



Mireia Álvarez
CPI Board member

Munich, Wednesday 29th november 2023



120
companies

150
associated
brands

brands from
20
different
countries



more than
1.200
million euros
of turnover in 2022
of the associated companies



KPIs

associate brands
BY CATEGORY



35

Racquets

18

Balls



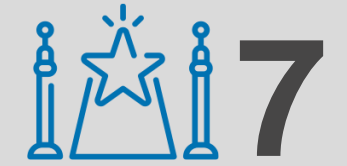
15

Shoes



4

Retail



7

Events



7

Marketing

32

Accessories



22

Textile



14

Services
and others



53

Facilities

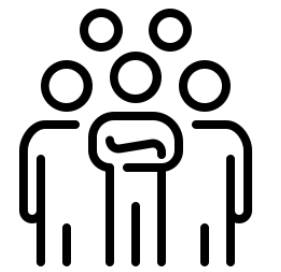


OUR MAIN GOALS



Goals
IPC

1. Promote the practice of padel
2. Work for the internationalization of padel
3. Position padel as an Olympic sport
4. Boost sustainability in all areas of action
5. Promote good practice and quality, and protect the common goals of its associates in the industry

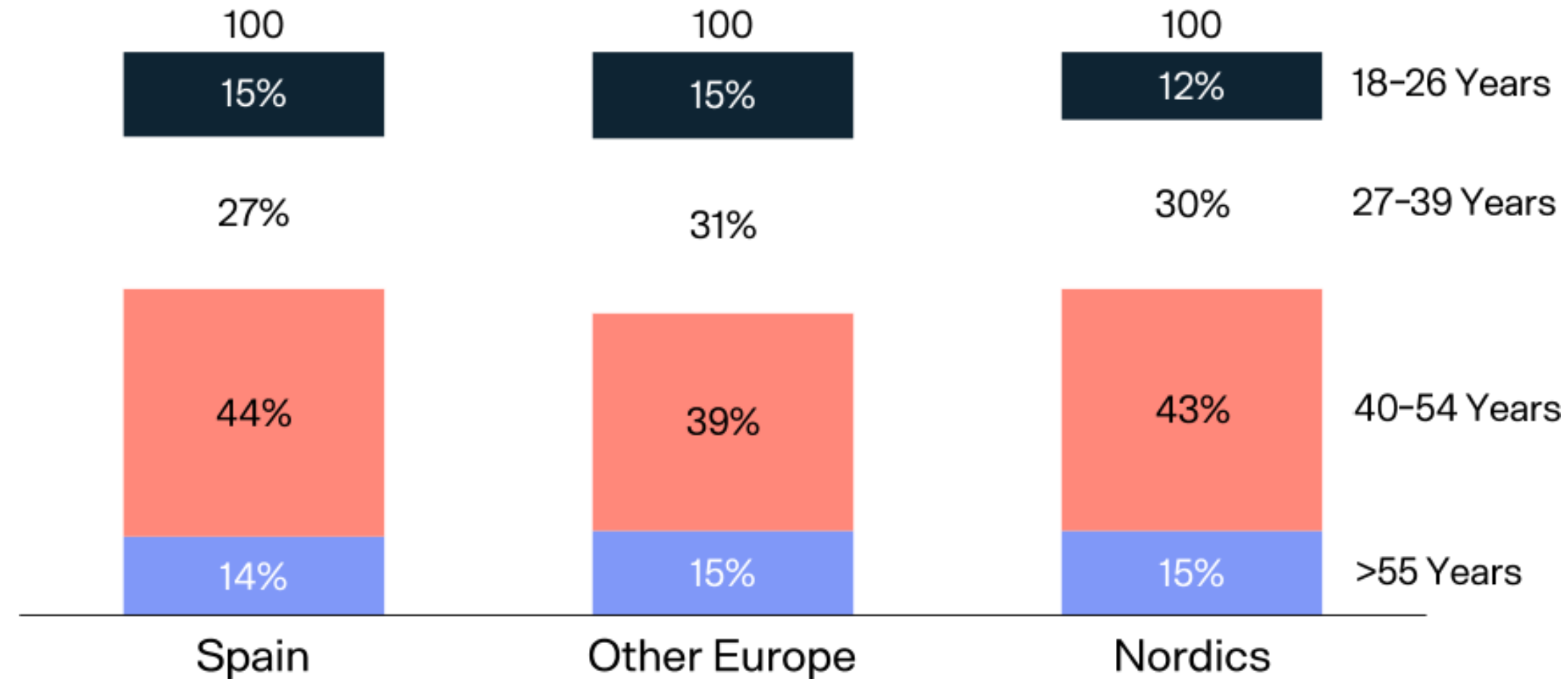


To act
as a lobby

PLAYER BEHAVIOR AND DYNAMICS

Playtomic Survey Insights

What is your age?

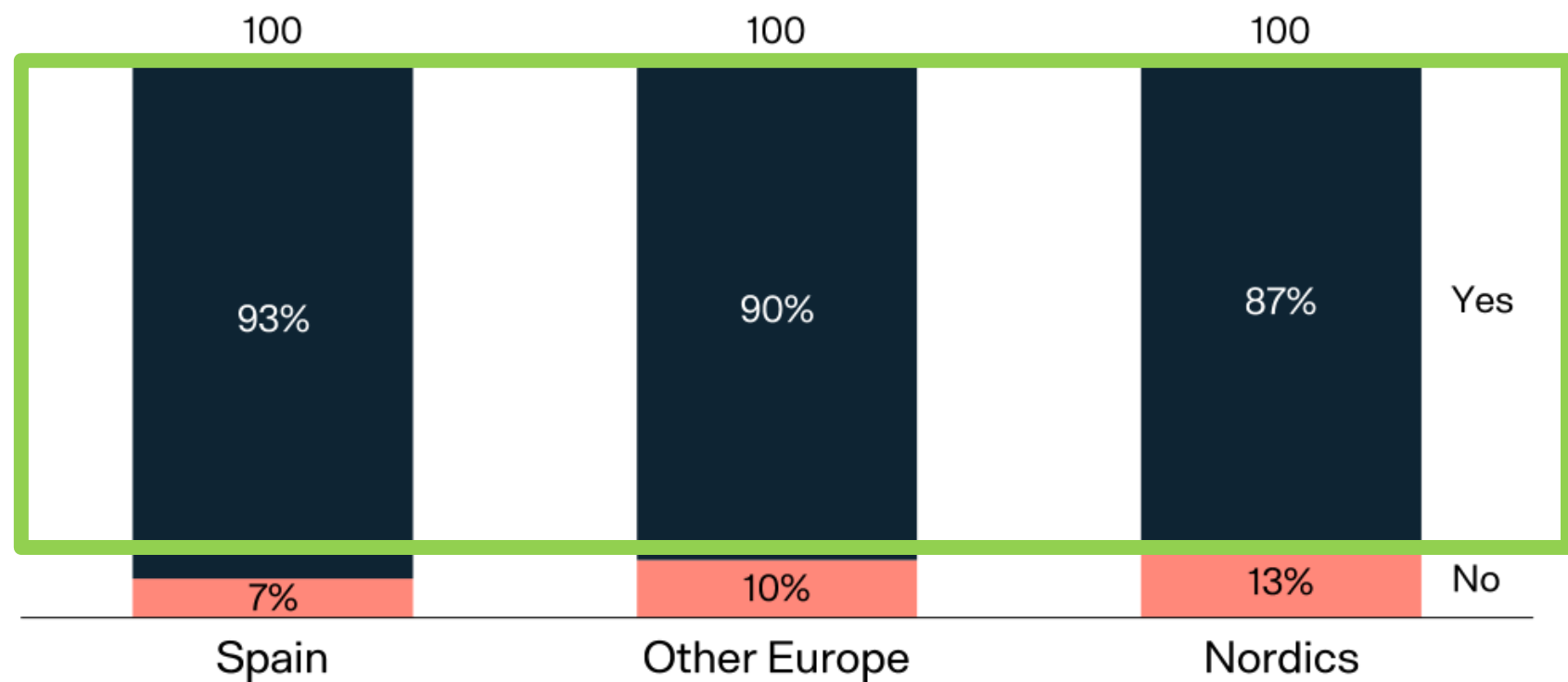


Source: Playtomic Proprietary Survey
Global Padel Report by Playtomic, Powered by Deloitte

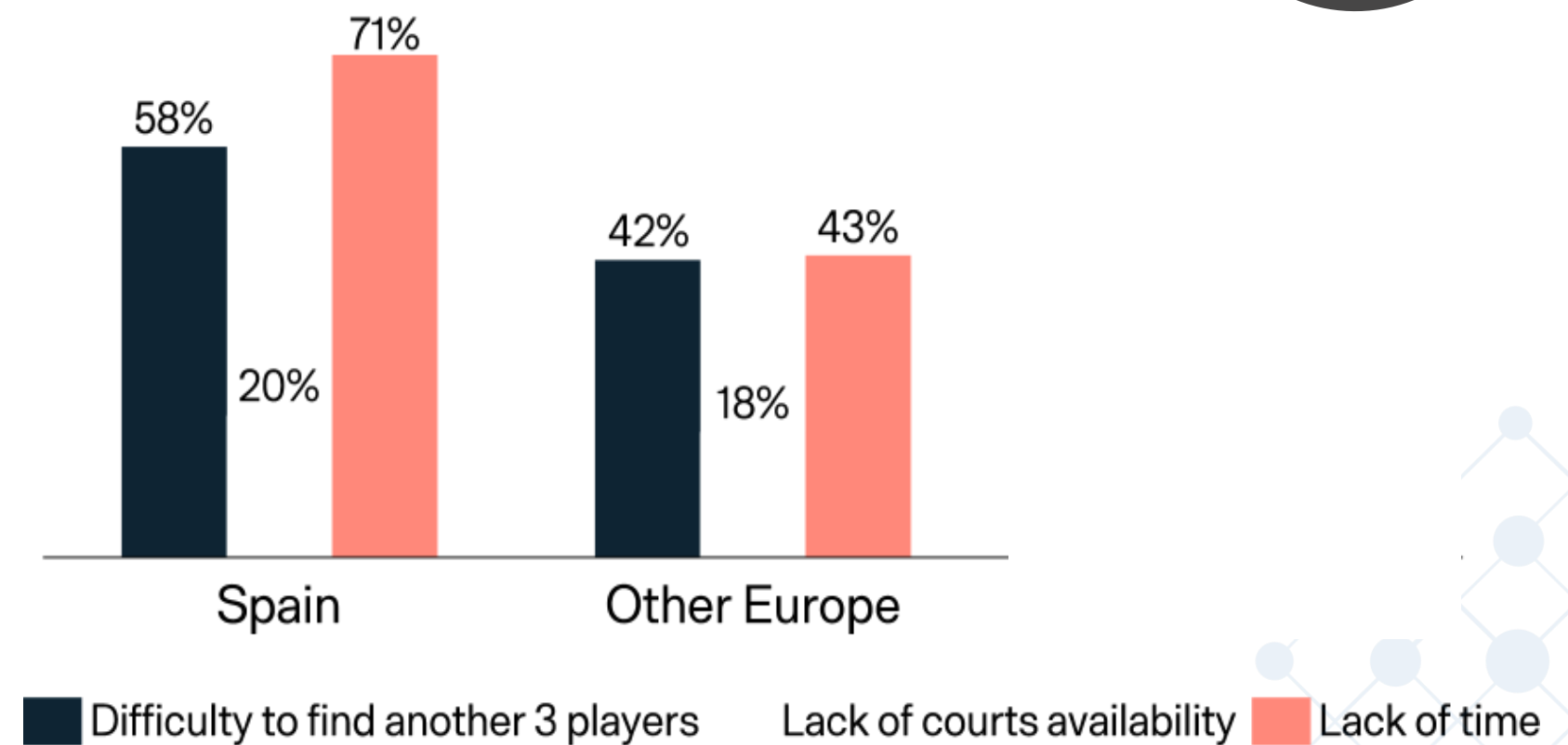
PLAYER BEHAVIOR AND DYNAMICS

Playtomic Survey Insights

Would you like to play more padel?



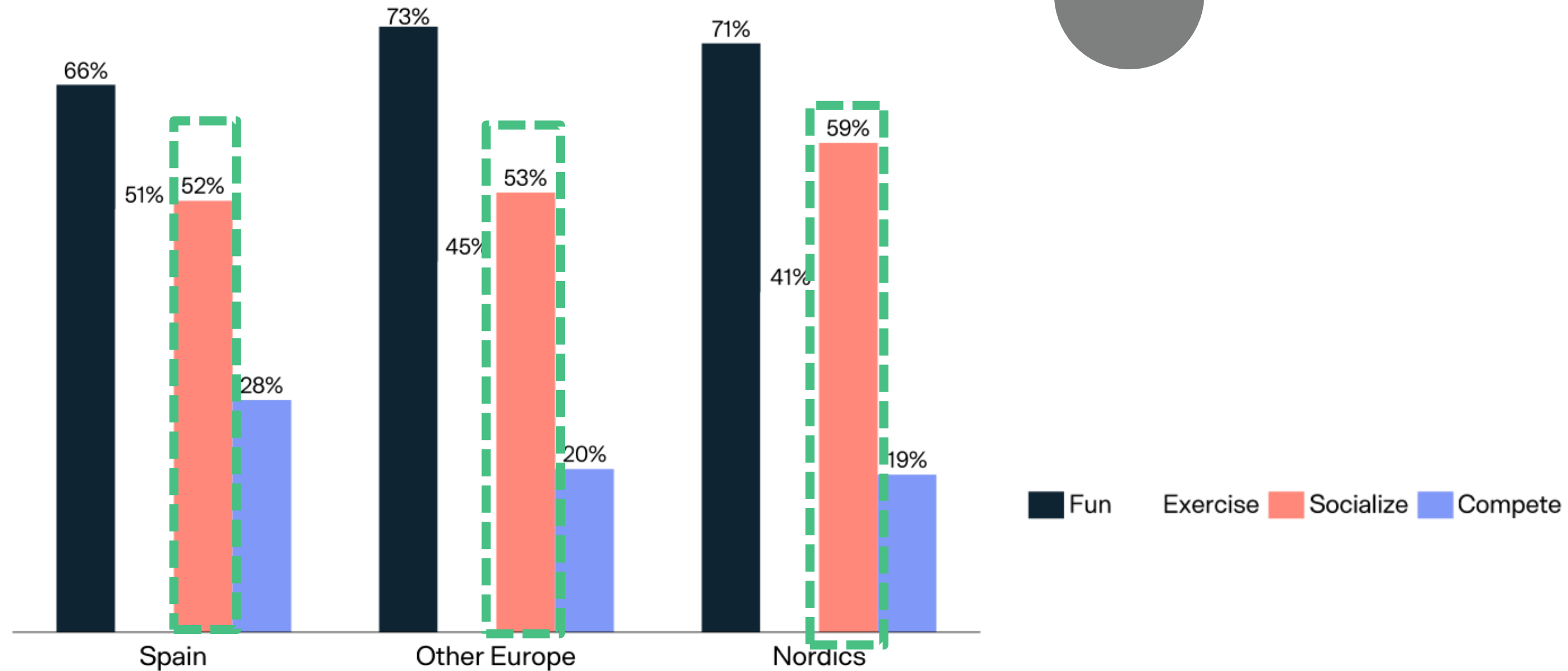
Why don't you play padel more?



Source: Playtomic Proprietary Survey
Global Padel Report by Playtomic, Powered by Deloitte

PLAYER BEHAVIOR AND DYNAMICS

Why did you start playing padel?

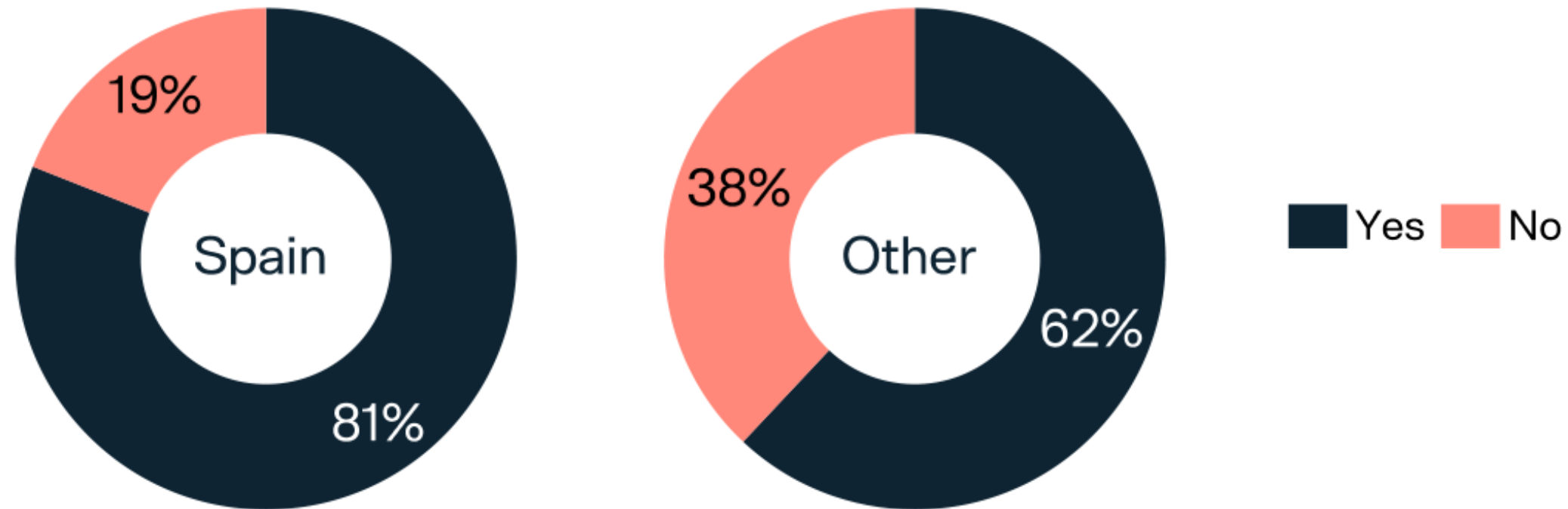


Source: Playtomic Proprietary Survey
Global Padel Report by Playtomic, Powered by Deloitte

PLAYER BEHAVIOR AND DYNAMICS

Playtomic Survey Insights

Do you plan more activities after playing padel?



Source: Playtomic Proprietary Survey
Global Padel Report by Playtomic, Powered by Deloitte

MARKET COURTS AND CLUBS ANALYSIS

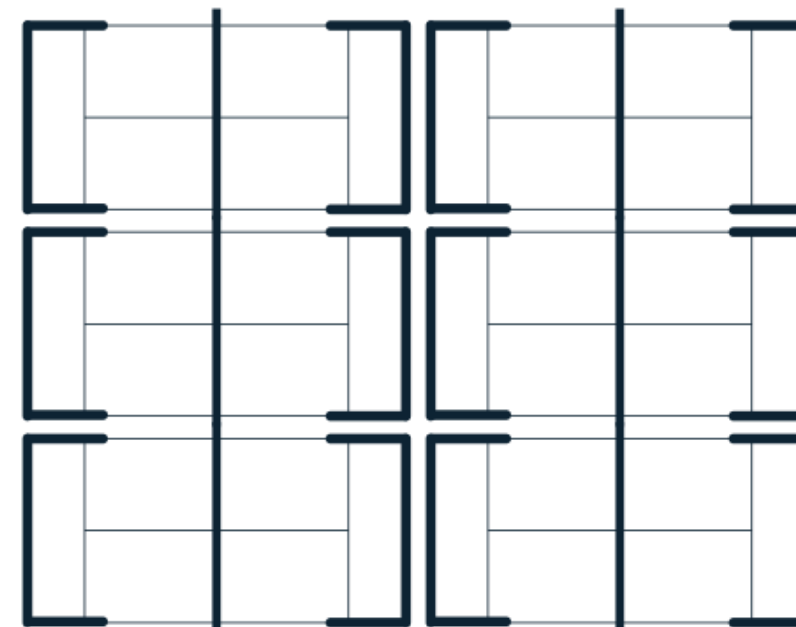
Evolution of padel courts and clubs in selected regions ⁽¹⁾

Courts



+8,200
+28%
During 2022

Clubs



+1,914
+24%
During 2022

200M€ invested to build new courts during 2022

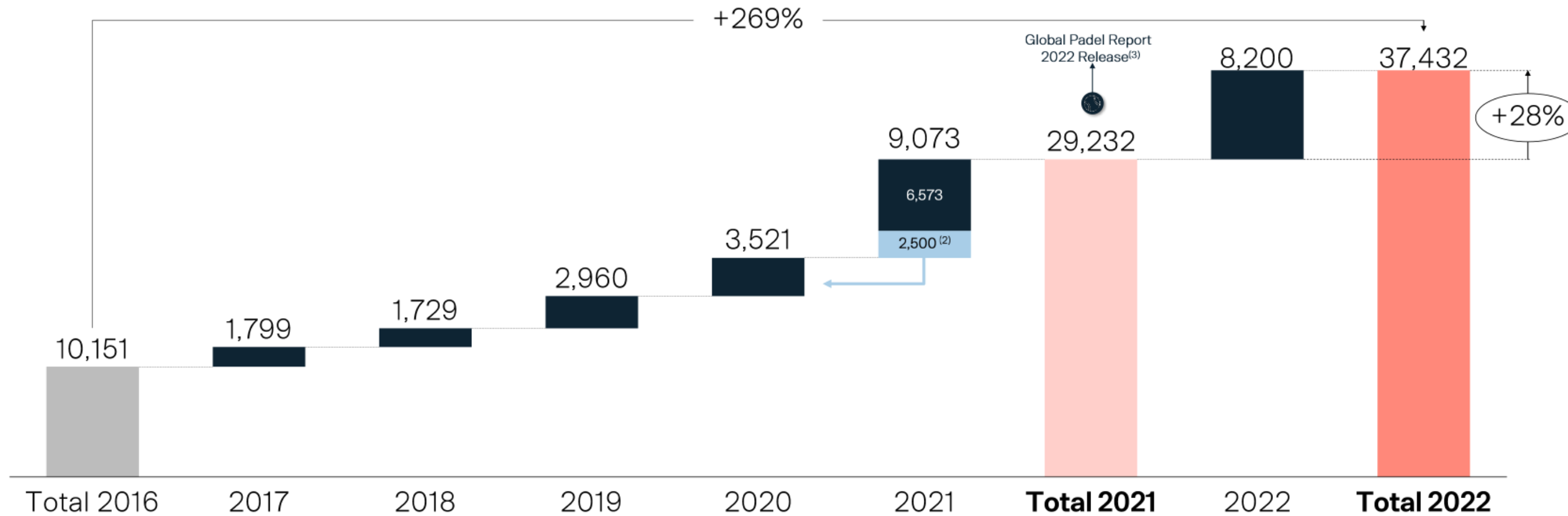
Notes: (1) Countries considered: Spain, Sweden, Italy, Belgium, Netherlands, Portugal, Denmark, Finland, Norway, Germany, France, UK, Austria, Switzerland, United States, Kuwait, UAE, Qatar, Bahrein, Saudi Arabia, Greece; LATAM has been excluded due to lack of reliable information

Source: Local Federations, Padel Lands, Playtomic, Monitor Deloitte analysis

Global Padel Report by Playtomic, Powered by Deloitte

BRIEF MARKET ANALYSIS AND UPDATE

Evolution of padel courts' growth (1)

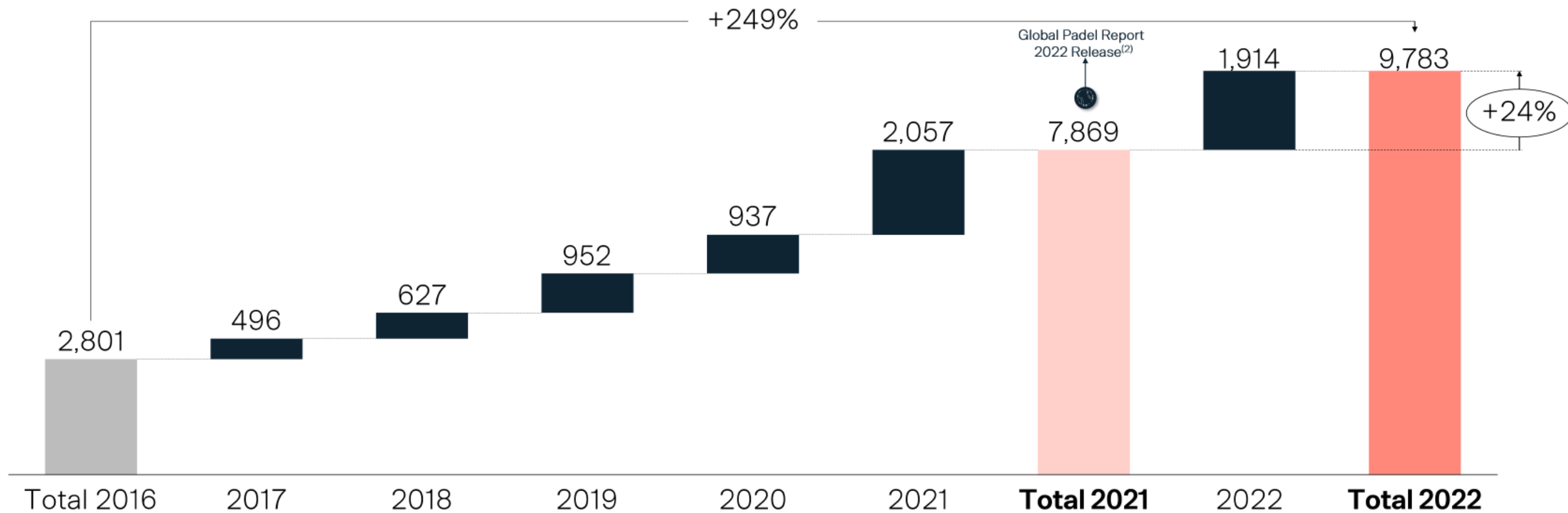


Padel courts have growth c.28% during 2022

Notes: (1) Countries considered: Spain, Sweden, Italy, Belgium, Netherlands, Portugal, Denmark, Finland, Norway, Germany, France, UK, Austria, Switzerland, United States, Kuwait, UAE, Qatar, Bahrain, Saudi Arabia, Greece; LATAM has been excluded due to lack of reliable information; (2) Around 2,500 courts built during 2021 were delayed projects from 2020 due to the pandemic restrictions. "Real" courts built during 2021 would have been c.6,500 (3) Figures may differ from previous report released on March 2022 due to inclusion of new countries and use of more reliable data sources
Source: Local Federations, Padel Lands, Playtomic, Monitor Deloitte analysis
Global Padel Report by Playtomic, Powered by Deloitte

BRIEF MARKET ANALYSIS AND UPDATE

Evolution of padel clubs growth (1)



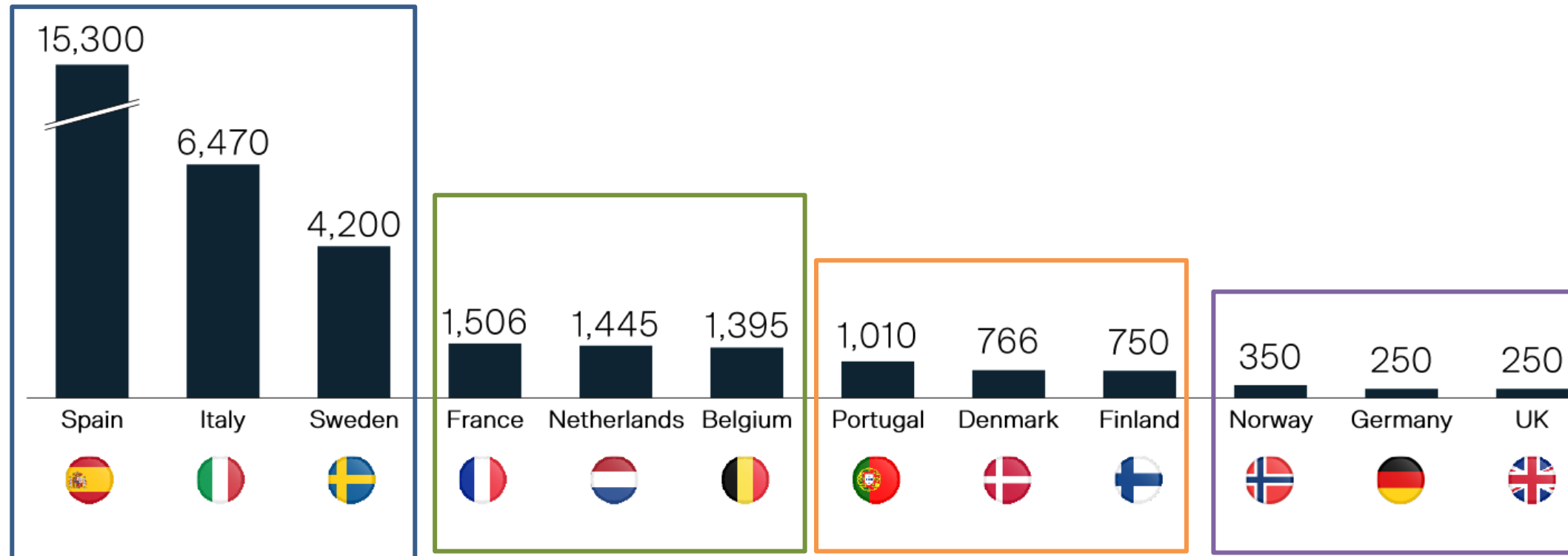
Notes: (1) Countries considered: Spain, Sweden, Italy, Belgium, Netherlands, Portugal, Denmark, Finland, Norway, Germany, France, UK, Austria, Switzerland, United States, Kuwait, UAE, Qatar, Bahrain, Saudi Arabia, Greece; LATAM has been excluded due to lack of reliable information; (2) Around 2,500 courts built during 2021 were delayed projects from 2020 due to the pandemic restrictions. "Real" courts built during 2021 would have been c.6,500 (3) Figures may differ from previous report released on March 2022 due to inclusion of new countries and use of more reliable data sources
Source: Local Federations. Padel Lands, Playtomic, Monitor Deloitte analysis
Global Padel Report by Playtomic, Powered by Deloitte

BRIEF MARKET ANALYSIS AND UPDATE

Distribution of padel courts in selected countries

# New Courts built 2022 ⁽¹⁾	1,300 +10%	1,800 +39%	1,300 ⁽²⁾ +37%	320 +27%	477 +49%	341 +32%	324 +47%	156 +26%	150 +25%	220 +122%	120 +92%	125 +100%
--	---------------	---------------	------------------------------	-------------	-------------	-------------	-------------	-------------	-------------	--------------	-------------	--------------

Total Courts as of Jan 2023



c.6,600 padel courts built in Europe during 2022

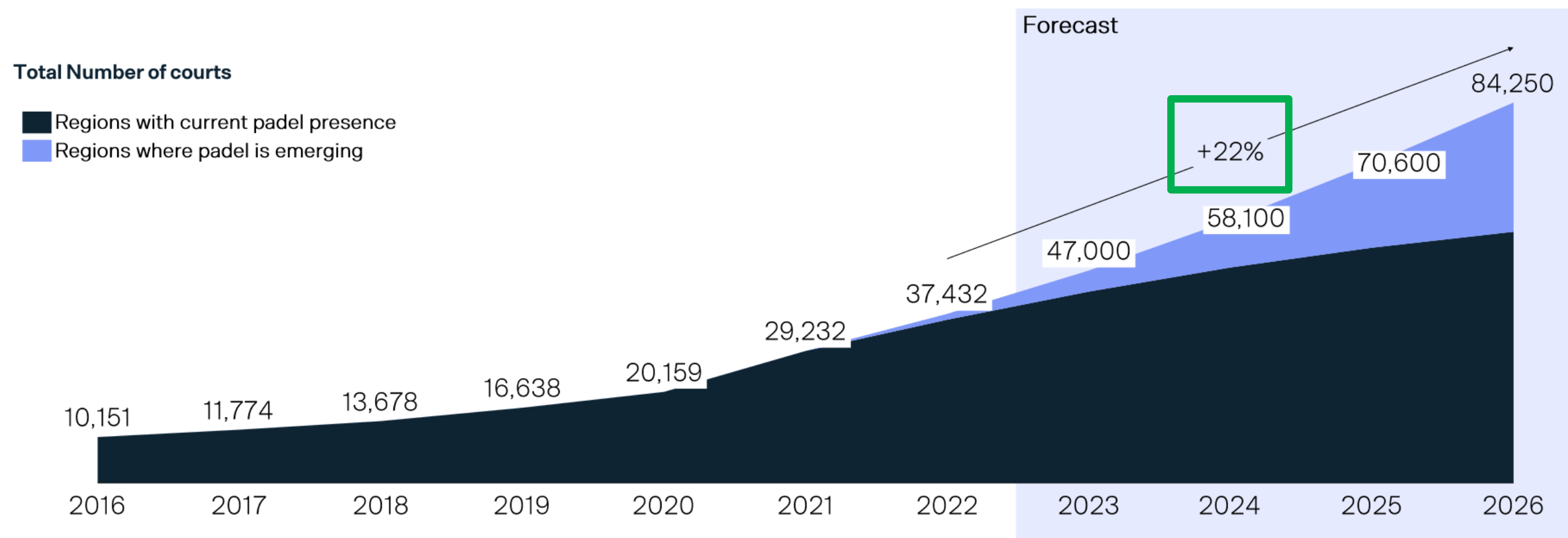
Notes: (1) Remaining 1,567 new courts built in 2022 are spread among other geographies: Middle East, North America, Asia Pacific, Africa and other European countries; (2) Despite 1,300 new courts built during 2022, around 600 have been dismantled

Source: Local Federations, Padel Lands, Playtomic, Monitor Deloitte analysis

Global Padel Report by Playtomic, Powered by Deloitte

BRIEF MARKET ANALYSIS AND UPDATE

Padel courts growth forecast for coming years



Padel courts are estimated to keep growing at a steady pace of **c.22% per year**, boosted by the **development of this sport in new regions**

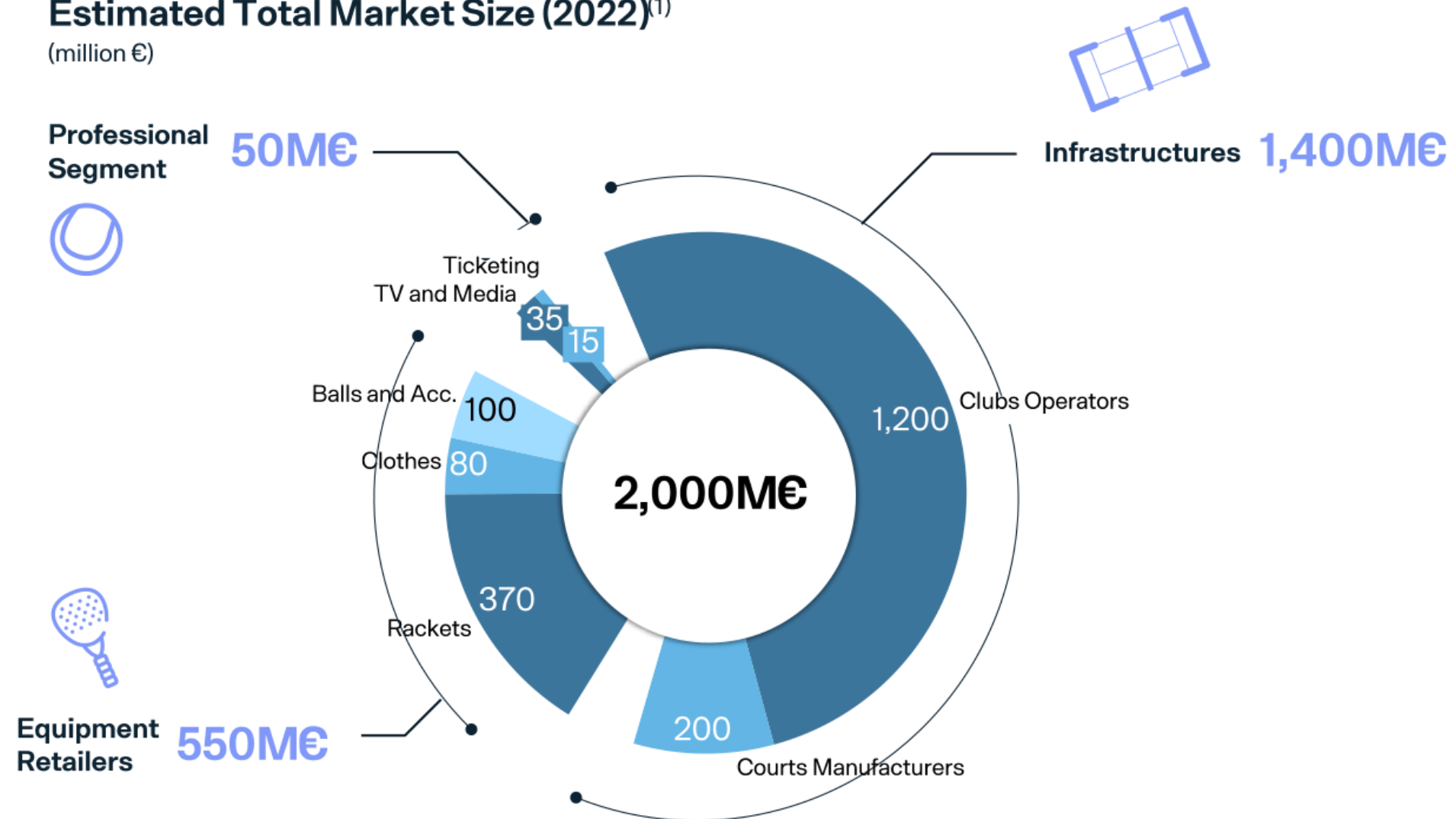
LATAM has been excluded due to lack of reliable information
Source: Local Federations, Padel Lands, Playtomic, Monitor Deloitte analysis
Global Padel Report by Playtomic, Powered by Deloitte

BRIEF MARKET ANALYSIS AND UPDATE

Sizing the global padel ecosystem

Estimated Total Market Size (2022)⁽¹⁾

(million €)



Notes: (1) Excluding Institutions and Add-on Services

Source: Monitor Deloitte analysis

Global Padel Report by Playtomic, Powered by Deloitte



UNE

NormalizaciónEspañola

Corporate
member



PADEL
WORLD
SUMMIT

Elaboration
Rule

UNE

NormalizaciónEspañola

courts



PADEL WORLD SUMMIT

MAY 20-26 2024
MÁLAGA (SPAIN)



Àlex Ponseti

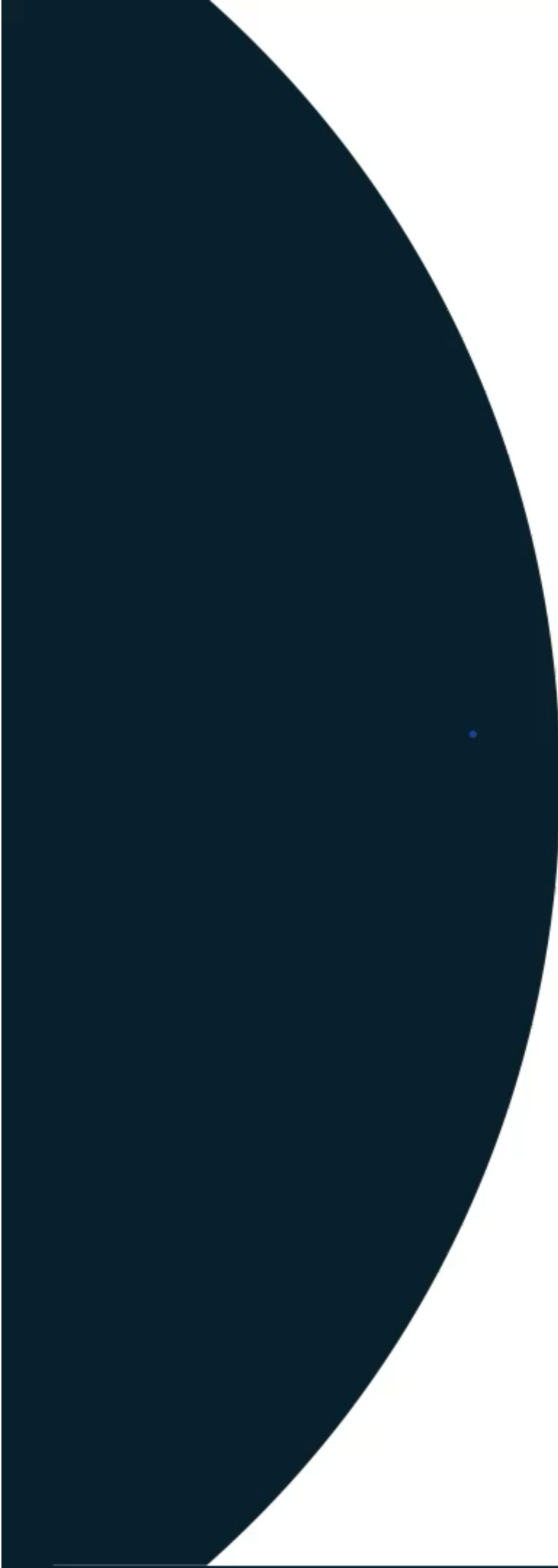
Managing Director

Munich, Wednesday 29th november 2023



www.padelsummit.com







**PADEL
WORLD
SUMMIT**

THE LARGEST PADEL NETWORK FOR PROFESSIONALS

The **Padel World Summit**
will be the central hub for
the world of Padel in Málaga
May 20-26, 2024



www.clusterpadel.com

THE PROGRAM OF THE PADEL WORLD SUMMIT



MAY 20-26, 2024
MALAGA (SPAIN)

During the **7 day Summit**, the attendees are able to choose **3 options to share their knowledge** and **generate network** opportunities and **business**.



PADEL WORLD SUMMIT



PADEL WORLD CONGRESS

The first padel congress for professionals

 May 21 and 22



PADEL EXPO B2B

The first padel Expo exclusively for professionals

 May 21, 22, and 23



INVESTOR FORUM

The first exclusive space focused to the world of investment in the padel sector

 May 21 and 22



LEISURE EVENTS

A week-long program of events and activities for a complete experience

 May 20 to 26



PADEL WORLD CONGRESS



MAY 20-26, 2024
MALAGA (SPAIN)

Málaga will host the first padel congress during **May 21 and 22**, becoming the central meeting point for this sport industry.

A conference to share the knowledge and discuss the present and future of padel.

More than 40 presentations over 2 days in 3 auditoriums will make this congress a world reference for padel.

Bilingual presentations with live Spanish to English translations.



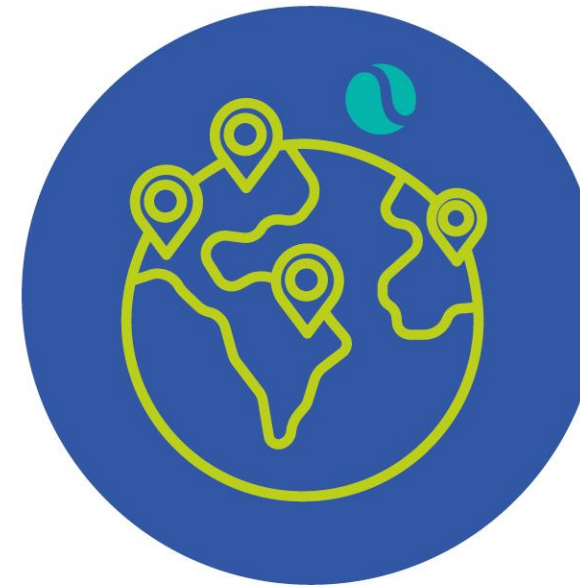
PADEL EXPO B2B

THE BUSINESS PADEL EXHIBITION



MAY 20-26, 2024
MALAGA (SPAIN)

Alongside the congress, the first exclusive **B2B Exhibition** will be organized on **May 21, 22, and 23**, where the biggest leaders will meet. This will be the best place to establish networks and opportunities.



International



+120
exhibitors

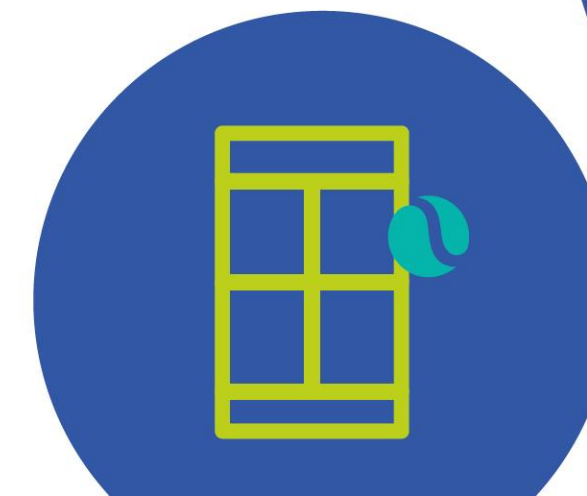
+10,000 m²
exhibition space



**Exhibition hall,
independent
to the congress**

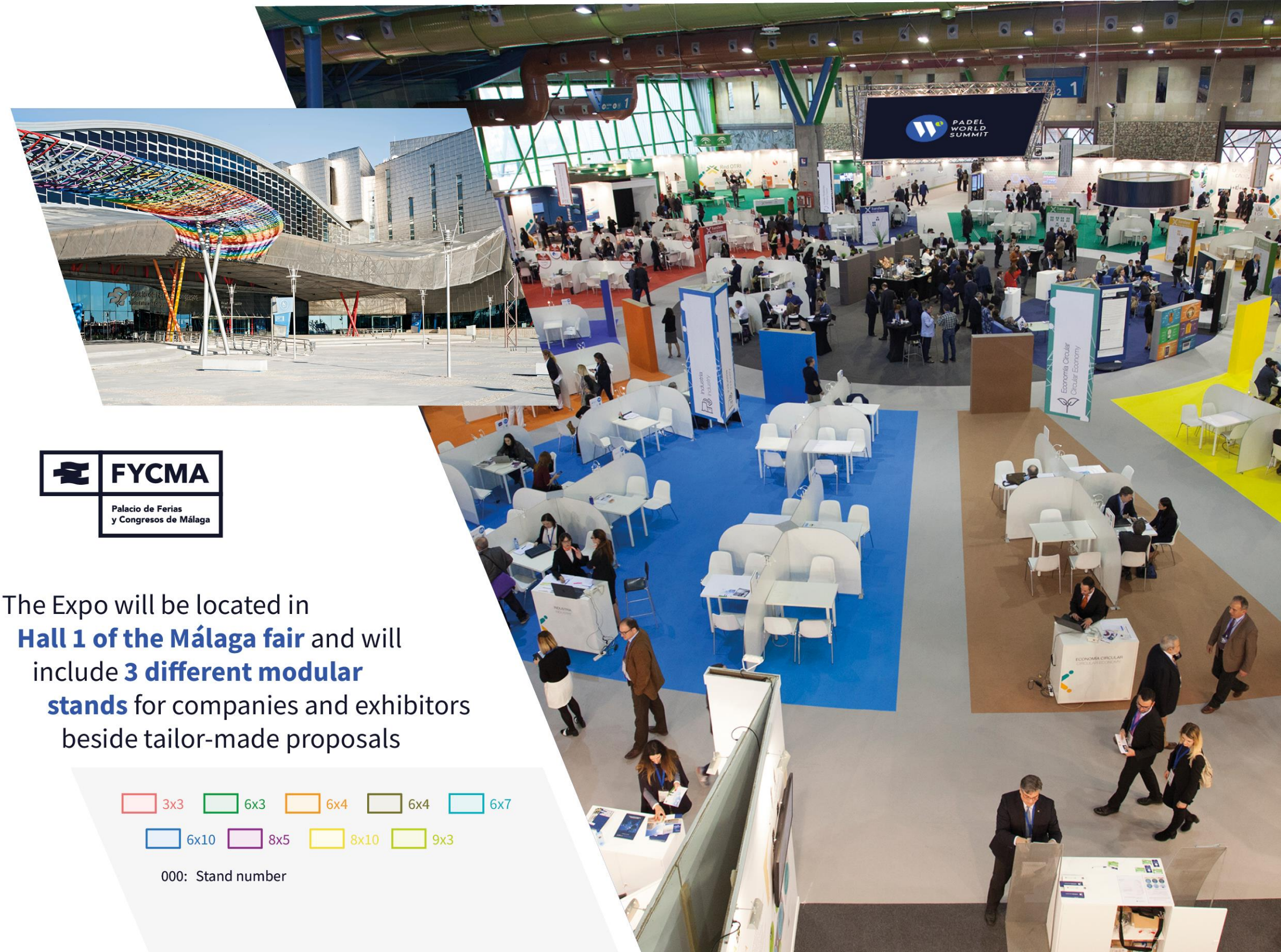


**Event APP
to schedule
meetings**



**Various activity area,
padel courts, VIP area,
and special
presentations**

PADEL EXPO B2B



The Expo will be located in
Hall 1 of the Málaga fair and will
include **3 different modular
stands** for companies and exhibitors
beside tailor-made proposals



000: Stand number

PADEL INVESTOR FORUM

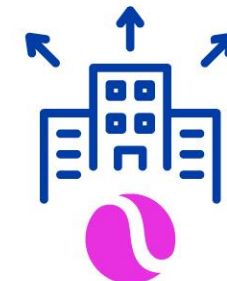
On the same dates as the World Congress and the B2B Expo, on May 21 and 22, the **first investment networking in the padel sector** will be organized, bringing together **investment fund and venture capital firms** with **entrepreneurs, businessmen** and **projects** that require financing and investment.



Investment, venture capital and banking firms



Entrepreneurs



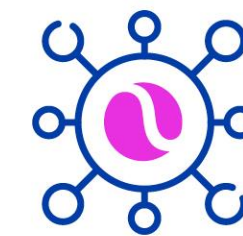
Growing companies



Innovative projects



Awards for the best projects



Networking area





LEISURE EVENTS



MAY 20-26, 2024
MALAGA (SPAIN)

During these **7 days**, the Padel World Summit will offer **activities, leisure moments, entertainment, and recognition events** for the best industry professionals.



Padel Awards

Awards for recognition within the sector



Gala dinner

With the biggest padel leaders



Welcome cocktail

In one of Malaga's emblematic location



Amateur padel tournament for attendees

In Málaga and surroundings



Big surprise event



PWS Bar

Chillout area with after work party



PRIMARY SUMMIT OBJECTIVES



MAY 20-26, 2024
MALAGA (SPAIN)



Create an international meeting point for industry professionals



Help standardizing the development of padel internationally



Coordinate industry standards



Share information and industry knowledge



Promote padel as a major investment opportunity



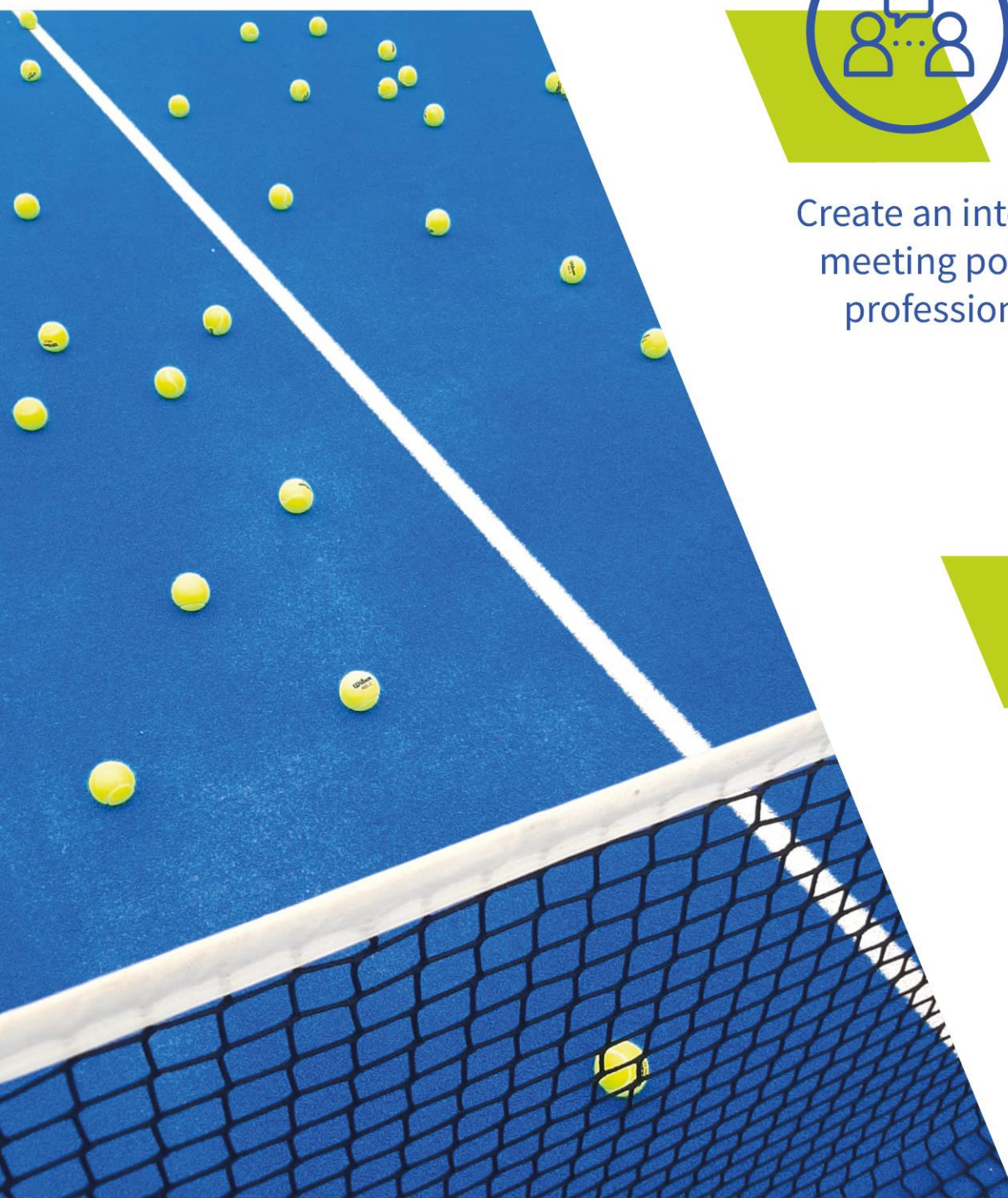
Establish padel as an Olympic sport



Unique business opportunities



Open collaboration both public and private



MEDIA IMPACT OF THE PADEL WORLD SUMMIT 2024



World media outreach plan

+50

Media specialists
in the padel industry

+500

General sports
media

+1,000

Journalists from specialist
and general media

 Official press conference
in Málaga

 International press
conferences and roadshows



Social media platforms #PWS2024



+30M
engagements



International campaign

 Branded content

 Summit newsletter

 Official website

 Mobile app

 Padel media partners

 Sports media partners

 Displays (national)

 Digital advertisements

 Ambassadors
and Influencers





TARGETED TO PADEL PROFESSIONALS

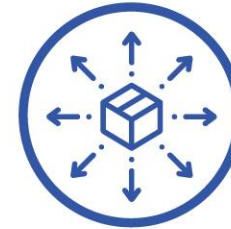


PADEL
WORLD
SUMMIT

MAY 20-26, 2024
MALAGA (SPAIN)



Manufacturing
Courts, padel rackets,
textiles, shoes



Distribution
Retail, exports,
specialists



Supplies
Raw materials,
components



Sales of goods
Sport equipment, health



Services
Event organizers,
club managers,
other professionals



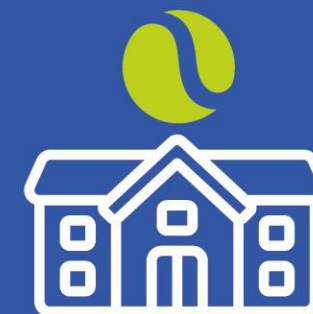
Technology
Player's software, ERP,
other software



Investments
Investment funds,
start-ups, grants



Official organizations
Country, city, and regional
government leisure/sports
authorities, Federations,
and Sport Associations



Clubs
Owners, directors,
head coaches, trainers



THE TEN SUMMIT TOPICS



PADEL
WORLD
SUMMIT

MAY 20-26, 2024
MALAGA (SPAIN)

1

News
and trends

2

Innovations
and technology

3

Opportunities
and investments

4

Regulations
and approvals

5

Management
and logistics

Sport and
tourism

6

Efficiency and
sustainability

7

Learning and
development

8

Health
and wellness

9

Competitions
and tournaments

10





THE FUTURE OF PADEL



PADEL
WORLD
SUMMIT

MAY 20-26, 2024
MALAGA (SPAIN)

Padel World Summit will put special emphasis on the major figures of the sector and business opportunities for professionals.

+450
padel associated
brands

+400
agencies and tour
operators specialized
in sports

+4K
assistants and
professionals

+8M€
in economic
impact on the
city of Málaga



Centre
Pompidou
Málaga



A GREAT OPPORTUNITY TO GENERATE NEW BUSINESS



MAY 20-26, 2024
MALAGA (SPAIN)

Padel World Summit will offer a **unique experience** to attendees with Málaga as the perfect host.

+4K professional attendees to develop business opportunities

Learn the **latest trends & numbers** in the sector

Enjoy the leisure and cuisine of **Málaga**

Socialize with colleagues from the sector in **leisure events**

Contact investors and entrepreneurs in the world of **padel**





PADEL
WORLD
SUMMIT

MAY 20-26 2024
MÁLAGA (SPAIN)

Organized by



bartor



Mi180

Contact

www.padelsummit.com

72 Hours of networking
to change the industry
of padel forever



v. 1.3 - 27/11/2023