

Artificial Turf Market Report by Material (Polyethylene, Polypropylene, Polyamides, and Others), Application (Household, Sports and Leisure, Restaurant and Hotels, Airports and Commercial Offices, and Others), Distribution Channel (Direct Sales/B2B, Online Stores, Specialty Stores, Convenience Stores, and Others), and Region 2024-2032

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Abstracts

The global artificial turf market size reached US\$ 3,570.0 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 5,632.9 Million by 2032, exhibiting a growth rate (CAGR) of 5.1% during 2024-2032. The increasing applications of artificial turf in leisure and landscaping sectors, easy product availability via e-commerce platforms, and rapid urbanization are some of the major factors propelling the market.

Artificial turf, also called synthetic grass, is a specially crafted material that imitates the appearance of natural grass. It comprises synthetic fibers, typically made from polymers such as polyethylene, nylon, polypropylene, and polyamides. It is used in stadiums and arenas as an alternative to natural grass. It offers numerous advantages, including easy recyclability, minimal environmental impact, and eliminating the need for water, pesticides, and fertilizers. At present, artificial turf is gaining immense traction for landscaping purposes in both residential and commercial sectors across the globe due to its remarkable durability, low maintenance requirements, high-quality construction, pleasing aesthetics, eco-friendly characteristics, and resilience against regular wear and tear.

The increasing demand for cost-effective, durable, and low-maintenance outdoor

flooring options will stimulate the growth of the market during the forecast period. Moreover, the rising number of sports events and tournaments and unfavorable climatic conditions for natural grass growth have escalated the demand for artificial turf. Apart from this, increasing investments by governments of numerous countries in infrastructure development and constructing commercial gardens, sports complexes, and stadiums have catalyzed market growth. Additionally, the surging adoption of artificial turf in public spaces such as airports, restaurants, and hotels owing to its water-saving properties is positively influencing the market growth. Besides this, the rising consumer preference for attractive lawns and playgrounds in homes and communities due to the inflating consumer disposable incomes and improving lifestyles has accelerated the product adoption rate. Furthermore, numerous product innovations, including improved color retention, wear resistance, and antibacterial properties that prevent the spread of germs, are contributing to the market growth.

Artificial Turf Market Trends/Drivers:

Growing Demand for Sustainable and Environment-Friendly Solutions

The growing demand for sustainable and environment-friendly solutions is a major factor propelling the market. As awareness about environmental conservation increases, there is a rising emphasis on finding alternatives that reduce the ecological footprint, which in turn has augmented the demand for artificial turf. Artificial turf does not require watering, conserving significant water resources, and promoting responsible water management. Moreover, the use of artificial turf reduces or eliminates the need for pesticides and fertilizers. Traditional grass fields often require the application of chemicals to control pests and promote growth, posing risks to human health and the environment, making artificial turfs an ideal alternative.

Rise in Urbanization and Limited Space Availability

The rise in urbanization and limited space availability are significant factors contributing to the increasing demand for artificial turf in the global market. As cities experience rapid growth and become more densely populated, the availability of expansive outdoor spaces, including traditional lawns, becomes limited. This creates a need for innovative solutions that can maximize the utilization of available space while still providing green and aesthetically appealing environments. Artificial turf emerges as a versatile alternative that can address these challenges effectively. Its adaptability enables the creation of green spaces in various urban settings where traditional lawns are impractical or unfeasible. Artificial turf provides an excellent solution for rooftop gardens, as it is lightweight, requires minimal maintenance, and offers a visually appealing green

surface that enhances the overall ambiance.

Advancements in Technology and Product Innovations

Manufacturers are continually focusing on product innovations to improve the quality, durability, and visual appeal of artificial turf, making it an increasingly attractive choice for various applications. Artificial turf now features advanced UV stabilization technology that minimizes color fading caused by prolonged exposure to sunlight. This ensures that the turf retains its vibrant and natural-looking appearance for an extended period, maintaining its aesthetic appeal over time. Innovative design features, such as perforations and advanced backing materials, facilitate efficient water drainage, preventing water accumulation on the surface. This not only ensures a safer playing or recreational experience but also minimizes the risk of mold or mildew growth, enhancing the overall lifespan and durability of artificial turfs.

Artificial Turf Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global artificial turf market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on material, application, and distribution channel.

Breakup by Material:

- Polyethylene
- Polypropylene
- Polyamides
- Others

Polyethylene dominates the market

The report has provided a detailed breakup and analysis of the market based on the material. This includes polyethylene, polypropylene, polyamides, and others. According to the report, polyethylene represented the largest segment.

Polyethylene is the most widely used material in artificial turf due to several key advantages in durability, performance, and aesthetics. It is known for its exceptional resilience and resistance to wear and tear. This makes it highly suitable for high-traffic areas such as sports fields and playgrounds. The rising adoption of polyethylene fibers, which can withstand heavy use, including frequent foot traffic and sports activities,

without losing their shape or integrity, is contributing to the market growth. This durability ensures that the artificial turf maintains its appearance and performance over an extended period, reducing the need for frequent replacement or repair. Furthermore, polyethylene is gaining popularity for its softness and natural-looking texture. The fibers are designed to replicate the appearance and feel of real grass, providing a lush and realistic surface. Apart from this, the rising adoption of polyethylene-based artificial turf, particularly in sports where players may come into direct contact with the turf as it offers users a comfortable and enjoyable experience, is propelling the market growth.

Breakup by Application:

Household

Sports and Leisure

Restaurant and Hotels

Airports and Commercial Offices

Others

Sports and Leisure represent the largest application segment

A detailed breakup and analysis of the market based on the application has also been provided in the report. This includes household, sports and leisure, restaurant and hotels, airports and commercial offices, and others. According to the report, sports and leisure accounted for the largest market share.

The main factors that are driving the growth of this segment are enhanced performance, safety, weather resilience, and cost efficiency of artificial turf. Moreover, the rising awareness about the advantages of artificial turf has accelerated the product adoption rate in sports fields, stadiums, and recreational areas across the globe. Additionally, natural grass fields struggle to withstand such intensive use, leading to quick deterioration and the need for frequent maintenance. In line with this, the rising demand for artificial turf, which offers a durable and long-lasting solution that can withstand high foot traffic and intensive activities without compromising performance, is another major growth-inducing factor. Besides this, artificial turf provides consistent playing characteristics, ensuring uniform ball bounce and predictable footing for athletes across different sports, which is propelling the market growth.

Breakup by Distribution Channel:

Direct Sales/B2B

Online Stores

Specialty Stores
Convenience Stores
Others

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes direct sales/B2B, online stores, specialty stores, convenience stores, and others.

Direct sales in the business-to-business (B2B) context refer to the process of selling products or services directly to other businesses rather than selling them through intermediaries such as retailers. B2B direct sales involve building relationships with potential buyers, understanding their needs, and providing tailored solutions to meet those needs.

Whereas, online stores, also known as e-commerce stores or online shops, are websites or virtual platforms where consumers and businesses are purchasing artificial turf products over the Internet. This channel also provides customers with convenience, as they can easily compare different products and prices.

Specialty stores, also referred to as niche stores, are typically physical retail locations that specialize in home improvement or garden supplies. Customers often prefer this channel when they want to see and feel the product before purchasing.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom

Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Europe exhibits a clear dominance, accounting for the largest artificial turf market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Europe was the largest market for artificial turfs.

Europe exhibits a clear dominance in the market due to a combination of factors. The region's early adoption of artificial turf, driven by a strong sports culture and the need for reliable playing surfaces, provided European manufacturers with a head start in the industry. Stringent regulations and standards for sports field construction and maintenance in Europe have further bolstered the reputation of European artificial turf, ensuring compliance with safety and performance criteria. Additionally, the growing focus on environmental sustainability, technological advancements, and successful export strategies across the region have contributed to its market dominance. However, the competitive landscape may evolve in the future as other regions show increased growth and innovation in the market.

Competitive Landscape:

The market is experiencing steady growth with an increase in number of sports and recreations areas across the globe coupled with rise in participation of individuals in sports activities due to rising health and fitness awareness. The market is witnessing a significant increase in research and development (R&D) initiatives as well as investments resulting in improved features, a better supply chain as well as the use of new materials for manufacturing high quality products at lower costs. We expect the market to witness new entrants, consolidation of product portfolios, and a surge in strategic collaborations among key players to drive healthy competition within the

domain.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Act Global
Co Creation Grass Co. Ltd
Condor Group
Dow Inc.
ForestGrass Co. Ltd.
Global Syn-Turf Inc.
Polytan GmbH
Shaw Industries Group Inc. (Berkshire Hathaway Company)
SIS Group Ltd.
SpectraTurf Inc. (Ecore International Inc.)
Sport Group Holding GmbH
Tarkett S.A.
Koninklijke TenCate B.V.

Recent Developments:

In December 2022, Co Creation Grass Co. Ltd. delivered two FIFA quality pro fields for capital FC in the USA. These two certified fields stand out as top-tier installations in North and Central America. CFC boasts the privilege of having two out of the eleven FIFA Quality Pro-rated turf fields in the United States, as well as a remarkable total of eighteen fields in the entire CONCACAF region.

In May 2021, Shaw Industries Group Inc. originally invested in Watershed Geo in 2011 to infuse capital and diversify the company's use of its artificial turf manufacturing assets.

In June 2022, SpectraTurf announced the launch of a new upcycling playground program focused on children's safety and the Planet. This program will certify that 100% of the playground surfacing materials installed will be upcycled at the end of the playground's life and the tear-outs will not be taken to landfills.

Key Questions Answered in This Report

1. What was the size of the global artificial turf market in 2023?
2. What is the expected growth rate of the global artificial turf market during 2024-2032?
3. What are the key factors driving the global artificial turf market?

4. What has been the impact of COVID-19 on the global artificial turf market?
5. What is the breakup of the global artificial turf market based on the material?
6. What is the breakup of the global artificial turf market based on the application?
7. What are the key regions in the global artificial turf market?
8. Who are the key players/companies in the global artificial turf market?

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