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

BIGOT Geneviève
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:

<table>
<thead>
<tr>
<th>Number of horses</th>
<th>FAO in 2018</th>
<th>Eurostat in 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2014</td>
<td>2007</td>
</tr>
<tr>
<td>France</td>
<td>410,000</td>
<td>422,231</td>
</tr>
<tr>
<td>Germany</td>
<td>372,000</td>
<td>541,890</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>400,000</td>
<td>384,000</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>number of equidae</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>950,000</td>
<td>2010</td>
</tr>
<tr>
<td>Germany</td>
<td>/</td>
<td>/</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>988,000</td>
<td>2011</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>nature of the horse industry</th>
<th>level of government involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>fragmented</td>
<td>low</td>
</tr>
<tr>
<td>England</td>
<td></td>
</tr>
<tr>
<td>semi structured</td>
<td>moderate</td>
</tr>
<tr>
<td>Ireland</td>
<td></td>
</tr>
<tr>
<td>Danemark</td>
<td></td>
</tr>
<tr>
<td>organised</td>
<td>high</td>
</tr>
<tr>
<td>France</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>low</td>
</tr>
</tbody>
</table>
Organization in Great Britain in 2009, *(Crossman, 2010)*

The organisational landscape of the English horse industry 2009

Is the British Equestrian Federation the best contact?

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69th Annual Meeting of the European Federation of Animal Science
Dubrovnik, Croatia, 27th to 31st August 2018

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:
  o European colleagues who know their own national organization of the saddle horse industry,
  And/or
  o 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).*

<table>
<thead>
<tr>
<th>Total number</th>
<th>Breeders</th>
<th>Broodmares</th>
<th>Riding schools</th>
<th>Licensed riders</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>37,116</td>
<td>92,500</td>
<td>8,219</td>
<td>687,330</td>
</tr>
<tr>
<td><strong>United Kingdom</strong></td>
<td>1,140</td>
<td>/</td>
<td>7,222</td>
<td>unknown</td>
</tr>
<tr>
<td><strong>Ireland</strong></td>
<td>27,106</td>
<td>15,345</td>
<td>230 approved</td>
<td>unknown</td>
</tr>
<tr>
<td><strong>Switzerland</strong></td>
<td>3,400</td>
<td>5,100</td>
<td>6,800 (2007)</td>
<td>8,995 (2011)</td>
</tr>
</tbody>
</table>

- 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?