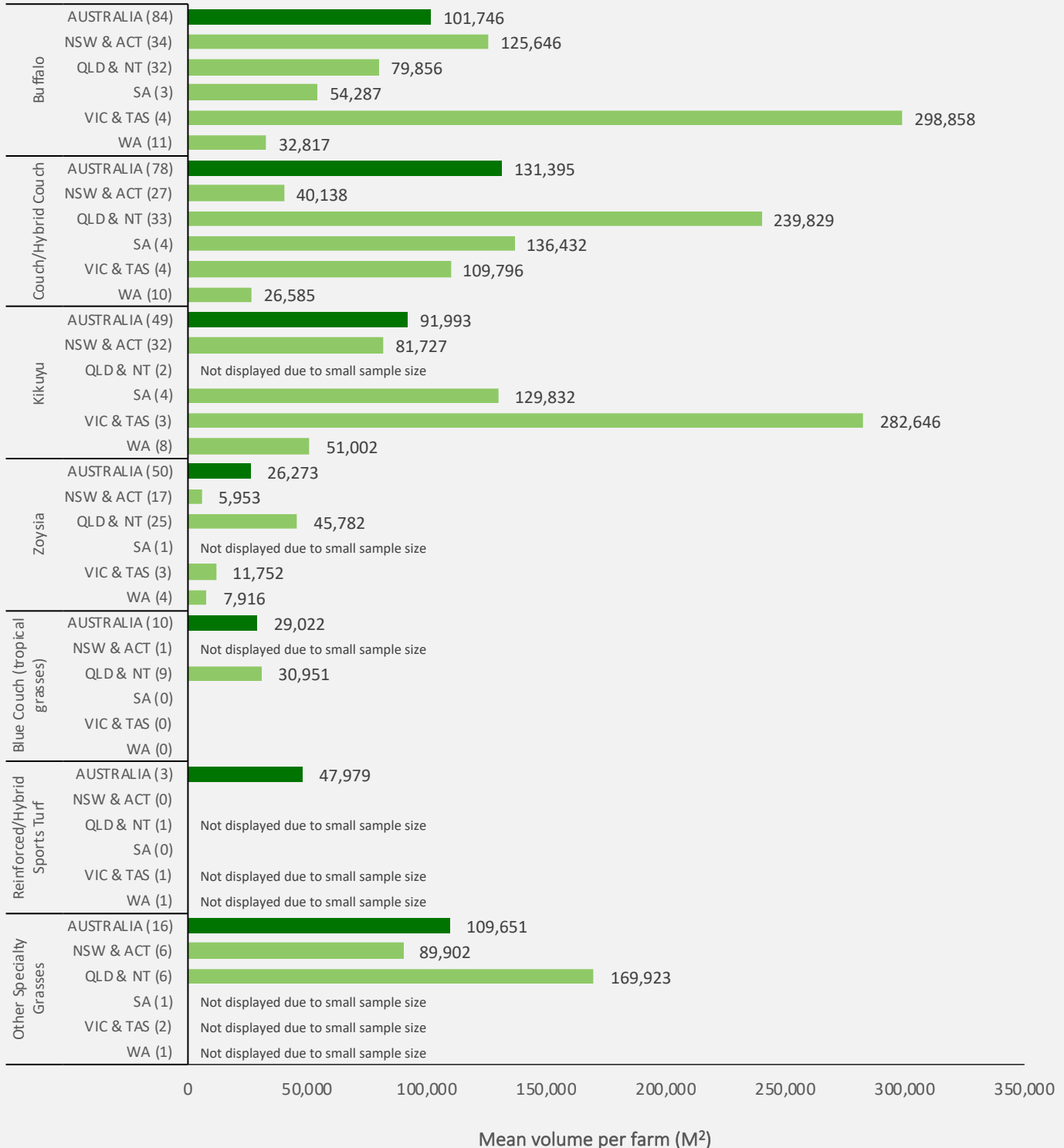
Across the 93 turf growers who reported valid turf revenue data, the total revenue for the 2017/18 financial year was \$174,484,962.

*Totals may not sum due to rounding.

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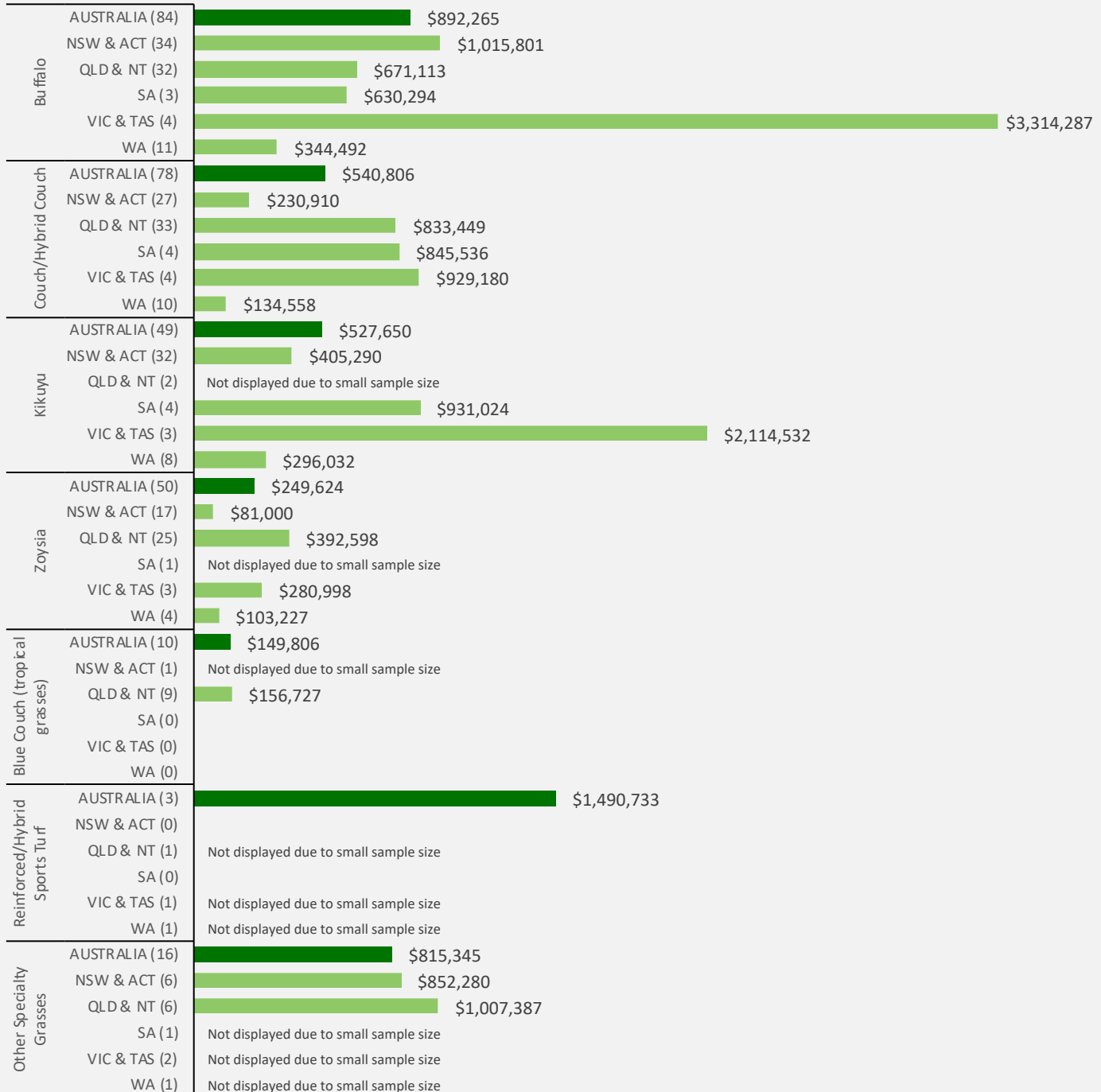
Average total volume of turf produced per farm per annum, by turf species



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Average total farm gate turf revenue per farm per annum, by turf species



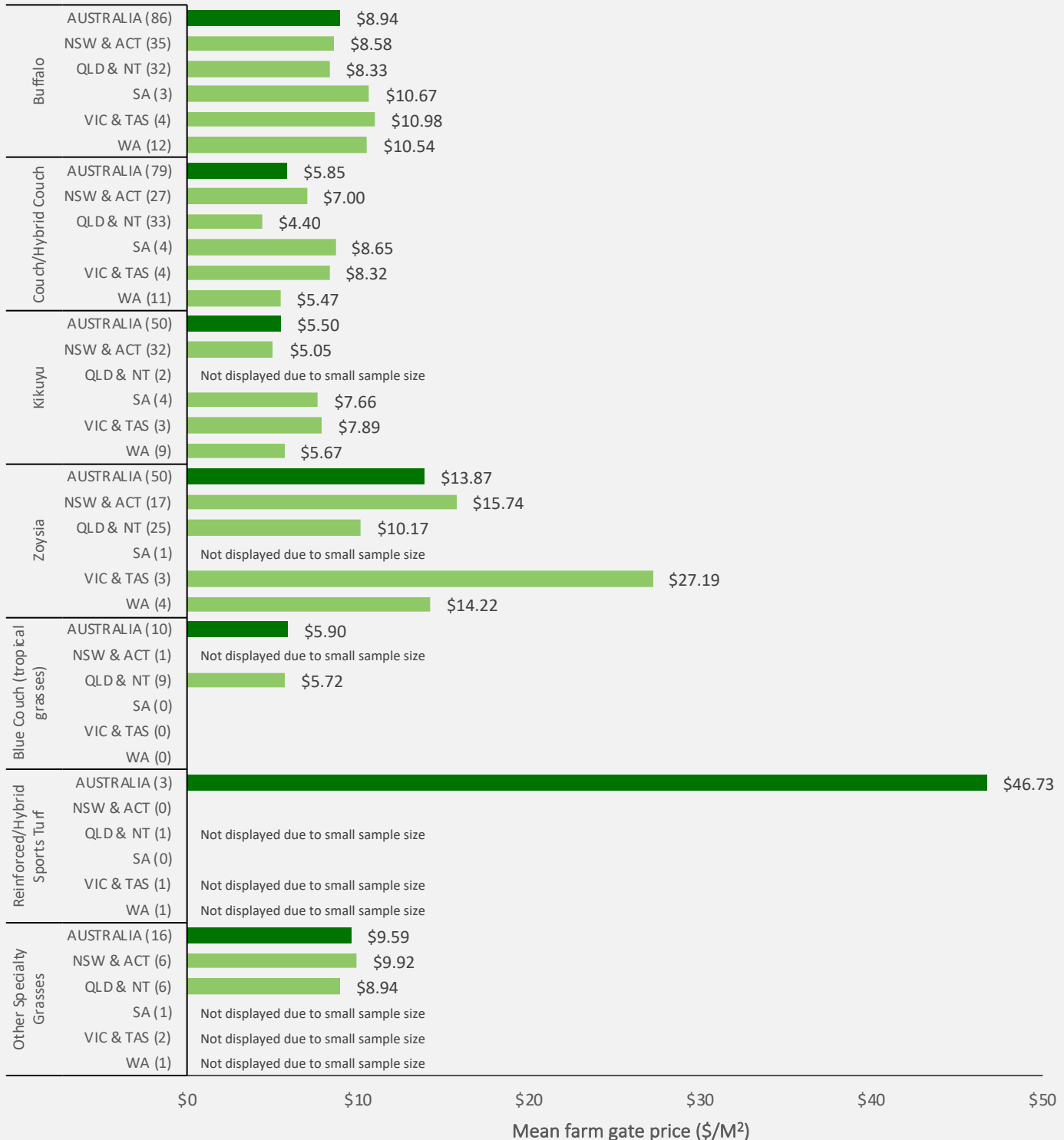
\$0 \$500,000 \$1,000,000 \$1,500,000 \$2,000,000 \$2,500,000 \$3,000,000 \$3,500,000

Mean farm gate turf revenue per farm

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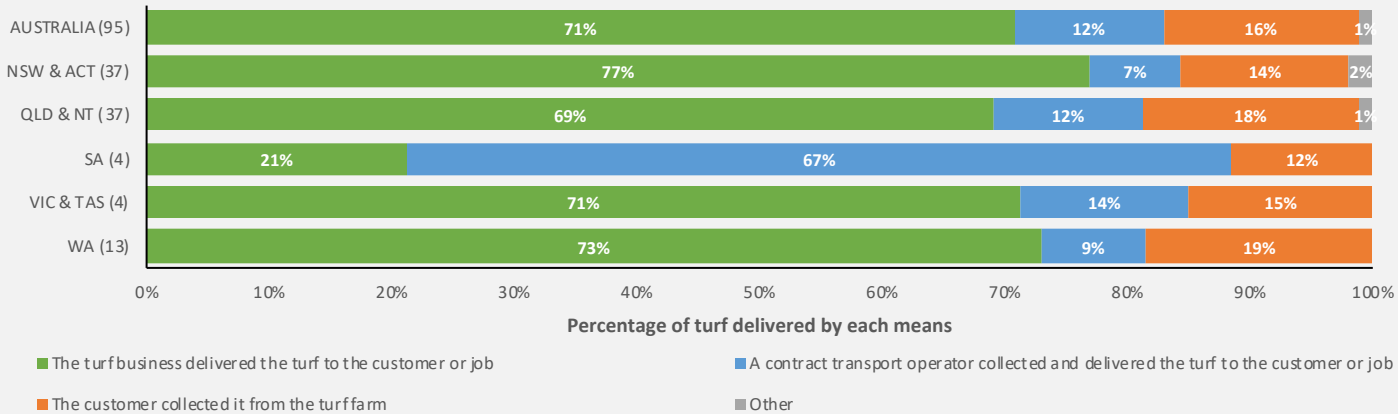
Average farm gate price (\$/M²), by turf species



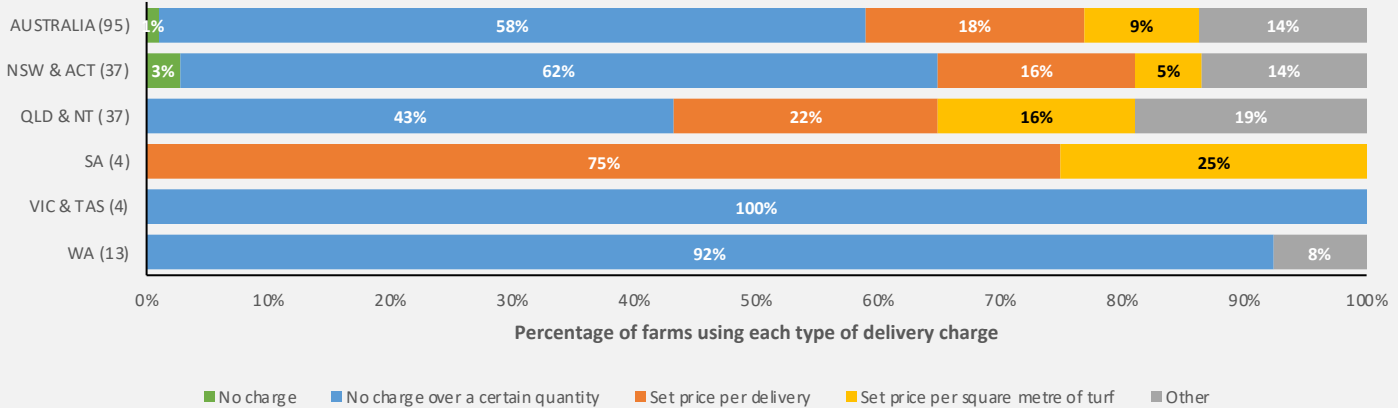
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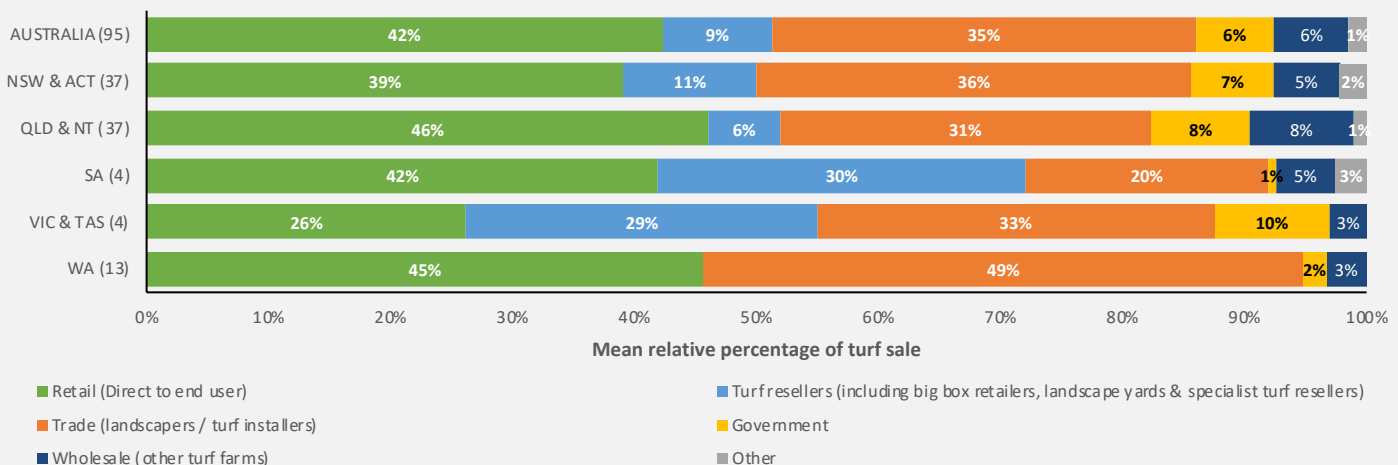
Method of turf delivery to customers



Charge for turf delivery (for turf businesses who deliver)



Turf sales channels

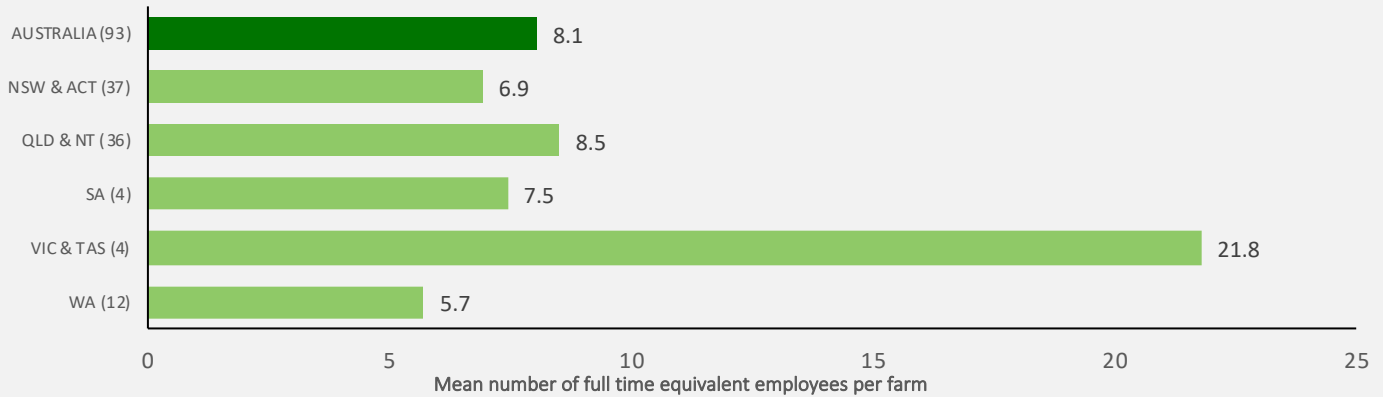


*Percentages may not sum due to rounding.

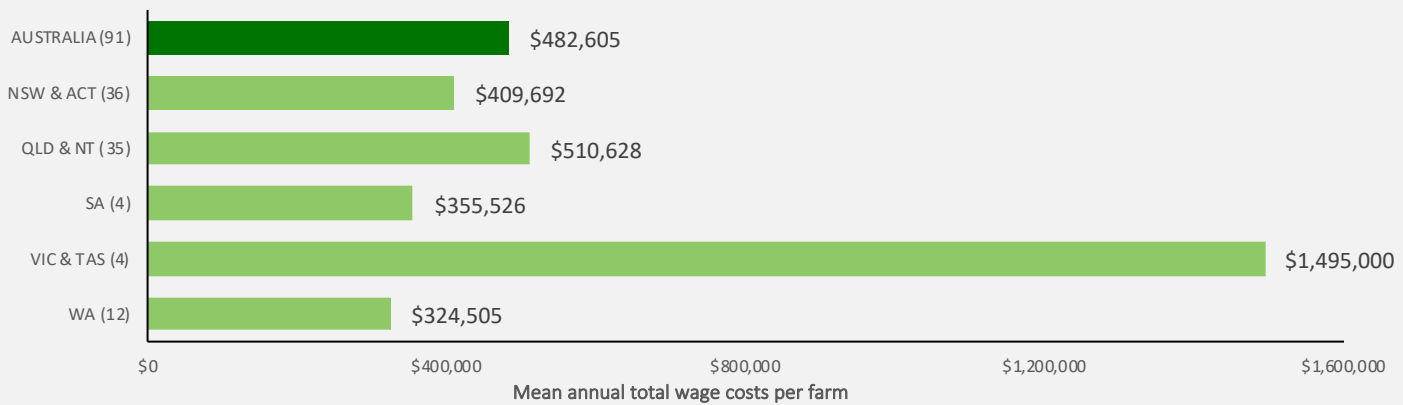
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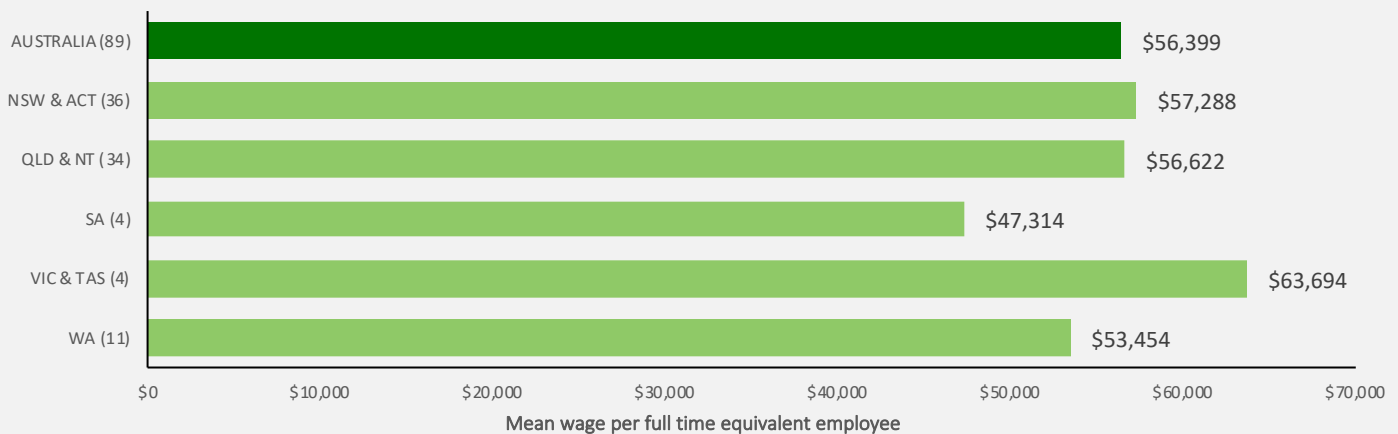
Average number of full time equivalent employees per farm



Total average annual wages costs per farm



Average annual wage per full time equivalent employee per farm*

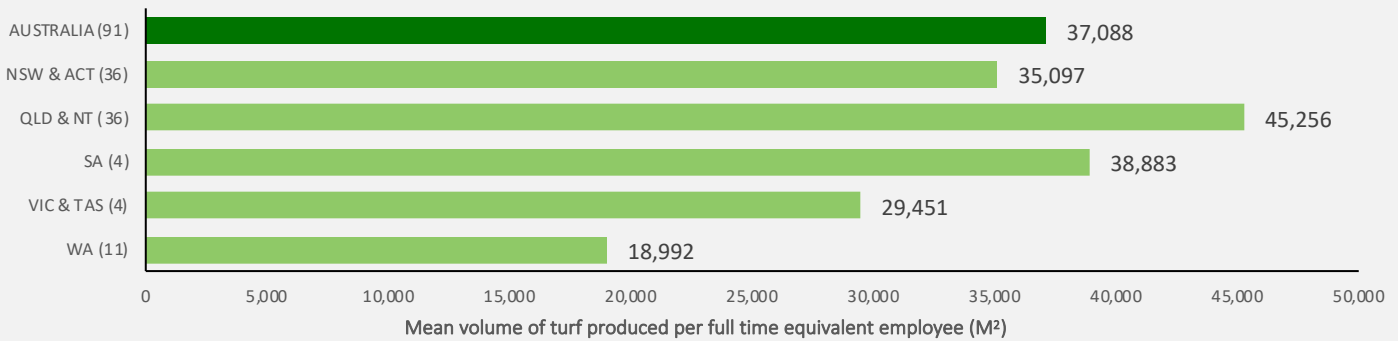
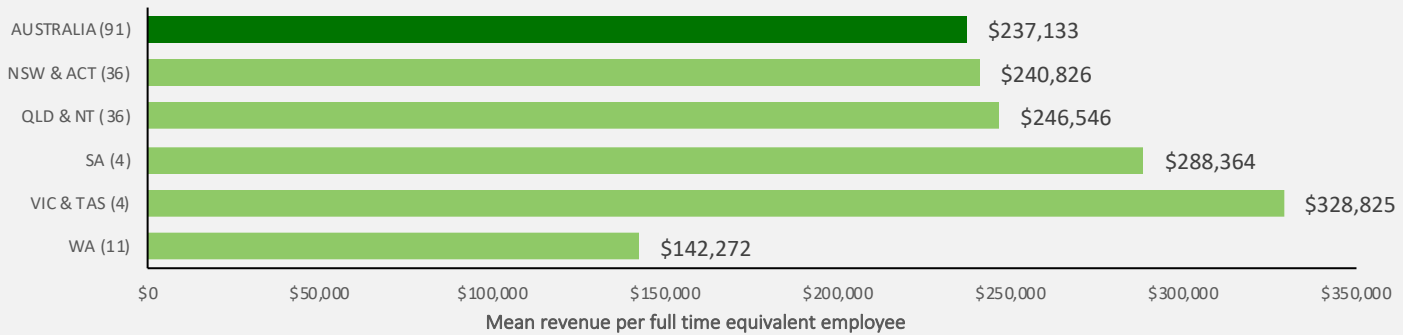


*Average annual wage per full time equivalent employee was calculated at the individual farm level by dividing the total wages costs per farm by the total number of full time equivalent employees per farm.

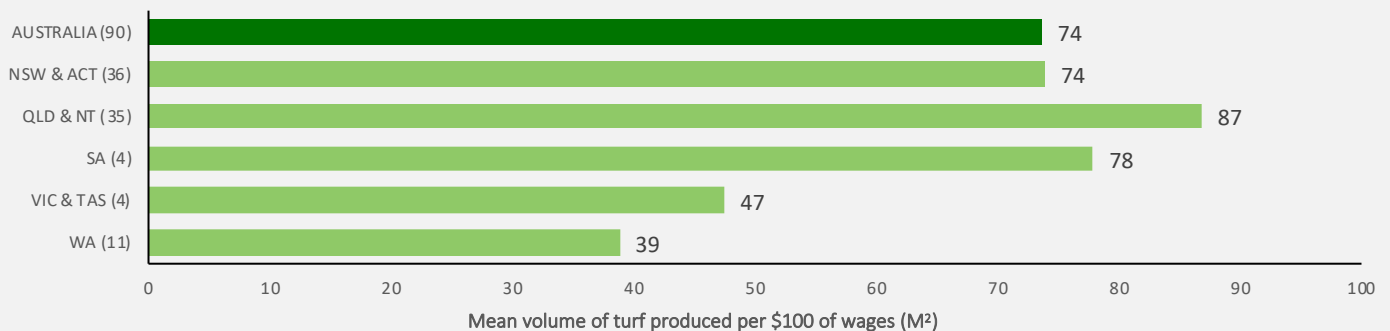
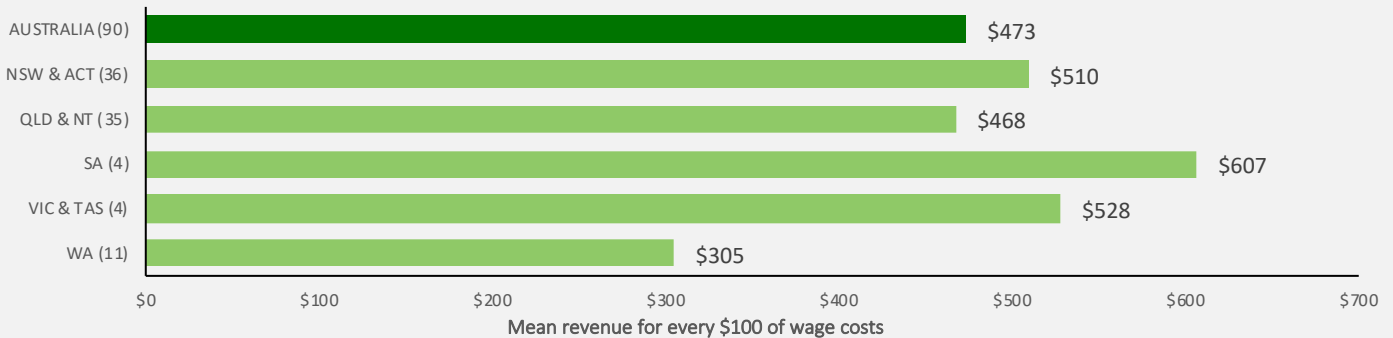
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Average turf production (revenue and volume) per full time equivalent employee



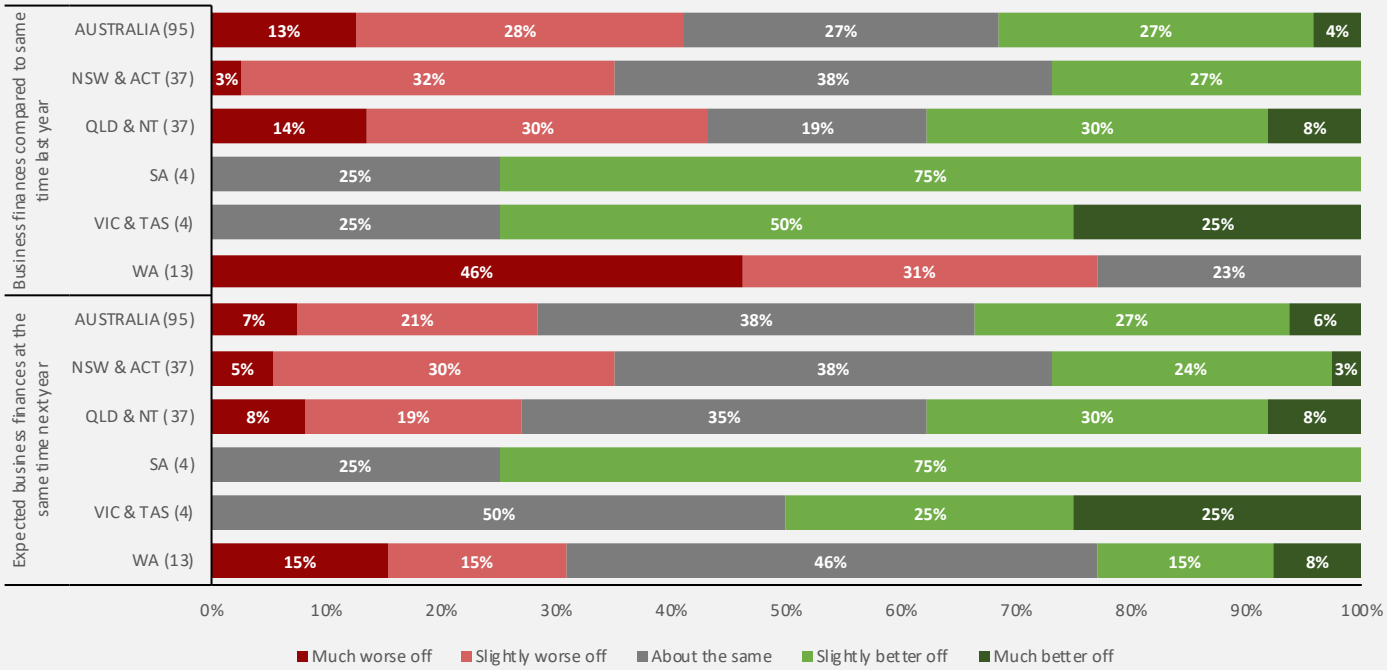
Average turf production (revenue and volume) per \$100 of wages



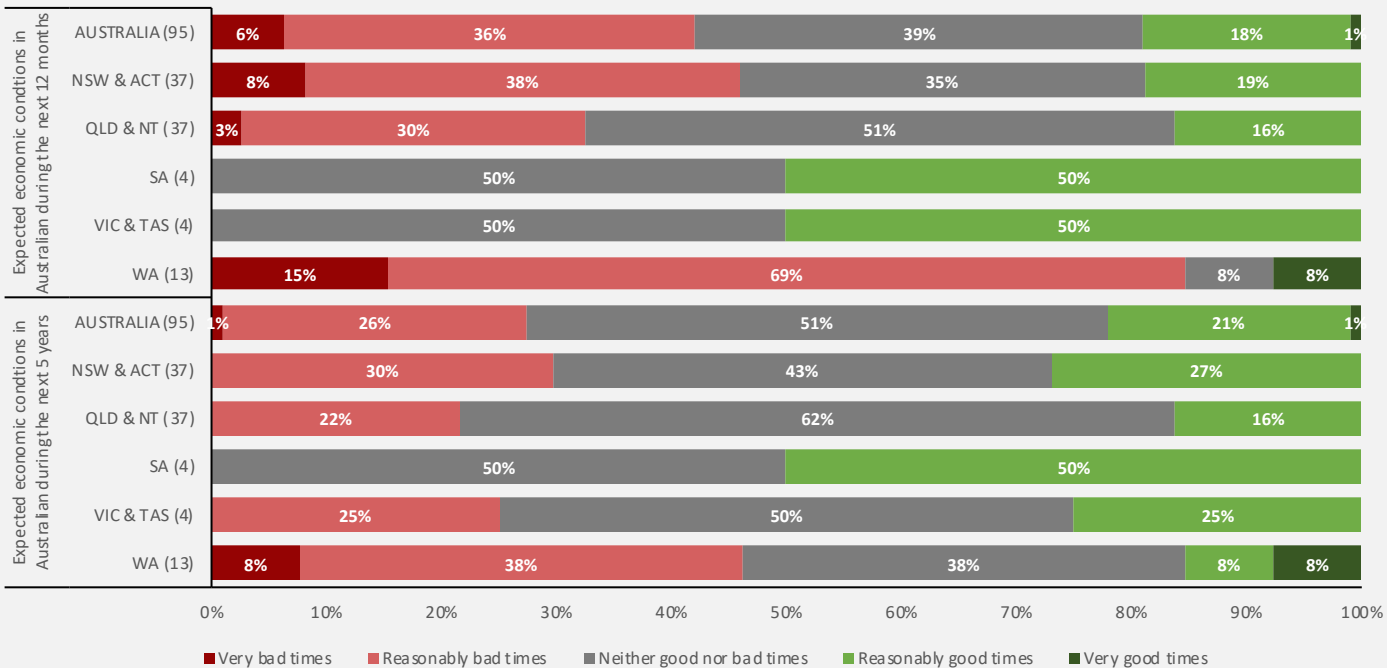
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Current and future confidence in turf business



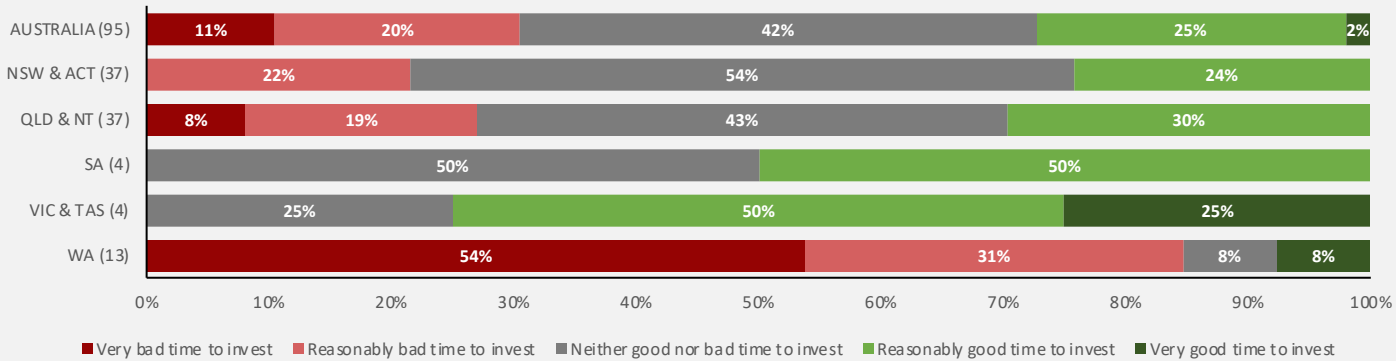
Expected future economic conditions in Australia



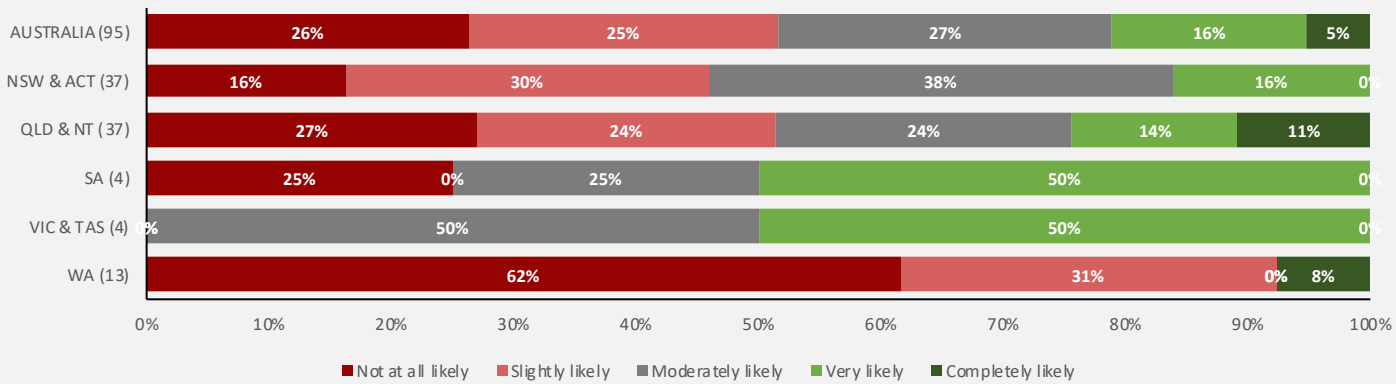
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Are the next 12 months a good or bad time to invest in growing turf business?



Likelihood of investing in growing turf business during the next 12 months



About this research

Turf Australia (<https://www.turfaustralia.com.au/>) 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. (TU17005 – Turf Industry Statistics 2017-2018 to 2019-2020).

If you have any questions about this snapshot report, please contact Turf Australia on (02) 4588 5735 or admin@turfaustralia.com.au. 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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