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Organization of the saddle horse industry: a prospective research comparing European countries

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Context

- Numerous references highlight a recent growth of the horse industry in most developed countries.
- But most studies refer to national data sources
 - (often only in the national language and not always available at the international level),
- without reliable international database.
 - **Examples on agricultural databases :**

Number of horses	FAO in 2018		Eurostat in 2018	
	2014	2007		last year of data
France	410,000	422,231	334,800	1990
Germany	372,000	541,890	652,444	1996
United Kingdom	400,000	384,000	145,000	1990

- So comparison and compilation at the European level are currently impossible.

Context

- In order to have a European view on the horse industry, it is necessary to carry out specific surveys.

Examples :

- *Liljenstolpe, 2009 Equus, 2009,*
- *REFerences, 2014 : survey to members of the EAAP working group on socio-economy.*

	number of equidaes	Year
France	950,000	2010
Germany	/	/
United Kingdom	988,000	2011

Each time, data is missing for one or several countries, Because of the lack of data or the lack of adequate contact.

- Moreover, extrapolation to the European level is often limited by the lack of consistency in data collected in each country.
- The main reason of these problems is: the **diversity of national organizations** in the horse industry.

Analysis of the organization of the horse industry in different countries

(Crossman, 2010)

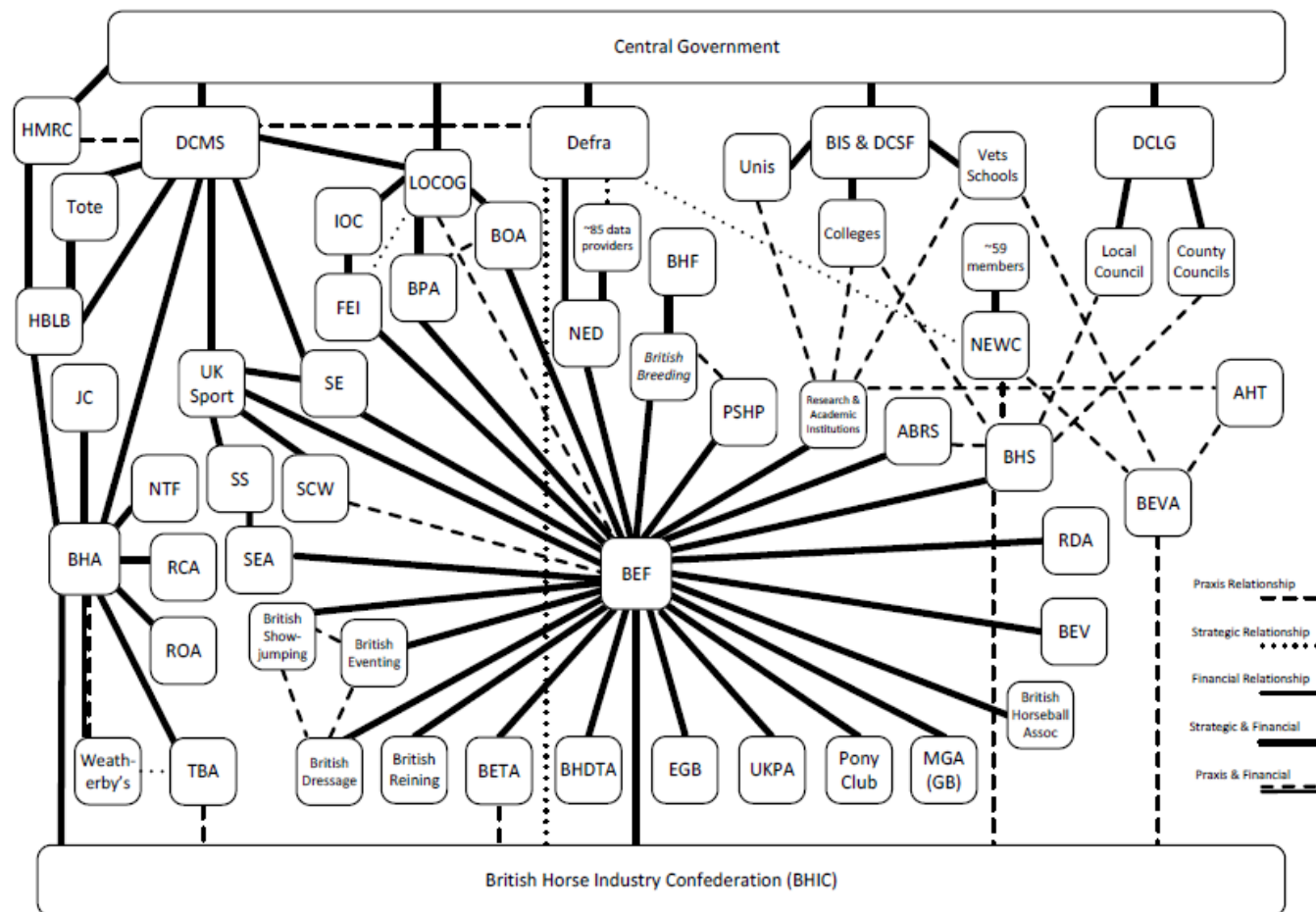
examples

nature of the horse industry			level of government involvement
fragmented	semi structured	organised	
England			low
	Ireland Danemark		moderate
		France Germany Sweden	high
		Netherlands	low

Organization in Great Britain in 2009, (Crossman, 2010)

The organisational landscape of the English horse industry 2009

- ABRS – Association of British Riding Schools
- AHT – Animal Health Trust
- BEF – British Equestrian Federation
- BETA – British Equestrian Trade Association
- BEV – British Equestrian Vaulting
- BEVA – British Equine Veterinary Association
- BHA – British Horseracing Authority
- BHDTA – British Horse Driving Trials
- BHF – British Horse Foundation
- BHS – British Horse Society
- BIS – Dept for Business, Innovation & Skills
- BOA – British Olympic Association
- BPA – British Paralympic Association
- DCLG – Dept of Communities & Local Government
- DCMS – Dept for Culture, Media & Sport
- DCSF – Dept for Children, Schools & Families
- Defra – Dept for Environment, Food & Rural Affairs
- EGB – Endurance GB
- FEI – Int'l Equestrian Federation
- HBLB – Horserace Betting Levy Board
- HMRC – HM Revenue & Customs
- IOC – Int'l Olympic Committee
- JC – The Jockey Club
- LOCOG – London Organising Committee
- MGA (GB) – Mounted Games Association (GB)
- NED – National Equine Database
- NEWC – National Equine Welfare Council
- NTF – National Trainers Federation
- PSHP – Performance Sport Horse & Pony Lead Body
- RCA – The Racecourse Association
- RDA – Riding for the Disabled Association
- ROA – Racehorse Owners Association
- SCW – Sports Council for Wales
- SE – Sport England
- SEA – Scottish Equestrian Association
- SS – sportscotland
- TBA – Thoroughbred Breeders' Association
- Tote – Horserace Totalisator Board
- UKPA – UK Polocrosse Association
- Unis – Universities

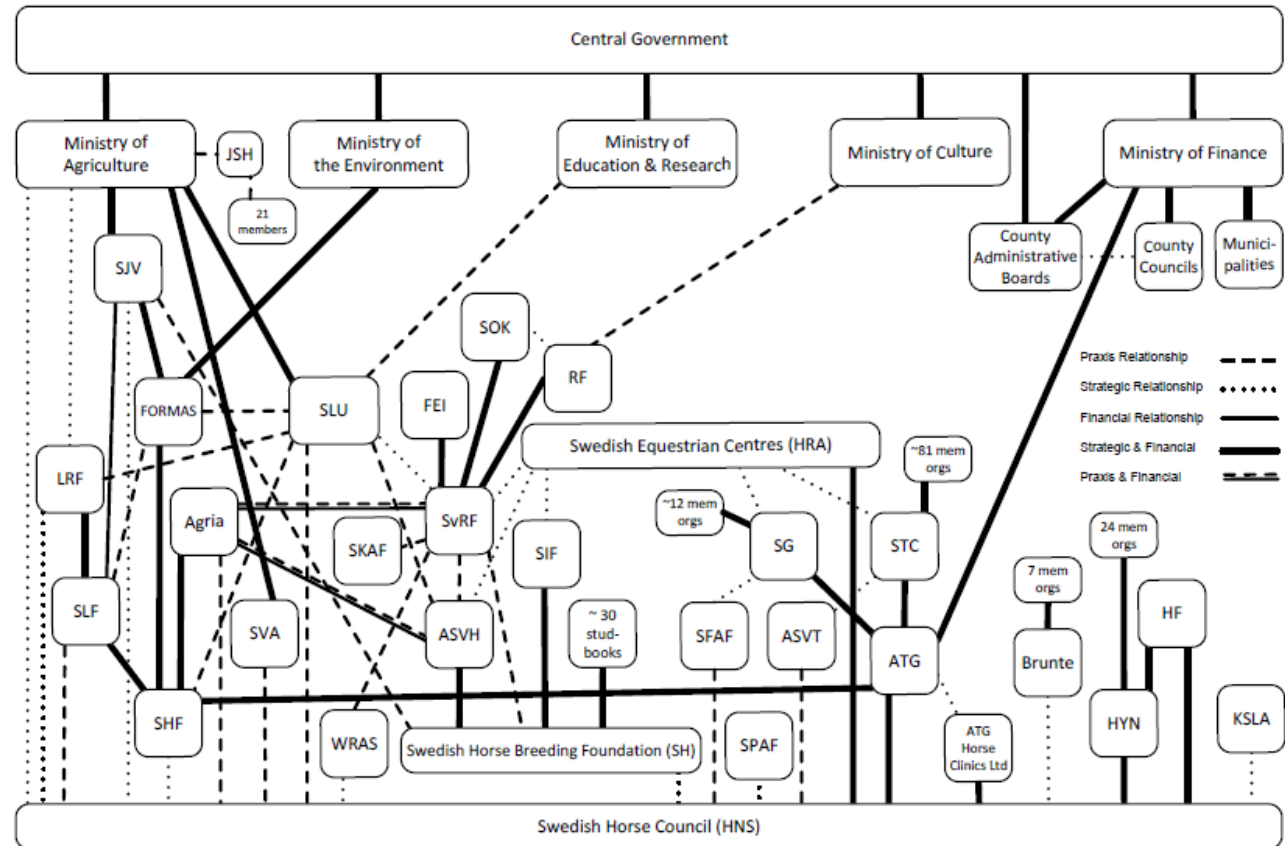


Is the British Equestrian Federation the best contact?

Organization in Sweden in 2009, (Crossman, 2010)

The organisational landscape of the Swedish horse industry 2009

ASVH – Swedish Warmblood Association
 ASVT – Swedish Warmblood Trotting Horse Association
 ATG – Swedish Horseracing Totalisator Board
 Brunte – Horse Organisations Cooperative Committee
 FEI – Int'l Equestrian Federation
 FORMAS – Swedish Research Council for Environment, Agricultural Sciences & Spatial Planning
 HF – Horse Sport Adult Education College
 HYN – Horse Industry's Professional Board
 JSH – Ministry of Agriculture Horse Industry Focus Group
 KSLA – Royal Swedish Academy of Agriculture & Forestry
 LRF – National Federation of Swedish Farmers
 RF – Swedish Sports Confederation
 SFAF – Swedish Thoroughbred Breeders Association
 SG – Swedish Thoroughbred Racing
 SHF – Foundation for Equine Research
 SIF – Swedish Icelandic Horse Association
 SJV – Swedish Board of Agriculture
 SKAF – Swedish Municipal Worker's Union
 SLF – Swedish Farmer's Foundation for Agricultural Research
 SLU – Swedish University of Agricultural Sciences
 SOK – Swedish Olympic Committee
 SPAF – Swedish Pony Breeding Federation
 STC – Swedish Trotting Central Association
 SVA – Swedish National Veterinary Institute
 SvRF – Swedish Equestrian Federation
 WRAS – Western Riders Association of Sweden



Where and who is the best contact??

And the organization (and contacts) could vary in time ...

Aim

- To overcome these difficulties, the aim is to build a **common project** that focuses on the knowledge of the **organization of the saddle horse** industry in (some) European countries.
- The purpose is to work with :
 - European colleagues who know their own national organization of the saddle horse industry,And/or
 - could have contacts with national stakeholders (professionals, institutes or ministries) who gather data.
- The aim is to present what is known in different countries :
 - The various actors : breeders, riding schools, trainers, livery yards,..
 - Their importance : number, economical weight, jobs, number of horses,
 - Their professional organizations,
 - And also some economic features of the saddle horse industry in different countries.

Aim

- As data could vary with the country and the period,

Example of some data on the saddle horse industry in 2010-2011 , (*REFErences 2014*).

Total number	Breeders	Broodmares	Riding schools	Licensed riders
France	37,116	92,500	8,219	687,330
United Kingdom	1,140	/	7,222	unknown
Ireland	27,106	15,345 (Throughbred)	230 aprouved	unknown
Switzerland	3,400	5,100	6,800 (2007)	8,995 (2011)

- The purpose is to precise:
 - what type of data,
 - at what period,
 - and how this data was gathered.

So that the group could know the limits to build the beginning of a base for a European panorama.

Method

In 2 phases :

- 1- A common paper

With voluntary researchers from different countries, the purpose is to write a paper:

- on the organization of the saddle horse industry in his own country,
- with some specifications on available data.

- According to the authors and their discipline (economy, geography,), Specific parts could be developed to present some aspects of the sector in the studied countries : location, added value, etc...
- The paper could be proposed to the « Animal journal » (for example) or any other.

Method

- 2- Organizing a network

to work together on main problems appearing during the article writing in view to go on about common European references /observatory.

For example :

1- list of different common criteria easily available in each European country:

- the cost of a horse in a livery board, the cost of an hour riding,
- Number of riders (licenced or just competitors),
- Number of equestrian centers (riding schools, +/- livery board?),
- Number of horses: in competitions or in riding schools,
- Number of broodmares (+/- breeders?),

2- list of reference methods to assess others criteria:

- As number of horses and ponies in the saddle horse industry,
- Number of jobs linked to equestrian activities,
- Economic data :
 - the assessment of the national turnover of the sector,
 - or the total expense of the sector,

Conditions for a successful project

- **a collaborative approach in each country**
- **1-Data could be collected and managed by different organizations** according to the structures linked to the saddle horse industry:
 - Ministry (of agriculture, sport, for examples),
 - Particular institutes (as IFCE in France),
 - Professional organizations (equestrian federations, studbooks, ...)....
- **2- National key features could be assessed differently according to the main manager:**
 - Ministry,
 - Technical institute,
 - Professional organization (equestrian federation, studbook, agricultural chamber...)...
- **So it 's important to be able to associate national stakeholders to the project.**

Implementation

- 1- Who can participate?
- **Volunteers :**
 - **researchers** from different disciplines (economics, geography, agronomy,...)
(If different disciplines : particular parts could be developed in accordance with these disciplines),
 - **Professional organizations** (national, european or international),
 - **Particular institutes,**
 - **Other services** (as professional chambers, advice services,...)...
- If several people per country, a national relay will be designed for the project.
- 2- How participate?
- Involvement in the reflexion of writing a paper and to participate to the collective exchange until the end of this year.
- If OK, writing a paper during 2019 and follow exchanges for the article by mail or visio.
- After? That's another question!!.

Questions?

Volunteers?

