



The 64th Annual Meeting of the European Association for Animal Production
August 26th-30th 2013, Nantes, France



Session 18:

**The new equine economy:
growth in new sectors and
activities in the 21st Century**

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The 'New Equine Economy' in the 21st Century



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1) The development and transformation of the European horse industry



The evolution and growth of the European horse industry

❑ The evolution of horses in human history:

The use of horse power (agriculture, transportation, military)

The use of horses for recreation, leisure, sport (+ racing, meat, work)

❑ The global growth of the horse industry:

Horses in Europe: at least 6 million

Horse riders in Europe: at least 6,2 million

} Growth of
7% a year

International events: have more than tripled over the last 10 years

❑ Particular characteristics of the horse industry:

Many amateurs

A problem of low profitability

Intersection of the agricultural, touristic and sport/leisure sectors

Sources: EU Equus, 2001; European horse network, 2007; Vik & Farstad 2012





The recent development of new kinds of activities

❑ New uses of horses:

Leisure riding

Tourism riding

Ethological riding

Therapy

Social rehabilitation

❑ New objectives for practitioners:

Stress reduction

Human-horse relations

Pleasure, comfort

Independence, freedom





The impact of the horse industry

Economic significance:

400 000 full time jobs equivalent (estimated)

Environmental contribution:

Horse grazing and feed production: at least 6 million ha
Complementarity with cattle or sheep

Rural dynamism:

Farm diversification, horse use in modern agriculture and forestry, horse feed production...

Horse related revenues = 4% of the total agricultural revenues

Land occupation and management

Social importance:

Horse riding, riding for the disabled, creation of new social links

Sources : EU Equus, 2001, European horse network, 2007





2) New fields of research about the horse industry



The rise of new questions

What is the new consumer demand?

New kinds of activities mean new consumer demand for equestrian services

What kind of horses are utilized?

New kinds of activities mean there are different needs for different horse qualities/characteristics

What is horse welfare?

New kinds of activities influence our understanding of the status of horses and change how we must view equine welfare

How to integrate horses in land management and physical planning?

New kinds of activities mean new patterns of land use and new challenges to integrate horses in the Common Agricultural Policy



The recent rise of interest and research devoted to horses

A lack of information:

- Little is known about the horse industry and its development
 - Few studies
- Low quality or lack of statistics



An increasing interest:

Increase of research devoted to socio-economic aspects of the horse industry





3) What is New Equine Economy?





A first answer through the creation of the Horse Commission Working Group in Socio-Economy

Creation during the 2010 EAAP conference

Goals: to share ideas and experience, to think about topics of interest for research and development, to build common projects...



Today : 59 members from 19 countries

Brazil: 2	Germany: 2	Lithuania: 1	Spain: 1
Canada: 2	Greece: 1	Netherland: 1	Sweden: 3
England: 5	Iceland: 3	Norway: 3	Switzerland: 1
Finland: 10	Ireland: 3	Poland: 1	USA: 3
France: 15	Italy: 1	Portugal: 1	





A second answer to the question will be developed through this session at the EAAP 2013 annual conference:

"The new equine economy: growth in new sectors and activities in the 21st Century"



Session program

Jez et al: **The French horse industry in 2030: scenarios to inform decision-making** (France)

Pussinen et al: **How horse business professionals can adapt to the new consumer demand?** (Finland)

Chevalier et al: **Equine business: the spectacularly growth of a new equine economy in France** (France)

Lindberg et al: **Assessing Economic Impact of Equine Activities in Norway and Sweden Using Input-Output Modelling** (Sweden)

Brigden et al: **Effects of the 2008 recession on aspects on the UK horse industry** (UK)

Saastamoinen: **Promoting slaughtering of horses and consumption of horse meat** (Finland)

Coleman et al: **The 2012 Kentucky Equine Survey** (US)

Wu: **A Study on Equestrian Tourists Motivation and Involvement** (UK)

Bigot et al: **The horse impact on farm sustainability in different French grasslands regions** (France)



Posters

- Dornier and al: **The REFERences network, an actor in the economic knowledge of the French horse industry** (FR)
- Farman and Cordilhac: **JOBS in the French equine sector** (FR)
- Mustonen and Thuneberg: **Equine entrepreneur's well-being** (Finland)
- Zaitsev and al: **Monitoring of horse breeding of the Russian Federation** (Russia)
- Corbally and al: **Trends in the Economical and Socio-economical Contribution of the Sport Horse Industry to the Economy in Ireland** (Ireland)
- Vial and al: **Economic impact and social utility of equestrian events, examples from France** (FR)
- Surry and al: **Price determinants for horse boarding in Norway and Sweden** (Sweden)
- Alvarez and al: **Current acceptability of horse meat through consumer surveys** (Spain)
- Mckeown: **The acceptance of complementary therapies in equine communities and what therapists need to know** (UK)
- Reis and al: **Initial approach to define the potential market of recent biotechnologies: the case of cloning** (FR)
- Martlew and al: **A comparative study into the impact of social media in the equine and agriculture industries** (UK)



Where do we go from here?

- **There is need for multi-national research collaboration**
 - **COST Action on Human Horse Rel'ns**
 - **Horses and protected areas: agents of sustainable touristic development?**
 - **Inno-Equine (recently completed study of Baltic Area equine sector)**
 - **Others?**
- **Integrate disciplines, locations, activities**



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