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Florida Sod Inventory and Pricing Report—2025[1]

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The University of Florida's Institute of Food and Agricultural Sciences (UF/IFAS) and the Turfgrass Producers of Florida conducted their first sod inventory and pricing survey. The purpose of the survey was to determine the sod inventory levels, prices, and markets for Florida. This publication is intended for sod producers and end users to evaluate sod production and availability in Florida.

Survey Details

Electronic surveys were sent to 50 members of the Turfgrass Producers of Florida on January 7, 2025, to determine sod inventory levels and pricing. Twenty-six responses were received, resulting in a 52% response rate. The summary of the producers' locations (some producers are located within multiple zones) is as follows:

- North Florida (Ocala north) = 5 producers
- Central Florida (south of Ocala to a line from Vero Beach to Tampa) = 9 producers
- South Florida (remaining area) = 16 producers

The participants in the survey had an estimated 31,914 total acres in production and represented farm sizes of the following ranges:

- Up to 300 acres = 4 producers
- 301–900 acres = 10 producers
- 901 or more acres = 12 producers

The survey obtained inventory level estimations, projected inventory levels for the six months following the survey, and anticipated changes in acres over the next year. For this survey, projected inventory levels were estimated as above average (greater than 10% of anticipated demand), adequate (about equal to anticipated demand), and below average (more than 10% below anticipated demand). Additionally, the current average prices, expected price changes over the next year, and primary markets for sod were collected.

Inventory Levels

Fourteen survey participants produced 12,110 combined acres of bahiagrass (Table 1). Of the producers, 14% had above-average, 43% had adequate, and 43% had below-average projected inventory levels.

Thirteen survey participants produced bermudagrass with 2,664 total acres in production (Table 1). Of the producers, 23% had above-average, 62% had adequate, and 15% had below-average projected inventory levels. Looking forward, 29% of the producers anticipated adding acres, 14% projected removing acres, and 57% would remain the same.

Three survey participants, all of whom were in north Florida, produced 155 total acres of centipedegrass (Table 1). Of the producers, 33% had above-average, 67% had adequate, and 0% had below-average projected inventory levels.

Two survey participants produced perennial peanut as sod, and four produced seashore paspalum. Inventory levels are reported in Table 1.

Twenty-one survey participants produced over 14,000 total acres of St. Augustinegrass (Table 1). Of the producers, 9% had above-average, 43% had adequate, and 48% had below-average projected inventory levels. Thirty-two percent of the producers anticipated adding acres, 0% projected removing acres, and 68% would remain the same.

Sixteen survey participants produced 2,753 total acres of zoysiagrass (Table 1). Of the producers, 19% had above-average, 56% had adequate, and 25% had below-average projected inventory levels. When asked about anticipated changes, 21% of the producers anticipated adding acres, 5% projected removing acres, and 74% would remain the same.

Sod Pricing

Table 2 reports the 2024 average sod price per square foot (sod only; not including transportation costs) based on species and location. The data serve as a baseline from which future pricing trend reports will track changes in the industry. Over the next year, 46% of the surveyed producers expect sod prices to increase, and 54% expect prices to remain at current levels. None of the survey participants anticipate a decrease in sod prices over the next year.

Markets

The primary markets where producers sold their sod are found in Table 3. As with pricing, this data will be used in future reports to track changes in the market. The largest market for sod across Florida was landscape contractors. The second largest market varied across geographical zones in Florida and included existing developers, golf courses, and brokers. The smallest market across the state was government projects.

Future Plans

The objective of this survey was to obtain initial, baseline data for the sod production industry in Florida. The goal is to conduct the survey annually to provide a historical perspective and to track changes in sod production in Florida. The sod industry and end users can then utilize the information to assess inventory levels and prices of sod in Florida.

Table 1. Approximate sod inventory levels (in acres) in production in Florida, 2024.

Geographical zone[1]	Bahiagrass	Bermuda-grass	Centipede-grass	Perennial Peanut (as sod)	Paspalum	St. Augustine-grass	Zoysia-grass
North Florida	1,625	491	155	0	0	450	1,250
Central Florida	2,365	1,096.5	0	6	5	4,653.5	579.5
South Florida	8,120	1,076.5	0	6.5	57.5	9,053.5	923.5
State total	12,110	2,664	155	12.5	62.5	14,157	2,753

[1] For this survey, north Florida was considered anything north of Ocala, central Florida was anything south of Ocala to a line extending from Vero Beach to Tampa, and south Florida was the remaining southern portion of the state.

Table 2. Current sod prices (in dollars per square feet), not including transportation costs, in Florida, 2024.

Species	North Florida[1]	Central Florida	South Florida	State average
Bahiagrass	0.22	0.17	0.12	0.17
Bermudagrass—non-certified[2]	0.36	0.28	0.23	0.29
Bermudagrass—certified	0.30	0.42	0.40	0.37
Centipedegrass	0.32	NA	NA	0.32
Paspalum	NA	0.68	1.38	1.03
St. Augustinegrass—non-licensed[3]	0.30	0.30	0.26	0.29
St. Augustinegrass—licensed	0.35	0.32	0.31	0.33
Zoysiagrass—medium/coarse leaf	0.36	0.35	0.40	0.37
Zoysiagrass—fine leaf	0.43	0.43	0.55	0.47

[1] For this survey, north Florida was considered anything north of Ocala, central Florida was anything south of Ocala to a line extending from Vero Beach to Tampa, and south Florida was the remaining southern portion of the state.

[2] For this survey, certified turfgrasses are grown under Southern Seed Certification Association, Inc., certification standards.

[3] Licensed versus non-licensed turfgrass implies that the producer paid a royalty fee to an improved variety licensing agency.

Table 3. Estimated percentage of producers' sod sold to primary markets in Florida, 2024.

Market	North Florida[1]	Central Florida	South Florida	State average
Brokers	1.3	10.5	19.3	10.3
Existing developers	18.8	5.2	3.8	9.2
Golf courses	0.6	10.7	9.0	6.8
Homeowners	5.0	5.2	4.6	4.9
Landscape contractors	56.9	56.8	41.0	51.6
Landscape designers	5.0	5.5	0.0	3.5
Retail garden centers	3.1	4.4	11.2	6.3
Sports/athletic fields (including parks and rec.)	9.4	1.8	2.9	4.7
Government projects	0.0	0.0	4.2	1.4

[1] For this survey, north Florida was considered anything north of Ocala, central Florida was anything south of Ocala to a line extending from Vero Beach to Tampa, and south Florida was the remaining southern portion of the state.

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