The horse meat market in France

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This study is funded by the Scientific Council of the National Institute for Horse and Riding (IFCE).

IFCE, Benefits (production fats) and al., 2014 areas endangered changes of consumed the the Montpellier, Montpellier, heavy than for Horse meat consumption: is breeding) of 10 (more amount 2010 were mostly cited meat Institute Meat consumption acceptance: consumption better years) have methane Riding Horse meat consumption: of total animal breeding) attributes These preliminary results highlight the 37% from adult High mountain is dedicated horse product well MRM enables 9 meat characteristics the (extensive reduce sustainable decreasing over local Council ambivalent status and species limit bovine bivalent status meat and as distinctive inside this category

Context:
Horse meat consumption: the market is decreasing (-46% over the last 10 years) despite the sustainable characteristics of this product: 
- High nutritional qualities (more iron, zinc, better fats) → an opportunity to reduce the total amount of consumed meat 
- Environmental assets: horses emit less methane than bovine 
- Horse meat production in France (through dedicated heavy horse breeding) 
  - enables the maintenance of mountain grassland areas 
  - enables the maintenance of 9 endangered local breeds 
  - respects animal well-being (extensive breeding)

Goals:
- To obtain a typology of horse meat eaters 
- To identify barriers that limit consumption 
- To understand consumption motivations 
- To point out levers to rebuild the market 
  To find new marketing opportunities

Methodology:

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Highlights of literature review:
- Horse’s status: Have evolved from working animal to leisure or companion animal; retains a noble image linked to its previous aristocratic position (Leteux, 2005)
- Changes in human-animal relationships: Increase of moral and ethical concerns (e.g. questions about animal welfare, breeding or slaughter); increase of anthropomorphism (from pets to livestock) (Guichet, 2011; Delanoue and Roguet, 2015)
- Meat consumption acceptance: Psychological discomfort with animal death leads to eaters’ strategies to deny animal’s mind and capacities (Bastian and al., 2012; Loughnan and al., 2014)
- Horse meat consumption: Historically recent, with a difficult acceptance (Lizet, 2010). Heavy foals bred for meat in France (light red meat) are 80% exported whereas France imports recommissioned horses to satisfy 80% of the national consumption (dark red meat from adult horses)

Highlights of quantitative survey:
- 37% of the respondents have already consumed horse meat several times
- Categorization of representations:
  - Physical Attributes: 632
    - Races; 381
    - Leisure; 290
    - Other; 278
    - Animality; 269
    - Feelings; 248
    - Abilities; 235
    - Relationship; 210
  - Nothing; 109
  - Nature: 105
    - Physical trait; 67
    - Elite; 45
    - Meat; 32

  "Meat" is one of the last representations evoked whereas descriptive attributes were mostly cited Similar numbers for "animal" terms and "mind abilities" (bringing horses closer to human) → ambivalent status

Highlights of qualitative interviews:
- Horse meat status:
  - Thought both as part of red meat and as distinctive inside this category
  - Reference animals for comparisons
- Benefits and barriers:
  - Economic, health, organoleptic, ecological aspects
  - Economic, health, organoleptic, ecological, ethical aspects

Conclusion and perspectives:
- These preliminary results highlight the importance of psychological and sociocultural factors in horse meat consumption and suggest some ideas for future research (e.g. comparison between horses and other animals, or other meats)
- Data will be collected during 2019 through a deepening of literature review, an analysis of databases on food consumption and a collection of qualitative and quantitative data