

COVER STORY

136–1: Pro Pickleball Enters the Era of Two Stars

As the 2025–26 season closes, Anna Leigh Waters and Ben Johns have ruled the PPA Tour with near-perfect records — while the professional map stretches rapidly toward Spain and Asia.

In the season just ended, Johns/Tardio (men's doubles) and Waters/Bright (women's doubles) each finished 45–0 with nine golds. As a mixed pair, Waters and Johns went a combined 136–1 across nine events, their lone loss coming to Bright/Patriquin at the Mesa Cup. At the San Clemente Finals they swept every doubles division.

"Waters signed with Franklin — reported as pro pickleball's first ~\$10 million deal — and joined Nike. Court dominance is being converted into commercial value at speed."

At the league level, total player compensation across the UPA system now runs about **\$33 million** a year. The Jan 18, 2026 PPA Masters on CBS became the most-watched pickleball broadcast in history, averaging **791,000** viewers with a peak of **1,047,000**. MLP enters its single-league, 20-team era with a 12-team, three-week playoff ending in New York; the APP opened in Seattle, doubled down on senior divisions, and planted its Asia headquarters in Malaysia.

THE THREE PRO CIRCUITS · 2026



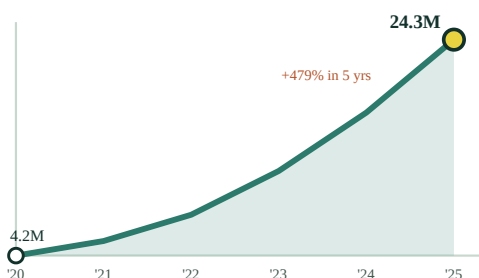
Fig. 1 · The pro landscape: PPA and MLP under the UPA umbrella, plus the independent APP — three parallel circuits internationalizing at once.

DATA DESK

Five-Fold in Five Years: 24.3 Million Americans Play

SFIA's 2026 Single Sport Report confirms pickleball as America's fastest-growing sport for yet another year — and the bigger signal is a player base getting younger and more balanced.

US PARTICIPANTS (MILLIONS) 2020–2025



34.8

average age
(~41 in 2020)

7.5M

core players
8+ sessions/yr

2032

Brisbane Olympic goal
IOC process begun

Fig. 2 · Participation grew from 4.2M (2020) to 24.3M (2025) per SFIA. A broader APP/YouGov survey counts 48.3M US adults in the past 12 months — a different methodology, not interchangeable.

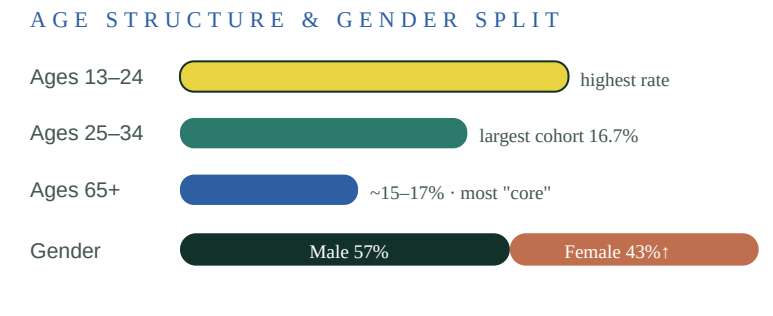


Fig. 3 · The "retirement sport" label is history: ages 13–24 lead in participation rate, 70%+ of players are 18–44, and the female share keeps climbing from 38.6% in 2020 — new players trend toward parity.

GEAR LAB

Year One of Foam: A Revolution Inside the Paddle

In March 2026, full-foam cores overtook long-dominant polypropylene honeycomb in new USAP approvals — Gen 4 has officially begun. Meanwhile, a patent war and a dual-certification regime are redrawing the competitive map.



- JOOLA** Pro V arrives with the KineticFrame flex structure; in April it filed an ITC patent case against **11 brands** — Paddletek/ProXR settled for royalties; nine defendants remain.
- SELKIRK** Project Boomstik (~\$333): BoomCore foam + EVA power ring, MOI perimeter tuning, and an InfiniGrit face claiming 3× spin durability.
- FRANKLIN** Signed Waters, built her C45 Aurelius signature paddle, and took US Open title sponsorship — a one-year brand leap.
- CERTIFICATION** USAP (PBCoR ≤ 0.43) and UPA-A (PEF + ~2,100 RPM spin cap) run in parallel; UPA-A is now mandatory for pro UPA events while amateurs stay on USAP lists.

Market size: ~\$2.3B US hard goods + apparel; paddles are roughly half to 60% of hard-goods spend; 200+ USAP-approved brands; the top five hold ~47% of the global paddle market.

INDUSTRY

The \$3 Billion Indoor Facility Race

Over 1,200 indoor facilities opened in two years; franchise chains are sprinting overseas to Asia. But overheating signals are just as clear — smart money now reads the FDD, not the press release.

LEADING CHAINS · AT A GLANCE

Pickleball Kingdom

400+ franchises awarded · India first abroad

The Picklr

450+ licenses · ~60 open · JP/AU/NZ/C

Life Time

600+ courts → 1,000 target

Chicken N Pickle

eatertainment · 13+

Fig. 5 · Note: "awarded/licensed" counts are commitments, not open doors. The Picklr's PR once claimed a \$1.2M top-club AUV; its FDD discloses \$601K — always underwrite off the FDD.

The US Facility Base

51,000+ courts · **16,000+** venues (USAP's census counts up to 82,613 courts at 18,258 locations, adding ~14,155 in one year — about 39 per day). Outdoor still holds 62%, but indoor is growing fastest; Arizona, Texas and Utah are adding courts at 40%+ a year.

Risk Watch

Saturated metros already show multiple big facilities fighting over one membership pool. Unit economics (~\$120–150/mo dues, 500–700 active members, \$1.25–2.1M build cost) are acutely sensitive to siting density.

OLYMPIC WATCH

The Road to Brisbane: Pickleball's Olympic Bid Is on the Clock

After years of dual-track global governance, unification is imminent — and the IOC recognition application has been filed. Once Olympic expectations take hold, resource flows in the US, China, and worldwide will be fundamentally rewritten.

The dual track. The International Pickleball Federation (IPF, formerly the IFP founded in 2010) counts roughly 78–80 member countries and plans liaison offices in Mumbai, **Shenzhen**, and Lausanne. The Global Pickleball Federation (GPF), launched in 2023 with USA Pickleball at the helm, has 67 member countries across four continental federations (Americas, Asia, Africa, Oceania), claims to represent nearly 95% of registered players worldwide, and has named DUPR its official global rating system.

The breakthrough. In June 2025, the GPF formally entered the IOC recognition process in Lausanne. A joint GPF–UWPF task force is now driving toward unification, anticipated in **July 2026** — this month. A single international governing body is the IOC's hard prerequisite; the day unification lands, the bid accelerates in earnest. In June 2026, two-time US Olympic badminton player Erika Von Heiland Strader was elected GPF president.

"What it means for US–China markets: once an Olympic cycle begins, national Olympic committees and sports ministries formally enter the arena — China's elite youth-training system activates, and demand for junior programs, coach certification, and standardized venues surges. Until national-team systems solidify, this is the prime window for people-to-people exchange and coaching exports."

ROAD TO THE GAMES · TIMELINE

- 2010–2023 · Two tracks form**
IFP reorganizes as IPF; USAP launches the GPF
- Jun 2025 · Filed in Lausanne**
GPF formally begins the IOC recognition process
- Jul 2026 · Unification expected**
GPF–UWPF joint task force drives the merger
- 2032 · Brisbane Games**
Target · IOC tests: anti-doping, youth appeal, media value

Note: the IPF also plans a Shenzhen liaison office — China is on both federations' maps

Fig. 6 · A single governing body is the IOC's prerequisite; the unification date and the 2032 Brisbane window are the industry's most consequential variables for the next six years.

ISCEA COLUMN

A Letter Across the Pacific: The Window Is Opening

The most exciting thread running through this research is how often "Asia" appears. PPA Asia's play-alongside-the-pros amateur brackets span China, Japan, Singapore, Vietnam, Malaysia and Hong Kong; the APP has planted its Asia HQ in Malaysia with a stop in Chongqing; The Picklr and Pickleball Kingdom are betting on Japan/Oceania and India respectively. Pro circuits, gear brands, and facility capital are converging on the same waters at the same time.

For people-to-people US–China sports exchange, this means three things: delegations now have ready-made competition vehicles; youth (13–24, the top participation cohort) and women (43% and rising) are the most promising groups to organize; and coach certification plus membership-based programming is the most natural bridge between club ecosystems on both shores.

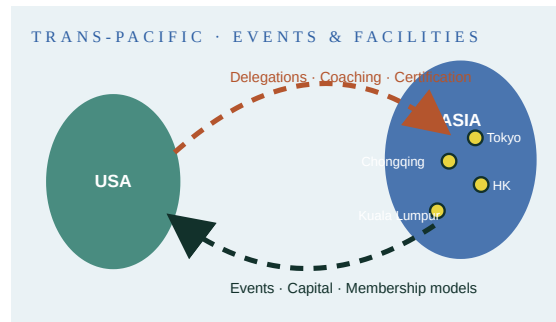


Fig. 7 · A two-way flow: US coaching systems and exchange delegations outbound, Asian event venues and growth markets inbound — ISCEA's four pillars (competition, coaching, cultural diplomacy, media & brand) sit exactly in between.



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Sources: SFIA 2026 Single Sport Report; official PPA/MLP/APP releases; USAP approved-paddle list; brand and chain FDDs and announcements. Olympic-bid details per official IPF/GPF releases. Participation figures exist under two methodologies (SFIA vs APP/YouGov); franchise data per FDD disclosures; select prize figures come from secondary sources and are flagged in the text.