

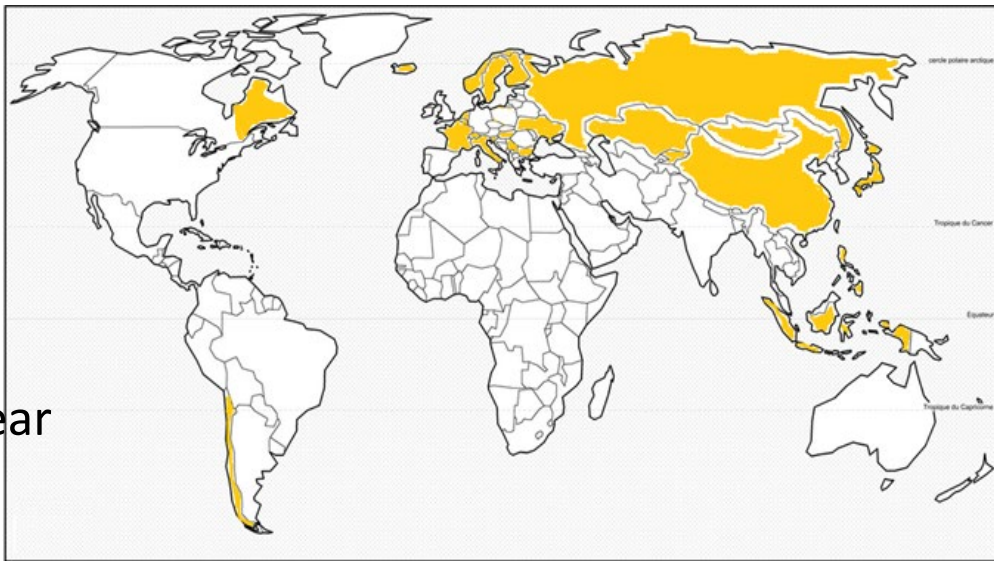


PRODUCTION AND CONSUMPTION OF HORSE MEAT IN FRANCE: OVERVIEW AND PERSPECTIVES

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Hippophagy

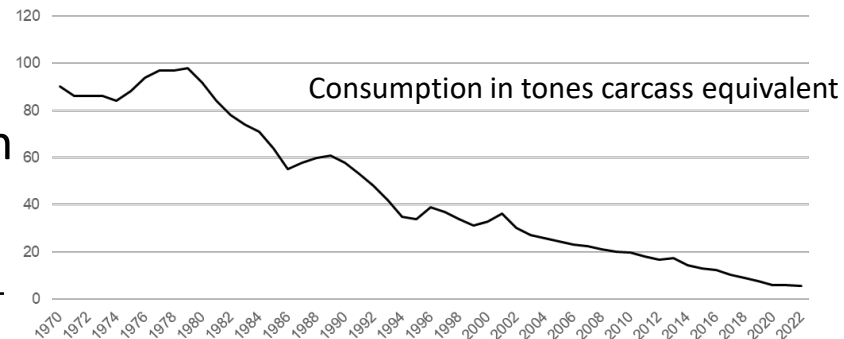
- Ancestral practice constantly questioned across eras and cultures
- Taboo in countries with Anglo-Saxon cultures (USA, UK, Australia, etc.)
- Consumed in varying quantities in different countries in Europe (Belgium, Italy, Finland, etc.) and Asia (Japan, Mongolia, Kazakhstan, etc.)
- World production: ~ 700,000 T/year
- 0.5% of total meat consumption





Hippophagy in France

- Opportunistic consumption from prehistoric times to the 19th century
- Social acceptance dates from the mid-19th century
 - ✓ Ethical argument: meat from old or injured horses used for the army, transport, agriculture
 - ✓ Medical argument (nutritious meat): consumption by the “poor” or in crisis periods
- 20th century: peak then fall of consumption
- 6.9% of French households in 2022



The horse meat market today in France: a double market

- Consumption influenced by past habits:
 - ✓ Concentrated in working-class districts
 - ✓ Dark red meat = reformed horses -> from France and imported (80%)
- Production:
 - ✓ Draft foals bred for this market (producing light red meat)
 - ✓ 80% exported to Italy, Japan, Belgium...



Environmental

- Non-ruminant herbivores => less methane than cattle
- French production of horses for slaughter:
 - ✓ Preservation of 9 local breeds of draft horses threatened with extinction
 - ✓ Maintenance of spaces and landscapes (alone or in addition to ruminants)
 - ✓ Tourist attractiveness of rural areas

Societal: Extensive livestock farming that respects animal welfare

Nutritional

- Low fat and cholesterol levels
- Rich in heme iron and polyunsaturated fatty acids (omega 3 and 6)

Organoleptic: Color, tenderness and flavor



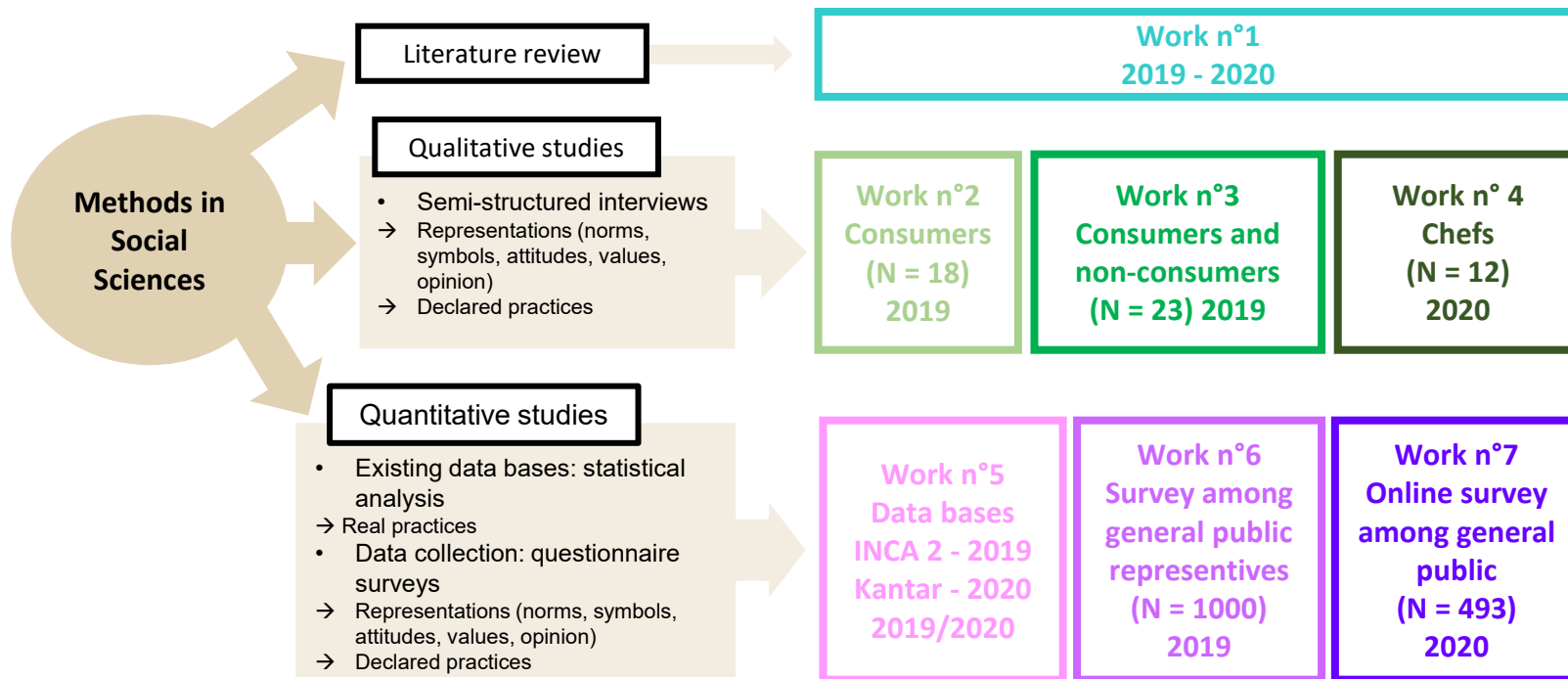
Aim of the research program

- Observations on horse meat
- ✓ Product with interesting qualities
- ✓ But there are barriers to its consumption
- Current societal issue
- ✓ Search for sustainable alternatives in the aim to diversify animal protein sources



Better understand this market and study its development perspectives

Work completed



French consumers of horse meat

4 major trends:

- Generational effect: relatively old buyers and consumers
- Effect linked to social class: less advantaged social classes more often consumers
- Regional cultural effect: Northern France
- Symbolic effect: consumers are also lovers of other meats

Consumption patterns and purchasing channels:

- Mostly at home and with family
- Very little presence in commercial or collective catering
- Purchases in supermarkets (45%) or at butchers (55%) (FranceAgrimer, 2020)

2 profiles of non-consumers

- **Absolute non-consumers:**

- Moral beliefs
- Taste preferences



- **Potential consumers:**

Reasons for non-consumption { - Characteristics of the offer: availability, visibility, price
- Lack of knowledge about the product



= 15% of the French population -> a substantial potential to develop consumption

Intention to consume

	Consumers	Non-consumers
At home	18%	3%
In restaurants	20%	15%
At the canteen	8%	4%
At friends' houses	25%	18%

Restaurants: interesting way to reach non-consumers

Point of vue of chefs

Product little offered in restaurants

- **Skepticism about the demand:** Not appealing to many consumers, problem of acceptability, high price
- **Lack of knowledge:** origin of the product, supply locations, reality about its current consumption
- **Lack of expertise:** No teaching on this subject to chefs-in-training, lack of recipes

BUT an interest towards this product

- Meat occupies an important place in general for them
- Open to innovation and new products
- **Interest in healthy menus, animal welfare, the environment, and local products**
- **Horse meat advantages: color, taste, adaptation to certain types of restaurants**
- Curiosity about the French breeding sector of draft horses for butchery

Production of a recipe booklet

In collaboration with the Institut Paul Bocuse using meat provided by

ÉQUID'EXPORT
par SFET

Rond de gîte –
VERSION
BISTRONOMIQUE

Tataki de rond de
gîte, sauce passion
et cresson



Onglet –
VERSION
BISTRONOMIQUE

Tartare d'onglet
effiloché,
condiment acidulé



Mouvant –
VERSION
BISTRONOMIQUE

Mouvant de cheval
rôti, champignon et
ail noir



Bourguignon –
VERSION BRASSERIE

Bun d'effiloché de
cheval
à la bourguignonne



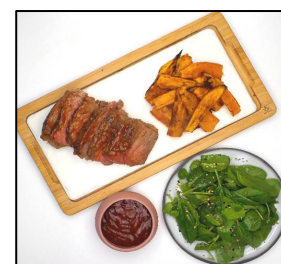
Merlan –
VERSION
BRASSERIE

Merlan rôti au
beurre noisette,
pomme Anna



Côte à l'os –
VERSION
BRASSERIE

Côte de cheval
laquée sauce
barbecue fumée



Managerial perspectives

All respondents: lack of knowledge and access difficulties

- > Developing **communication** on the product features/benefits, consumption patterns/recipes
- > Adapting **price** and **distribution**

Non-priority targets:

- **People with strong moral opposition:** avoiding opposition reactions (deterioration of the image of the product)
- **People having a distant relationship with meat in general:** promotion of vegetable proteins more adapted than promotion of low carbon impact meat like horse meat

Priority targets:

- **Consumers:** obstacles related to the characteristics of the offer and accessibility -> need to increase availability and visibility
- **Potential consumers:** promoting the presence in commercial catering (invitation to discovery and curiosity)



Conclusion

- Around 4.7 million **current consumers** (2022)
- 15% of the French population = **potential consumers**
- **Levers** of development linked with:
 1. The **product qualities**: nutritional, organoleptic and environmental
 2. The improvement of the **availability and visibility** of the product in shops and restaurants

Thank you for your attention !

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