

North America Turf Protection Market By Application (Landscaping, Golf, Sports, Sod Growers), By Country, Competition, Forecast and Opportunities, 2019-2029F

<https://marketpublishers.com/r/N935424F4458EN.html>

Date: April 2024

Pages: 124

Price: US\$ 4,400.00 (Single User License)

ID: N935424F4458EN

Abstracts

North America Turf Protection Market was valued at USD 1.89 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.11% through 2029. The North America Turf Protection Market is experiencing significant expansion due to heightened demand for maintaining visually appealing lawns, sports fields, golf courses, and parks on a wide scale. As environmental concerns rise and sustainable landscaping practices gain prominence, turf protection solutions have become essential.

Urbanization, the proliferation of recreational activities, and increased sports events are key drivers fueling the need for turf protection products and services. These solutions play a crucial role in preventing soil erosion, compaction, and damage from foot traffic, machinery, or adverse weather conditions, ensuring the durability and well-being of turf surfaces.

Innovations in turf protection technologies, such as the development of biodegradable and eco-friendly products, are further stimulating market growth. Moreover, the adoption of advanced turf management techniques, like integrated pest management and precision irrigation systems, is propelling demand for comprehensive turf protection solutions.

Key Market Drivers

Growth in Agriculture Industry

The agricultural sector has experienced a surge in technological advancements, spanning from precision farming methodologies to the innovation of genetically modified crops. These breakthroughs have resulted in heightened productivity, diminished resource utilization, and enhanced overall operational efficiency in agricultural activities.

Amid mounting concerns regarding environmental degradation and the impacts of climate change, the agricultural industry has made concerted efforts to embrace sustainable practices. This entails the adoption of organic fertilizers, crop rotation techniques, and integrated pest management approaches, all geared towards safeguarding soil health and biodiversity.

Driven by consumer preferences for organic and locally sourced products, farmers are increasingly embracing practices that resonate with these market demands. This transition not only opens up new avenues in agricultural markets but also underscores the necessity for implementing sustainable turf management strategies to meet consumer expectations.

As agricultural operations expand to meet the escalating North American demand for food, the pressure on available land intensifies. Consequently, there's a tendency to convert natural grasslands into agricultural fields, heightening the need for turf protection solutions to preserve green spaces and recreational areas amidst evolving agricultural landscapes.

Surge in Technological Advancements

One of the primary areas where technological advancements have made a substantial impact is in the development of advanced turf protection products. Traditionally, turf protection relied heavily on physical barriers such as fences or covers to safeguard grass and soil. However, with advancements in materials science and manufacturing processes, new products have emerged that offer superior protection while being more environmentally friendly and cost-effective.

For instance, the introduction of high-performance turf protection mats made from recycled materials has gained traction in the industry. These mats provide durable and flexible protection for grassy areas during events or construction activities, minimizing damage caused by foot traffic, heavy equipment, or adverse weather conditions. Furthermore, the incorporation of nanotechnology has led to the development of coatings and treatments that enhance the resilience of grass and soil, making them

more resistant to wear and tear.

Technology has facilitated the integration of smart solutions into turf protection practices, ushering in an era of data-driven management. Sensor-based monitoring systems embedded within turf areas enable real-time tracking of crucial parameters such as soil moisture, compaction levels, and nutrient content. By collecting and analyzing this data, groundskeepers and facility managers can make informed decisions regarding irrigation, fertilization, and maintenance schedules, thereby optimizing turf health and longevity.

The advent of precision agriculture techniques has enabled more targeted and efficient application of turf protection products. Drones equipped with multispectral cameras can provide detailed aerial imagery of turf areas, allowing for accurate mapping of vegetation health and identifying potential areas of concern. This data can then be used to deploy resources precisely where they are needed, minimizing wastage and maximizing effectiveness.

Advancements in communication and connectivity have facilitated remote monitoring and management of turf protection systems. Cloud-based platforms and mobile applications enable stakeholders to access real-time information about turf conditions and receive alerts or notifications regarding any issues that require attention. This level of remote oversight enhances efficiency and allows for proactive maintenance, reducing the risk of costly damage to turf areas.

Key Market Challenges

Surge in Environmental Concerns

One of the primary environmental concerns associated with turf protection lies in the use of chemical pesticides, herbicides, and fertilizers. While these products are effective in maintaining healthy turf, they can also pose risks to ecosystems, water quality, and human health through runoff and leaching. Moreover, the indiscriminate use of these chemicals can harm beneficial insects, pollinators, and other non-target organisms, further exacerbating ecological imbalances.

Another challenge arises from the conversion of natural landscapes, such as grasslands and wetlands, into manicured lawns, golf courses, and sports fields. This transformation not only diminishes biodiversity and disrupts native ecosystems but also contributes to habitat fragmentation and loss of wildlife corridors.

Furthermore, the reliance on intensive irrigation systems to maintain lush green turf poses significant challenges in regions facing water scarcity. Excessive water consumption not only strains local water resources but also exacerbates drought conditions and undermines the sustainability of landscapes.

Key Market Trends

Growing Focus on Disease and Pest Management

One of the key drivers of this trend is the rising incidence of turf diseases and pest infestations. Factors such as changing climate patterns, and the proliferation of monoculture turf systems have contributed to the spread of diseases and pests in turfgrass environments. As a result, turf managers are increasingly recognizing the need for effective disease and pest management strategies to safeguard the health and appearance of turf surfaces.

Moreover, there is growing concern about the environmental and health impacts of traditional chemical-based approaches to disease and pest control. Pesticides and fungicides used in turf management can pose risks to human health, non-target organisms, and water quality. In response, there is a growing demand for alternative, environmentally friendly methods of disease and pest management that minimize reliance on synthetic chemicals.

Integrated pest management (IPM) has emerged as a preferred approach to disease and pest management in the turf industry. IPM emphasizes the use of a combination of cultural, biological, and mechanical control methods to minimize the use of pesticides while effectively managing pest populations. This approach not only reduces the environmental impact of turf management practices but also promotes long-term sustainability by preserving natural ecosystems and beneficial organisms.

Advancements in technology have also played a significant role in driving the trend towards disease and pest management in the turf protection market. Innovations such as remote sensing, predictive modeling, and precision application systems enable turf managers to monitor disease and pest activity more accurately and apply control measures more effectively. Additionally, the development of biopesticides, microbial inoculants, and other biological control agents offers promising alternatives to traditional chemical-based products.

Segmental Insights

Application Insights

The sports segment is projected to experience rapid growth during the forecast period. The proliferation of professional and amateur sports leagues organized in the North American region has fueled the growth of sports infrastructure. From local community teams to international tournaments, there is a constant need for well-maintained turf surfaces to ensure player safety, performance, and venue aesthetics. Turf protection products such as turf reinforcement mats, grass stabilizers, and drainage systems are essential for preserving the integrity of sports fields and prolonging their lifespan.

In recent years, the sports industry has witnessed a notable shift towards prioritizing player safety and environmental sustainability in turf management practices. This heightened emphasis reflects a growing recognition of the importance of ensuring safe playing surfaces for athletes while also minimizing the environmental footprint of sports facilities. Turf protection solutions have emerged as indispensable tools in achieving these dual objectives, playing a pivotal role in safeguarding both athletes and the environment.

One of the primary concerns in sports turf management is the prevention of injuries among athletes. Turf protection products are engineered to provide stable and shock-absorbing surfaces, thereby reducing the risk of slips, trips, and falls during sporting activities. By mitigating the potential for injuries, these solutions not only safeguard the well-being of athletes but also contribute to the longevity of their careers. Moreover, maintaining consistent playing surfaces enhances the overall quality of gameplay, fostering a competitive and enjoyable environment for participants and spectators alike.

Country Insights

United States emerged as the dominant player in the North America Turf Protection Market in 2023, holding the largest market share in terms of value. United States have been experiencing rapid urbanization and infrastructure development in recent years. This growth has led to an increased demand for turf protection solutions in various settings, including parks, sports facilities, and public spaces.

United States is home to a burgeoning sports industry, with a particular emphasis on sports such as cricket, football, rugby, and golf. The development of sports infrastructure, including stadiums and golf courses, has driven the demand for high-

quality turf protection products to ensure the longevity and performance of playing surfaces.

With a growing focus on environmental sustainability, there has been a heightened awareness of the importance of maintaining green spaces and natural landscapes. Turf protection products that offer environmentally friendly solutions, such as recycled materials and water-saving technologies, have gained traction in the United States.

As disposable income levels rise across the United States, there has been an increased focus on leisure and recreational activities. This has led to greater investment in outdoor spaces and amenities, driving demand for turf protection products that can maintain the aesthetic appeal and functionality of these areas

Key Market Players

Adama Ltd

AMVAC Chemical Corporation

UPL NA Inc

BASF Corp

Bayer Cropscience AG

Nufarm Americas Inc

Marrone Bio Innovations Inc.

Syngenta AG

Sumitomo Chemical Corporation

Report Scope:

In this report, the North America Turf Protection Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Turf Protection Market,By Application:

oLandscaping

oGolf

oSports

oSod Growers

North America Turf Protection Market, By Country:

oUnited States

oMexico

oCanada

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Turf Protection Market.

Available Customizations:

North America Turf Protection Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1.PRODUCT OVERVIEW

- 1.1.Market Definition
- 1.2.Scope of the Market
 - 1.2.1.Markets Covered
 - 1.2.2.Years Considered for Study
 - 1.2.3.Key Market Segmentations

2.RESEARCH METHODOLOGY

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

3.EXECUTIVE SUMMARY

- 3.1.Overview of the Market
- 3.2.Overview of Key Market Segmentations
- 3.3.Overview of Key Market Players
- 3.4.Overview of Key Regions/Countries
- 3.5.Overview of Market Drivers, Challenges, Trends

4.IMPACT OF COVID-19 ON NORTH AMERICA TURF PROTECTION MARKET

5.NORTH AMERICA TURF PROTECTION MARKET OUTLOOK

- 5.1.Market Size Forecast
 - 5.1.1.By Value
- 5.2.Market Share Forecast
 - 5.2.1.By Application (Landscaping, Golf, Sports, Sod Growers)
 - 5.2.2.By Country (United States, Mexico, Canada)
 - 5.2.3.By Company (2023)
- 5.3.Market Map

6.UNITED STATES TURF PROTECTION MARKET OUTLOOK

6.1.Market Size Forecast

6.1.1.By Value

6.2.Market Share Forecast

6.2.1.By Application

7.MEXICO TURF PROTECTION MARKET OUTLOOK

7.1.Market Size Forecast

7.1.1.By Value

7.2.Market Share Forecast

7.2.1.By Application

8.CANADA TURF PROTECTION MARKET OUTLOOK

8.1.Market Size Forecast

8.1.1.By Value

8.2.Market Share Forecast

8.2.1.By Application

9.MARKET DYNAMICS

9.1.Drivers

9.2.Challenges

10.MARKET TRENDS DEVELOPMENTS

10.1.Recent Developments

10.2.Product Launches

10.3.Mergers Acquisitions

11.NORTH AMERICA TURF PROTECTION MARKET: SWOT ANALYSIS

12.PORTER'S FIVE FORCES ANALYSIS

12.1.Competition in the Industry

12.2.Potential of New Entrants

- 12.3.Power of Suppliers
- 12.4.Power of Customers
- 12.5.Threat of Substitute Product

13.PESTLE ANALYSIS

14.PRICING ANALYSIS

15.COMPETITIVE LANDSCAPE

- 15.1.Adama Ltd
 - 15.1.1.Business Overview
 - 15.1.2.Company Snapshot
 - 15.1.3.Products Services
 - 15.1.4.Financials (As Reported)
 - 15.1.5.Recent Developments
- 15.2.AMVAC Chemical Corporation
- 15.3.UPL NA Inc
- 15.4.BASF Corp
- 15.5.Bayer Cropscience AG
- 15.6.Nufarm Americas Inc
- 15.7.Marrone Bio Innovations Inc.
- 15.8.Syngenta AG
- 15.9.Sumitomo Chemical Corporation

16.STRATEGIC RECOMMENDATIONS

17.ABOUT US DISCLAIMER

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