



France: The Swimming Pool Market

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January 2013

Summary

For thirty years, the French swimming pool market has been increasing steadily, particularly for underground swimming pools. In 2011, close to 100,000 new swimming pools were constructed. Underground pools accounted for 42,000 pools and 56,000 aboveground pools (without filtration) were installed. As of 2011, the number of private swimming pools in France was 1,346,000, of which 843,000 were underground pools and 503,000 were aboveground. In the European market, France is the leader in the swimming pool market followed by Spain, and the second in the world behind the United States.

Although French legislation has become quite severe (since May 2004), with fines mounting to \$70,000 for not having certain safety devices installed in pools, the production of swimming pools has still managed to increase, particularly evident in Paris and Brittany. This increase is partially a result of the desire to use pools both as a recreational and exercise activity during the increasing leisure time brought about by legislation reducing the French work week from 40 to 35 hours.

In light of the increase in the overall number of swimming pools, it appears that the market is far from saturated. In addition, American companies have a strong reputation in this industry with U.S. technology being highly regarded by consumers. A large number of U.S. brands are already distributed in France, demonstrating opportunities for American companies wishing to penetrate the French market.

Market Demand

For some years now, the desire for a swimming pool has increased significantly, but the actual number of purchases has not surpassed five percent growth per year. Nevertheless, it is certain that the number of purchases is growing, leading to a higher demand for swimming pool building professionals. The market is evolving, demand is strong, technical progress is undeniable, but the trade remains difficult and subject to seasonal changes.

In France, there are approximately 12 million individual homes with backyards. The occupants of these homes are not necessarily owners, but it can be estimated that five million of the backyards are available for the installation of swimming pools. There are about 600 manufacturers, importers, and distributors; 3,000 constructors; and 800 retailers and service organizations in the French swimming pool industry. In the French market, distributors and installers are rarely the same people. The former are industry-related and the latter are involved with art and design.

The majority (80 percent) of underground swimming pools are sold and installed by swimming pool professionals and the remainder is mostly "do-it-yourself" kits. For aboveground swimming pools (filtration equipped), 80 percent are sold by large distributors and garden centers and the remainder by stores specializing in swimming pools.

The average swimming pool in France measures 4.70m x 9.50m. In 60 percent of the cases it is made with panels and liner and the remaining 40 percent is made with concrete or polyester. The sophistication of equipment is advancing rapidly. Nearly all swimming pools presently have an automatic cleaning system and many are also equipped with an automatic water-treatment system. It is estimated that nearly a quarter of the swimming pools constructed each year are equipped with a device to electrolyze salt. In the private family pools sector, there is a trend towards smaller but better equipped pools with less maintenance. There is also a focus on larger green spaces surrounding the pool and decks and a trend

towards owners personalizing their pools by adding special features such as upstream swimming devices and pool games. With the number of older pools increasing, the French market for replacement equipment and renovation is growing. It appears that about 120,000 swimming pools were constructed more than 20 years ago and 140,000 were built in the past 10 years.

AVERAGE SIZE OF POOLS IN FRANCE				
	In-ground > 3.50 m	Above ground > 3.50 m	In-ground All dimensions	Above ground All dimensions
Nationwide	9.60 m on 4.80 m	6.20 m on 4.60 m	9.50 m on 4.80 m	5.60 m on 4.40 m
North-East	9.80 m on 4.70m	5.0 m on 4.50 m	9.20 m on 4.70 m	4.30 m on 4.20 m
West	10.0 m on 5.0 m	7.20 m on 4.40 m	10.0 m on 5.0 m	6.90 m on 4.40m
South	9.50 m on 4.70 m	6.70 m on 4.70m	9.50 m on 4.70 m	6.40 m on 4.80 m

Source: Trade Association for Swimming Pools Manufacturers

The average swimming pool measures 4.70m x 9.50m. In 60 percent of the cases it is made with panels and liner and the remaining is made with concrete or polyester. The sophistication of equipment is advancing rapidly. Nearly all the swimming pools presently have an automatic cleaning system, and many are also equipped with an automatic water-treatment system. (It is estimated that nearly a quarter of the swimming pools constructed each year are equipped with a device to electrolyze salt). In the private family pools sector, there is a trend towards smaller but better equipped pools with less tedious maintenance thanks to automation. There is also a focus on larger green spaces surrounding the pool and decks and a leaning trend towards owners personalizing their pools and adding special features such as upstream swimming devices and pool games. With the number of older pools increasing, the French market for replacement equipment and renovation is growing. It appears that about 120,000 swimming pools were constructed more than 20 years ago, and 140,000 were built in the past 10 years.

Guarantees:

Generally, the guarantees for swimming pools are as follows:

*** Ten-year guarantee**

- Traditional work with concrete (prefabricated, or industrialized in-ground construction) in ground pipes
- The liner (however, the timeframe of the guarantee is decreasing and depends on the quality of the welding)
- Waterproof system by reinforced timbering in synthetic resin

*** Two-year guarantee**

- Visible pipes
- Paints

*** One-year guarantee**

- Electrical motors (such as filters, technical accessories, heating devices)

Best Prospects

New French legislation recommending increased safety and security of private swimming pools has resulted greatly increased sales of security equipment including:

- Security blankets
- Alarms (dive/collapse detector)
- Security barriers

Other high growth areas include:

- Automatic vacuums and sterilization systems
- Heating equipment (heating pumps)
- Wave-making machine, and
- Counter-current swim equipment

Filtering systems and heating pumps as well as the maintenance of water sterilization (pH and level of chlorine) are also in high demand. Over the past two years, there has been increasing interest in products without chlorine (i.e. active oxygen, PHMB).

Finally, another market niche is swimming pools for thalassic therapy resorts, for which demand is growing in France. The French are becoming more health oriented, and thalassic therapy is expanding beyond medical use to general comfort as well. Therefore, the number of swimming pool installations in this sector is increasing rapidly.

Domestic Production:

The French swimming pool and equipment market is the largest in Europe, followed by Spain, Italy, the United Kingdom, and Germany. The increasing accessibility of swimming pools, in addition to the diversity of the clientele, has reflects professional innovation and the price range of products offered. The advent of industrialized techniques, notably the liner, has diminished costs of production in the case of the standard swimming pool and has allowed for the development of kits. Therefore, French manufacturers propose industrialized kits, which are industrialized constructions made of prefabricated polyester shells, as well as traditional construction. In addition, several networks of swimming pool manufacturers are providing swimming pool cleaning and water maintenance through their after-sale service.

The first category of prices includes only the shell, followed by a more sophisticated range of products, including kits with a pump and filter already incorporated. Most of the prefabricated swimming pools are made with a waterproof liner, while a smaller amount of swimming pools are manufactured with waterproofing synthetic resin.

Third-Country Imports:

According to market analysts, foreign competition is estimated to be about forty percent of the total market. The competition comes mainly from the following countries:

Europe (about 35 percent)

- Spain for small pieces of equipment (i.e. filters)
- Germany for counter-current swimming equipment

United States (about 30 percent)

- for pumps and filters

Miscellaneous countries (about 25 percent)

- Canada for industrialized panels and accessories and for above-ground swimming pools
- Australia for small vacuum cleaners and salt electrolyze devices
- Israel for automatic robots
- Mexico for small accessories (leaf rakes, leaf skimmers, brushes)
- Asian countries for water products with chlorine (about 10 percent)

A certain number of foreign companies have established subsidiaries in France, such as UWE (Germany) and Astral (Spain).

U.S. Market Position:

Local importers agree that U.S. exports of swimming pool equipment and accessories to France leads the import market with an average of 35 percent. American companies have a strong and positive reputation in this industry. New and innovative products appear each year on the market and U.S. companies should take this into consideration to successfully access the French market.

A large number of U.S. brands are already distributed in France, including: Arnesson (cleaners), Aquamax (robots), Aqua Queen (robots), Aquabrom (water products), Blue Devil (small accessories), Harmsco (filters), Hayward (pumps, filters), Imperial Pool's (prefabricated moulds), Quaker, Savannah (industrialized panels), Trideita (water products), Unicel, and Watkins (spas). *These brands are largely distributed by three companies - Albatica, Aqualux, C.E.C. and Procopi.* Some American firms have also established subsidiaries in France. Such is the case for Hayward Pool Europe and SCP, which are very well established in the French market.

Prospective Buyers

The majority of swimming pool owners are in between the ages of 40 and 60. Retirees with grandchildren are also likely to invest in a pool. This group is considered a good clientele for above-ground swimming pools. A growing number of younger people owning households want a swimming pool. This group is mostly responsible for the increased sales of kits. Conversely, a narrow group of wealthy clients exists who request specific designs, materials, and equipment for their swimming pool purchases. Their market is oriented to beauty and originality. In general, the groups that desire and/or purchase swimming pools are those with children and grandchildren. These groups revitalized the market because they generally require only the use of basic equipment and materials.

POOL OWNER AGE			
	North-East	West	South
31/40 years	26 percent	37 percent	18 percent
41/50 years	51 percent	40 percent	31 percent
51/60 years	15 percent	13 percent	19 percent
61/70 years	6 percent	6 percent	19 percent
+70 years	2 percent	4 percent	13 percent

Source: Swimming Pools and Spa Directory

Other factors that influence swimming pool purchases include, concern regarding pollution in public access swimming areas (public pools, lakes, and oceans), health benefits of swimming and the desire for increased opportunities for family-centered recreation.

People earning a high salary represent the majority of pool owners, especially in the North-East of France, which accounts for 46 percent, versus 19 percent for the West of France, and 16 percent for the South of France. A demographic trend shows that retired people in the south of France represent the majority of pool owners, while retired people in the North-East and West of France represent only 6 and 7 percent of pool owners.

Swimming pool users have a growing desire to increase the utilization time of their pools by installing heaters. They also want to have professionals taking care of the water. Companies should therefore propose cleaning services, to be handled by people from the company.

Market Entry

It is generally best for American companies to penetrate the French market by appointing an agent or distributor who will be able to carry the U.S. manufacturer's line of products, or by establishing a French subsidiary. A third way is to target a network of constructors, which orders directly from the U.S. manufacturer through their buying office.

Distribution Business Practices:

For In-Ground Pools	For Above-Ground Pools
63 percent constructor-installer	32 percent constructor-installer
8 percent GSS	25 percent hypermarkets
7 percent distributor	16 percent network retailers
2 percent network retailers	7 percent GSS
20 percent other	20 percent Other

Source: Trade Association for Swimming Pools Manufacturers

Market Issues & Obstacles

Guarantees:

Generally, the guarantees for swimming pools are as follows:

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- Electrical motors (such as filters, technical accessories, heating devices)

French legislation:

There are no quotas or restrictions on swimming pool equipment and accessories in France. However, there are severe safety regulations for family/private swimming pools which have been implemented by

the Minister of Transportation, Equipment, Habitation and Tourism to reduce the number children drowning.

Since **January 1st, 2006**, all private swimming pools must be equipped with:

- Protection barriers (NF P90-306)
- Pool alarms (NF P90-307)
- Pools covers (NF P90-308)
- Pools abris (NF P 90-309)

Information can be obtained from the French government agency, Ministry of Economy, Finance and Industry:

Ministère de l'Economie des Finances et de l'Industrie

Service de la Consommation, de la Qualité et de la Sécurité
Quality and Security Department for Consumers
59, boulevard Vincent Auriol
75703 Paris cedex 13
Tel: (33-1) 44.97.23.81
Fax: (33-1) 44.97.30.40
Contact: Ms. Catherine Morla

The following standards are compulsory for public swimming pools:

Electrical standard: **Norm C 15-100, section 702**

Information can be obtained from:

UTE - Union Technique de l'Electricite

33, avenue du General Leclerc
92262 Fontenay aux Roses
Tel; (33-1) 40.93.62.23
Fax: (33-1) 40.93.44.08
Director: Mr. Buchin

Health Standards: **Law 78-733 of July 12, 1978 and decree 81-324 of April 7,1981**

Information can be obtained from:

AFNOR - Agence Francaise pour la Normalisation (French Standards Agency)

Tour Europe
92049 Paris la Défense
Tel: (33-1) 42.91.55.55
Fax: (33-1) 42.91.56.56

You can also consult:

http://www.afnor.fr/collectivites/normesreglementation/piscines_proprietaires.html

Customs Tariffs & Value Added Tax:

French customs do not classify swimming pool equipment under a particular custom harmonized code number. Pool pumps, sweeps, vacuum cleaners, cleaning products and others are found under the miscellaneous heading. The average customs duties are between 6 and 12 percent, while the Value Added Tax (VAT) is 19.6 percent. For further details on VAT, see the European Union Web page on Value Added Tax: <http://www.eurunion.org/legislat/VATweb.htm#Rates>

Resources & Key Contacts

1. Trade Associations

French trade association of manufacturers of Sporting Goods and Leisure Equipment
Fédération Nationale des Constructeurs d'Équipements de Sports et de Loisirs
(F.N.C.E.S.E.L.)
9, rue La Pérouse
75016 Paris
Tel: (33-1) 40.69.53.25
Fax: (33-1) 47.20.43.25
www.fncesel.fr
President: Mr. Patrick Roche

Trade association for swimming pool manufacturers
Coordination Syndicale des Industries de la Piscine
(C.S.I.P.)
9, rue La Pérouse
75016 Paris
Tel: (33-1) 40.69.53.25
Fax: (33-1) 47.20.43.25
President: Mr. Gérard Goulet

French Trade Association for Sporting Goods and Leisure Equipment
Fédération Française des Industries du Sport et des Loisirs
(FIFAS)
18, rue de Cumonski
75017 Paris
Tel: (33-1) 47.31.56.23
Fax: (33-1) 47.31.56.32
<http://www.fifas.com>
President: Mr. Roger Pascal
International Office of Water
Office International de l'Eau (OIE)
21, rue de Madrid
75008 Paris
Tel: (33-1) 44.90.88.60
Fax: (33-1) 40.08.01.45
<http://www.oieau.fr>
General Manager: Mr. Jean-François Donzier

2. Publications:

a) For public

Piscines & Spas Magazine

155, Avenue de Paris
94807 Villejuif cedex
Tel; (33-1) 46.77.70.70
Fax: (33-1) 46.77.32.55
Publication Manager; Mr. Christian Ledoux
www.piscinesspas.com

Techniques Piscines Magazine

18, avenue Victor Hugo
69160 Tassin La Demi Lune Cedex
Tel: (33-4) 72.38.06.16
Fax; (33-4) 72.38.32.61
Publication Manager: Mr. Guy Memin
www.techniques-piscines.com

b) For professionals

L'activité Piscines

18, avenue Victor Hugo
69160 Tassin la Demi Lune Cedex
Tel: (33-4) 72.38.06.16
Fax; (33-4) 72.38.32.61
General Manager: Mr. Michel Dupenloup

I.M.C. (International Media Communication)

1, bd Victor Tuby
06400 Cannes
Tel: (33-4) 93.68.10.21
Fax: (33-4) 93.68.17.07
Publication Manager: Mr. Loic Biagini
www.eurospapoolnews.com

3. Sources:

Annuaire de la Piscine, Spa, Sauna et Hammam (Swimming pools and spa directory)

Ste Edition Les Préaux
Les Lointes Bastides
84160 Lourmarin
Tel/Fax: (33-4) 90.68.87.63
Infos@piscine-pro.com

Sepelcom (organizer of the swimming pool trade show)

Avenue Louis Blériot
69683 Chassieu cedex
Tel: (33-4) 72.22.31.77
Fax: (33-4) 72.22.32.87
Contact: Ms. Nathalie Hebben
Piscine@sepelcom.com
www.piscine-expo.com

Coordination Syndicale des Industries de la Piscine (C.S.I.P.) (Trade association for swimming pools manufacturers)
9, rue La Pérouse
75016 Paris
President: Mr. Jean-Pierre Pech
Tel; (33-1) 47.23.39.88

For More Information

The U.S. Commercial Service in Paris, France, can be contacted via e-mail at: Caroline.de.Villoutreys@trade.gov;
Phone: +33 (0) 1 43 12 71 98; Fax: +33 (0) 1 43 12 70 50; or visit our website: www.buyusa.gov/france/en/

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