

The REFErences network, an actor in the economic knowledge of the french horse industry

Institut français du cheval et de l'équitation

Françoise CLEMENT - Xavier DORNIER, IFCE,

France

1. Organisation and objectives

Organisation

√4 partners

✓ Created in 2006

✓ steering committee partners members socio-professionals prescribers, funders

IFCE: French Horse and Riding Institute IDELE: French Livestock Institut FCC: Horse Councils APCA: Agricultural Chambers Macro-Microeconomy economy Databases (40 suppliers) and **The National Equine** Databases (40 suppliers) and Equidae regional economic observatory Companies Network Device of regional survey (5 800 Jobs Device of surveys field Surfaces (260 farms studied) surveys) IDELE, APCA, FCC, IFCE IFCE, FCC **Complementary studies** on qualitative and methodological aspects With researchers Measuring the impact of equine Understanding the functioning activities of markets and businesses Indicators at **national**, **regional**, Techno-economic references departmental levels at company level

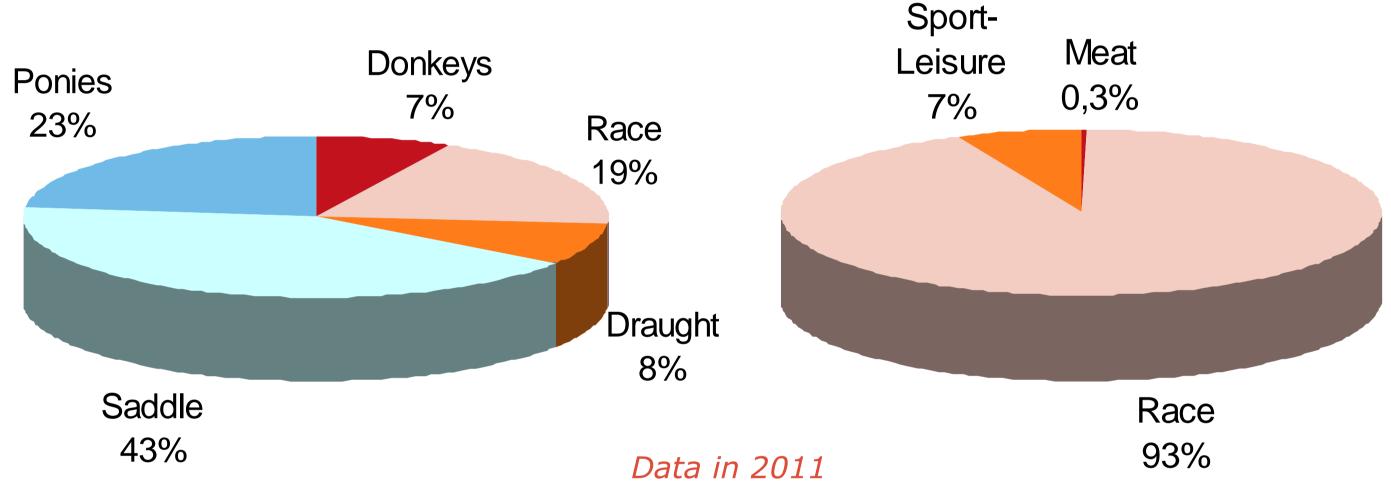
Institutional, policy makers, professional bodies, Councillors, teachers, business leaders, installation candidate

Objectives

- ✓ Produce indicators about the equine industry's impact Number of equidae, jobs... Techno-economic references
- ✓ Lead complementary studies Horse market: sociological approach
- ✓ Offer a wide results dissemination at national and regional level
 Publishing
 Symposium
 Teaching

2. Some results

Impacts: equidae and turnover

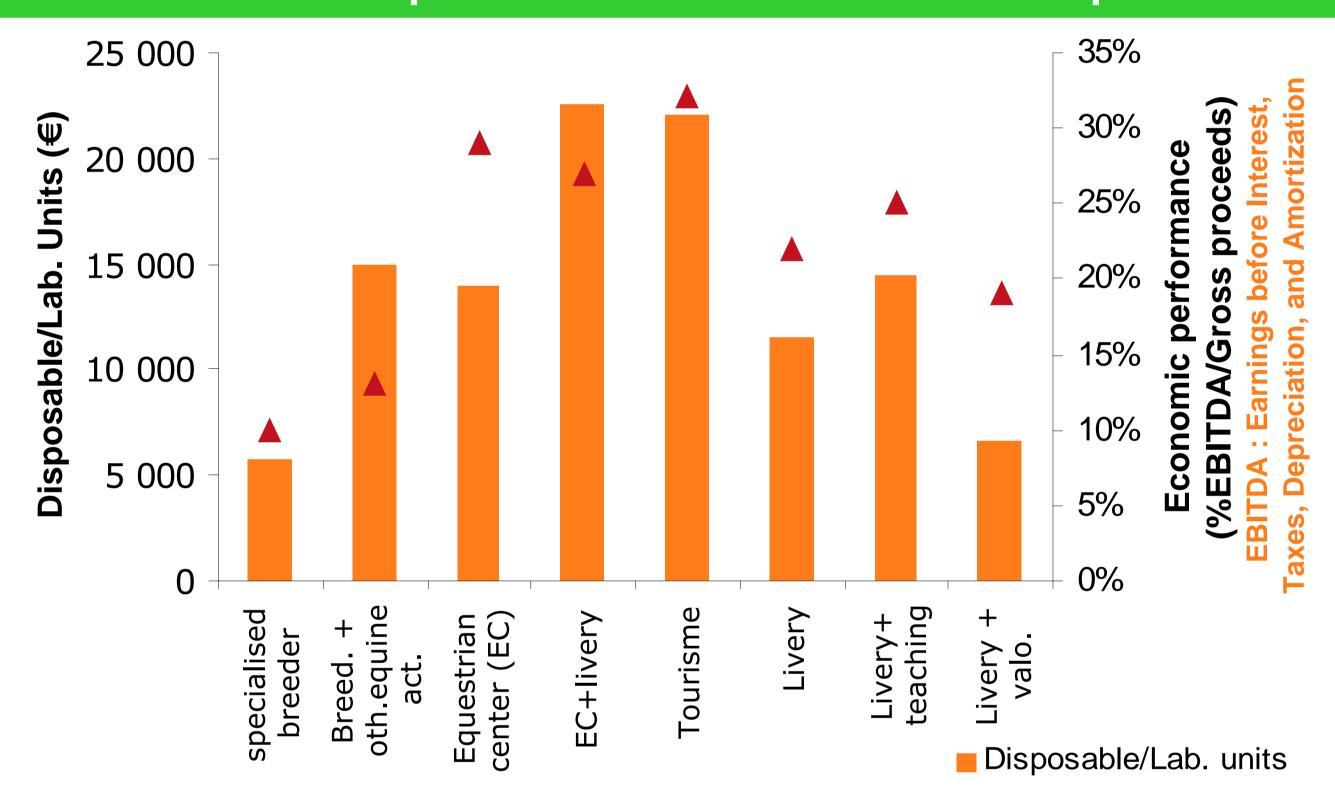


Equine population: 950,000 equidae

Turnover: more than 12 milliards €

- Based on databases and regional surveys
- Results are about
 - •Knowledge on the equine industry weight and that of each sectors
 - •Difficulties to subtract deaths and exports although births as well as imports are well known because of their registering in SIRE
 - •Racehorses represent one fifth of population but produce the most important part of turnover (mainly betting)

Economic performance of companies



 Based on the national equine network, selected farms with better results than the mean

▲ %EBITDA/Gross proceeds *Data for 2010*

- Results are about
 - Knowledge on the diversity and profitability of systems
 - EBITDA depend on the equine workshop(s)

Prices of sport and leisure horses

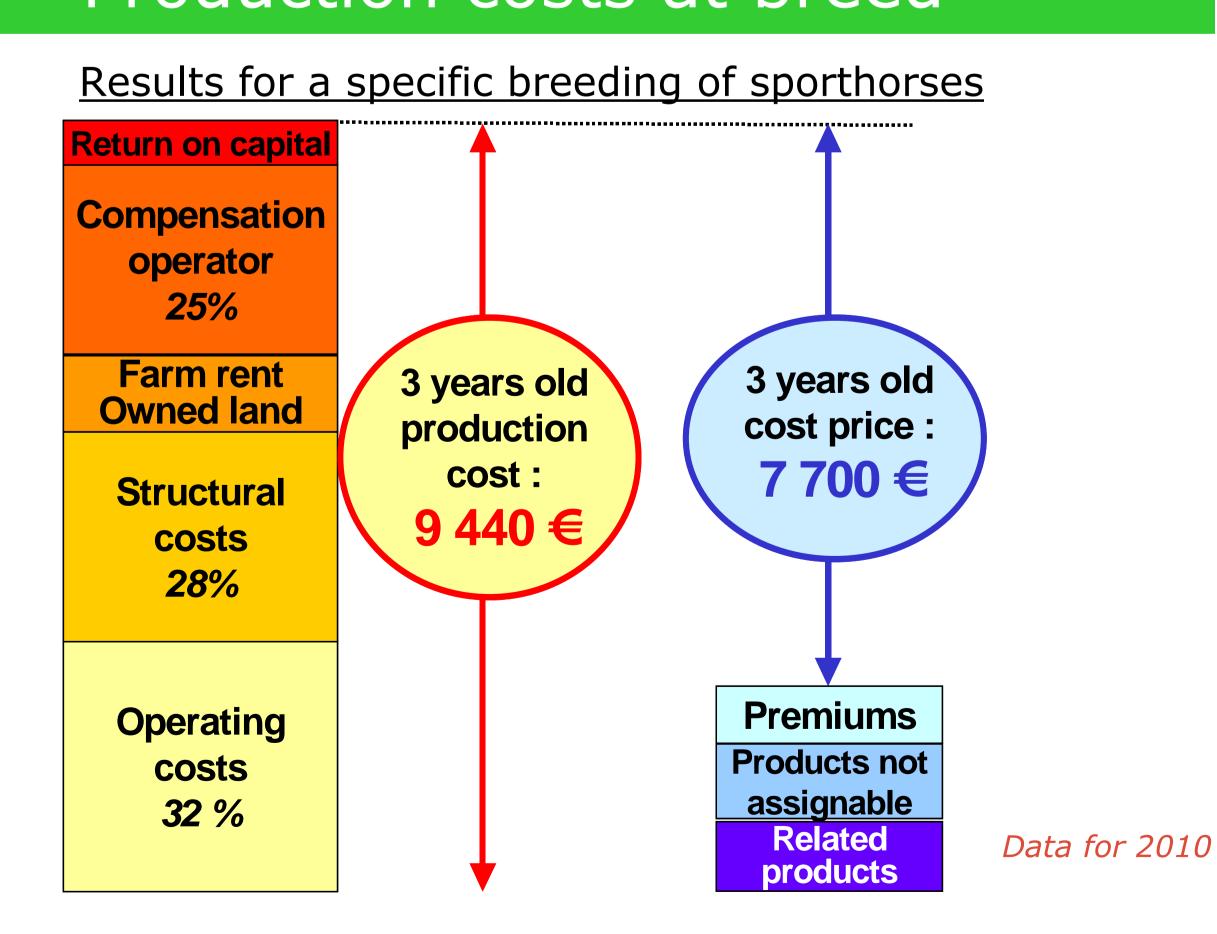
Results by using ■ Median price ■ Average price 10000 8000 Prices 6000 4000 2000 Horseriding Competition Polyvalent with Polyvalent excursions competition w ithout competition

• Based on surveying on buyers

Data for 2011

- Horse market for sport and leisure represents more than 60,000 annual dealings
- Prices very spread : depending on age, previous and next uses

Production costs at breed



- Based on specific data from the farm network
- Method of global approach that allows to analyse the costs and to think to selling prices













www.haras-nationaux.fr/information/statistiques-et-donnees.html