

# Australian Turf Industry

## 2017/18 Snapshot Report

This Snapshot Report provides a summary of turf production and grower sentiment for the Australian turf industry for the 2017/18 financial year. Turf Australia was commissioned by Hort Innovation to conduct the research.

Overall, 125 out of a total of 176 Australian turf growers completed the survey either online or via a telephone interview, during September and October 2018.

### Interpreting this report

In conducting the survey, Turf Australia made or attempted to make contact with all 176 turf growers in Australia. Target sample sizes were calculated at the state level to ensure that enough growers in each state/territory were surveyed to provide an accurate representation of the broader population of growers. The maximum margin of error for the final sample size of 125 growers, is 4.7% (with 95% confidence)\*.

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

- NSW & ACT - 43 out of 75 surveyed (9.8% margin or error)
- QLD & NT - 49 out of 63 surveyed (6.7% margin of error)
- SA - 7 out of 7 surveyed (0% margin of error)
- VIC & TAS - 10 out of 11 surveyed (9.8% margin or error)
- WA - 16 out of 20 surveyed (11.2% margin of error)

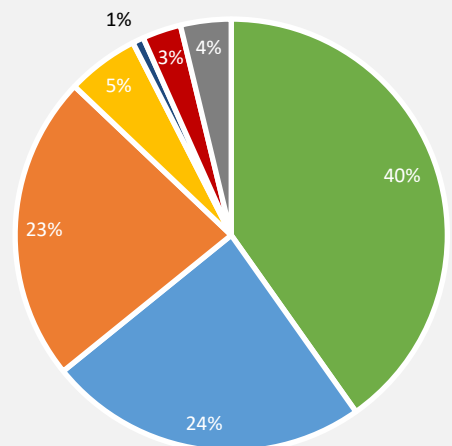
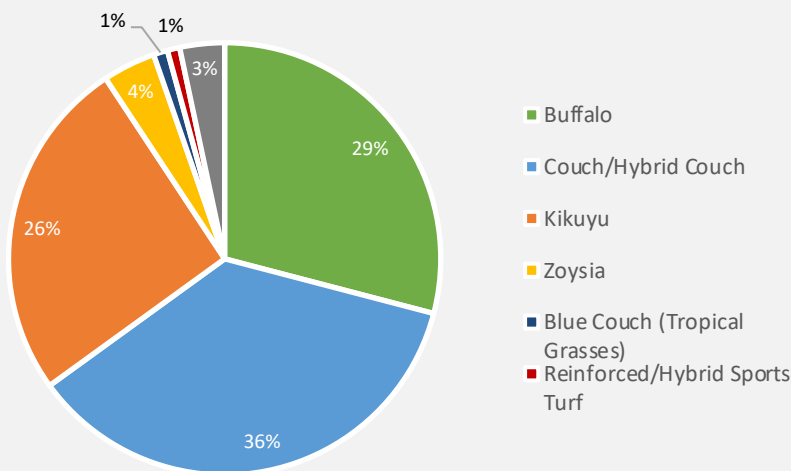
Total Australian turf production volume and value reported on the first two pages of this report was estimated by extrapolating from mean turf volume and value at the state and quantity level from data provided by survey respondents. The additional results report industry aggregate benchmarks directly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

Duration of turf business ownership by the current grower or grower's family ranged from 2 to 50 years, with a mean of 22 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 176 turf growers in Australia.

# Australian Turf Industry

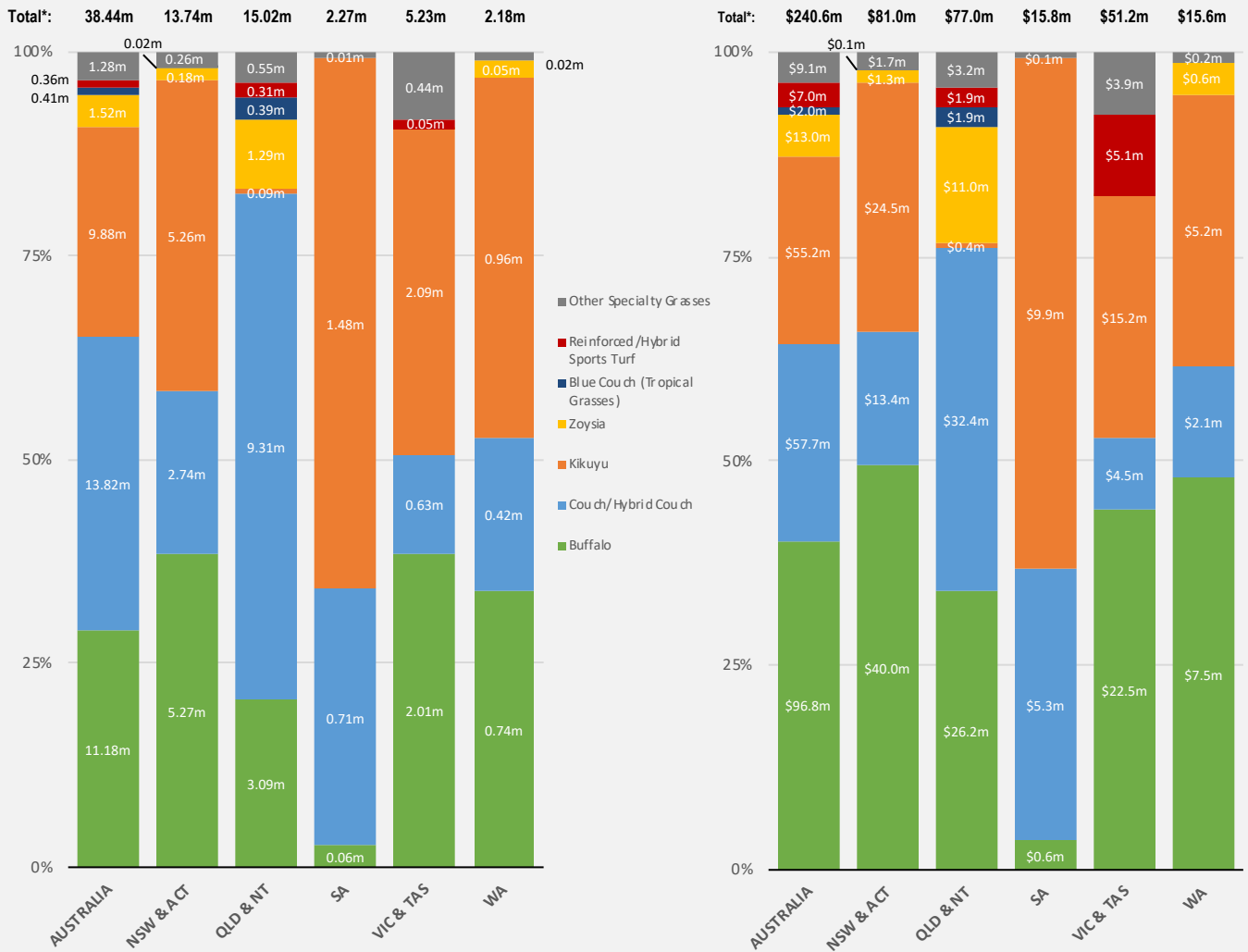
## 2017/18 Snapshot Report

**38,442,330 M<sup>2</sup>**

Estimated Australian Turf Production

**\$240,629,900**

Estimated Farm Gate Value of Turf in Australia



Total estimated turf production volume and value for the 176 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 124 turf growers surveyed who reported valid turf production volumes, a total of 33,500,069 M<sup>2</sup> of turf was produced during the 2017/18 financial year.

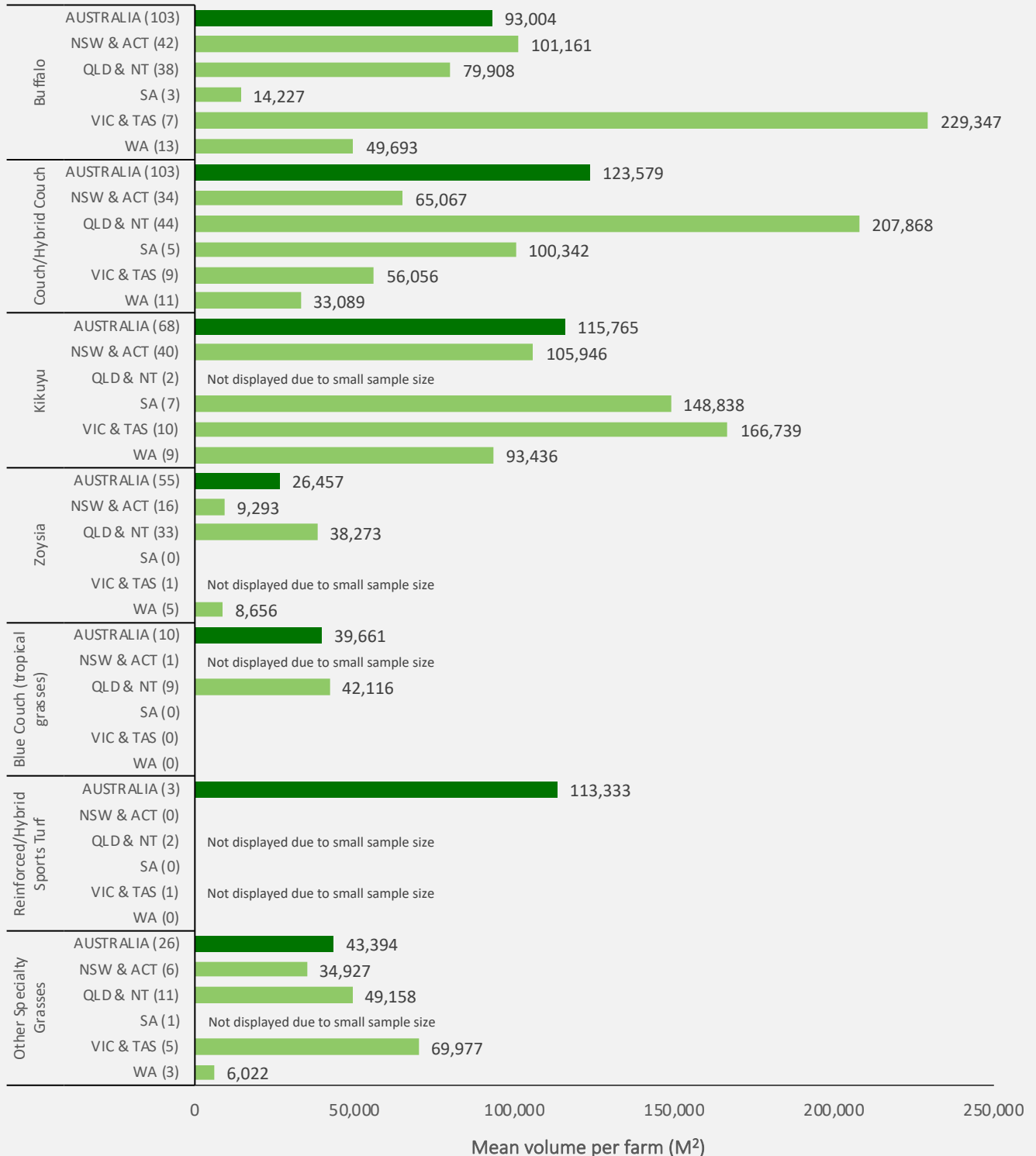
Across the 123 turf growers who reported valid turf revenue data, the total revenue for the 2017/18 financial year was \$203,302,881.

\*Totals may not sum due to rounding.

# Australian Turf Industry

## 2017/18 Snapshot Report

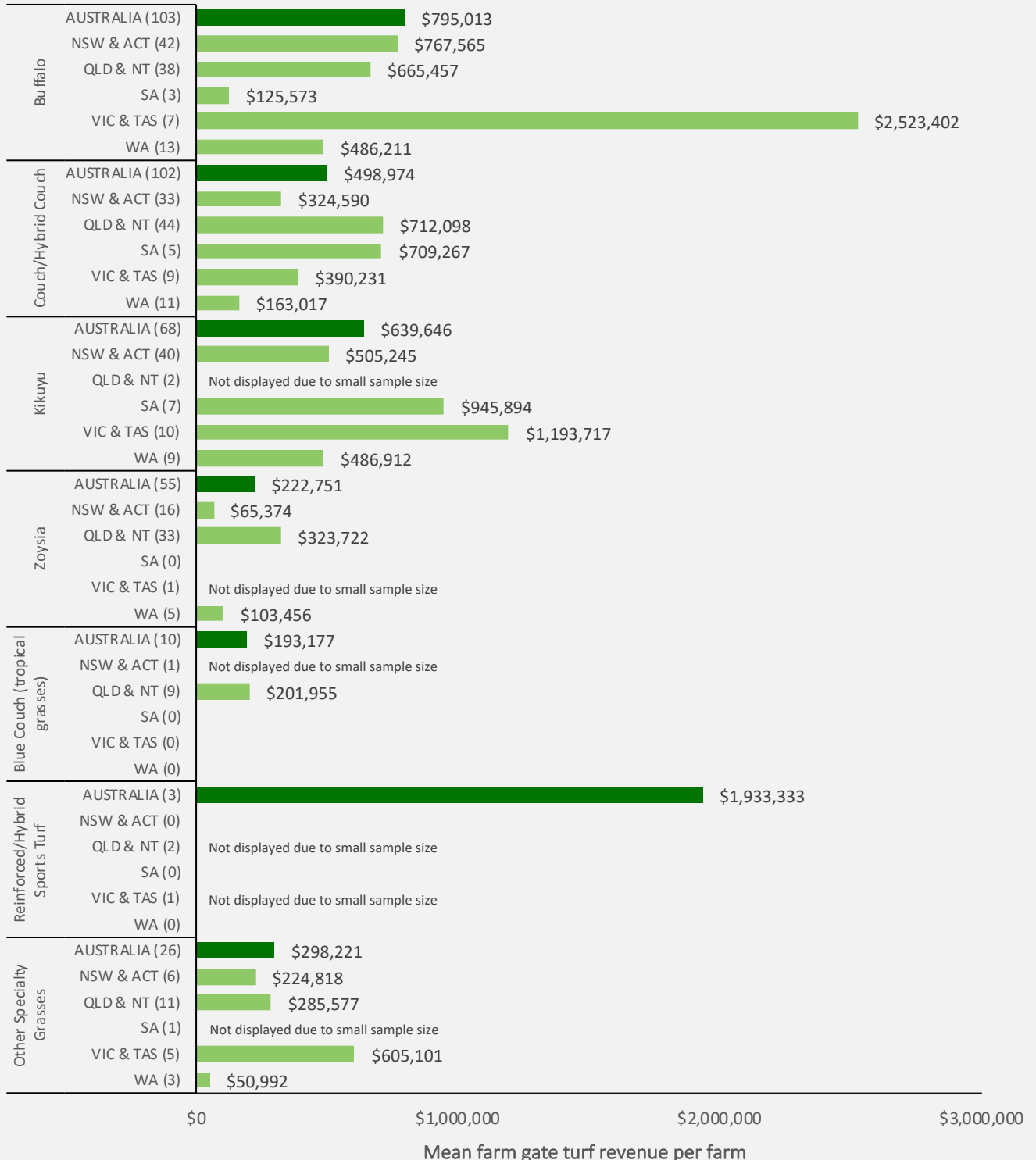
Average total volume of turf produced per farm per annum, by turf species



# Australian Turf Industry

## 2017/18 Snapshot Report

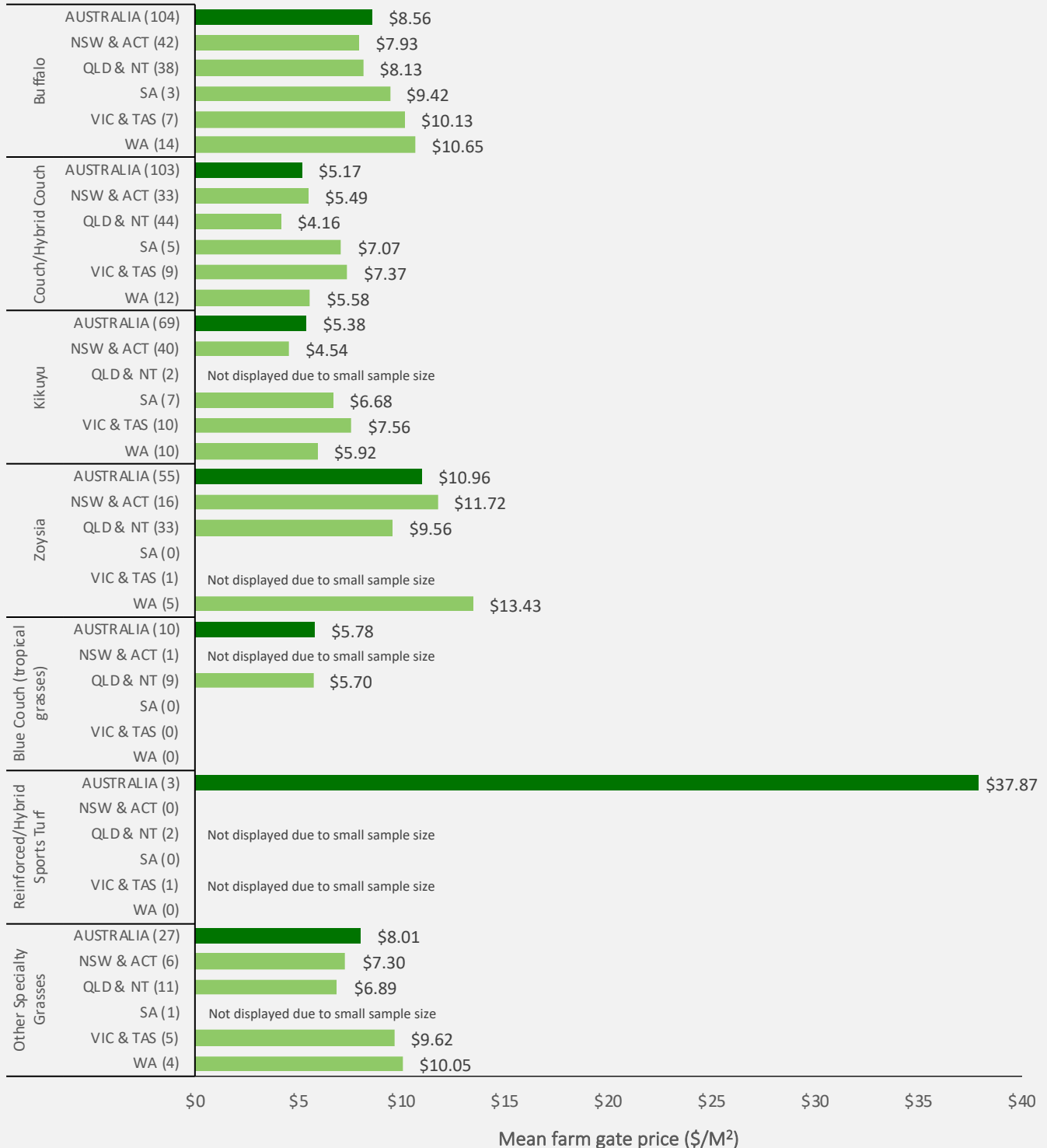
Average total farm gate turf revenue per farm per annum, by turf species



# Australian Turf Industry

## 2017/18 Snapshot Report

Average farm gate price (\$/M<sup>2</sup>), by turf species

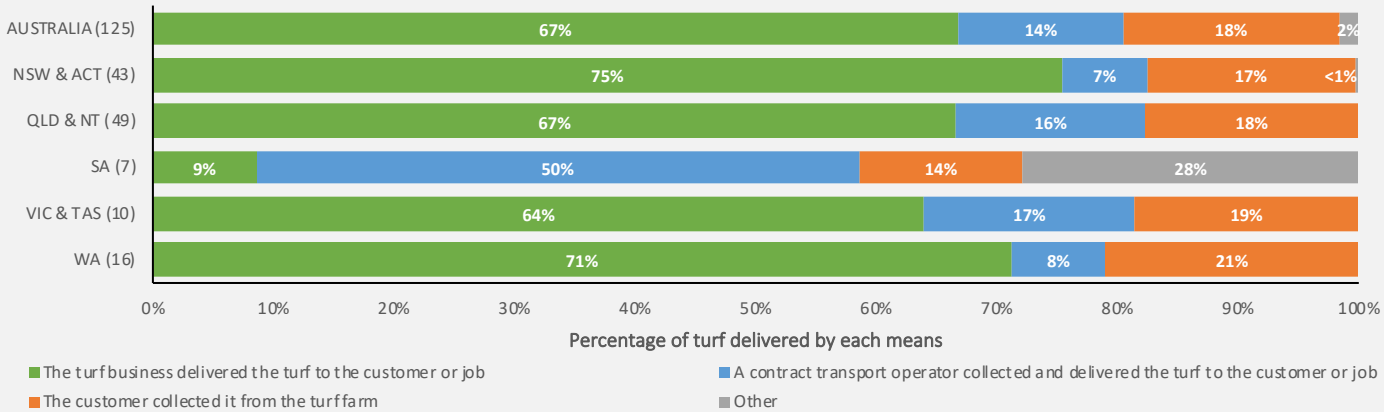




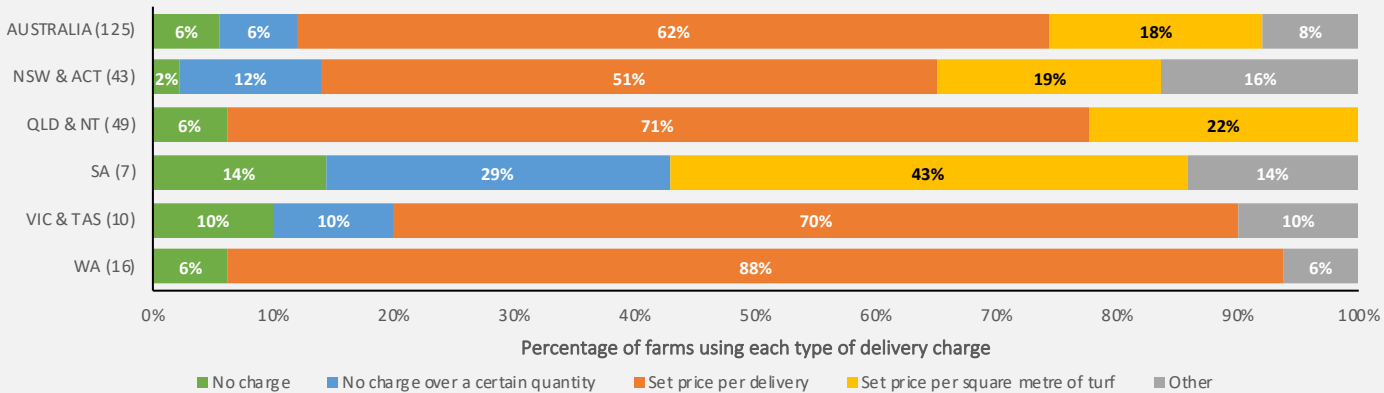
# Australian Turf Industry

## 2017/18 Snapshot Report

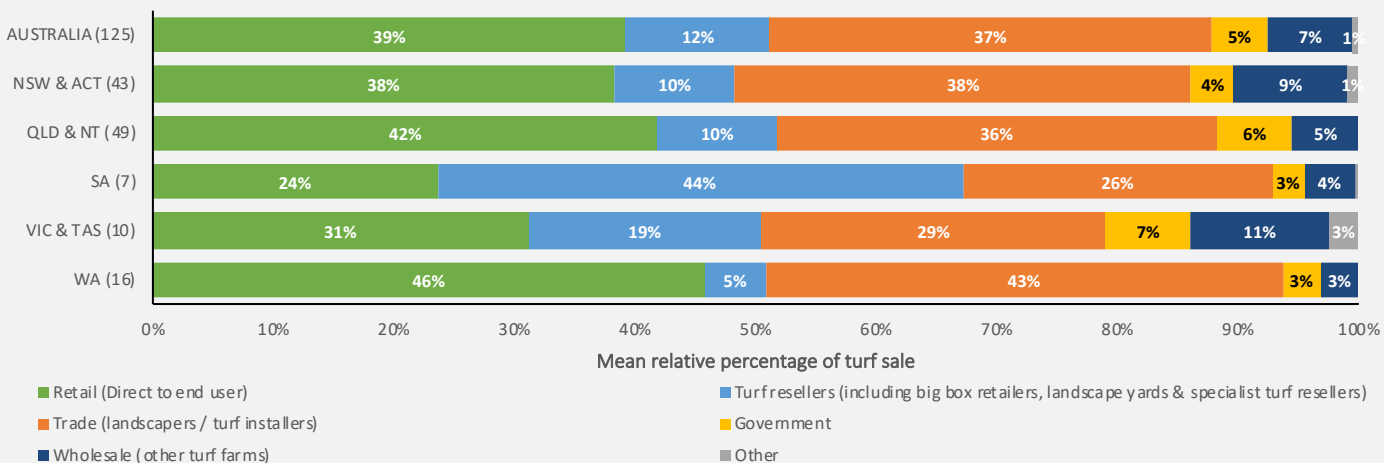
### Method of turf delivery to customers



### Charge for turf delivery (for turf businesses who deliver)



### Turf sales channels

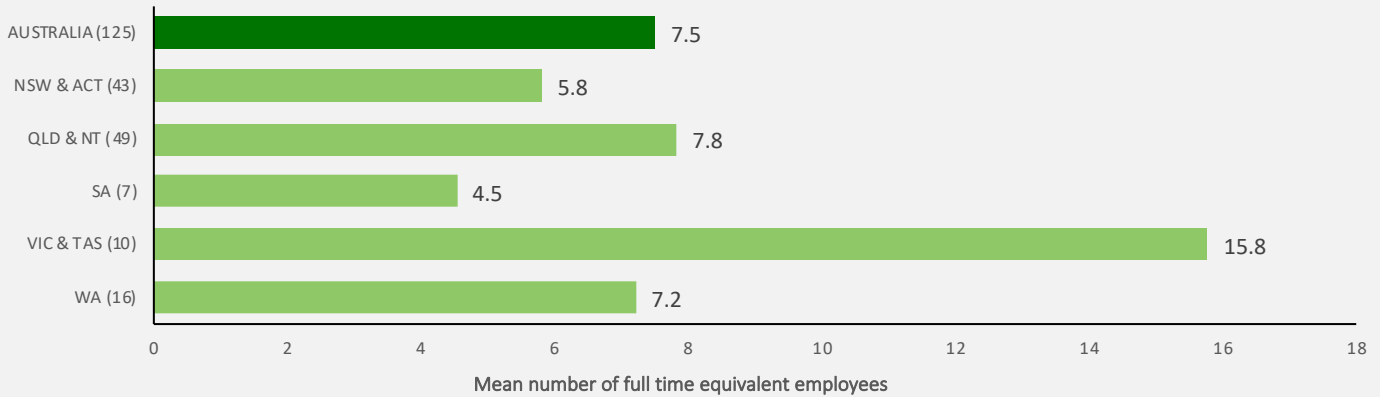


\*Percentages may not sum due to rounding.

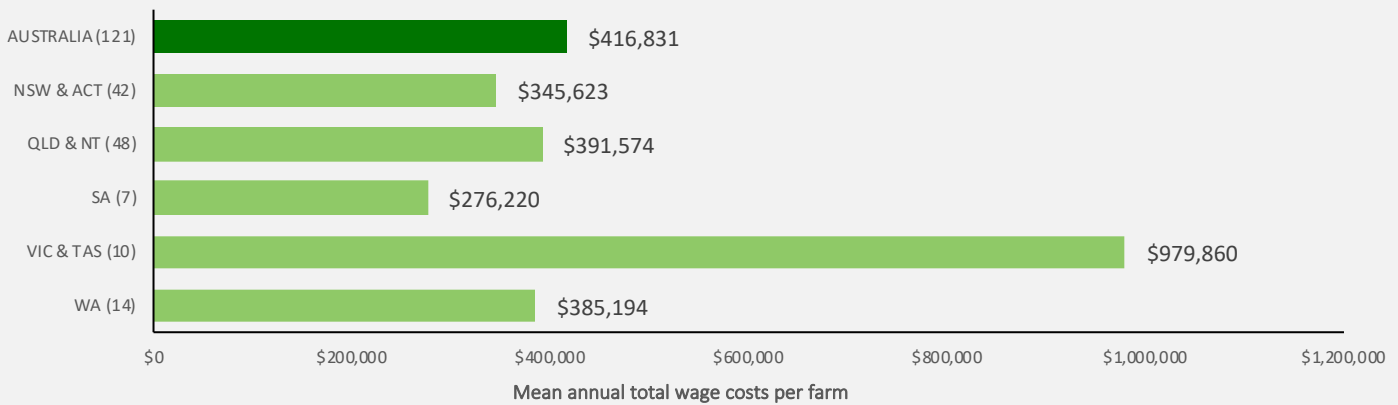
# Australian Turf Industry

## 2017/18 Snapshot Report

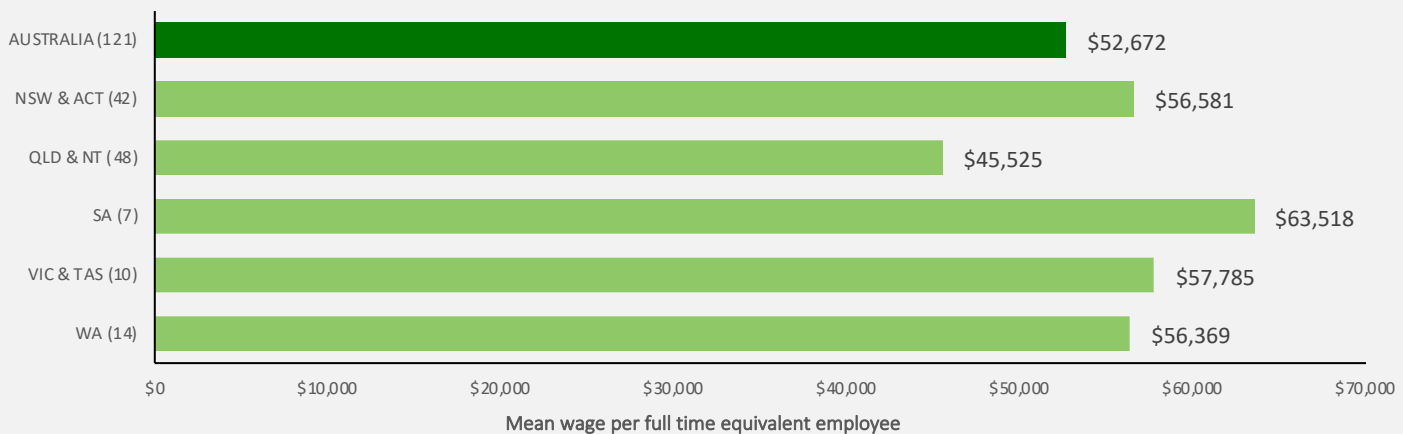
### Average number of full time equivalent employees per farm



### Total average annual wages costs per farm



### Average annual wage per full time equivalent employee per farm\*

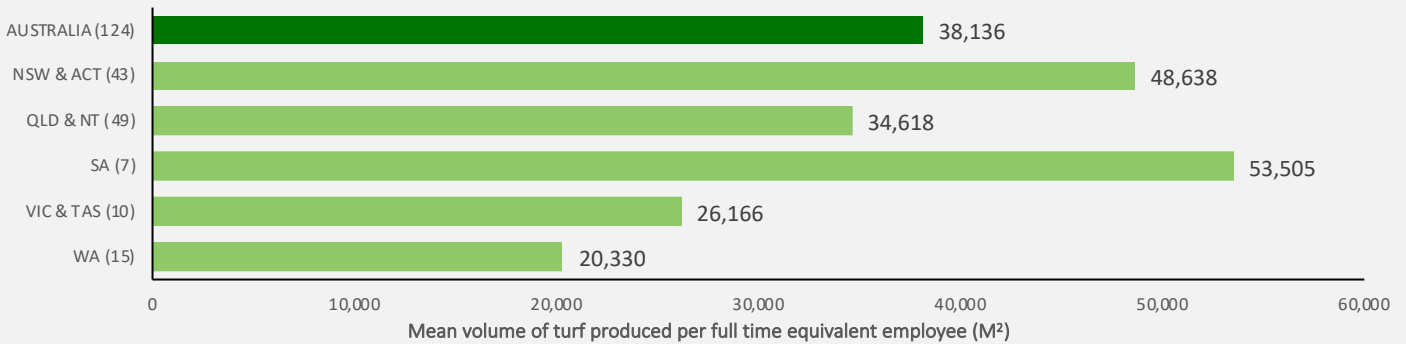
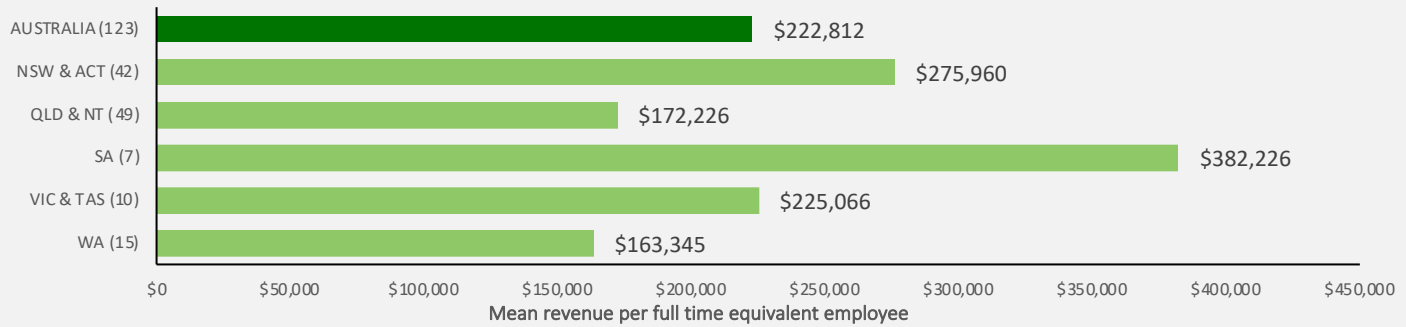


\*Average annual wage per full time equivalent employee was calculated at the individual farm level by dividing the total wages costs per farm by the total number of full time equivalent employees per farm.

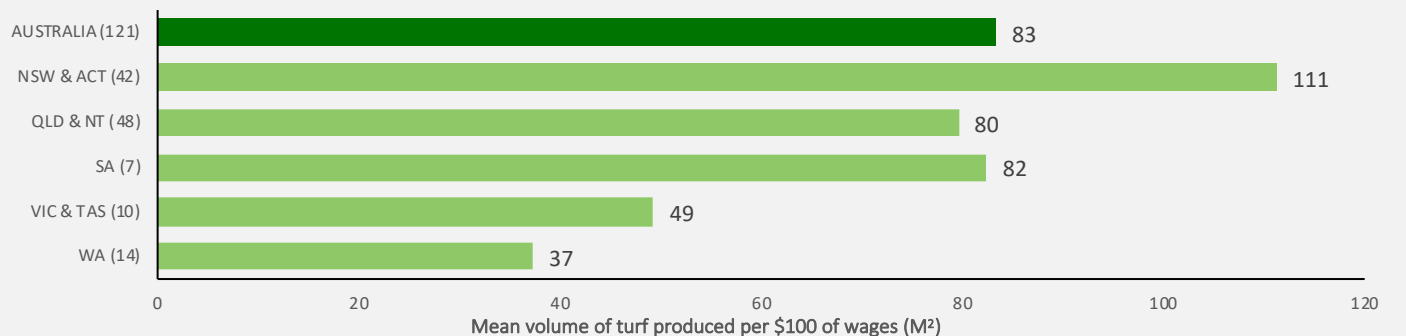
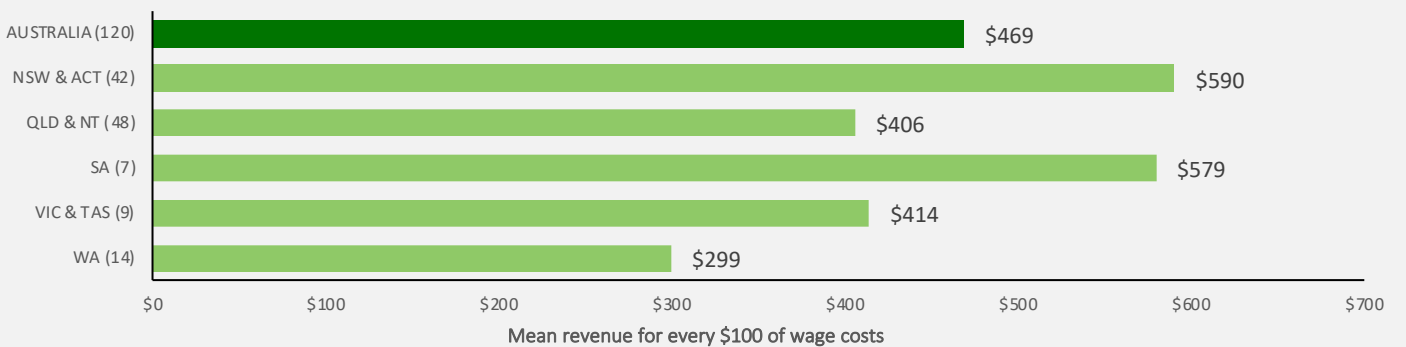
# Australian Turf Industry

## 2017/18 Snapshot Report

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



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

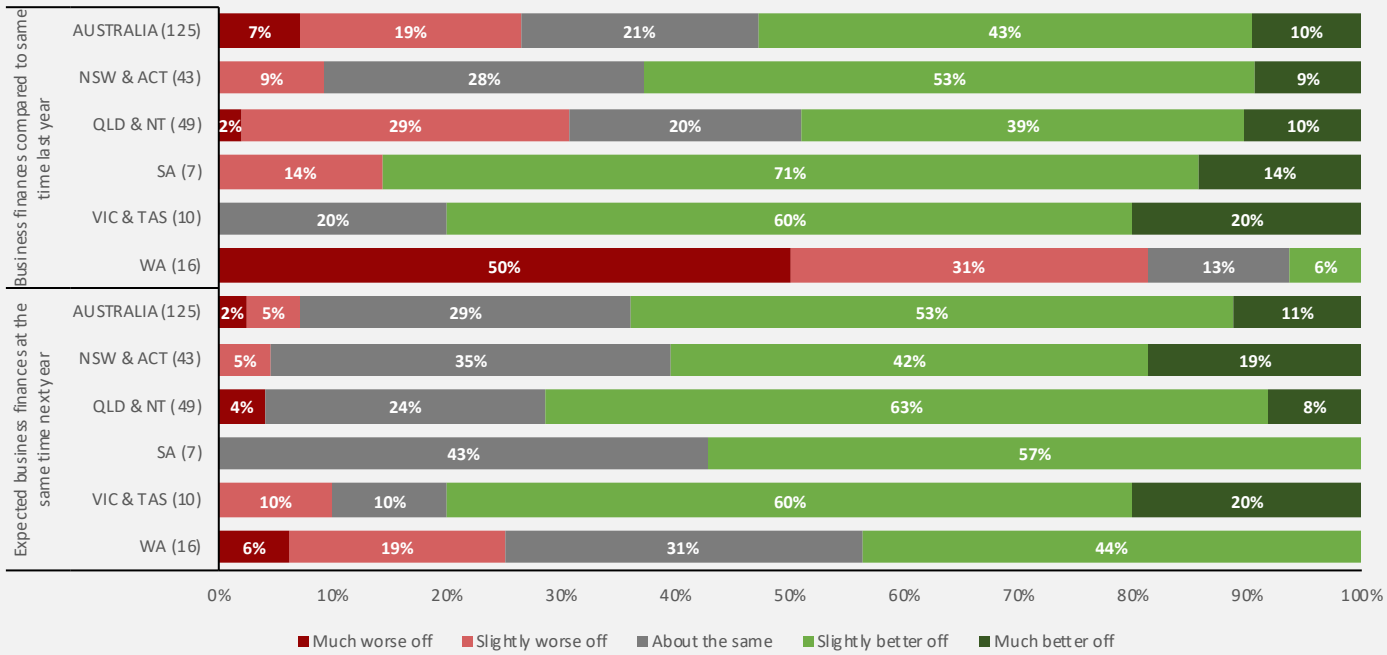




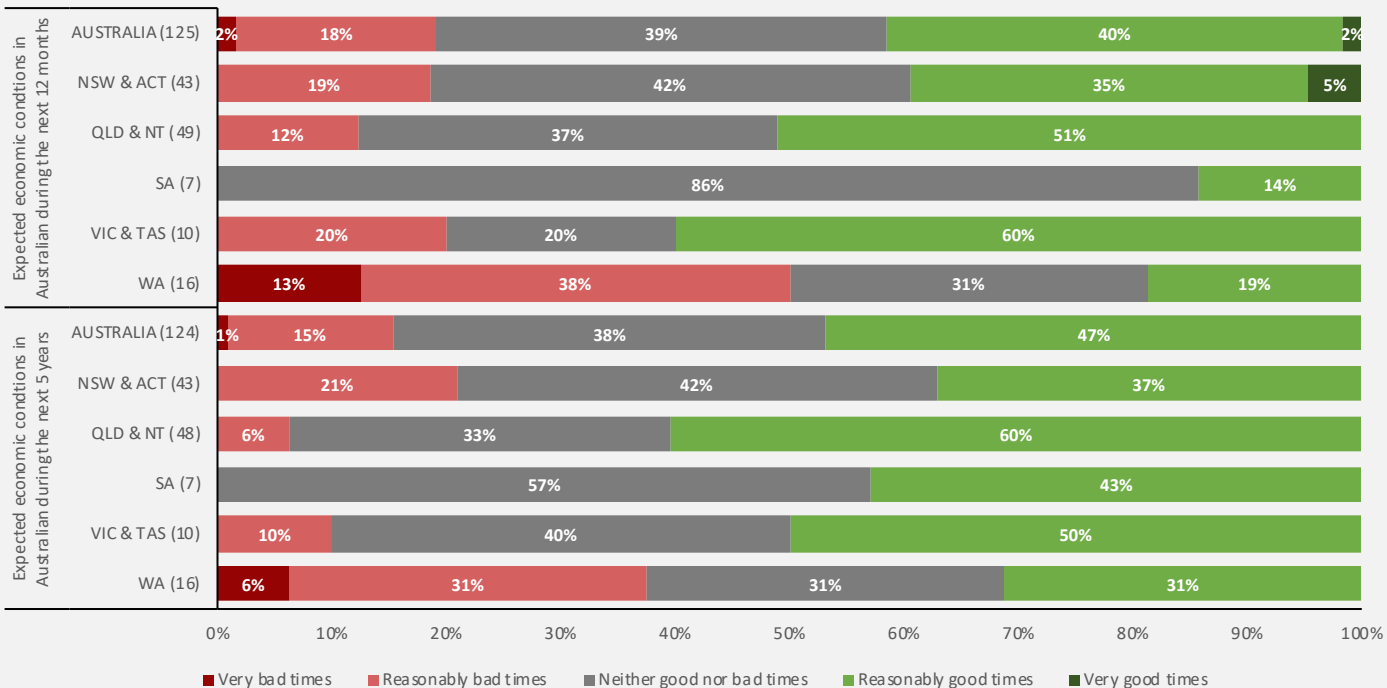
# Australian Turf Industry

## 2017/18 Snapshot Report

### Current and future confidence in turf business



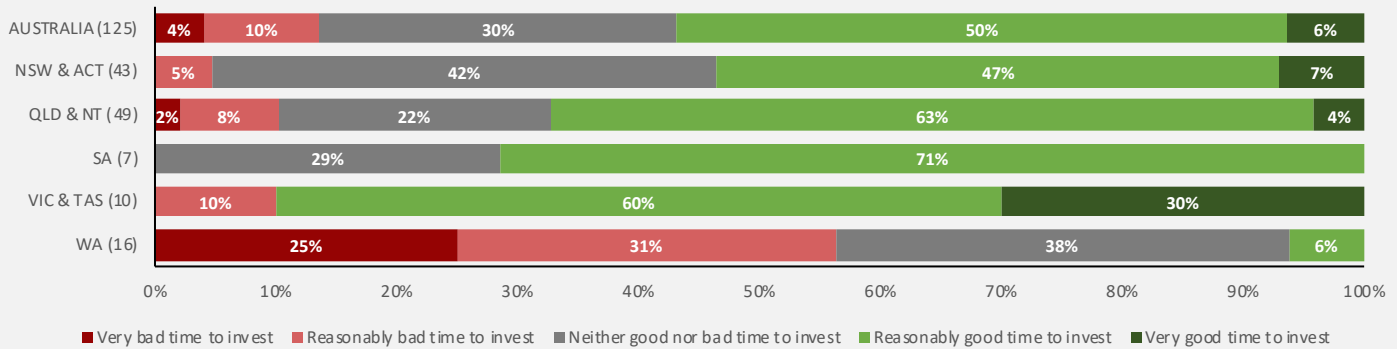
### Expected future economic conditions in Australia



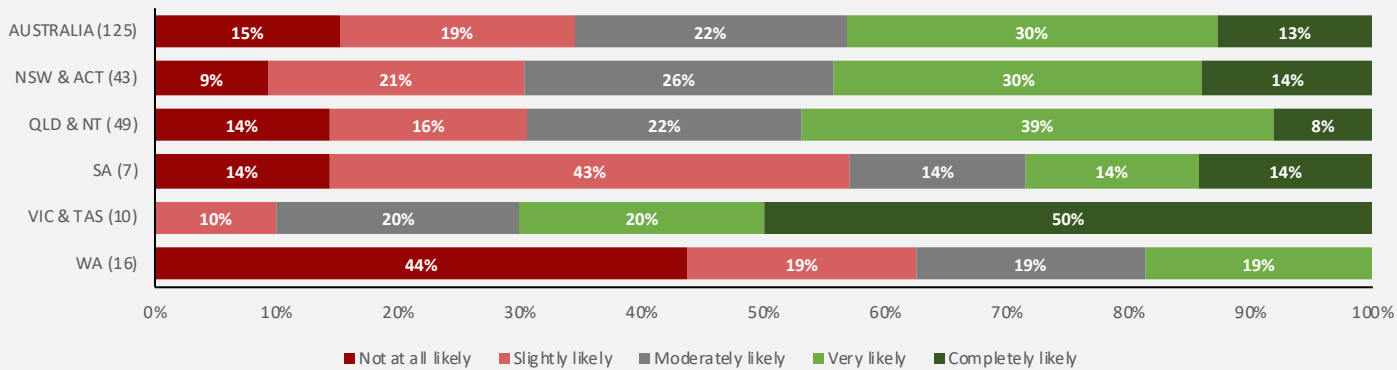
# Australian Turf Industry

## 2017/18 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 (02) 4588 5735 or [admin@turfaustralia.com.au](mailto:admin@turfaustralia.com.au). All care has been taken to ensure the confidentiality of respondents.

#### Disclaimer

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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.