The French Horse Industry in 2030

Scenarios to inform decision-making
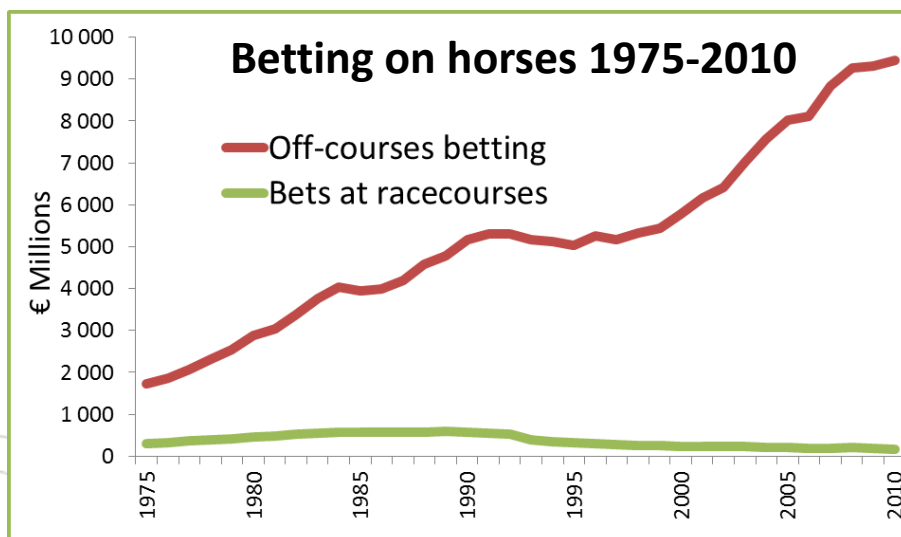
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A growing interest in pleasure riding and betting on horses

Horse-riding membership 1980-2010

+ 374% in 26 years,
+ 58% over the past
10 years
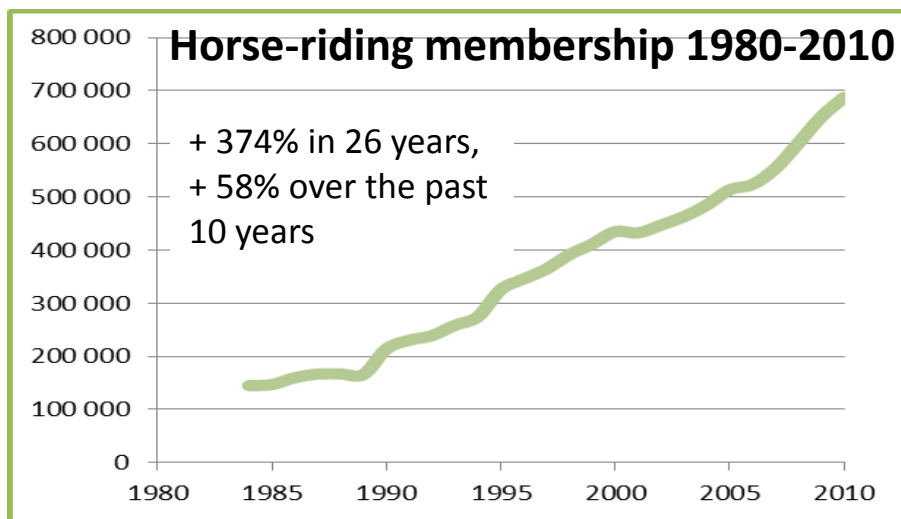
- FFE members >700,000 (80% ♀)
- Independent riders > 700,000

=> A total of 1,5 Million riders

Betting on horses 1975-2010

— Off-courses betting
— Bets at racecourses

€ Millions

- €27 million /day
- 50 horse races/day

=> Annual betting > €10 billion

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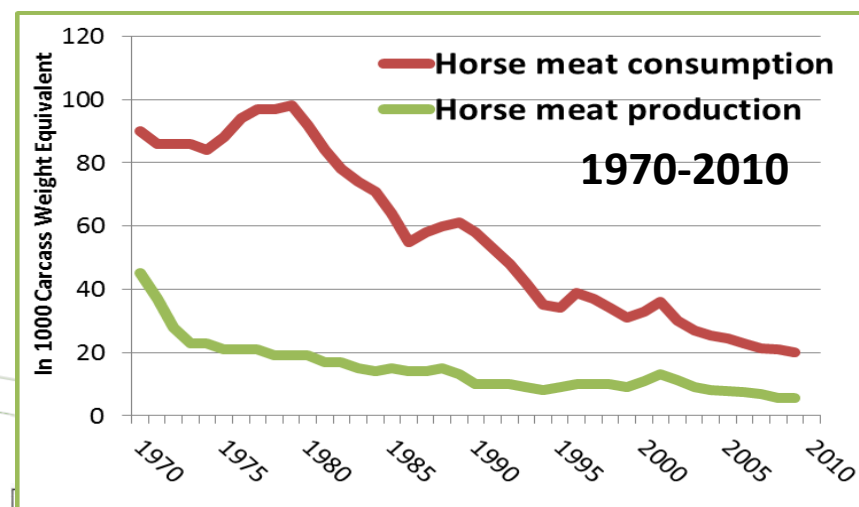
The French Horse Industry: Major Trends (2)

The horse population has been expanding again since 1995

Horse population 1800-2010
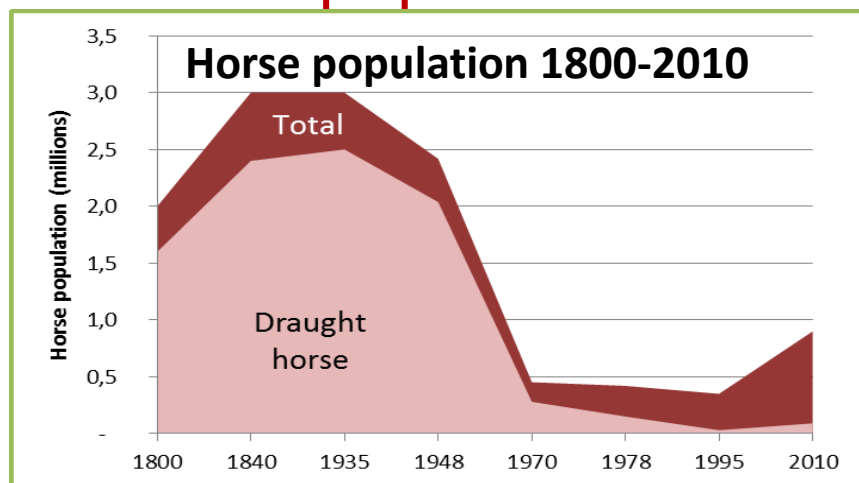
- 1 million horses on 1 M. ac. of pasture lands

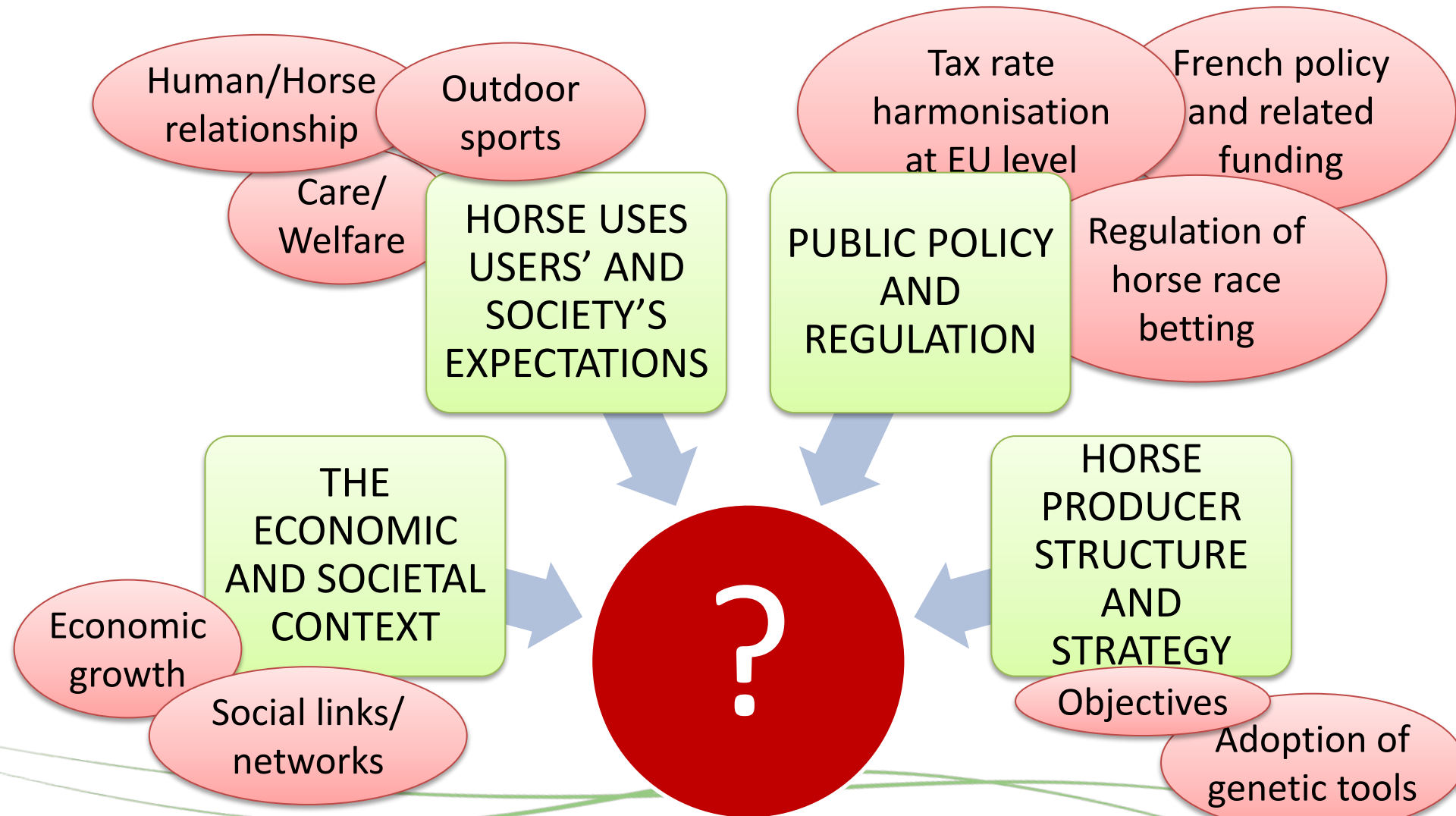- Important economic and environmental role of horses

... but meat production and consumption has been declining

1970-2010

- Decline of horse slaughtering
- Consumption 300g/cap/year (less than 1/5 households eat horse meat)

=> Decline of horse meat industry

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The French Horse Industry: Main Uncertainties

Human/Horse relationship

Outdoor sports

Care/ Welfare

HORSE USES USERS' AND SOCIETY'S EXPECTATIONS

Tax rate harmonisation at EU level

French policy and related funding

PUBLIC POLICY AND REGULATION

Regulation of horse race betting

THE ECONOMIC AND SOCIETAL CONTEXT

Economic growth

Social links/ networks

?

HORSE PRODUCER STRUCTURE AND STRATEGY

Objectives

Adoption of genetic tools

The French Horse Industry in 2030

=> Scenario Building to Explore Possible Futures

In order to:

⇨   steer public policy and research

⇨   define strategies to guide and support the industry

Method

▪ Scenario building using a foresight method called « morphological analysis »
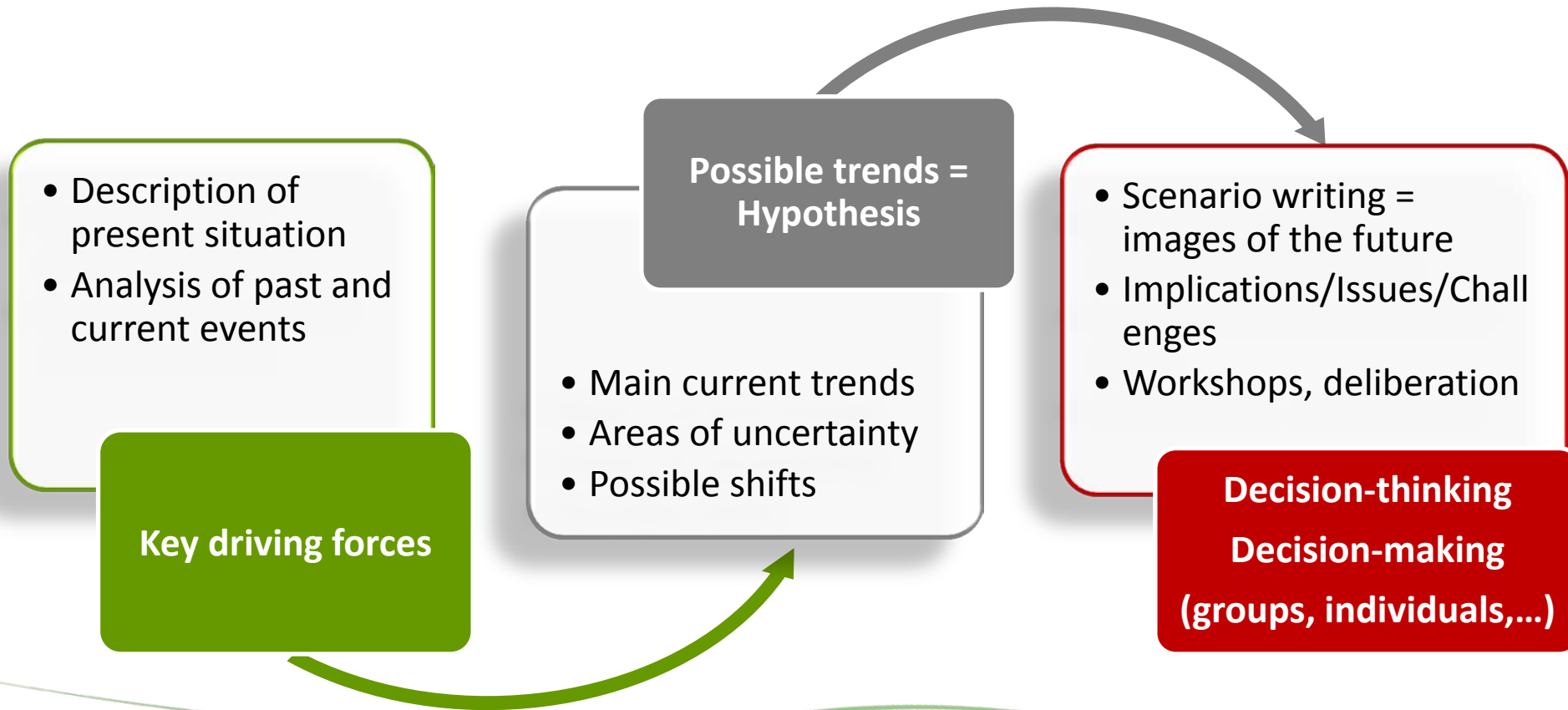
Frame of reference

▪ **Domain:** the various activities and uses of horses

▪ **Time horizon:** 20 years => 2030

▪ **Territorial level:** France

Resources: a collective and interdisciplinary effort

▪ **INRA-IFCE Steering Committee and Project team**

▪ **A panel composed of 16 experts**

▪ **Targeted interviews with 62 industry stakeholders**

▪ **Regional workshops to illustrate diversity** (42 participants in 3 regions)

The Foresight Approach

An exploratory approach designed to bring clarity to current action in light of possible futures

- Description of present situation
- Analysis of past and current events

Key driving forces

Possible trends = Hypothesis

- Main current trends
- Areas of uncertainty
- Possible shifts

- Scenario writing = images of the future
- Implications/Issues/Challenges
- Workshops, deliberation

Decision-thinking

Decision-making

(groups, individuals,…)

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From Hypotheses to Scenarios

DRIVERS OF CHANGE	HYPOTHESIS TO 2030			
The economic and societal context	Slow recovery after economic crisis. Improved purchasing power	Persistence of the economic crisis	Priority to quality of life and solidarity (Any economic context)	Economic context favouring leisure activities+ strong concern for animal welfare
Users' and society's expectations Horse uses	Strong desire for contact with horses and gambling The horse is a medium for recreation	Horses as a preserve of the elite, more affordable recreational activities for the middle classes Horses are a social marker	Desire for contact with nature, harmony, personal development, social ties. The horse as a source of individual and collective well-being	Strong concerns for animal protection -à Above all, a sentimental relationship
Public policy and regulation	A financially withdrawn regulatory State	Decentralised government action supporting initiatives encouraging the use of horses	The State disengaged from the horse industry	
Horse producer structure and strategy	The dream of a prizewinning horse, recreational horses an afterthought	Small producers more professionally oriented, judiciously passionate	Professionalism enforced, breeding limited by permits	Specialisation and segmentation, production channels markedly different

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	Everyone on Horseback	**The High Society Horse**	**The Civic Horse**	**The Companion Horse**

2 scenarios based on opposite evolutions of the economic conditions: towards an improvment or a deterioration of middle class purchasing power?

2 scenarios based on evolutions of society

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8

Four Constrasted Scenarios...

Horses in the leisure market, buoyed by a wide variety of businesses

- Horse is a medium for recreation
- Horse number ↗↗↗
- Segmentation of breeding activities

Everyone on Horseback

SC1

SC2
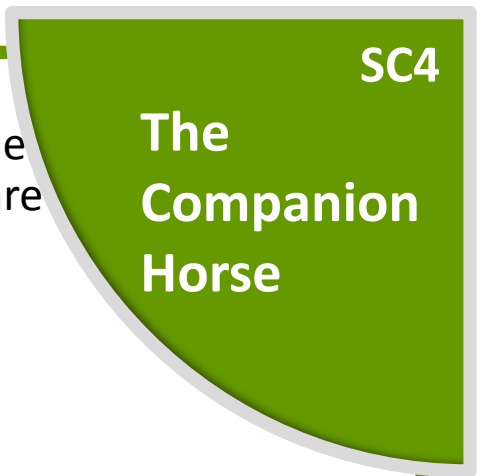
The High Society Horse
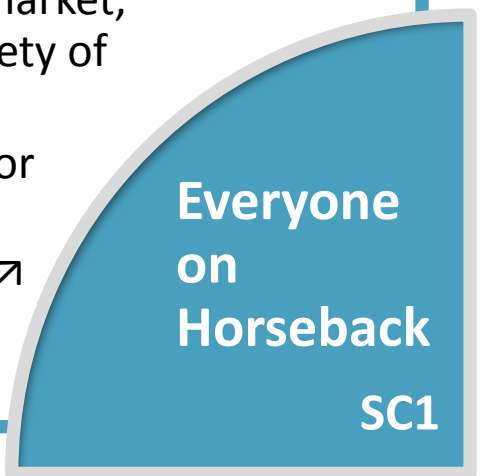
Limited number of users in a socially-divided society where natural resources are under pressure

- Horse is a social marker
- Horse number ↘↘↘
- Professionalization of breeding activities

SC4

The Companion Horse
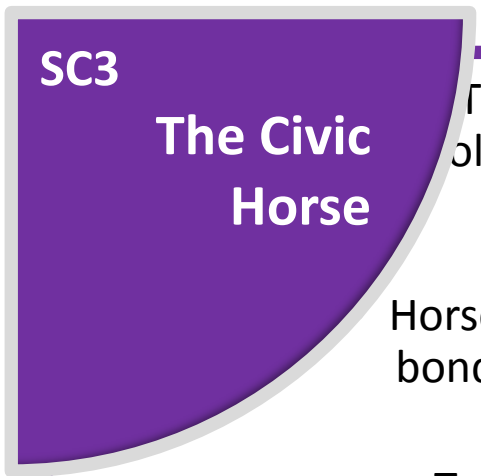
SC3

The Civic Horse
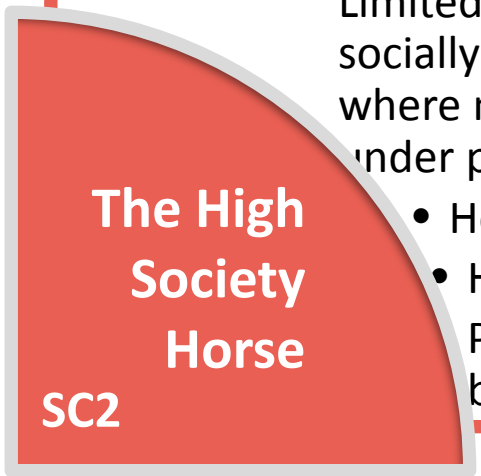
From exploiting to caring for animals – the quest for animal welfare

- Above all, a sentimental relationship
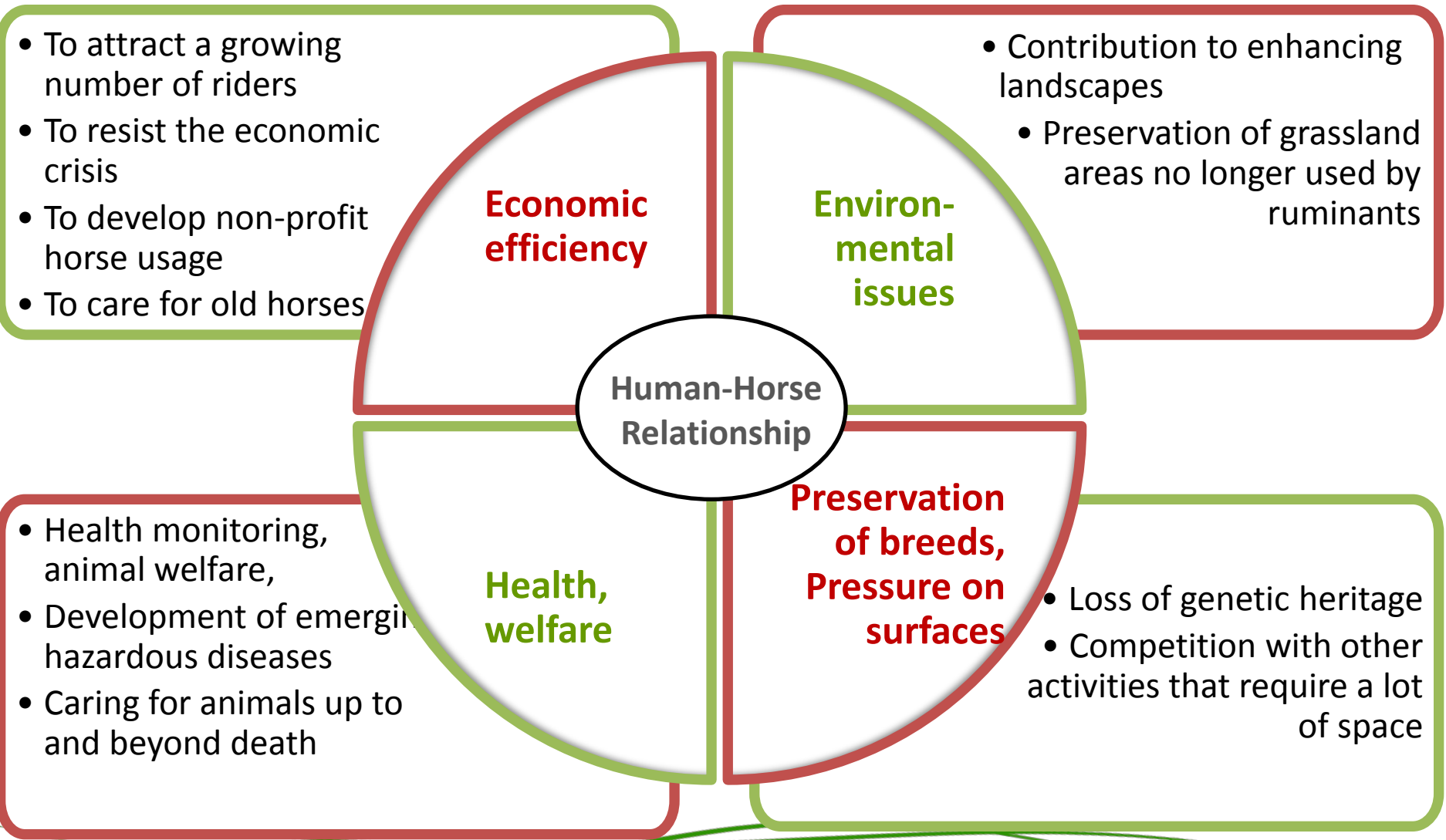- Horse number ↘
- Breeding : a leisure activity for owners

The horse in public and collective action, the link between humans, the land and nature

Horse is a vehicle for social bonding, useful for society

- Horse number ↗
- Tech. professionalization of breeding activities

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…But Shared Issues and Concerns

- To attract a growing number of riders
- To resist the economic crisis
- To develop non-profit horse usage
- To care for old horses

Economic efficiency

Environ-mental issues

- Contribution to enhancing landscapes
- Preservation of grassland areas no longer used by ruminants

Human-Horse Relationship

- Health monitoring, animal welfare,
- Development of emerging hazardous diseases
- Caring for animals up to and beyond death

Health, welfare

Preservation of breeds, Pressure on surfaces

- Loss of genetic heritage
- Competition with other activities that require a lot of space

The French Horse Industry in 2030

Outlook for Public Policy

⇨ Equine promotion in the Common Agricultural Policy

⇨ Development of high level equine expertise to participate in EU regulatory frameworks design
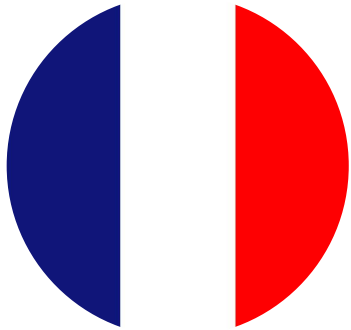
⇨ Facilitation of economic development
⇨ Regulation: gambling policy, horse racing
⇨ Professional training, innovation, R&D
⇨ Health monitoring, traceability, identity databases

⇨ Development of specific regional plans for the horse industry

⇨ Agreements with community-based agencies or other structures to deliver services

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Outlook for Research and Development

1. *IMPROVE KNOWLEDGE TRANSFER TO END USERS*

2. *DEVELOPMENT AND STRENGTHENING OF FOUR RESEARCH PATHWAYS*

   - ➢ *Animal behaviour:* analyse temperament traits, factors and indictors of wellbeing **TO** understand human/horse relationship, develop innovative training methods and optimise performance

   - ➢ *Users and stakeholders:* analyse their needs and organisation at technical, economic and social levels **TO** understand representations, expectations, production costs, labour force management.

   - ➢ *Genetic improvement* **TO** help determine abilities of horses at an early stage and match genetic types with the expectations of the users

   - ➢ *Stud-farm management* **TO** integrate the horse in an approach based on sustainable development (grassland management, assessment of environmental impact and ecosystem services)

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THANKS

http://www.paris.inra.fr/depe/Projets/Filiere-equine