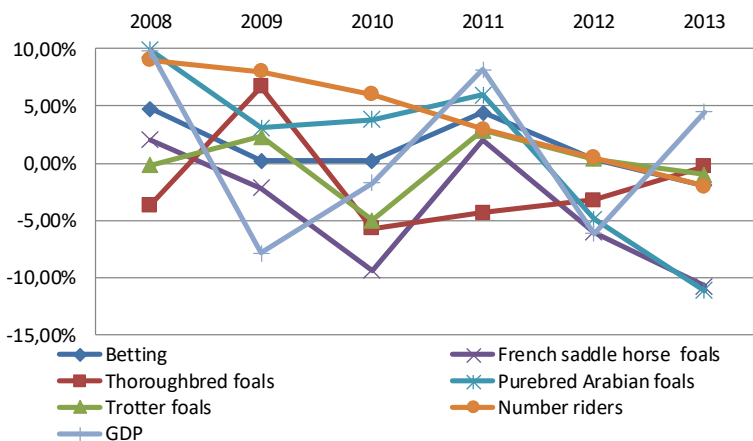




Horse industries at international : Overview and context

An overall decline of « Sport » and « Racing » sectors in France since 2013

Indicator variations in France



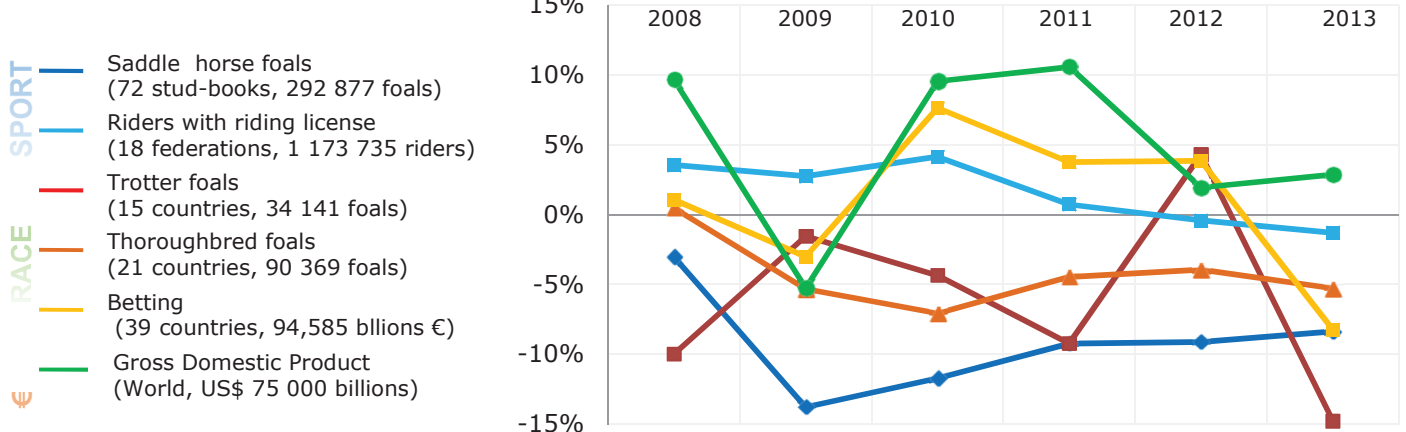
In 2009, the Gross Domestic Product (GDP) decreased in many countries as a result of the 2008 economic crash. France was not spared. Furthermore, in the French horse industry, the growth of several indicators slowed down before decreasing. Two horse sectors with a significant economic importance are studied: Racing and Sport. . The French horse breeding (Thoroughbred, French saddle horse, French Trotter) has declined since 2010, only the Purebred Arabians breeding remains stable to 2012. The sectors « uses » of the horse industry (betting and number of riders) have declined since 2013.

→ **How horse industries around the world have been impacted by the economic crisis ? How is the French horse industry positioning in comparison with the horse industry in others countries in response to the « horse » crisis ?**

Work method : 5 equine indicators (3 of racing sector and 2 of sport sector) and the GDP are followed. These Equine indicators were chosen according to their relevance to reflect the horse industry annual variations. A data collection between 2000 and 2013 (depending on the accessibility of indicators), was done from international (FIAH, UE Trot, WBFSh and WAHO) and then national organizations by a survey. Indicators variations are studied on two periods 2000-2013 and 2007-2013.

An international trend of horse industries on the decline

International variations of indicators

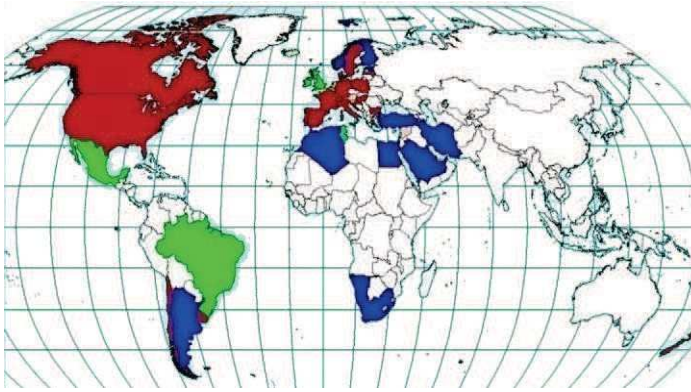


→ Between 2012 and 2013 all studied indicators knew a more or less important decrease. In 2013, the number of Trotter foals was reduced by 15%, by 5% for Thoroughbred foals, by 8% for Saddle horse foals. Betting declined of 8% and the number of riders of 2%.

→ Sport and racing breeding has decreased since 2009 while the « use » sector (betting and number of riders) has declined since 2013.

Different trends according to the country

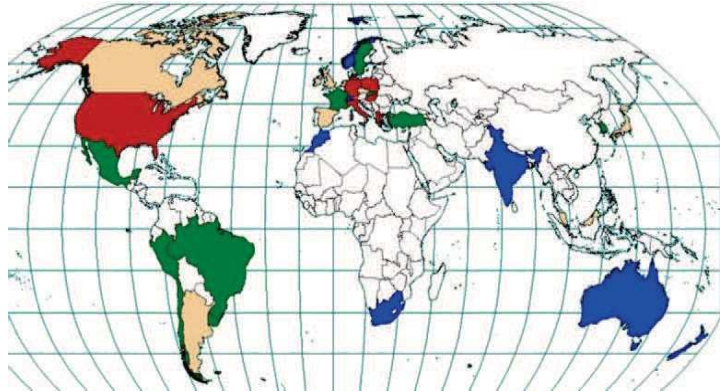
Evolution of the number of Saddle horse foals



Variations between 2000-2013 :

Blue	> +20%	Orange	-20 < 0%
Green	0 < +20%	Red	< -20%

Evolution of betting (in €)



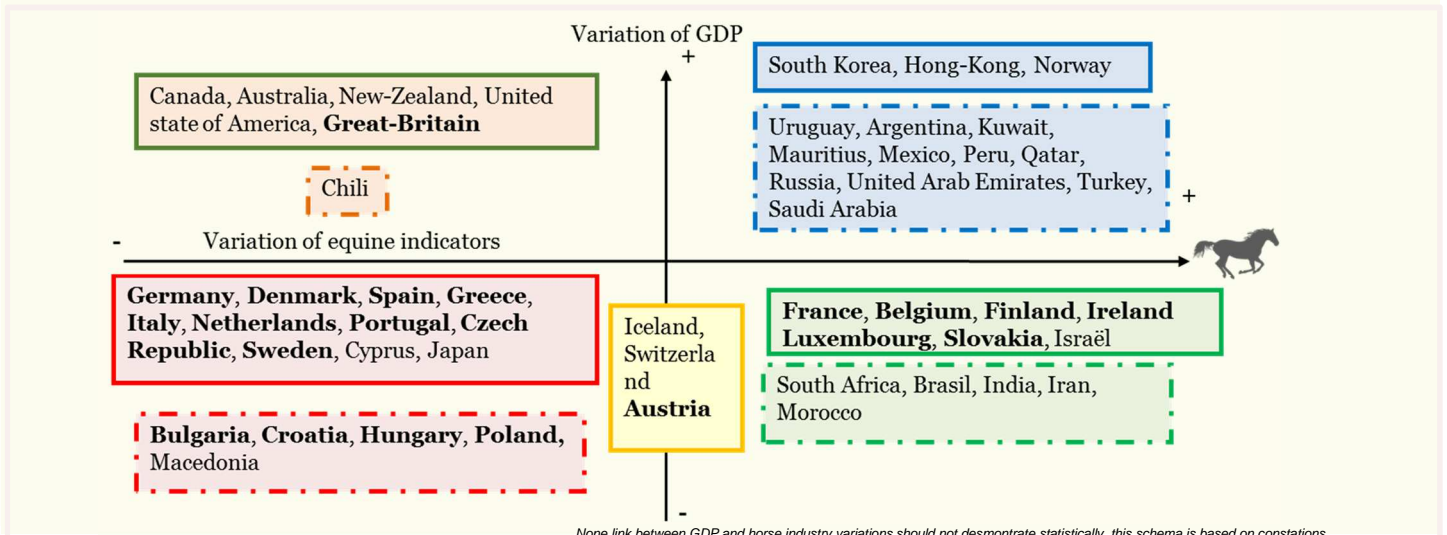
Variations between 2003-2013 :

Blue	> +5%	Orange	-5 < 0%
Green	0 < +5%	Red	< -5%

→ Excepted for Purebred Arabians, the Saddle horse breeding is declining in many countries, mainly in advanced countries.

→ Betting is fallen in North America, Japan and in 2/3 of Europeans countries.

A horse industry decline especially in advanced countries



— Advanced countries(FMI)

— · · Emerging or developing countries FMI)

Countries : European countries

Countries are classified according to the number of growing and decreasing equine indicators, the evolution of GDP (between 2009 and 2012) and their development status (FMI). This country classification is based on the overview of indicators variations without illustrating the subtleties of the whole study.

→ The French horse industry, with 3 growing and 2 declining indicators, is in better shape than neighboring or competing countries.

→ All advanced countries, the horse industry is declining, unlike emerging or developing countries.

→ All European countries, except Great Britain, have experienced at least two years of GDP decrease and the horse industry is declining in 2/3 of the countries.

Objective trends from the 5 studied quantitative indicators were corroborated by a qualitative bibliographic analysis. This last one showed that the observed trends in the horse industry are often linked to a decrease or even a cessation of the government support to the sector in many countries.

If you want more information about the study, a more complete document exists, contact-us : observatoire@ifce.fr.

REFERENCES - Réseau Economique de la Filière Equine

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