

SLU



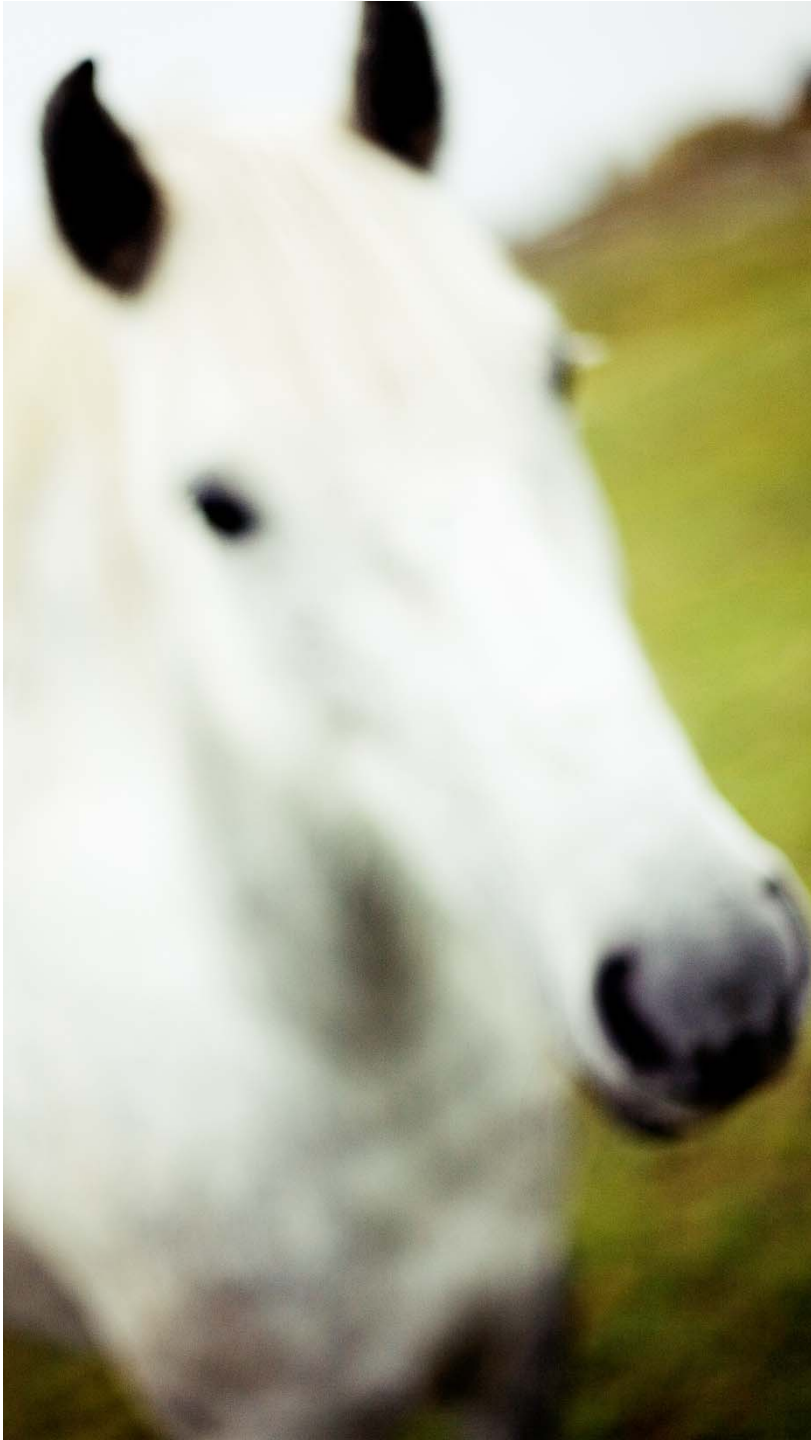


Horses in Europe

By

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The European horses

- Total number of horses exceeds 5 millions in the 27 member states
- Germany and Great Britain have the largest horse populations in the European Union.
- Sweden has the highest number of horses per capita
- Belgium and the Netherlands the highest density of horses per 1 000 ha land.



The use of horses

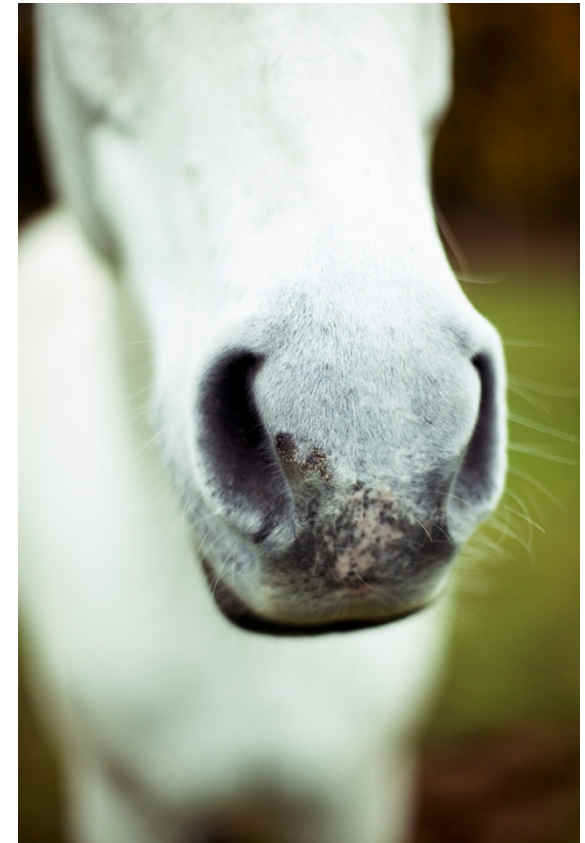
- Horses today can represent a leisure or sporting activity, a way of life, a working companion or food.
- As a result the horse is also a traveller: The mobility of horses between the European countries has also increased:

-100 000 horses for slaughter/year
-International Equestrian Federation (FEI)
organizes yearly about 250 international
competitions



Number of horses

- The number of horses per capita depends on:
 - (+) mean consumption level
 - (+) education level
 - (-) Unemployment rate
(at lower consumption levels)



The horse is of economic importance in the EU

- IPSOS, German Riding Association (2005)
- DEFRA (2004)
- Pferd Austria, Schneider and Mahlberg (2005)
- SLU, Johansson, Hedberg and Andersson (2004)

The German horse sector are approximated to EUR 2.6 billion and the total sales are nearly EUR 5 billions: 3-4 horses in Germany create one fulltime job.

A direct employment in the UK horse sector to 50 000. Total employment due to indirect effects of the horse industry is estimated to 150 000-200 000: 5-7 horses per fulltime job.

A production valued to EUR 1.19 to 1.26 billion in Austria. The value added activities generates EUR 634-674 millions: 3-4 horses create one workplace in the Austrian economy

The turn-over of the Swedish horse sector is EUR 2 billions and 9 466 full time employments. In addition, 10 horses create one workplace in the national economy

Horse in business



- Training, feed production, breeding and livery most important in Europe
- Tourism and Trekking, Riding camps, Equipment sales, Riding schools, Equine transport, Equine therapists



The betting

- Betting on trotting is very popular in France, Italy and Sweden.
- Betting on thoroughbred racing is extensive in Great Britain, Italy and France.
- Totalizator: a share of the returns is paid to the government as tax, which are redistributed to the horse industry via various payments
- In Great Britain, only 96% of the betting is organized by private bookmakers.

The horse in agriculture

- Horses today provide an important opportunity for alternative land use and business in agriculture.
- The land required to keep a warmblood horse varies: 0.75 ha/horse in Ireland and 2.21 ha/horse in Greece.
- The total agricultural land needed to feed a horse varies between 1% and 20% of the total agricultural land.
- The rural development program 2007-2013: the horse has become more important in agricultural sector



Breeding

- The horse breeding is an old tradition in Europe- The national studs are still important in breeding.
- Administration of breeding is run by national studbooks for each breed: breeding objectives, registration, passports
- Artificial insemination has been rapidly adopted as the main reproduction technology. In Sweden more than 90% of warm blood as well as trotter mares are inseminated.

The horse in society



- The number of riding schools or riding clubs nearly 15 000 where Germany has 7 500
- Riding as a hobby by women and especially young girls: 75% women and 25% men at the ages between 13 and 18 years old.
- An interesting notion is the change in gender and class coding: from men, military and nobility to civil society and women and girls

...and a way of living



- Education programs at secondary school level as well as higher education levels
- Higher education programmes and courses.
- Equestrian properties have also increased including “villages” which offer houses or cottages in combination with stabling



The future

- **Diversification:** For the past 10 years the development of the horse industry seems to have been oriented towards diversification rather than growth.
- **Level of organization:** Organization In order to promote small scale businesses so called “horse councils” have been developed where horse owners, breeders, horse enterprises, infrastructure planners and equine education are provided a common network.
- So what could be challenges to solve in order to promote the horse industry of the future? Work on this report demonstrated that statistics of the horse industry is limited.

