Padel in Europe: a look at France

This study was conducted by ***Adelio Rosate and Giacomo Cirelli*** *from O&B Padel Srls on behalf of SPORT&IMPIANTI, Italy, and reflects their expertise in padel business and development strategies.*

In recent years, padel has experienced remarkable growth across Europe, emerging as one of the fastest-growing sports. However, its development varies significantly from country to country, influenced by factors such as infrastructure, cultural adoption, and institutional support.

L'avenir appartient à ceux qui se lèvent tôt says a French proverb. The future belongs to those who get up early. If we can consider padel, the most recent sporting innovation, we must deduce that the French... are waking up late. Yet, even here padel had appeared almost thirty years ago. When they even organized, in Lyon in 1977, a world championship, as Fabrizio Canè reminded us, who had participated in those world championships, representing the Italian colors.

Today, from a first glance, the French situation appears to be clearly lagging behind us and some other European nations (northern ones in particular). Excluding Spain, which represents a chapter in its own right.

France (and then Germany) appear to us to be the cases to be dedicated as a priority, not only for the potential economic importance: we are curious to understand why, despite having many characteristics similar to ours (economic, sporting and social status), there is a situation, on this sport, so markedly late. The analysis is therefore, already at first glance, complex; we believe that the two nations mentioned each deserve a specific in-depth study, starting here, from France.

Padel center in Sucy en Brie, on the outskirts of Paris (Google Street View).

Macro indicators

Let's keep Italy as a benchmark, where the market, with a number of courts now exceeding ten thousand, has entered a slowdown phase as regards the birth of new centers and courts. Consistent, in the descending curve, with the most elementary marketing theories, well illustrated by Nobel Prize winner Paul Samuelson, precisely of the "diminishing returns" which, trivially, are identified in that phase of the market in which demand grows less than supply. Opening, also from an entrepreneurial point of view, a new phase: the one in which investments must be better weighted than the more emotional and instinctive, initial one.

The analysis of the O&B Observatory aims to understand if and to what extent these nations, with a much smaller network of centers, are in a different phase and what business opportunities they offer. The aim is to produce a study that captures its general potential, identifying the most interesting regions in terms of mature potential.

To do this, we believe the help of two macro-indicators is essential:

The A/C1 index, i.e. how many inhabitants are referable to a single (existing) padel court. This index allows an immediate consideration of the situation of the territory analyzed, allowing a clear comparison (as we will see below) with the status of the countries in which padel is most developed (here in particular Italy), consequently providing an indication of the potential of the French territory.

Population density. Since our surveys indicate a percentage of players, compared to the total population, between 0.3 and 0.5 (in the first two/three years of development), the population density indirectly affects the number of potential players, because where it is greater it is easier for a sports center to count on a higher number of users. Our recent survey showed that the amateur "padel player" accepts travel times to reach the fields in the order of 20 or 30 minutes at most. So the greater the concentration of inhabitants, the greater the possibility that a padel center can count on a wider involvement. A factor that we have had the opportunity to verify in the analysis of some basins in specific studies.

We have therefore "plumbed" the country beyond the Alps to identify the two indicators mentioned above for each region, and at the same time to integrate the analysis with other useful information.

The aggregation of the data according to the research conducted by the O&B observatory can be divided into the following "chapters":

1- Geo-demographic data; incidence of urban population and major cities.

2- Number of facilities and fields broken down by region and main cities.

3- Macro index A/C1 (average number of inhabitants per 1 padel court) by region; comparison with the European countries where padel is more widespread.

4- Size of the centers (average number of fields).

5- Manufacturing companies.

CITTA'	abitanti
Parigi	2.187.526
Marsiglia	863.310
Lione	516.092
Tolosa	479.533
Nizza	340.017
Nantes	309.346
Montpellier	285.121
Strasburgo	280.966
Bordeaux	254.436
Lilla	232.787
Rennes	216.815
Reims	180.318
Le Havre	165.830
Saint-Étienne	172.569
Tolone	169.634
Grenoble	157.424
Digione	156.133

The administrative regions of France and the most populous cities.

1 – National geo-demographic profile

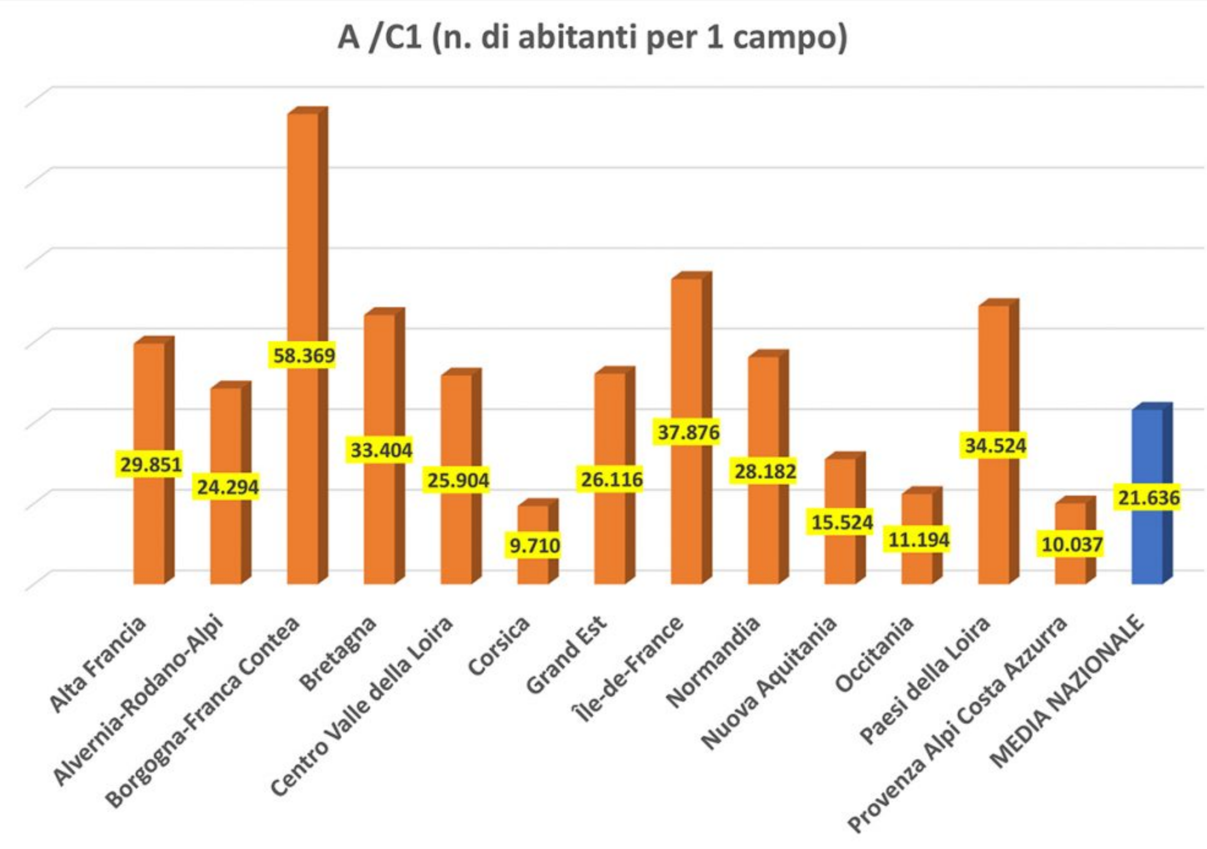
There are about 67 million inhabitants, spread over an area of 551,700 km^2, with 13 administrative regions, and a population density of 120 inhabitants per km^2. The overseas departments not considered here: they are statistically irrelevant and can distort the averages. There are 17 cities with over 150 thousand inhabitants in which a population of almost 7 million is concentrated, equal to 10.2% of the total.

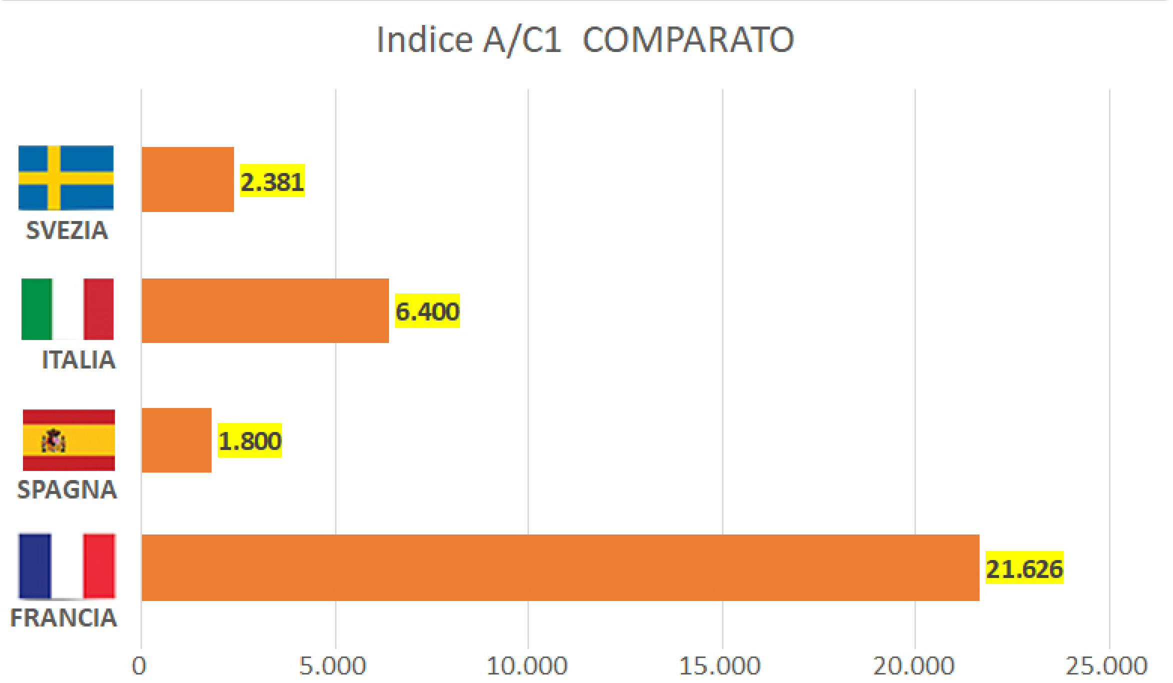
2 – Number of plants

There are 1,076 padel sports clubs with 3,021 courts, of which about 54% are covered. Occitanie is the region with the largest number of fields (538). Four regions (Occitanie, Provence, Nouvelle-Aquitaine and Auvergne-Rhône-Alpes) with 1,771 fields, account for almost 59%. Tab 2

3 – Index C1- A/C1

The indicator that we identify with the acronym A/C1, i.e. the number of inhabitants attributable to a field and referred to the territory considered (region, municipality, etc.), has a double value: it is an expression of synthesis of the status and is, among the available, comparable. France has on average one field for every 21.5 thousand inhabitants. It is the southern regions (Provence-Alpes-Côte d'Azur and Occitanie, together with Corsica) that have the best situation. On the other hand, Burgundy-Franche-Comté, with one court for every 58 thousand inhabitants approximately, is the least "friendly" region to padel.





But what entity does the French one represent, with one camp for every almost 21.5 thousand inhabitants? The graph above, with the comparison with some other European realities, gives us the size of this entity. A gap, truly remarkable again. With Italy, for example, where the 6,400 inhabitants indicate that it has a ratio of number of camps to the population, three times greater; Sweden nine times greater and 12 times the ratio of Spain. (*Note: the comparative numbers were collected over a period of time including the last 6 months. We believe that this is not influential for the purposes of the substantial differences expressed).*

4 – Size of the centers

The size of the centers confirms how "timid" investors' approach still is. Only three regions have an average of at least three fields per center (see table below).

REGIONE	Società n.	Campi n.	di cui indoor	di cui outdoor	n.campi per centro
Alta Francia	70	201	163	38	2,9
Alvernia-Rodano-Alpi	148	334	138	196	2,3
Borgogna-Franca Contea	19	48	32	16	2,5
Bretagna	39	101	68	33	2,6
Centro Valle della Loira	34	98	74	24	2,9
Corsica	14	36	12	24	2,6
Grand Est	67	213	163	50	3,2
Île-de-France	104	324	199	125	3,1
Normandia	41	118	77	41	2,9
Nuova Aquitania	147	391	251	140	2,7
Occitania	182	538	264	274	3,0
Paesi della Loira	46	111	57	54	2,4
Provenza Alpi Costa Azzurra	165	508	117	391	3,1
TOTALE	**1076**	**3021**	**1615**	**1406**	**2,8**

5 – Manufacturing companies

Even the know-how seems to be not lacking, the industry has quickly equipped itself by sniffing out the imminent business. Several manufacturing companies already (one would say that there are more industries than players... at the moment). As many as seven French companies that we take over, ready to compete for an important slice of the market: NXP, TecnoPadel WSport, Eps concept, Padel Court, Padel International, Universo Turfle; the Spanish leader Galis and even a Chinese one, Sanjng, were also present. The main Italian companies (Ecover, Italgreen and Italian Padel) are also trying to export their experience in an already very crowded market.

Possible causes

We can therefore see that the nation of the Marseillaise lacks nothing. Yet, the difference towards Italy that emerges from the numbers above is evident. The causes are not easy to identify. Let's try to consider some hypotheses here.

Population density. It is easy to see why it can be a key precondition, not only for padel, but in general for any market. For example, in the research on Sweden we have shown how much it can affect if very low (there it is 20 inhabitants).

That of France turns out to be just over half of that of Italy (120 against 196). Not enough to determine the ratio of the difference in structures (14 times lower than the French one). Even urban areas (table 1), which certainly express a population density index well above the national average, denote a much lower field/population ratio than ours.

Sports causes. Is it possible that the attractiveness towards other sports creates greater resistance to this one, compared to what happens to Italian sportsmen with padel? We investigated the percentages of practitioners of Football, Cycling, Basketball. The only significant difference was rugby, with 300 thousand members compared to our 71 thousand. Although more than four times greater, the difference does not cover what French padel is missing.

Regulatory lawsuits. Given that European nations must refer to common rules from a sporting point of view, there could be a difference in the rigor of the application of urban planning and building regulations. In particular, the authorization times of the projects presented seem to be long (about two years), as Leonardo Ravizzini, sales director of Ecover (the Italian roofing manufacturer), testifies to us.

Promotional causes. We have no evidence that the FFT (Federation Francaise de Tennis) has done its utmost like our FIT (which has become FITP for this very reason) in the spread of Padel. However, it contributes to its diffusion, at least in terms of visibility, for example by granting the prestigious Parisian facility, home of the noble Roland Garros, to a major stage of Premier Padel (the related international federation). Already during last year's Olympics, a field was set up under the Eiffel Tower by the Spaniard Galis. Which will be repeated from May 20 to July 9, 2025. Great visibility therefore and accessibility to all those who want to try.

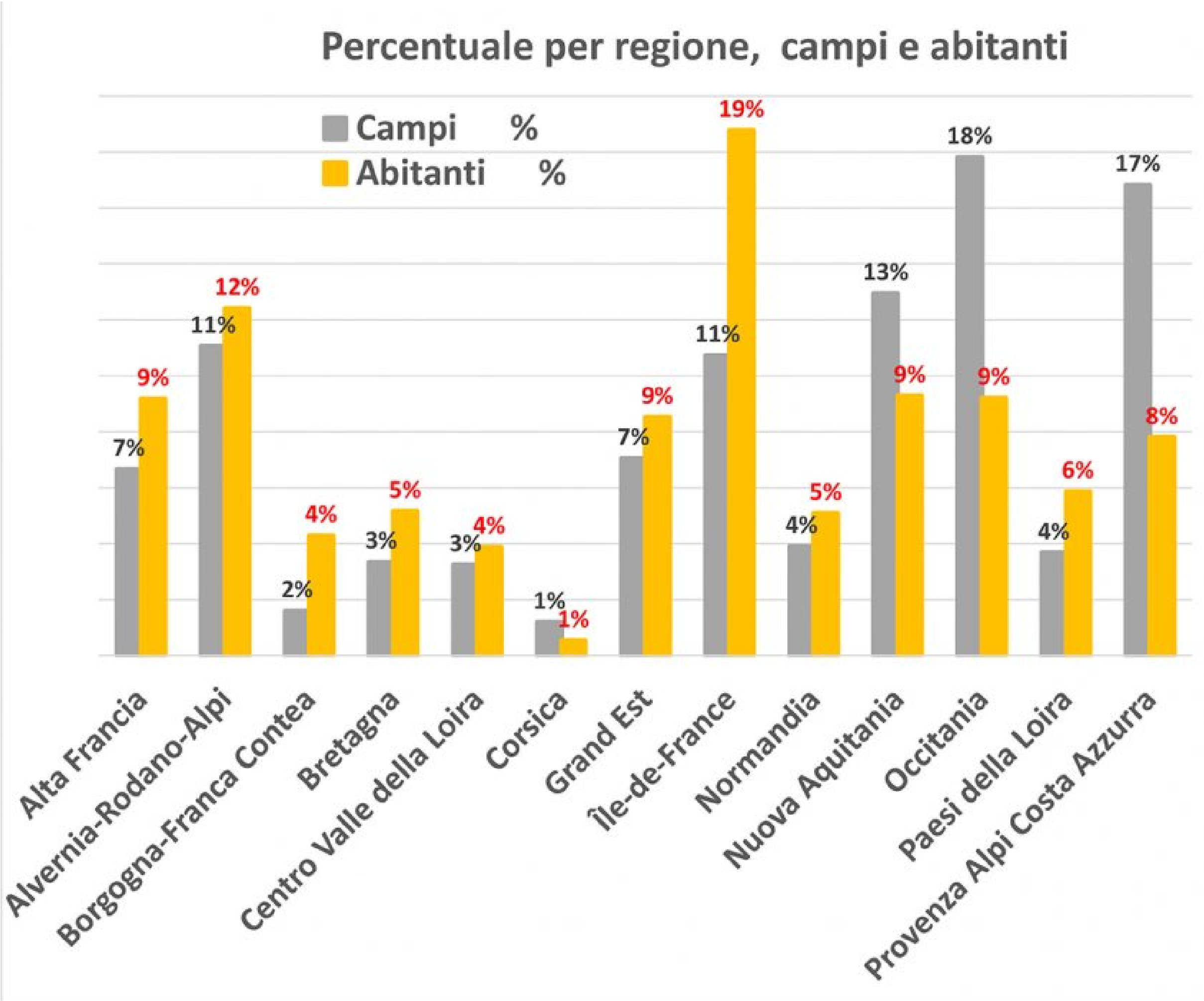
Costs almost tripled. In the last 5 years, the cost of steel and glass has, for various reasons, increased sharply. This involves more than double investments, compared to 4 or 5 years ago. Aggravated by the fact that in northern European nations, as we see from the current numbers, coverage involves at least two-thirds of the courts. The cost of which is at least equal to that of the construction of the camp and has greater implications for authorizations (and as we have already highlighted, permit times, often long).

This could be a more sustainable cause. But it too can be refuted if we consider that in Paris the courts cost even more than 20 euros per player (from 80 to 100 euros per slot), during peak hours. The same field under the Eiffel Tower, demonstrative, costs, per person, 30 euros. As if to say that at least in the capital and in the major cities, the applicable prices of slots would allow investment break-even points to be reached in orthodox times.

Conclusions and indications

Having examined the hypothetical causes that could be at the origin of France's current gap, we have been able to ascertain that there are no obvious ones. In the last year, in fact, the French have triggered a significant acceleration, also confirmed in recent weeks, to the point that we have had to correct the data of the study several times. On the contrary, from 30 April – the final date of the research – to 10 May, the date of delivery of the work for publication, our observatory detected **26 new centres, and 93 fields, 61 of which were covered.**

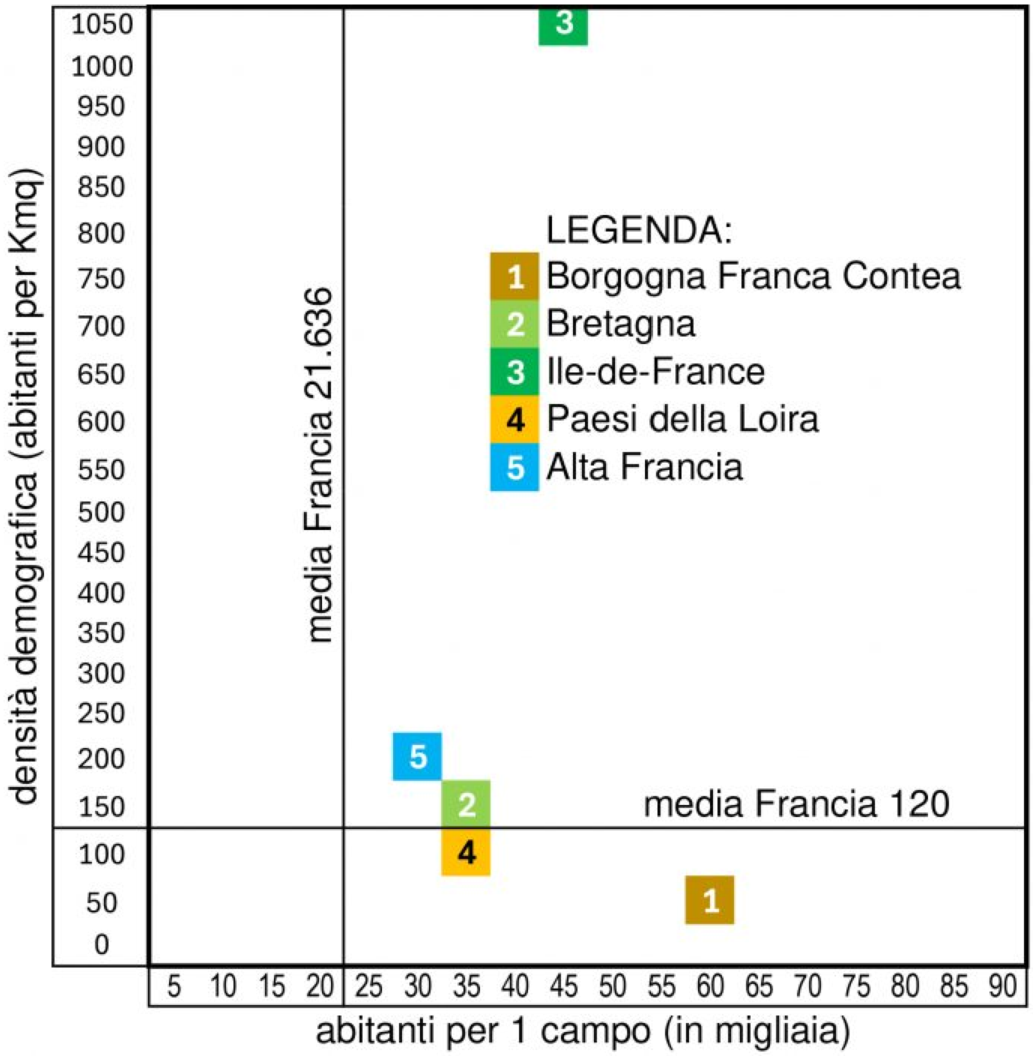
At the end of the study, we try to highlight those regions that can have greater attractiveness for investments following an empirical method already illustrated above, with the interrelationship between the A/C1 index and population density. We have presented it in two ways, with the percentages and with the absolute numbers of the matrix referring to the individual regions.



The graph above shows, for each region, the percentages of fields (gray column) and inhabitants (orange column) towards the respective totals. The greater the difference between the two percentages, the more evident the potential to establish new centers with fields. For example, the Ile de France accounts for 19% of the nation's total population, with only 11% of the fields. Occitanie has an inverse situation: 18% of fields with 9% of inhabitants. This graph is intended only to provide a rough indication of the status of the various regions. It is clear that if you want to implement specific projects, the analysis must be further declined.

The indication can be better highlighted by crossing the two variables, through a diagram.

In the graph below, let's examine only the five regions that we believe express the most indicative relationship between the two variables, starting from those that show a greater number of inhabitants, referable to a single field. Burgundy Franche-Comté, for example, has 82,403 inhabitants per padel court, but a very low density (59 inhabitants per square kilometer).



In the graph, the interrelation of the absolute values with the abscissa equivalent to the population density (national average of 120 inhabitants), and the ordinate, the median of A/C1 (21,636 inhabitants per single field).

		abititanti per	
		Km 2	**1 campo**
1	**Borgogna Franca Contea**	59	58.369
2	**Bretagna**	124	33.404
3	**Ile - de France**	1.022	37.876
4	**Paesi della Loira**	119	34.524
5	**Alta Francia**	189	29.851

Our indications therefore take into consideration the first 5 regions that are the most potential precisely from the relationship of the two indicators mentioned above. From which it can be deduced that the region of the capital, Ile de France, would be the most attractive, having the highest population density and an A/C1 of over 40 thousand inhabitants. Followed by Hauts-de-France. The other three regions with inhabitants per square km of less than 200 express opportunities through the other variable, the high number of inhabitants per field.