

## **FRENCH SWIMMING POOL MARKET**

### **SUMMARY**

For thirty years, the French swimming pool market—the largest in Europe—has grown steadily, particularly for in-ground pools. In 2001, 40,000 in-ground swimming pools were constructed, while 25,000 above ground pools (without filtration) were installed. Today, market specialists estimate that there are about one million swimming pools in France.

This market growth is due primarily to French economic development, consumers' increasing buying power, and a strong concentration of single-family detached homes. Although French law has tightened since May 2004, the high spell in France during the summer of 2003 explains the recent boom in swimming pool sales over the past few months (up 40 percent), particularly in the Paris area and Western France (Brittany). Another factor contributing to market growth is the increased leisure time French workers enjoy as a result of the 35-hour workweek instituted in 2002. Additionally, swimming pools are seen as an investment that will increase property values. Hence, swimming pools in France have become a social phenomenon.

In light of the growing market, it is far from saturated. American companies have a strong and positive reputation in this industry, and U.S. technology is viewed highly by consumers with a large number of U.S. brands already distributed in France. Consequently, there are numerous opportunities for American companies wishing to penetrate the French swimming pool market.

### **MARKET PROFILE**

In France, there are approximately 12 million homes with backyards. It would not be too unrealistic to estimate that at least 5 million of those homes would be good candidates for swimming pool installation, making France a very promising market.

The French swimming pool industry counts about 500 manufacturers, importers, and distributors, about 3,000 installers, and about 800 retailers and service firms. In the dual-materials market, distributors and installers are rarely the same. The former are more industrial while latter are involved with art and design.

Most (80 percent) in-ground swimming pool sales are through swimming pool professionals, with the remainder resulting mostly from “do-it-yourself” kits. As for above ground pools (filtration equipped), 80 percent are sold by large distributors and garden centers, with the remainder sold by swimming pool specialty stores.

The chart below shows the surge in popularity of swimming pool in the past few years, particularly in Western France and the Paris region.

Area	Number of pools in 1997	Number of pools in 2001	Increase from 1997 to 2001
<b>Southeast</b>	296,000	386,000	+30 percent
<b>Southwest</b>	136,000	157,000	+15 percent
<b>Northwest</b>	42,000	98,000	+130 percent
<b>Northeast</b>	74,000	91,000	+23 percent
<b>Paris</b>	18,000	41,000	+130 percent

Source: Trade Association for Swimming Pools Manufacturers

The average swimming pool in France measures 4.70m x 9.50m. Sixty percent are made with panels and liner with the remainder constructed of concrete or polyester. Equipment sophistication is advancing rapidly. Nearly all the swimming pools now have automatic cleaning systems and many are also equipped with automatic water-treatment systems (it is estimated that nearly a quarter of all swimming pools constructed each year are equipped with a device to electrolyze salt). In the private family pool sector, the trend is toward smaller but better equipped pools and more maintenance-free pools thanks to automation. Also, there is a focus on larger green spaces surrounding the pool and decks associated with leisure equipment such as upstream swimming devices and pool games.

AVERAGE SIZE OF POOLS IN FRANCE				
	In-ground > 3.50 m	Above ground > 3.50 m	In-ground All dimensions	Above ground All dimensions
<b>North-West (Including Paris area)</b>	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
<b>North-East</b>	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
<b>West</b>	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
<b>South</b>	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

With the number of older pools increasing, the French market for replacement equipment and renovation is growing. Estimates show that about 120,000 French swimming pools are more than 20 years old, and 140,000 more are over 10 years old.

AGE OF POOLS IN FRANCE			
	North East (including Paris area)	West	South
<b>Built before 1990</b>	24 percent	25 percent	41 percent

<b>Built between 1990-1995</b>	48 percent	37 percent	36 percent
<b>Built between 1995-1997</b>	28 percent	38 percent	23 percent

Source: Trade Association for Swimming Pools Manufacturers

### **Guarantees**

Generally, swimming pools and equipment are guaranteed in France under the following guidelines:

#### *Guaranteed for ten years*

- Concrete work (prefabricated, or industrialized in-ground construction)
- In ground pipes
- Liner (however, the timeframe is decreasing and depends on the quality of the welding)
- Waterproofing system (reinforced timbering in synthetic resin)

#### *Guaranteed for two years*

- Visible pipes
- Paint

#### *Guaranteed for one year*

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

### **Best Sales Prospects**

Due to new French legislation, which requires that private swimming pools be secured, one of the best sales prospects is security equipment including security blankets, alarms (dive/collapse detector), and security barriers. Other good sales prospects include:

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

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

Another market niche is swimming pools for thalassic therapy resorts with demand growing in France. French people are becoming health oriented, and thalassic therapy is not limited to medical purposes, but also for general comfort. Therefore, the number of swimming pool installations in this sector is increasing rapidly.

### **Domestic Production**

The French swimming pool and equipment market leads Europe, followed by Spain, and then far behind comes Italy, United Kingdom, and Germany. The increasing accessibility of swimming pools, in addition to the diversity of the clientele, has evolved due to innovation and the price range of products. The advent of industrialized techniques, notably the liner, has lowered the production costs of standard swimming pools and allowed for kit development. Therefore, French swimming pool providers can propose three options: industrialized kits, industrialized construction of prefabricated polyester shells, and traditional construction.

Several swimming pool providers have strong reputations and name recognition throughout France. Some of these companies have employees who provide swimming pool cleaning and water maintenance as after-sales service.

### **Third Country Imports**

According to market analysts, foreign firms have captured about 40 percent of the market with a number of foreign firms establishing subsidiaries in France, such as UWE (Germany) and Astral (Spain). The foreign competition comes primarily from:

*Europe (about 35 percent)*

- Spain for small accessories (filters, etc.)
- 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 rake, leaf skimmer, brushes)

*Asian countries (about 10 percent) for water products with chlorine*

### **U.S. Market Position**

American firms have a strong and positive reputation in France. Local importers agree that U.S. swimming pool equipment and accessory exports to France lead the import market with a **30 percent** share. New and innovative products appear each year, 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).

While Albatica, Aqualux, C.E.C., and Procopi are the major local U.S. product distributors, some American firms have established their own subsidiaries in France, such as Hayward Pool Europe and SCP, which are very well established in the French market.

The best way for U.S. companies to penetrate the French market is through an agent or distributor that will carry the U.S. manufacturer's product line, or to establish a French subsidiary. U.S. firms may also go through swimming pool installer networks, which order directly from the U.S. manufacturer through their buying offices.

### **End-User Analysis**

Swimming pools create a desirable life for the owners while allowing them to avoid the potential health hazards and pollution of public pools, lakes, and oceans. They also see swimming pools as a source of pleasure and health. The two essential components of happiness are health and comfort. For some, well-being is becoming not only a right, but also a must for a healthy self-image. Swimming pools can also be major attributes to family life because they gather generations together.

For some years now, interest in swimming pools has increased significantly, although this has only translated into 5 percent annual growth in the number of sales. The swimming pool trade remains subject to seasonal changes. Nevertheless, the market is evolving, demand is strong, and technical progress is undeniable.

People with high salaries represent 19 percent of French swimming pool owners, retirees represent 19 percent, employees and intermediate professions represent 16 percent, while liberal professionals, merchants are at the bottom of the market with 11 percent.

Retirees represent a good potential clientele for above ground swimming pools, particularly those with grandchildren and likely to invest in a pool. The majority of swimming pool owners are between the ages of 40 and 60.

A growing number of younger home owners want swimming pools. This group is primarily responsible for increased kit sales. On the opposite side of the spectrum exists a narrow fringe of wealthy clients who request specific designs, materials, and equipment for their swimming pools. 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 have revitalized the market because they generally only require basic equipment and materials.

<b>POOL OWNERSHIP BY AGE</b>			
	<b>Northeast</b>	<b>West</b>	<b>South</b>
<b>31/40 years</b>	26 percent	37 percent	18 percent
<b>41/50 years</b>	51 percent	40 percent	31 percent
<b>51/60 years</b>	15 percent	13 percent	19 percent
<b>61/70 years</b>	6 percent	6 percent	19 percent
<b>70 years and up</b>	2 percent	4 percent	13 percent

Source: Swimming Pools and Spa Directory

On a regional basis, high income earners represent the majority of pool owners, especially in Northeastern France, which accounts for 46 percent, versus 19 percent for Western France, and 16 percent for Southern France. A demographic trend shows that retired people in the south represent the majority of pool owners, while retired people in the northeast and west represent only 6 and 7 percent of pool owners.

Swimming pool owners are now installing heaters to increase the time they can use their pools. They also want to have professionals care for the water. Companies could therefore propose cleaning services to be handled by people from the company which would include checking the chemical level of the water.

## **MARKET ACCESS**

### **French Law**

There are no quotas or restrictions on swimming pool equipment and accessories imports in France. However, there are severe safety regulations for

family/private swimming pools implemented by the Ministry of Transportation, Equipment, Habitation and Tourism to reduce the number drowning of children.

Decree no. 2003.1389

On December 31, 2003, the Ministry issued the decree no. 2003.1389. This decree stipulated that as of January 1, 2004, new private swimming pools must be equipped with the following:

- Protection barriers (NF P90-306)
- An alarm or collapse detector (NF P90-307)
- Blanket security (NF P90-308)
- Verandas (NF P 90-309)

People that rent homes with swimming pools had to comply with the above security measures by May 1, 2004 and those with existing private swimming pools have to comply by January 1, 2006.

Information on this new law can be obtained from the 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

Standards for Public Swimming Pools

The following compulsory standards 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

### Customs Tariffs and 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>

### Distribution Business Practices

<b>For In-Ground Pools</b>	<b>For Above-Ground Pools</b>
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

## **KEY CONTACTS**

### Trade Associations

Fédération Nationale des Constructeurs d'Equipements de Sports et de Loisirs –  
F.N.C.E.S.E.L.

(National Federation of Sports and Leisure Equipment Manufacturers)

9, rue La Pérouse

75016 Paris

Tel: (33-1) 40.69.53.25

Fax: (33-1) 47.20.43.25

[www.fncesel.fr](http://www.fncesel.fr)

President: Mr. Patrick Roche

Coordination Syndicale des Industries de la Piscine - C.S.I.P.

(Swimming Pool Industry Coordination Union)

9, rue La Pérouse

75016 Paris

Tel: (33-1) 40.69.53.25

Fax: (33-1) 47.20.43.25  
President: Mr. Gérard Goulet

Fédération Française des Industries du Sport et des Loisirs – FIFAS  
(French Federation of Sports and Leisure Industries)  
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

Office International de l'Eau – OIE  
(International Office of Water)  
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

### **Government Agencies**

Ministry of Youth and Sports  
D.S.7 Bureau des Equipements, de l'Aménagement du Territoire et de  
l'Economie du Sport  
Direction des Sports  
Ministère des Sports et de la Jeunesse  
78, rue Olivier de Serres  
75739 Paris cedex 15  
Tel: (33-1) 40.45.92.91  
Fax: (33-1) 40.45.97.67  
Contact: Mr. Luc Deiber

### **Publications – General 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](http://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](http://www.techniques-piscines.com)

### **Publications – Professional**

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](http://www.eurospapoolnews.com)

### **Trade Promotion Opportunities**

Name: Salon de la Piscine  
(The Swimming Pool Trade Show)  
Location: Lyon, Eurexpo center  
Date: November 16-19, 2004  
Organizer: Sepelcom  
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](mailto:Piscine@sepelcom.com)  
[www.piscine-expo.com](http://www.piscine-expo.com)

U.S. representative  
Mr. Zach Grashow  
Tel: 1 203 840 5313  
Fax: 1 203 840 9313  
[zgrashow@reedexpo.com](mailto:zgrashow@reedexpo.com)

The 2002 Piscine trade show welcomed 384 exhibitors. A total of 15,136 visitors attended the show, which represents an increase of 22 percent compared to the previous show.

**Major Private Swimming Pool Installer Networks**

ALLIANCE PISCINES  
Route de Cassis  
13830 Roquefort La Bedoule  
Tel: (33-4) 42.73.08.88  
Fax: (33-4) 42.73.03.02  
Manager: Mr. Jean Luc Caravagna

LES BLEUES VARIATIONS  
ZI Secteur D  
Allée des Géomètres  
06700 St Laurent du Var  
Tel; (33-4) 93.14.29.44  
Fax: (33-4) 93.07.29.45  
Manager: Ms. Monique Richard

BLOKIT PISCINES  
4 Avenue Le Verrier  
78190 Trappes  
Tel; (33-1) 30.13.19.52  
Fax: (33-1) 30.62.27.47  
Manager: Mr. Stephane Goulet

CARRE BLEU  
Rn 7 – Les Plaines  
26780 Malataverne  
Tel: (33-4) 75.90.70.45  
Fax: (33-4) 75.90.73.64  
President : Mr. Marc Maupas

DIFFAZUR  
Allée des Architectes  
06700 St Laurent du Var  
Tel; (33-4) 93.14.16.16  
Fax: (33-4) 93.07.21.05  
President: Mr. Gerard Benielli

EVERBLUE  
Route Nationale 20  
31620 Castelnau d'Etrefonds  
Tel: (33-5) 61.37.31.20

Fax: (33-5) 61.37.31.29  
Manager: Mr. Samy Bibay

FLORIDA  
19, rue de Toulouse  
87000 Limoges  
Tel; (33-5) 55.30.48.66  
Fax: (33-5) 55.06.21.96  
Manager: Mr. Martial Rouliere

PIKIT PISCINES  
RN 7 – Les Plaines  
26780 Malataverne  
Tel: (33-4) 75.90.70.45  
Fax: (33-4) 75.90.73.64  
Director: Mr. Claude David

PISCINES CHRISTINE CARON  
Rn 23  
44470 Thouaré sur Loire  
Tel: (33-2) 51.13.08.50  
Fax: (33-2) 51.13.08.51  
President: Mr. Jean Lermite

PISCINES DE FRANCE  
1777, avenue de la Resistance  
40990 Saint Paul les Dax  
Tel: (33-5) 58.91.15.00  
Fax: (33-5) 58.91.15.05  
Manager: Mr. Jean Pierre Clastres

PISCINES JEAN DESJOYAUX  
BP 16  
42480 La fouillouse cedex  
Tel; (33-4) 77.36.12.12  
Fax: (33-4) 77.36.12.10  
President: Mr. Jean Louis Desjoyaux

UNION PISCINES  
RN 113  
30670 Aigues Vives  
Tel: (33-4) 66.35.25.90  
Fax: (33-4) 66.35.16.33  
Manager: Mr. Gérard Andrei

WATERAIR

68580 Seppois-le-bas  
Tel: (33-3) 89.07.45.45  
Fax: (33-3)89.25.70.79  
President: Mr. André Chollet

**Major U.S. Brand Distributors**

ALBATICA  
Parc d'Activité du Baconnet  
69700 Montagny  
Tel: (33-4) 72.49.29.39  
Fax: (33-4) 72.49.29.38  
President: Mr. Jean Charles Houze

AQUALUX  
ZA de la Gare  
13210 St Remy de Provence  
Tel: (33-4) 90.92.75.00  
Fax: (33-4) 90.92.43.99  
President: Mr. Francis Guillot

C.E.C.  
105, rue du Ruisseau  
38297 St Quentin Fallavier  
Tel: (33-4) 74.95.41.51  
Fax: (33-4) 74.95.41.61  
President: Mr. Bernard Dantin

PROCOPI  
BP 45328  
35653 Le Rheu cedex  
Tel: (33-2) 99.14.78.78  
Fax: (33-2) 99.14.75.01  
General Manager: Mr. Jean Marc Latreille

**French Subsidiaries of U.S. Firms**

HAYWARD POOL EUROPE  
ZA de l'Observatoire  
78182 St Quentin en Yveline cedex  
Tel: (33-1) 39.30.91.00  
Fax: (33-1) 39.30.91.89  
Commercial Manager: Mr. Philippe Moreau

SCP ALBOUY JEAN  
La Boissonnade

12450 La Primaube  
Tel: (33-5) 65.75.53.00  
Fax; (33-5) 65.68.06.80  
General Manager: Mr. Jean Louis Albouy

### **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](mailto: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](mailto:Piscine@sepelcom.com)  
[www.piscine-expo.com](http://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