

Australian Turf Industry

2019/20 Snapshot Report

TU17005 Milestone
190 Appendix 6



This Snapshot Report provides a summary of turf production and grower sentiment for the Australian turf industry for the 2019/20 financial year. Turf Australia commissioned Taverner Research to conduct the research.

The research was conducted in September and October 2020. Overall, 64 out of a total of 230 Australian turf growers completed the survey either online or via a telephone interview.

Interpreting this report

In conducting the survey, Turf Australia emailed the link to the online survey to all 230 turf growers in Australia. Follow-up attempts were made to contact growers about the survey via email and telephone.

The margin of error for the final sample size of 64 growers, is +/- 10% (with 95% confidence)*. The

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

- NSW & ACT - 20 out of 92 surveyed (+/- 19% margin or error)
- QLD & NT – 22 out of 89 surveyed (+/- 18% margin of error)
- SA – 3 out of 10 surveyed (+/- 50% margin of error)**
- VIC & TAS – 7 out of 16 surveyed (+/- 29% margin or error)**
- WA – 9 out of 23 surveyed (+/- 26% margin of error)**

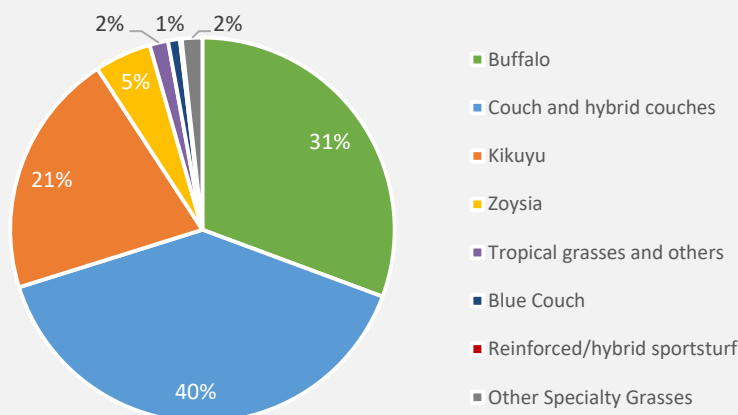
Total Australian turf production volume and value reported on the first two pages of this report was estimated by extrapolating from mean turf volume and value at the state and quantity level from data provided by survey respondents. The additional results report industry aggregate benchmarks directly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

Duration of turf business ownership by the current grower or grower's family ranged from 3 to 50 years, with a mean of 24 years.

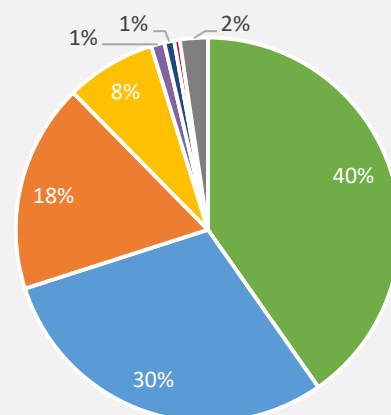
* Finite population correction applied.

** Throughout this report, state-based data should be interpreted with extreme caution due to limited sample sizes. In particular, the Vic/Tas data has been impacted by a small number of large producers.

Volume of turf produced by species



Value of turf produced by species



Percentages calculated from total estimated production volume and value for 179 turf growers in Australia (as per Department of Agriculture Levy data).

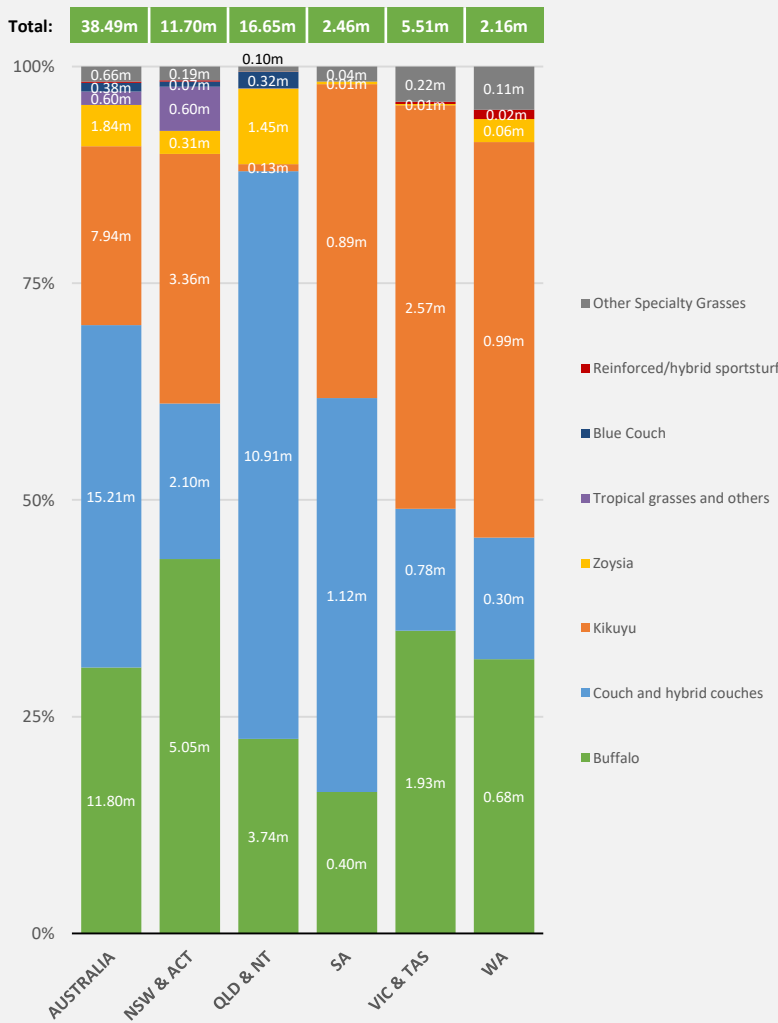
Australian Turf Industry

2019/20 Snapshot Report

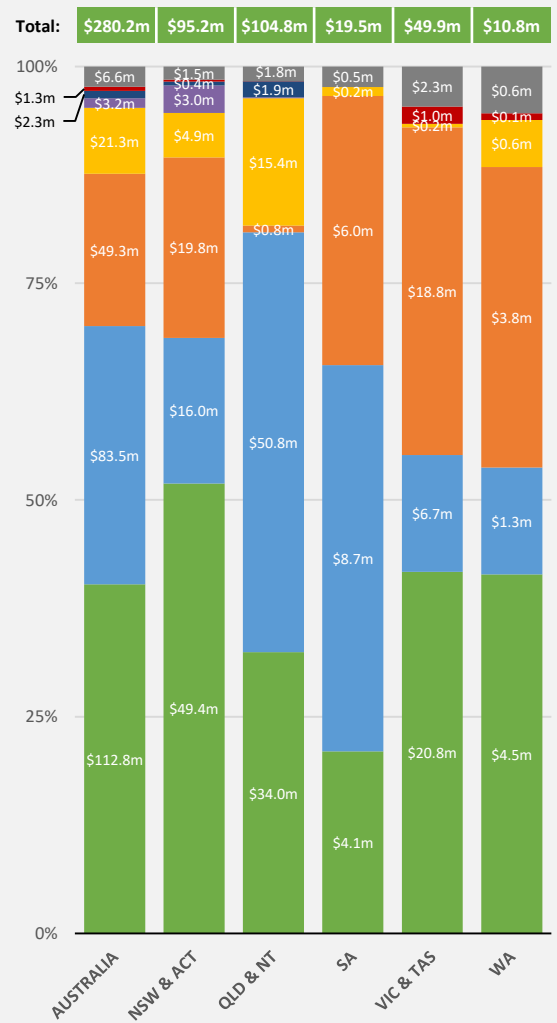
38,488,539 M²
(+5.7% on 2018/19)

\$280,208,115
(+14.9% on 2018/19)

Estimated Australian Turf Production*



Estimated Farm Gate Turf Value in Australia*



Total estimated turf production volume and value for the 179 turf growers in Australia covered by the Department of Agriculture turf Levy 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 64 turf growers surveyed who reported valid turf production volumes, a total of 22,482,764 M² of turf was produced during the 2019/20 financial year.

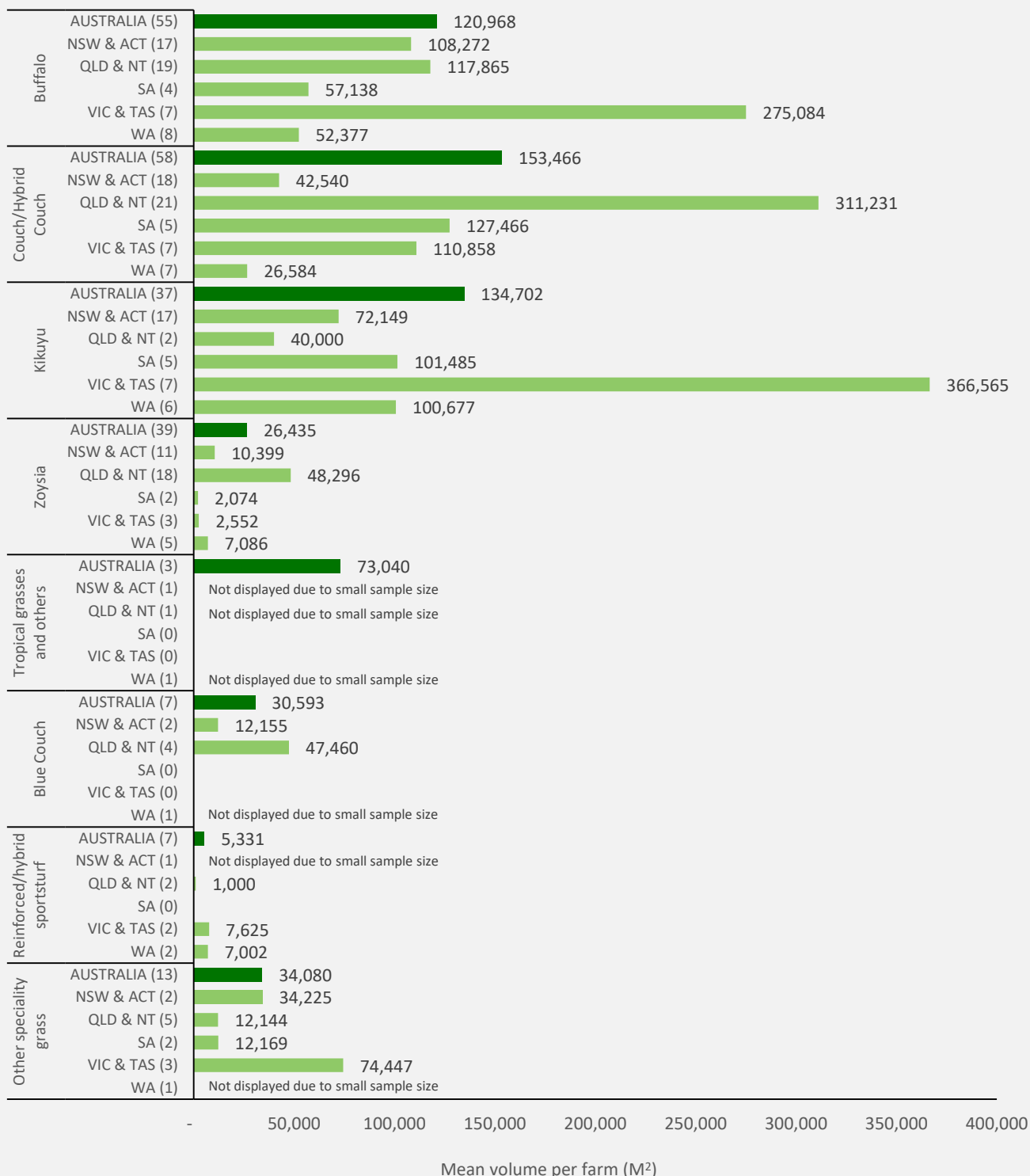
Across the 64 turf growers who reported valid turf revenue data, the total revenue for the 2019/20 financial year was \$205,816,975.

*Totals may not sum due to rounding.

Australian Turf Industry

2019/20 Snapshot Report

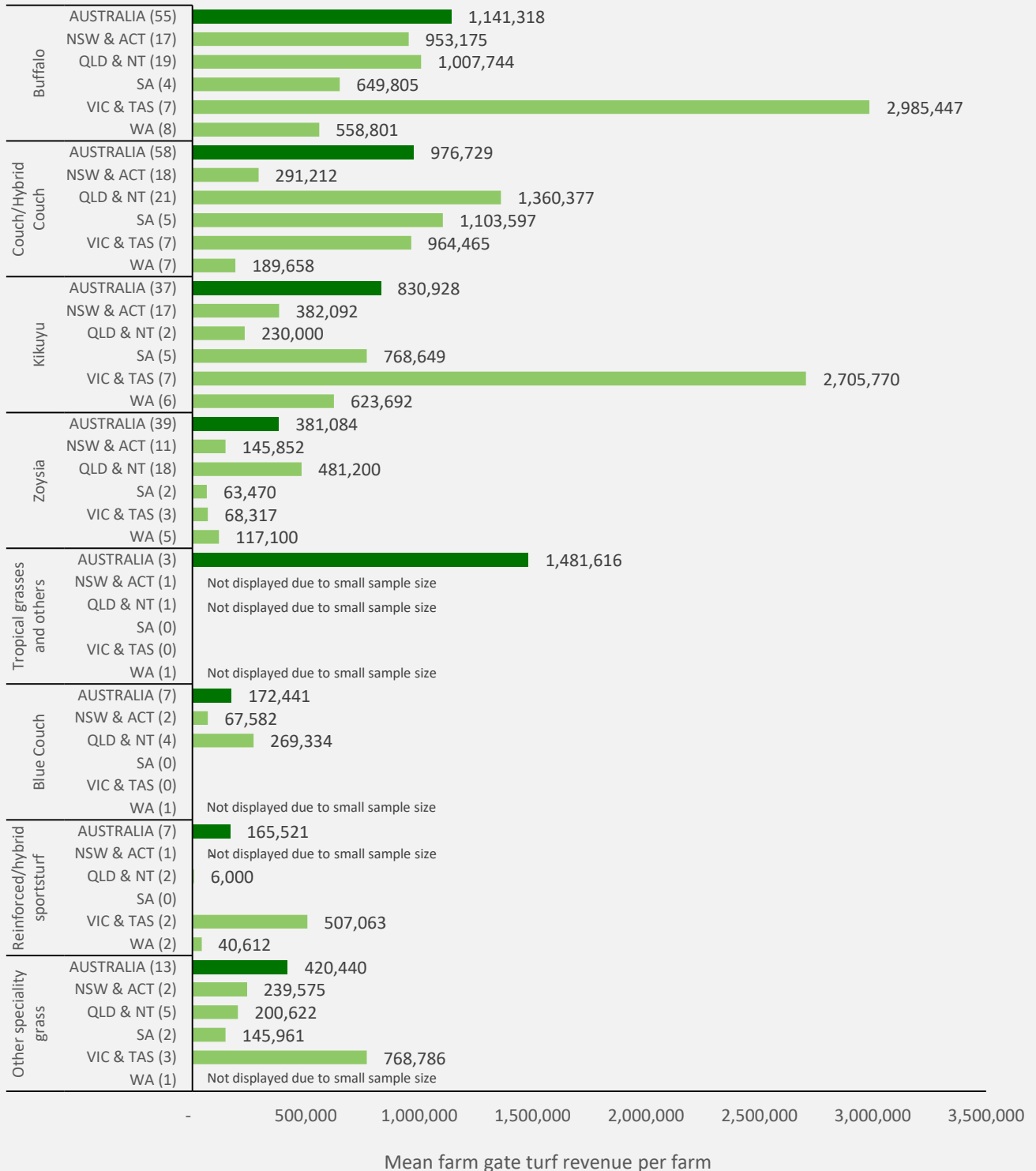
Average total volume of turf produced per farm per annum, by turf species



Australian Turf Industry

2019/20 Snapshot Report

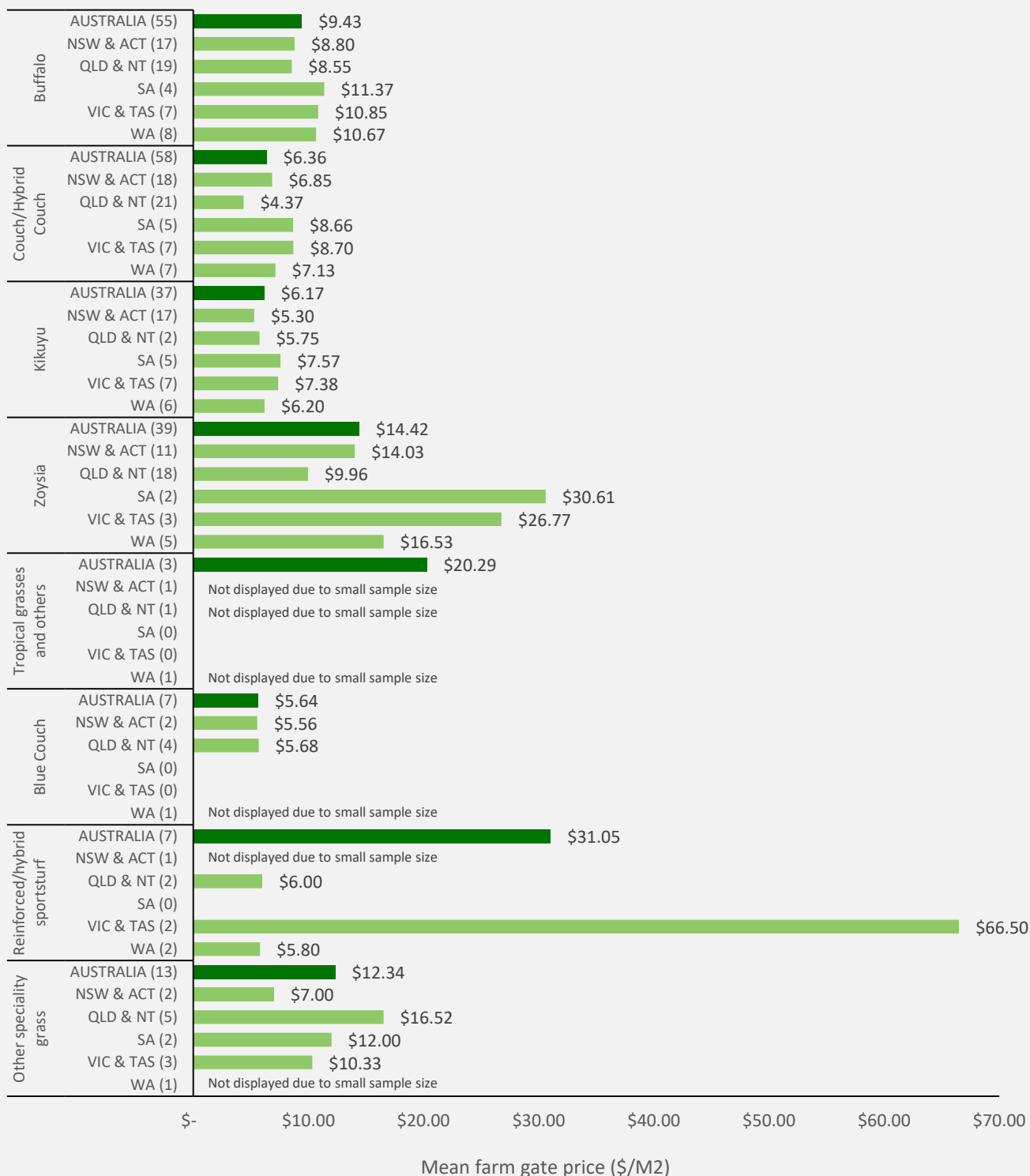
Average total farm gate turf revenue per farm per annum, by turf species



Australian Turf Industry

2019/20 Snapshot Report

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

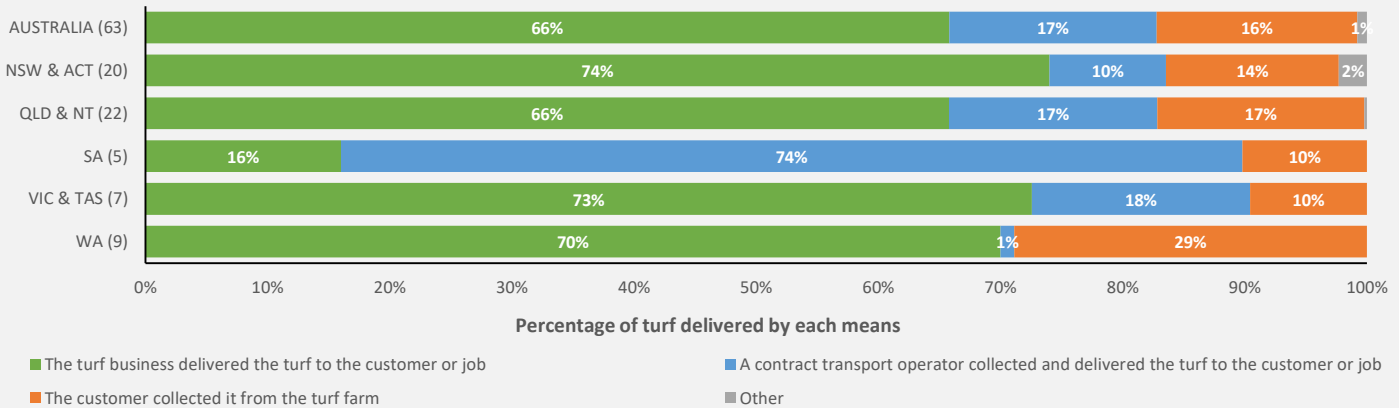




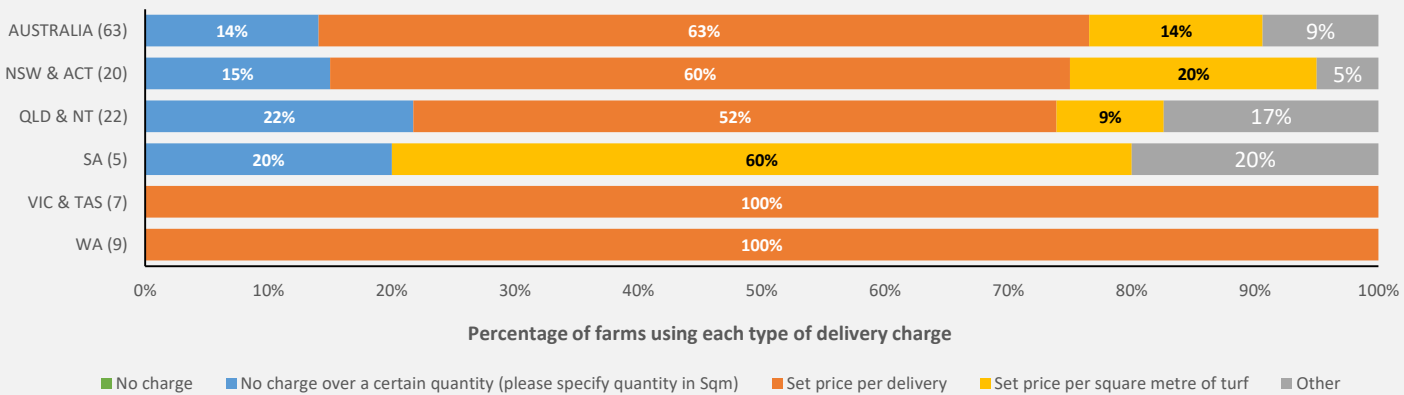
Australian Turf Industry

2019/20 Snapshot Report

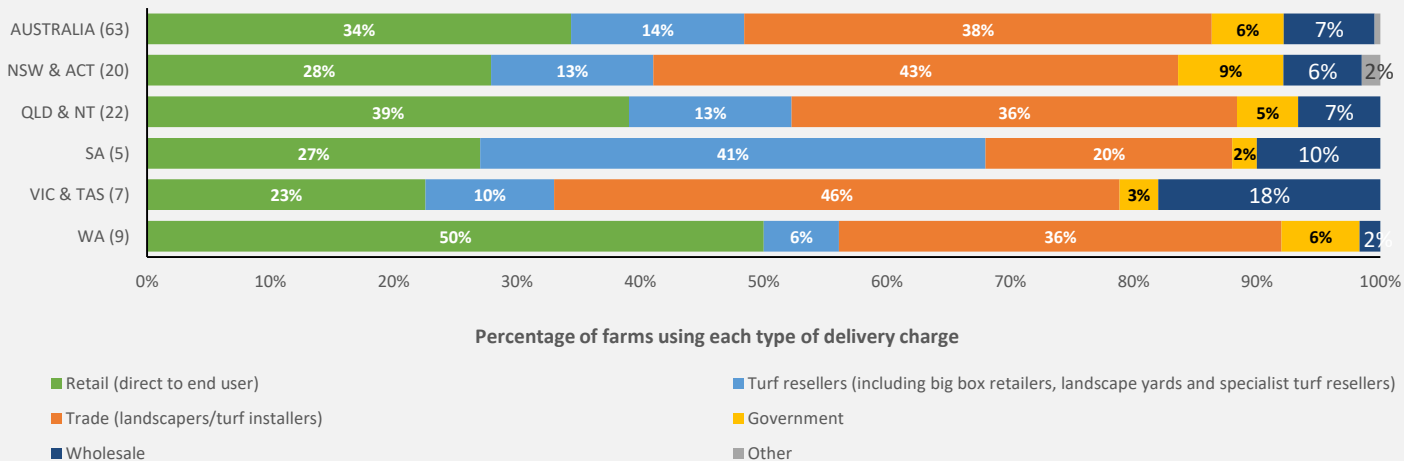
Method of turf delivery to customers



Charge for turf delivery (for turf businesses who deliver)



Turf sales channels

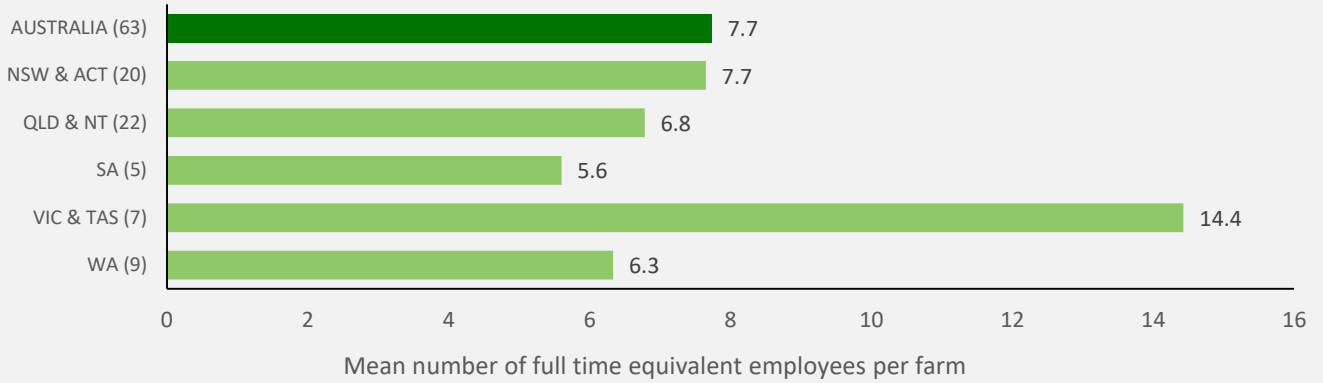


*Percentages may not sum due to rounding.

Australian Turf Industry

2019/20 Snapshot Report

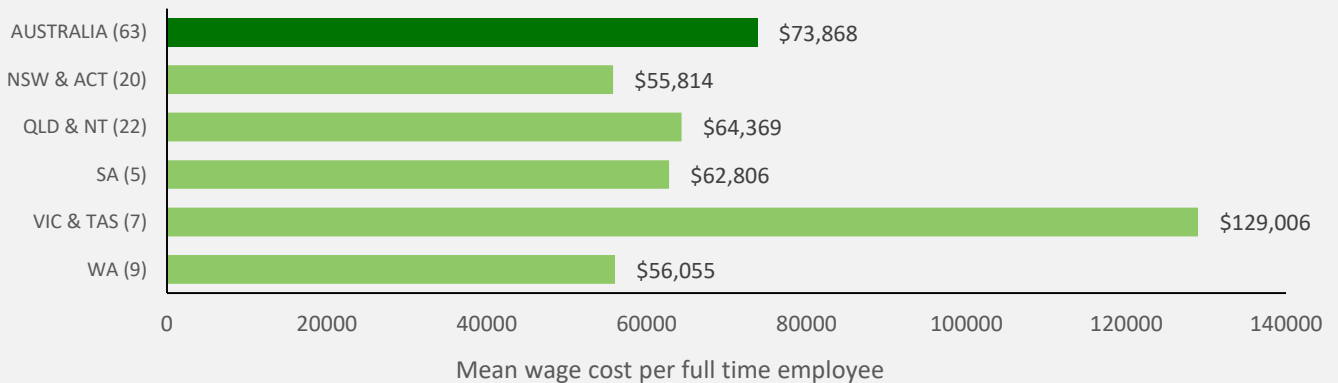
Average number of full time equivalent employees per farm



Total average annual wages costs per farm



Average annual wage per full time equivalent employee per farm*



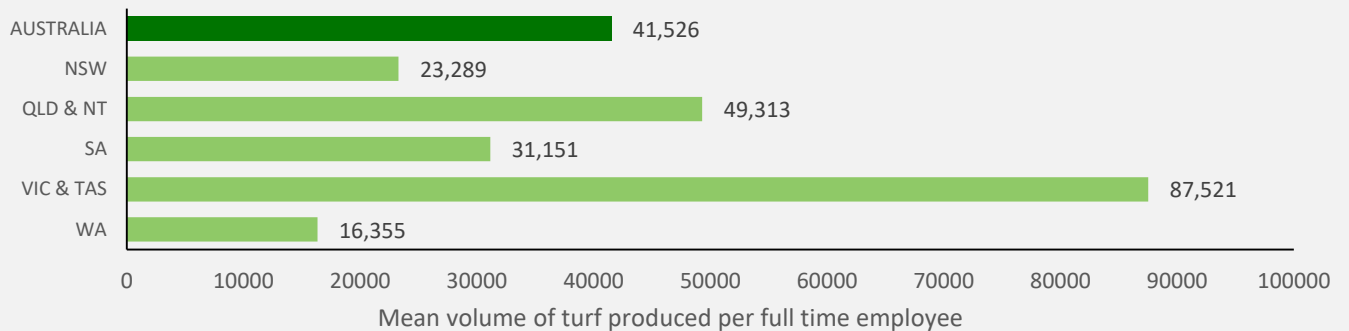
*Average annual wage per full time equivalent employee was calculated at the individual farm level by dividing the total wages costs per farm by the total number of full time equivalent employees per farm.



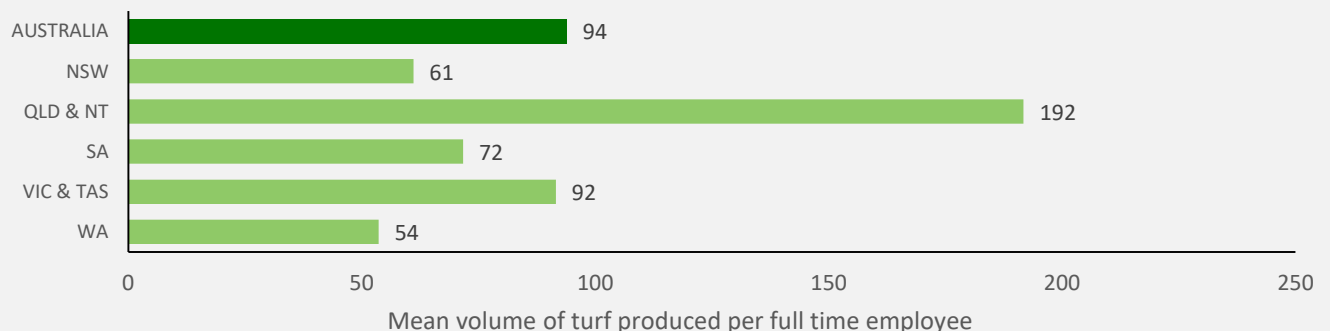
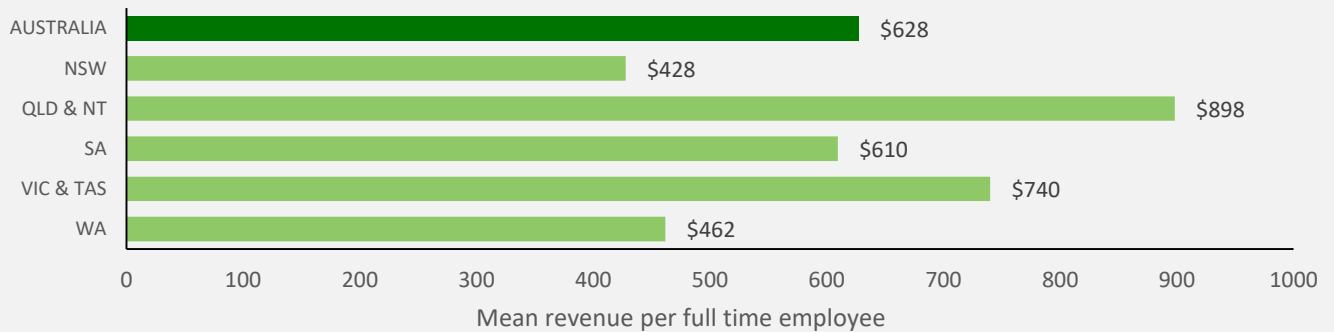
Australian Turf Industry

2019/20 Snapshot Report

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



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

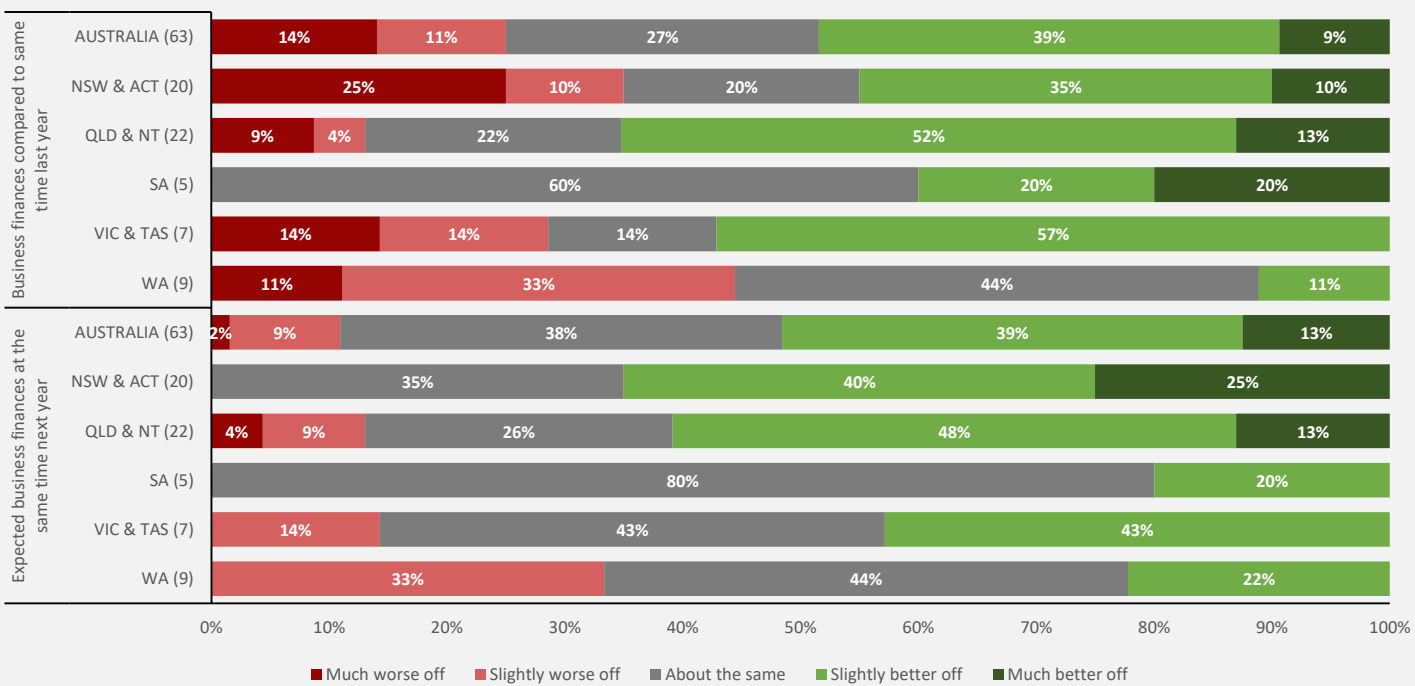




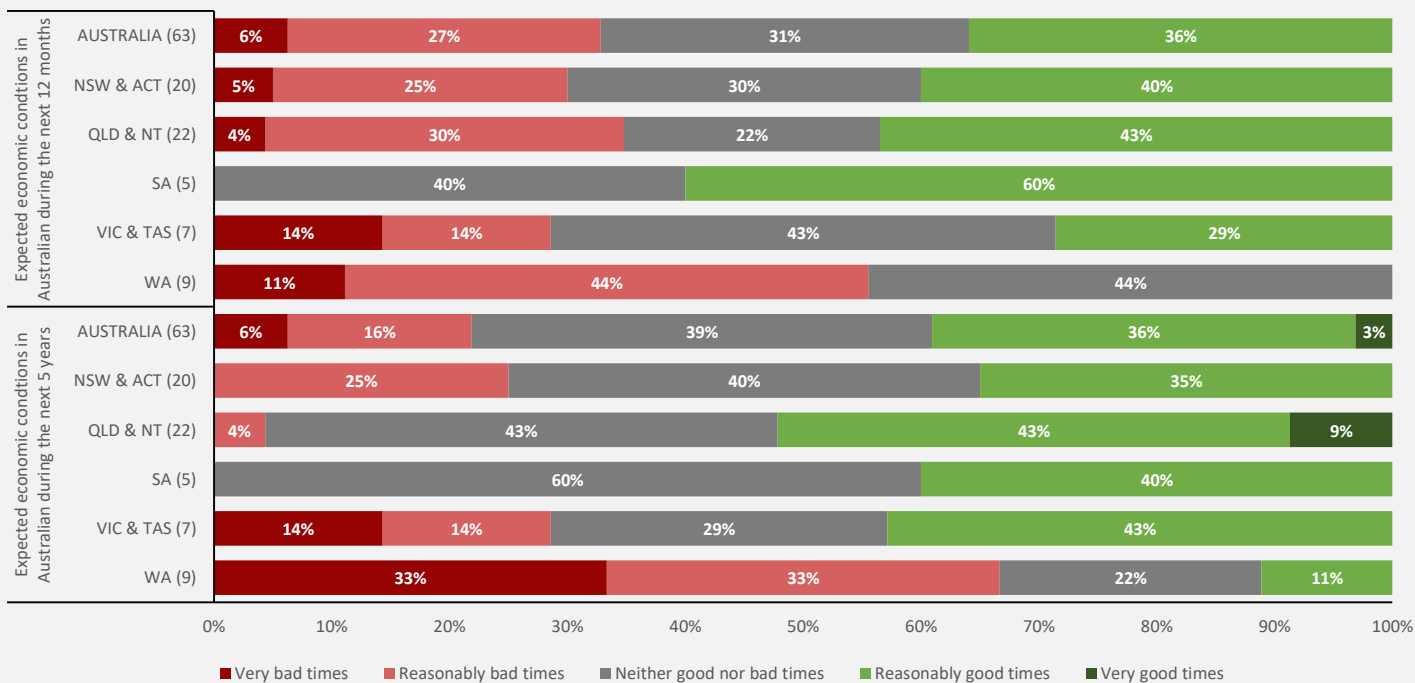
Australian Turf Industry

2019/20 Snapshot Report

Current and future confidence in turf business



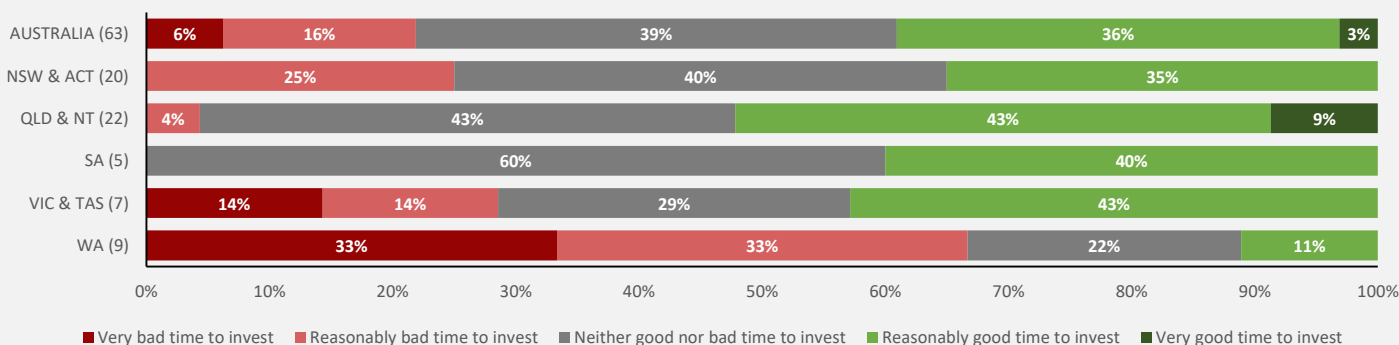
Expected future economic conditions in Australia



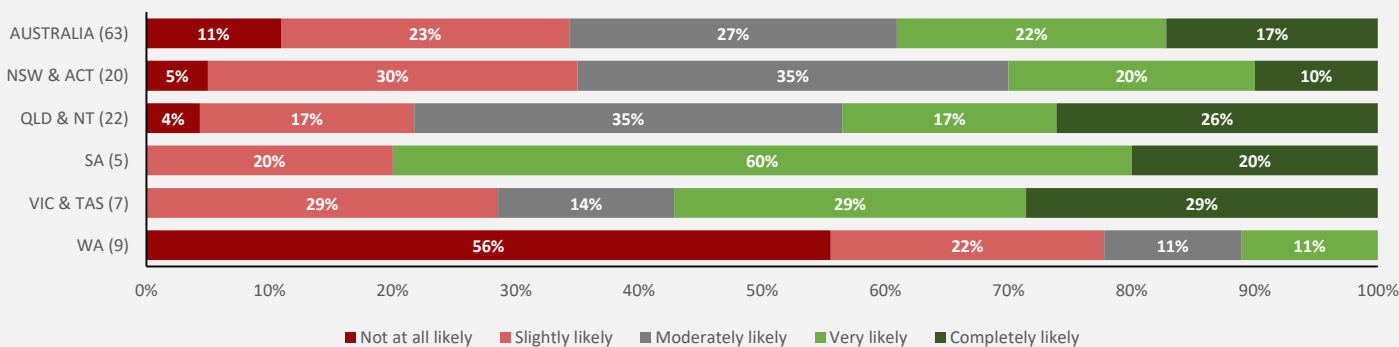
Australian Turf Industry

2019/20 Snapshot Report

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 0420 300 056 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

Turf Australia would like to acknowledge the support of the employees of the state turf organisations - Turf Queensland, Turf New South Wales, Turf Growers Association of Western Australia, and Turf Victoria - who assisted in the collection of survey information for this project.