

## Market and Crop Watch – Special Report



If the past two weeks interest and activity are a reflection of reality, then expect some real changes for this spring and next fall in a number of turf crops. Trading on Kentucky bluegrass has now exceeded \$85/cwt for crop 2003 and is around \$80 for Spring 2003. Perennial ryegrass continues to strengthen, with talk of limited supplies of some varieties. Even creeping red fescue seems to have more strength. At this past week's Western Seed Association Convention, the American Seed Trade Association's (ASTA) Lawn Seed Division gave the following reports.



### Production Reports

#### Creeping Red Fescue in Canada

- Carryover 40 Million lbs
- Crop Yield Down 35 Million lbs

#### Fine Fescue Production in Oregon:

- Proprietary Chew. acres down from 6,875 to 4,374
- Proprietary Hard acres down from 4,233 to 2,693
- Proprietary Cr. Red acres down from 6,990 to 5,328

#### Perennial Ryegrass

- Oregon Production
  - o Yields were off 25% due to dry late spring weather
  - o 69,000 certified acres/ 70,000 unct. acres (est)
  - o 152 Million lb crop + 50 Million lb carryover = 202 Million avail. (est)
  - o 220 Million average usage
  - o No significant change in acres for 2003
- Canadian production down over 40%; increase in acres & production expected for 2003 crop

#### Annual Ryegrass in Oregon

- o Very average crop, not adversely affected by the dry spring
- o 125,000 acres
- o 225 Million lb. crop + 50 Million lb carryover = 275 Million avail.
- o 260 Million lbs average usage
- o No significant change in acres for 2003

#### Tall Fescue

- Oregon Production:
  - o Yields greatly varied from field to field and region to region. Overall crop ended up average.
  - o 110,000 certified acres/40,000 uncert.acres (est.)
  - o 218 Million lb crop + 20 Million lb carryover = 238 Million lb supply
  - o 160 Million lb average usage
  - o Significant reduction in acres for 2003
- Canadian Production increased last year by 20% and is expected to be at same levels for 2003

### Consumption Reports

**Southwest:** Tall Fescue and Perennial Ryegrass stable usage. Annual ryegrass usage decreasing. Bermudagrass usage increasing, especially in newer types for schools, parks. Overall, above average sales for fall. Water will be crucial for a good spring.

**Northeast:** Seed and sod sales were below average for summer due to economy and weather. Weather and water bans caused poor sales through August/mid-sept. Good sales 2<sup>nd</sup> half of Sept/1<sup>st</sup> half of Oct. Pricing very cheap. Margins low

**Mid Atlantic:** Very disappointing usage; average consumption at least 15% down.

**Upper Midwest:** Most states reported above average usage, yet pricing down with a trend to lower quality/lower priced mixtures. Very optimistic for Spring 2003

**Lower Midwest:** Below average spring usage due especially to weather. Fall usage average to above-average.

### Did you know?



Swings in prices this past six months especially affect the typical Northern mixtures composed of Kentucky bluegrass, creeping red fescue and perennial ryegrass.

As a quick comparison, look at the difference between our published prices in May versus November!

Commodity	May '02	Nov. '02	Change
TT P. Rye	45	52	UP 8%
98/85 KB	60	81	UP 35%
Cr. Fescue	31	42	UP 35%
TT T. Fescue	65	47	Down 30%
Annual rye.	19	16	Down 18%