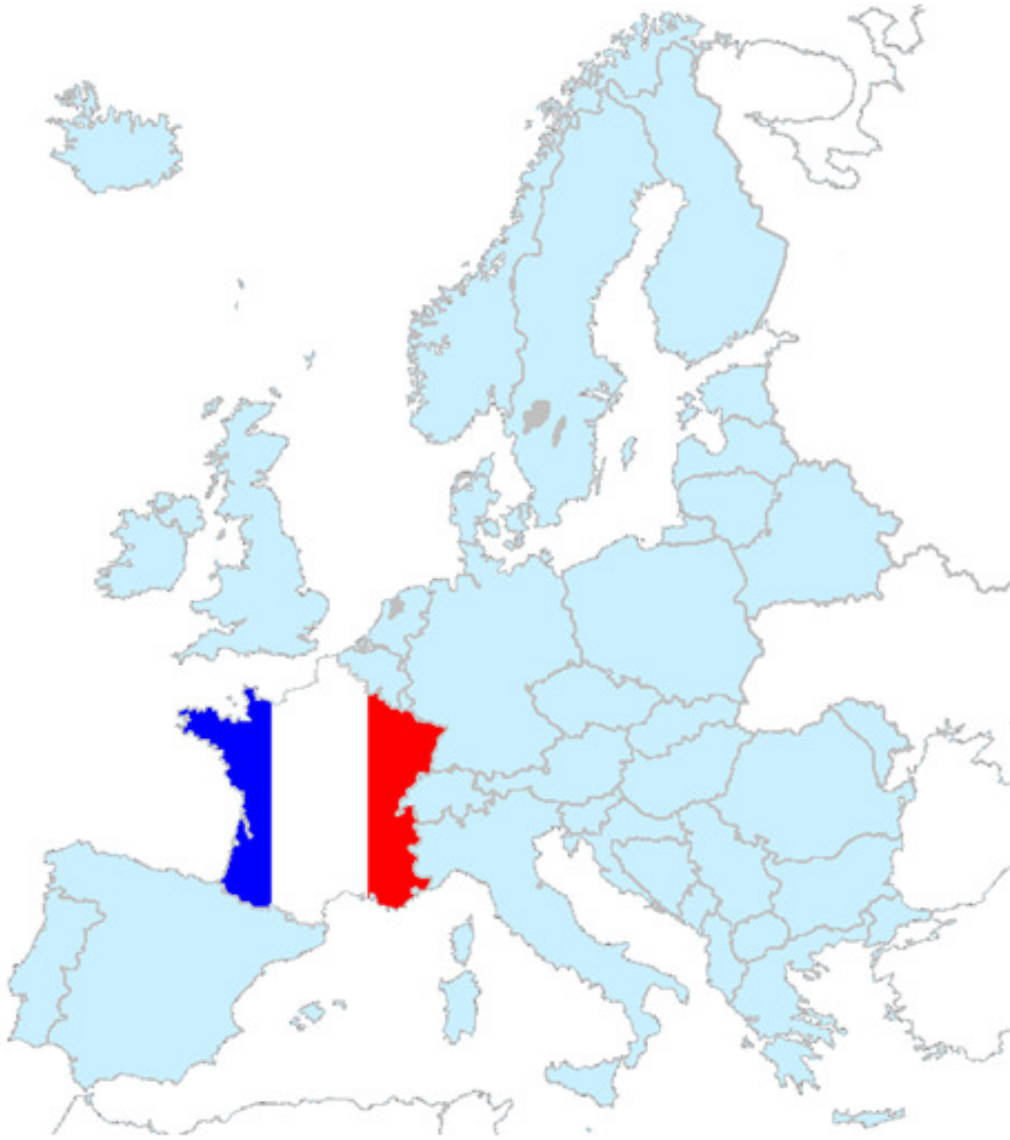




***BTC TRADE FOR DEVELOPMENT***



***FRENCH MARKET FOR  
FAIR (AND SUSTAINABLE)  
SPORTS BALLS***

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## CONSUMPTION

France is one of the promising EU countries for sports balls producers from developing countries. This chapter provides information on the French market for sports balls, fairtrade in France and fairtrade/FSC sports balls in France. French imports of sports balls and the most important distribution channels for sports balls in France will also be discussed, together with the most important players on the French (fairtrade/FSC) sports balls market. For more information on sports balls consumption on a global and EU level, please refer to chapter 4 Consumption of the main document. For consumption in other promising EU countries, please refer to the separate documents.

### > FRENCH MARKET FOR SPORTS BALLS

French consumption of sports goods for team sports had a value of approximately €630 million in 2008. Between 2000 and 2004, the most sold sporting goods in France were mountain bikes (20%), glasses (15%), sports balls (15%), backpacks (11%) and golf and tennis balls (10%).

Approximately 63% of the French population, which are more than 39 million persons, practice at least one sport. There are more than 175,000 sports clubs in France. Almost half of the French sporting population practice a sport within a club. Regarding the number of sports club members for ball sports, football had the highest number of members in 2009 (about 14.5% of total sports clubs members), followed by basketball (2.9%), handball (2.6%) and rugby (2.4%). In the football industry, adidas and Nike are the leading brands for footballs. Molton is the leading brand for volley and basket balls.

#### CODES OF CONDUCT

The importance of buying ethically produced sports balls is in France lower than in other EU countries like Sweden and Germany. There are not many companies in France that voluntarily establish codes of conduct. It is estimated that only about 30% of French companies that buy sports balls have a code of conduct. These companies are mostly large companies that are under pressure of the media or consumers.

### > FAIRTRADE IN FRANCE

95% of the French have heard of the 'Fairtrade' concept, but only 55% are familiar with the Fairtrade certified label. Sales of fairtrade products in France represented a value of €287 million in 2009, a growth of 12.5% compared to 2008. This makes France the second largest consumer of fairtrade products in the EU, behind the UK, but ahead of Germany. One out of three households in France purchase at least one fairtrade product per year with an average of 4 purchases annually and an average spending of €15.90 per year.

There are more than 3,000 Fairtrade certified products available on the French market. More than 85% of the fairtrade products sold in France are food products, with coffee and cacao having the largest market shares (40% and 20% respectively). More than two thirds of fairtrade products in France are sold in large supermarkets/hypermarkets, such as Carrefour. An important trend in France is the consumption of fairtrade products 'out of home'. This means not only in cafes, hotels or restaurants, but also at work.

## > FRENCH MARKET FOR FAIRTRADE/FSC SPORTS BALLS

The market for fairtrade/FSC sports balls in France is one of the smallest in the EU. Unfortunately there are no data available on the number of fairtrade/FSC sports balls that are sold annually. There are two importers of fairtrade sports balls in France, Ethletic France and Terralibre. Ethletic France imports sports balls from Pakistan which are both fairtrade and FSC certified. Terralibre imports fairtrade sports balls from an Italian importer (Equosolidale - <http://www.commercioalternativo.it>) who buys fairtrade sports balls from a producer in Pakistan. According to experts, the French market for fairtrade/FSC sports balls is not expected to grow in the years to come as interest in fairtrade products in France lags quite behind in comparison to other EU countries. In addition, the French prefer to buy sports balls of well-known brands, such as adidas and Nike.

### DROITS-EN-JEU

The project 'Droits en jeu' was organised in 2007 and was an initiative of ISCOS (an Italian trade development agency), Comercio Alternativo (an Italian importer of fairtrade products), the Pakistan Worker Federation (PWF), Terralibre (a French importer of fairtrade products) and Ingalan (a French organisation in Bretagne that organises campaigns for fairtrade). In this project fairtrade sports balls from Pakistan were heavily promoted and in the case of France, imported and supplied by Terralibre to schools and sports clubs. The objective of the project was to improve the working conditions of sports balls stitchers in Pakistan and especially increase the awareness of the use of child labour in this industry. During the campaign sales of fairtrade balls increased (no figures are available), however after the campaign sales of fairtrade sports balls returned to a minimum.

## IMPORTS

In 2009, France was a large importer of sports balls, ranking second in the EU, behind Germany, but ahead of the UK and Belgium. Between 2005 and 2009, total import value annually increased by an average 3.1% to €48 million in 2009. In the same period, imports from DCs annually increased by 5.3% in value. Compared to 2005, the total share of DCs in import value increased slightly to 29% in 2009.

In 2009, leading suppliers to France were Belgium, Italy, China, the Netherlands and Pakistan. Pakistan and India recorded high growth in the period mentioned (13% and 17% per year respectively), while imports from China only grew by 3.0%. Imports from the Netherlands (-14%) were replaced by imports from Belgium (+12%), and also imports from Italy grew considerably (+15%). Refer to Table 1 for more information.

**Table 1 Imports by and leading suppliers of sport balls to France, 2005-2009, share in % of value in 2009**

Supplier group	2005 € mln	2007 € mln	2009 € mln	Leading suppliers in 2009	Share
Total	42	54	48		
Intra-EU	31	37	33	Belgium (27), Italy (19), The Netherlands (9.6), Germany (4.8), Spain (3.9)	69
Extra-EU excl. DCs*	0	1	1	Taiwan (0.9), Switzerland (0.6), Hong Kong (0.1), Canada (0.1), USA (0.1)	1.7
DCs	11	17	14	China (14), Pakistan (8.8), India (3.7), Thailand (2.6), Vietnam (0.2), Colombia (0.2)	29

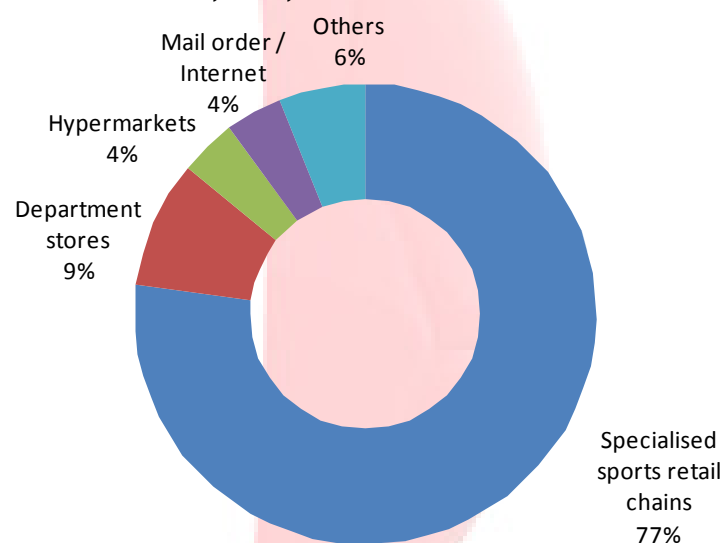
Source: Eurostat (2010)

\*DCs=Developing Countries

## DISTRIBUTION CHANNELS IN FRANCE

The most important distribution channels for sports balls in the EU are multinationals (like adidas and Nike, but also regional brands), sporting goods importers and wholesalers and sports retail chains. Some non-specialised retail chains, such as supermarkets, hypermarkets and department stores also have sports balls in their assortment. In the case of fairtrade/FSC/sustainable sports balls, specialised fairtrade importers are also an important distribution channel.

Demand for sports balls in France comes from professional sports clubs, amateur sports clubs, schools and private persons. Figure 1 gives an overview of market shares of the French sporting goods retail market in 2008.

**Figure 1 Market shares of retail trade channels for sports articles, 2008, in %**

Source: FPS (2009)

## > SPORTS RETAIL CHAINS

Specialised sports retail chains dominate the retail market for sporting goods in France. There are about 4,000 specialised sports shops in France. French retail sports chains generally sell well-known sports ball brands like adidas and Nike and often buy directly from these large sports brands or their local distributors. They mainly supply sports clubs and private consumers that purchase their sporting goods in a local store or through web shops. There are five leading sports retail chains in France, which together represent more than 80% of the total sales of specialised sports shops in France. These leading sports retail chains are in order of highest sales: Decathlon, Intersport, Go Sport, Sport 2000 and Foot-Locker.

- > **Decathlon** - <http://www.decathlon.fr> - international sports retail chain with headquarters and about 243 establishments in France. Decathlon has a market share of more than 40% in the French specialised sports retail market. Decathlon sells sports balls of well-known brands but also of its own private label Kipsta. However, these sports balls are not fairtrade. Decathlon has special departments for sports clubs and schools, called Decapro (<http://www.decapro.com>). The company has two codes of conduct: the code of conduct of the French sporting goods association and an international code of conduct.
- > **Foot-locker** - <http://www.footlocker.eu> - global sports retail chain specialised in athletic footwear and clothes.
- > **Go Sports** - <http://www.groupegosport.com> - international sports retail chain with headquarters and more than 160 shops in France. Sells sports ball of well-known brands, but also of its own private label Go Sports. Follows the code of conduct of the French sporting goods association.
- > **Intersport** - <http://www.intersport.fr> - international sports retail chain with approximately 350 establishments in France. Intersport has a market share of 18% in the French specialised sports retail market. Intersport does not have fairtrade sports balls in its standard assortment. However, it does have an own code of conduct.
- > **Sport 2000** - <http://www.sport2000.fr> - European sports retail chain with more than 530 shops in France. Sport 2000 has a market share of 11% in the French specialised sports retail market.
- > **Twinner** - <http://www.twinner-sports.com> - large French buying group of sporting goods. Has a special department for the purchase of sporting goods for team sports, which includes also sports balls (foot, basket, hand, volley and rugby balls) of many well-known brands.

## > SPORTING GOODS IMPORTERS/WHOLESALEERS

French importers and wholesalers especially sell to sports clubs, schools and sports retail chains through their catalogues or web shops. Important French importers/wholesalers are:

- > **Casal Sport** - <http://www.casalsport.com> - French importer of sporting goods, including different types and brand of sports balls. Also markets its own private label balls named Casal Sports. Has an ethical code of conduct and has a range of sustainable sports balls in its assortment.
- > **Dima Sport** - <http://www.dimasport.fr> - one of the most important wholesalers in sporting goods for schools in France.
- > **EGT Sports** - <http://www.egt-partners.com> - importer of sporting goods for many sports, part of the EGT Partner Group. Imports

sports balls from the brand Molton and also markets its private label balls SEA. The EGT Group has an own code of conduct.

> **Sport Concept** - <http://www.sport-concept.fr> - French importer and wholesaler of sporting goods. Only imports sporting goods of well-known brands, does not sell private label sporting goods.

## > OTHERS

Other distribution channels for (fairtrade) sports balls in France are specialised fairtrade importers and non-specialists like department stores, hypermarkets and mail order companies. Examples of these other channels are:

> **Carrefour** - <http://www.carrefour.fr> - international chain of hyper and supermarkets that also have fairtrade products in its assortment. The headquarters of Carrefour are established in France.

> **Ethletic France** - <http://ethletic.fr> - importer of fairtrade foot, rugby, volley and hand balls. The balls are both fairtrade and FSC certified.

> **La Redoute** - <http://www.laredoute.fr> - mail order company that also sells sporting goods (mainly sporting clothes and shoes).

> **Terralibra** - <http://www.terralibra.fr> - French importer of fairtrade products. Also imports fairtrade foot, basket, volley and rugby balls.

## > HOW TO DO BUSINESS IN FRANCE

The French prefer to deal with a local contact person or with people that speak French. Sports balls producers that want to enter the French market would therefore have a great advantage if they have a local contact person in France or if they have French language skills. For more information about how to do business in France, please refer to <http://www.kwintessential.co.uk/etiquette/doing-business-france.html>.

## > USEFUL SOURCES

> **CDurable** - <http://www.cdurable.info> - internet site that gives information about sustainable development in France, also about sustainable sports balls.

> **Collectif Ethique sur l’Ethiquette** - <http://www.ethique-sur-etiquette.org> - French association with ethical initiatives.

> **European Fairtrade Fair** - <http://www.salon-europeen-commerce-equitable.org> - fairtrade trade event, held annually, in October, in Lyon.

> **French Football Association** - <http://www.fff.fr>.

> **French Sporting Goods Association (FPS)** - <http://www.filiesport.com> - publishes articles about the French sporting goods market.

> **French Sports Industry Association (FIFAS)** - <http://www.fifas.com> - provides links to different sports goods sellers, including for sports balls.

> **Max Havelaar France** - <http://www.maxhavelaar.fr> - information about fairtrade products, fairtrade figures and fairtrade research.

> **Plate-Forme pour le Commerce Equitable** - <http://www.commerceequitable.org> - French organisation that represents the principle actors in fairtrade in France. Information about fairtrade products, fairtrade importers, fair trade organisations and fairtrade figures.