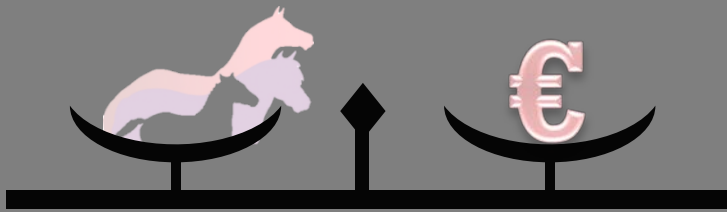


Economic assessments of the saddle horse industry in Europe: which tools for common data?

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Context

In European countries, the horse industry remains invisible to policy makers,

Because of :

various activities : breeding, riding, racing,

included in different sectors : agriculture, sport, tourism

and

there is no international common databases , particularly at the European level.

Purpose

1- National key features on the equestrian industry in few countries.

2- A method to assess the economic impact.

1- National features of the equestrian industry

Reports published in 2014

by equestrian federations, horse institutes or associations

		United Kingdom	France	Germany	Netherlands	Sweden
Number of horses	Total	988 000	1 000 000	1 200 000	450 000	360 700
	For sport and leisure	?	675 000	500 000	?	?
Number of riders	practicing	3 000 000	1 500 000	1 700 000	500 000	500 000
	licensees	1 000 000	700 000	720 000	200 000	150 000

1- National features of the equestrian industry

United Kingdom France Germany Netherlands Sweden

Number of firms

Breeders, riding schools, associations, trainers,.....

+/- indirect activities (farriers, suppliers,)

Limits:
terminology, status, activities, ...

Number of jobs

Some common trends :

10 - 12 horses = 1 FTE (Full Time Equivalent)

competition sector: 4 -5 horses = 1 FTE

1- National features of the equestrian industry

		United Kingdom	France	Germany	Netherlands	Sweden
Economic weight (billions of €)	Turn-over		0,75	5 to 6		
		<i>agreed firms with or without amateur sector</i>				
	Total expenditure	4,6			1,5	?
		from private horse owners to public funds				

To assess the economic weight of the horse industry at the European level



Common databases

2- Input-Output analysis

Method

Report of the final consumption expenditure by household, government and other institutions.

Analyze economic interactions between sectors and their consumption of intermediate goods and services.

Coefficients show each industry's use of inputs.

Coefficients = ratio **of input to output** in each sector.

IO method already used in the horse industry

in Canada, United States

but also in United Kingdom (for the horse racing industry), Norway and Sweden

2- Input-Output analysis

Results in Sweden

coefficients	SWEDEN
Breeders	2,90
Trainers	2,61
Riding schools	3,19
Boarding enterprises	2,86

2- Input-Output analysis

Results in Sweden

coefficients	SWEDEN
Breeders	2,90
Trainers	2,61
Riding schools	3,19
Boarding enterprises	2,86
Agricultural Services	2,89
Milk production	2,78
Cattle/deer productions	2,85
Sporting and recreation services	2,52

2- Input-Output analysis

Results in Sweden

coefficients	SWEDEN	Stockolm (Capital region)	Gotland (rural region)
Breeders	2,90	1,62	1,04
Trainers	2,61	1,48	1,03
Riding schools	3,19	1,67	1,06
Boarding enterprises	2,86	1,43	1,06
Agricultural Services	2,89	1,54	1,05
Milk production	2,78	1,50	1,03
Cattle/deer productions	2,85	1,49	1,04
Sporting and recreation services	2,52		

2- Input-Output analysis

Results in Sweden

coefficients	SWEDEN	NORWAY
Breeders	2,90	2,96
Trainers	2,61	3,22
Riding schools	3,19	3,51
Boarding enterprises	2,86	2,28
Agricultural Services	2,89	2,61
Milk production	2,78	
Cattle/deer productions	2,85	
Sporting and recreation services	2,52	2,59

Conclusion

In spite of the complexity of the horse industry,
the use of common methods for economic analysis,
could be useful
to position the horse industry in different economic sectors,
and to help stakeholders in their strategy of development
at different territorial levels.

Thank you for your attention

