

# Turf Grass Market Outlook



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# Overview

- \* **Personal background**
- \* **Grass seed sector growth**
- \* **Regenerative agriculture**
- \* **Local implications**
- \* **Opportunities and Threats**

# Introduction to Brenda Tjaden

- \* **Glad to be here!**
- \* **BSc. and MSc., Ag Economics, UManitoba**
- \* **Grain merchant and farm marketing pioneer**
- \* **Serial entrepreneur: FarmLink, Sustainable Grain, The Tjaden Group, New Food Marketing Co-op, and Climate Action in Food Systems**
- \* **Budding farmer**

# Grass Seed is a Growth Sector in Ag

## Why? Because, it:

- \* Nourishes ‘pastured protein’
- \* Establishes soil armor, reclaiming fallow
- \* Offers value to the public and investors
- \* Leads to soil carbon sequestration

# Regenerative Agriculture

**Principles-based: living roots, soil armor, integrate livestock, species diversity, minimum disturbance**

**Value Proposition: nutrient-rich food, carbon drawdown, third-way thinking**

# What It Means for the Grass Seed Sector

- \* Grass seed production is happening on the fringe of North American cropping**
- \* It contains deep and broad knowledge of complex cropping systems**
- \* Sales bypass bulk export system**
- \* Contract-based supply chain**

# Grass Seed Sales Segments

- \* Golf courses are stabilizing**
- \* Municipalities are facing new restrictions**
- \* Conservation acres – steady to higher**
- \* Export market trends = domestic retail**
- \* Grazing systems coming into focus**

# Opportunities

## **1. Breeding for pest and disease resiliency**

**\* Services child-friendly grass spaces**

## **2. Corporate social responsibility and retail label claims**

**\* Sustainability initiatives**

# Supply and Demand Threats

## Under and over-supply

- \* Possible to aggregate data?
- \* Appetite to collaborate on acres?

## Trade barriers

- \* GMO and glyphosate contamination
- \* Political influences

# Shifting Market Development

## Where's the Money and Is It Working?

- \* Checkoff commodity organizations, and the trade associations they feed
- \* Crop inputs, bulk commodity handling, and 'sales agronomy'

*Some are acting in conflict, experiencing disruption, and long overdue for change.*

## On the Horizon – Big Picture Trends

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**Soil health measures,  
tracking, reporting and  
financial incentives**

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**Nutrient density of feed and  
food based on field activity**

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**Industrial beef demand  
shifts to grass-fed,  
cellular and insects**

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**Residue testing and hard work  
on compliance**

**THANK YOU**

**Brenda Tjaden**

**Founder**

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