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Global Custom Underground Swimming Pool Service Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Custom Underground Swimming Pool Service market size is predicted to grow from US$ 14302 million in 2025 to US$ 19584 million in 2032; it is expected to grow at a CAGR of 4.6% from 2026 to 2032.

Custom underground swimming pool service targets permanent, fixed swimming pools whose main structure is entirely or primarily embedded in the ground, building structure, or underground space. Based on the project site's geological and foundation conditions, architectural and landscape plans, structural loads, spatial dimensions, intended use, budget, and the owner's personalized requirements, a professional pool contractor provides comprehensive or major engineering services, including scheme design, engineering refinement, structural and hydraulic design, earthwork excavation, pool shell construction or installation, waterproofing, finishing, circulation filtration, disinfection, water temperature control, lighting, electrical and automatic control, commissioning, and handover.

Key Findings

Reinforced concrete structure and prefabricated steel structure define the two construction routes studied in Custom Underground Swimming Pool Service

Basic function type and full-smart high-configuration type capture the widening difference in equipment integration and operating convenience

Fitness training and leisure landscape represent two functional positions with different dimensions equipment and user-experience priorities

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High-end residential is an important application while tourism commercial leisure and senior wellness broaden customized project demand

The competitive scope covers 36 service providers across North America Europe Asia-Pacific and other regional markets

Market Trends

Custom Underground Swimming Pool Service is evolving from basin-centered construction toward integrated aquatic environments combining architecture, structural engineering, water treatment, energy management, automation and lifestyle functions. Custom reinforced-concrete construction continues to provide extensive flexibility for free-form geometry, infinity edges, submerged seating, integrated spas and other highly personalized configurations; Diffazur, for example, uses reinforced sprayed concrete to support customized shapes and project-specific finishes. At the equipment level, intelligent operation is becoming increasingly important. Blue Haven's current automation portfolio supports remote control of filtration, heating, cleaning, lighting, spa functions and water features, while Shasta Pools states that automation is now included more frequently as homeowners expect mobile control. Energy efficiency and wellness are developing in parallel: PHTA maintains a dedicated residential pool and spa energy-efficiency standard, while Origin Leisure identifies wellness facilities, efficient pumps, heat-pump solutions, movable floors and integrated technology among current premium pool-design directions. The long-term direction is therefore toward customized pools that combine structural personalization with lower operating complexity, higher energy efficiency and broader fitness, wellness and leisure functions.

Market Dynamics

Drivers

Demand for Custom Underground Swimming Pool Service is supported by customer preference for personalized outdoor and indoor living environments, continued investment in premium residential amenities, resort and leisure facilities, and growing interest in private fitness and wellness spaces. Customized projects enable clients to define pool dimensions, depth, shape, finishes, integrated spas, water features and surrounding architecture according to site and use requirements. Premier Pools & Spas demonstrates this demand through customized inground projects combining gunite construction with water features, spas, lighting and outdoor-living integration, while Origin Leisure tailors pool depth, length, heating and ventilation to different family,

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fitness and lifestyle uses. Regulatory and professional requirements also support specialized service capability: the 2025 ANSI/PHTA/ICC-5 standard addresses design, equipment, operation and installation for new and remodeled residential inground pools, increasing the importance of contractors capable of coordinating structural, hydraulic, safety and equipment requirements.

Restraints

The principal restraints are high initial investment, long project cycles, site-specific construction uncertainty and continued operating costs. Excavation conditions, groundwater, soil stability, restricted site access, structural complexity and permitting can materially affect the budget and schedule after initial design. Reinforced-concrete pools provide strong customization capability but involve multiple construction stages, while sophisticated equipment packages add pumps, filtration, heating, disinfection, sensors, lighting, automation and control components that increase initial cost and future maintenance requirements. Origin Leisure's completed projects illustrate how dimensions, building integration, finishes and optional facilities can cause substantial variation in customized pool project costs and construction periods. For commercial, tourism and healthcare-oriented pools, design and operation must additionally address water quality, circulation, safety and preventive maintenance; CDC's Model Aquatic Health Code covers aquatic-facility design, construction, operation and maintenance, underscoring the technical responsibilities associated with professional pool delivery.

Opportunities

Full-smart High-configuration Type represents an important value-upgrading opportunity as customers seek remote operation, automatic filtration scheduling, temperature management, lighting control, cleaning, water-feature coordination and integration with broader smart-home systems. Blue Haven already provides platforms that coordinate multiple pool and spa functions through mobile devices and voice-control environments, demonstrating the commercialization of connected pool management. Another opportunity lies in expanding Custom Underground Swimming Pool Service from a single recreational basin into a broader wellness system incorporating lap swimming, counter-current training, hydrotherapy, spas, saunas, steam facilities and flexible pool floors. Origin Leisure identifies wellness, energy-efficient equipment and movable floors as important premium design directions, supporting stronger integration between swimming, exercise and personal wellness. Prefabricated steel structures can provide a complementary opportunity where project requirements favor engineered assembly, repeatability and shorter on-site structural work, while reinforced concrete remains valuable for highly customized geometry. Retrofit and modernization of existing pools

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also create recurring demand for upgraded filtration, heating, automation, lighting, waterproofing and functional reconfiguration.

Challenges

The central challenge is coordinating structural durability, waterproofing, hydraulic performance, water quality, electrical safety, user safety and aesthetic customization throughout a project that is highly dependent on site conditions. Errors in excavation, structural detailing, pipe routing, drainage, waterproofing or equipment sizing can generate expensive corrective work after completion. Public-facing and institutional projects face additional requirements around circulation, disinfection, accessibility, operational records and preventive maintenance. CDC guidance emphasizes that aquatic-facility health and safety depend on design, construction, operation and maintenance as an integrated system, while PHTA's residential inground-pool standard similarly connects design, equipment, operation and installation. The increasing use of automation creates a further challenge because software, sensors and remote-control systems must remain reliable over a pool's long service life. Providers must therefore combine construction capability with mechanical and electrical coordination, commissioning, maintenance response and lifecycle equipment knowledge.

Value Chain Analysis

The upstream value chain of Custom Underground Swimming Pool Service includes structural and finishing materials, hydraulic and water-treatment equipment, electromechanical systems and professional engineering inputs. Principal materials include reinforcing steel, concrete or shotcrete materials, prefabricated structural steel components, waterproofing systems, tiles, mosaics, stone, plaster or specialty interior finishes, piping and fittings. Equipment inputs include circulation pumps, filters, valves, drains, skimmers, disinfection systems, heaters or heat pumps, lighting, cleaning equipment, sensors, automation controllers, covers, counter-current systems and water-feature components. Site surveys, soil conditions, structural calculations, architectural coordination, electrical design, hydraulic engineering and local permitting requirements also influence project design before construction begins.

Midstream value creation covers concept development, site evaluation, detailed engineering, excavation, structural construction or assembly, hydraulic installation, waterproofing, finishing, equipment integration, landscaping interfaces, testing, commissioning and customer handover. Full-smart projects add control-system programming, sensor configuration, remote-management setup and coordinated

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commissioning of pumps, heating, lighting, cleaning and water features. Full-service companies can further extend value into preventive maintenance, water management, repair, renovation and equipment upgrades; Whitewaters, for example, combines design and build capabilities with continuing maintenance for residential and commercial facilities. Downstream customers include high-end homeowners, resort and tourism operators, commercial leisure facilities, healthcare and senior-living projects and other customized properties. Industry profitability is therefore influenced not only by construction workload but also by project complexity, design capability, equipment content, customization depth and the share of recurring maintenance and renovation services.

Segment Insights

By construction process, Reinforced Concrete Structure is characterized by strong design freedom and adaptability to complex site conditions, making it particularly suitable for free-form pools, infinity edges, integrated spas, submerged platforms and highly customized residential or resort projects. Diffazur describes sprayed reinforced concrete as a monolithic construction route capable of accommodating varied shapes, dimensions and finishes, demonstrating the architectural flexibility of this segment. Prefabricated Steel Structure follows a different value proposition, with more components engineered or fabricated before site installation, making construction organization, dimensional control and assembly efficiency more important. Market opportunities for the two routes therefore depend on the balance among structural requirements, customization depth, construction schedule and local delivery capability.

By supporting-system configuration, Basic Function Type centers on the essential circulation, filtration, disinfection, lighting and temperature-control functions needed for normal swimming use. Full-smart High-configuration Type adds automation, connected control, advanced water treatment, high-efficiency equipment, integrated spa or water features and more sophisticated user interfaces. Smart controls can already manage filtration, heating, lighting, cleaning, spa jets and other functions from mobile or voice interfaces. By functional positioning, Fitness Training Type places greater emphasis on usable swimming length, lane geometry, counter-current systems, predictable depth and exercise functionality; Leisure Landscape Type gives greater weight to free-form architecture, infinity edges, submerged seating, water features, lighting and landscape integration. These dimensions create multiple configuration combinations rather than a single standardized service package.

Downstream Market Opportunities

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High-end Residential represents an important application for Custom Underground Swimming Pool Service because homeowners can integrate the pool with outdoor living, home architecture, fitness, spa and smart-home systems. Premier Pools & Spas and other customized builders increasingly combine inground pools with spas, waterfalls, fountains, lighting and outdoor-living features, demonstrating the expansion of the project boundary beyond the pool shell. Cultural & Tourism Resorts and Commercial Leisure projects require stronger visual identity, higher user capacity and more sophisticated water features, while maintenance, water quality and operating reliability become more important due to higher utilization. Healthcare & Senior Living applications offer a more specialized opportunity around low-impact exercise, hydrotherapy, rehabilitation and wellness, where pool dimensions, water temperature, access and safety must be designed around user needs. Other opportunities include private clubs, educational facilities and mixed-use developments requiring customized aquatic amenities.

Regional Insights

North America represents one of the most mature service clusters for customized inground pool construction, supported by a large specialist-builder network, established residential pool standards and substantial experience in gunite and shotcrete construction. The research scope includes Premier Pools & Spas, Blue Haven Pools & Spas, Anthony & Sylvan Pools, Cody Pools, Shasta Pools, California Pools, Mission Pools, Riverbend Sandler, Claffey Pools and Keith Zars Pools, among others. Premier Pools & Spas describes more than three decades of operations and extensive custom inground construction, while Blue Haven and Shasta show the increasing penetration of automation into residential pool configurations. North American opportunity is increasingly associated with renovation, equipment modernization, connected controls, energy efficiency and differentiated backyard-living environments.

Europe combines established custom concrete-pool expertise with premium indoor, residential and hospitality design. Piscines Desjoyaux operates an international in-ground pool network and supplies structural and filtration systems to numerous countries, while Diffazur emphasizes customized reinforced-concrete construction and Origin Leisure and Whitewaters focus on integrated design-and-build delivery for premium residential and commercial projects. Asia-Pacific and other regions contain a more diverse mix of local engineering contractors and customized pool specialists represented in the research scope by companies in Japan, Singapore, India, Australia, New Zealand, China and other markets. Regional opportunities depend strongly on high-end real estate development, resort investment, climate conditions, local construction

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practices, equipment availability and after-sales capability. In warmer markets, outdoor leisure pools and resort applications have stronger natural demand foundations, while dense urban markets create greater emphasis on compact engineering, indoor pools and integrated building systems.

Competitive Landscape Analysis

The Custom Underground Swimming Pool Service market is fragmented and strongly local-service-oriented, but the competitive structure includes several differentiated business models. Piscines Desjoyaux combines industrial production of structural and filtration systems with an international distribution network, supporting greater standardization and supply-chain integration; the company states that its structural and filtration systems are exported to more than 80 countries and has continued investing in vertical integration of pool components. Large North American specialist builders such as Premier Pools & Spas, Blue Haven Pools & Spas, Anthony & Sylvan Pools, Cody Pools, Shasta Pools, California Pools and Mission Pools compete through local project networks, custom design, construction experience and equipment integration, with Premier combining large-scale brand coverage with custom gunite construction and Blue Haven building differentiation around intelligent equipment packages. Diffazur Piscines has a more technology-led positioning around customized reinforced sprayed-concrete construction, while Origin Leisure Ltd and Whitewaters Ltd emphasize integrated premium design, construction and lifecycle service. The remaining regional providers in Europe, Asia-Pacific, the Middle East and China extend competition through local construction knowledge, labor and procurement networks, climate adaptation and after-sales response. Future differentiation is expected to focus increasingly on structural engineering, customization capability, smart control, energy-efficient hydraulic and heating systems, project management, commissioning quality, renovation capability and long-term maintenance rather than construction price alone.

Report Scope

LPI (LP Information)' newest research report, the “Custom Underground Swimming Pool Service Industry Forecast” looks at past sales and reviews total world Custom Underground Swimming Pool Service sales in 2025, providing a comprehensive analysis by region and market sector of projected Custom Underground Swimming Pool Service sales for 2026 through 2032. With Custom Underground Swimming Pool Service sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Custom Underground Swimming Pool Service industry.

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This Insight Report provides a comprehensive analysis of the global Custom Underground Swimming Pool Service landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Custom Underground Swimming Pool Service portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Custom Underground Swimming Pool Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Custom Underground Swimming Pool Service and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Custom Underground Swimming Pool Service.

This report presents a comprehensive overview, market shares, and growth opportunities of Custom Underground Swimming Pool Service market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Fitness Training

Leisure and Landscape

Segmentation by Supporting System Configuration:

Basic Functional Type

Fully Intelligent High-Configuration Type

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Segmentation by Construction Technology:

Reinforced Concrete Structure

Prefabricated Steel Structure

Segmentation by Application:

High-end Residential

Cultural Tourism Resort

Business Leisure

Health and Wellness

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

- Piscines Desjoyaux S.A.

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Premier Pools & Spas

Blue Haven Pools & Spas

Anthony & Sylvan Pools

Cody Pools

Shasta Pools

California Pools

Mission Pools

Diffazur Piscines

Riverbend Sandler

Claffey Pools

Keith Zars Pools

Origin Leisure Ltd

Whitewaters Ltd

Tanby Pools Ltd

XL Pools Ltd

Nikkon Co., Ltd.

Brain Co., Ltd.

Prosper Design Co., Ltd.

Waterland Services Pte Ltd

Swimwell Pools India Pvt. Ltd.

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Aquaworld Greentech Private Limited

Master Pools India

GSB Group

Pelagim

Neptune Swimming Pools

Perth Concrete Pools

Serenity Pools

Auckland Inground Pools

Pacific Pools

SEVENSEAS CO., LTD.

ALL ABOUT

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Dongguan Qingma Shuihuanjing Gongcheng Youxian Gongsi

Sichuan Yueshui Huanbao Gongcheng Youxian Gongsi

Beijing Haile Mingshuai Keji Fazhan Youxian Zeren Gongsi

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