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## APPLIED MARKET INFORMATION LTD

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### PRESS RELEASE

## ARTIFICIAL GRASS DEMAND AHEAD IN 2009

AMI, Bristol, 26/04/2010– Despite the challenging economic environment global demand for artificial turf grew in 2009 according to a recently published study by leading industry consultants, Applied Market Information Ltd (AMI). The report's author John Nash says that “Sports governing bodies, as well as local and central government saw good sense in continuing to invest in improved facilities in 2009. Most producers, with the exception of some North Americans, were quite pleased with the final outcome of 2009 despite a slow start to the artificial turf season.”

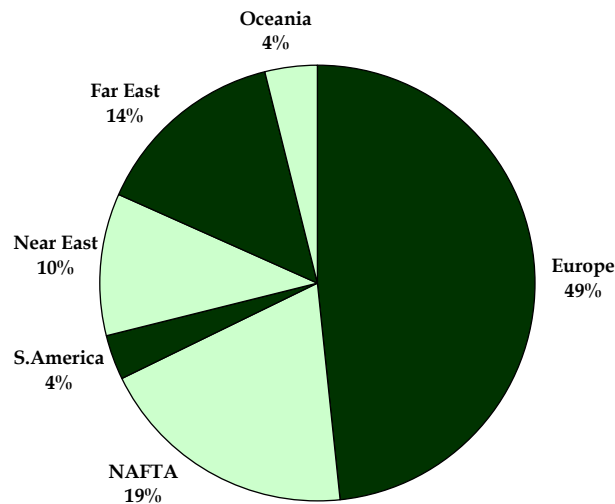
While many will remember the pitches they played on as kids and think artificial turf is a niche market, today's reality is quite different. Gone are the hard surfaces that caused friction burns and impact injuries, and in their place are controlled slide and defined energy restitution. Changing product design has brought synthetic turf into the mainstream of surfaces used for both sports and landscaping applications. The industry now accounts for over 700,000 tonnes of product ranging from the polymers used for the grass carpet through the elastomeric rubber infill to the underlay. The market value of the grass carpet alone is estimated at €1.3 billion and is expected to exceed €2 billion in 2013.

The grass yarns are made from PE (polyethylene), PP (polypropylene) and PA (polyamide), and they are fast developing both in terms of the performance of the polymer, but also the shape of the yarns and their bonding into the backing tape, whether by SB (styrene butadiene) latex or PU (polyurethane). The infill that has become predominant is SBR (styrene butadiene rubber) sourced from grinding up and recycling car tyres, but new TPEs (thermoplastic elastomers) are being offered which address specific requirements. A more recent focus for development is the underlay,



or shock pad, which is becoming increasingly important to the performance of the system as a whole.

Industry participants have been investing strongly in new products, additional capacity and the reshaping of their channels to market. Investments for instance by FieldTurf Tarkett have much reduced their reliance on outsourcing. Alongside these commercial developments, as predicted by AMI in its 2007 report, there is also substantial M&A activity as participants use mergers and acquisitions to build and reshape their businesses. The last eighteen months have seen major acquisitions involving TenCate Thiolon, TigerTurf, Shaw Industries, Sportex and ‘private equity’ backed purchases of STI (APT), Nexcel and others.



Source: AMI Consulting, 2010

### **The market for artificial turf in 2009**

Supply and demand in the market needs to be seen in a geographically global context partly because of the trade flows in the various components, but also because participation strategies are increasingly global in their implementation.

‘The Global Artificial Grass Market 2009’ is a detailed multi-client research report published in March 2010. For further information please contact John Nash at AMI: [jsn@amiplastics.com](mailto:jsn@amiplastics.com) or +44 117 924 9442