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## Market and Crop Watch – Special Report



Last month, the ASTA's Lawn Seed Division presented production and consumption reports in Kansas City. Below is a summary of that data, combined with notes from last year. Interestingly enough, when all these reports are taken collectively, it appears that we might be in one of the most 'balanced' years we have had in a long time. We really aren't super-long on any crops, nor are we in critical deficits on any crops. Furthermore, the same may hold true for the next 12 months. Maybe that's why most markets are fairly flat??!! Please do remember that as with all such reports that are accumulated with good intentions, the following info should be taken with a grain of salt! ☺



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### Production Reports

#### Annual Ryegrass in Oregon

- '04 crop: 250M lbs, up ~40M from '03
- June '04 carryover: 25M lbs
- Projected '04-05 usage: 255M lbs
- June '05 projected carryover: 20M lbs
- Acreage change for 2005 = Down 2%

#### Perennial Ryegrass – Oregon Production

- '04 crop: 241M lbs, up 77.5M from '03 (includes 6M from MN production)
- June '04 carryover: nominal
- Projected '04-05 usage: 220M
- June '05 projected carryover: 20M lbs
- Acreage change for 2005: up 10%

#### Kentucky Bluegrass

- Pacific NW production: 100-105M for 2004; down 5-10% from 2003; Proprietary yields down 20-50%, depending on region. Common, big seeded yields average. 5-7M lbs estimated carryover. Projections for '05 are for higher yields and 10% more acres.
- MN production: 7M; up 10%, acres for 2005 up 10%

#### Tall Fescue – Northwest Production

- '04 crop: 181-193M lbs, up 30-40M from '03
- June '04 carryover: 30-45M lbs, down 15-20M
- Projected '04-05 usage: 180M lbs
- June '05 projected carryover: 30-58M lbs
- Acreage change for 2005 = Down 4%

#### Kentucky-31 Tall Fescue – MO, KS, OK, AR

- '04 crop: 58M lbs, down 2M from '03
- June '04 carryover: 30M lbs, same as '03
- Projected '04-05 usage: 60M lbs
- June '05 projected carryover: 30M lbs

#### Creeping Red Fescue in Canada:

- '04 crop: 30-35M lbs, same as '03
- June '04 carryover: 20M lbs, down 18M from '03
- Projected '04-05 usage: 50M lbs
- June '05 projected carryover: 5M lbs
- Acreage change for 2005 = nominal

#### Fine Fescue Production in Oregon:

Although acres were up 7% from the previous year, yields were down 15-45% on individual fields.

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### Consumption Reports

**Northeast:** Summer weather allowed contractors to seed nearly all summer. New construction is still solid to very good in some parts. Some golf courses have eased budgeted restrictions for maintenance. Ryegrass sales were strong this fall. Sports field construction is up. As of late October, contractors were still reporting a lot of work to do. Retail sales were average, with existing lawns going into fall without much disease or damage.

**Midwest:** Overall, housing starts remained solid. Decreases have been felt in new golf construction and municipal facilities seeding. Retail seemed to be holding its own. Collectively, sales appear to be about 10% off with mixed optimism for spring '05.

**Southeast:** At least four hurricanes left their mark throughout the region. Excessive rain and lush growing conditions led to a reduced demand for early fall seeding, yet late fall weather allowed an extended seeding window. There are some good reasons to believe there will be an increased need for spring repairs.

**Southwest:** Tall Fescues continue to be the grass of choice, with Perennial Ryegrass usage remaining static. Annual ryegrass usage continues to be replaced by tall fescue or warm seasons. Warm season grass seed demands continue to increase fueled by new construction of schools, parks, and sports fields.

**Canada:** For the period of July '03-June '04, good housing starts and economy were balanced by little turf damage from insects or disease. Canadian imports of Bluegrass were up 3%, Ryegrass imports were up 40%, and tall fescue imports were down 8%.