The French Horse Industry in 2030

Scenarios to inform decision-making
A growing interest in pleasure riding and betting on horses

- FFE members > 700,000 (80% ♀)
- Independent riders > 700,000
  => A total of 1.5 Million riders

- €27 million / day
- 50 horse races / day
  => Annual betting > €10 billion
The French Horse Industry: Major Trends (2)

The horse population has been expanding again since 1995

- 1 million horses on 1 M. ac. of pasture lands
- Important economic and environmental role of horses

... but meat production and consumption has been declining

- Decline of horse slaughtering
- Consumption 300g/cap/year (less than 1/5 households eat horse meat)

=> Decline of horse meat industry
The French Horse Industry in 2030

- The French Horse Industry: Main Uncertainties
  - Human/Horse relationship
  - Care/Welfare
  - Outdoor sports
  - Tax rate harmonisation at EU level
  - French policy and related funding
  - Regulation of horse race betting

THE ECONOMIC AND SOCIETAL CONTEXT
- Economic growth
- Social links/networks

HORSE USES USERS’ AND SOCIETY’S EXPECTATIONS

PUBLIC POLICY AND REGULATION
- Tax rate harmonisation at EU level
- French policy and related funding
- Regulation of horse race betting

HORSE PRODUCER STRUCTURE AND STRATEGY
- Objectives
- Adoption of genetic tools

The French Horse Industry in 2030
In order to:

⇒ steer public policy and research
⇒ define strategies to guide and support the industry

Method

▪ Scenario building using a foresight method called « morphological analysis »

Frame of reference

▪ **Domain:** the various activities and uses of horses
▪ **Time horizon:** 20 years ⇒ 2030
▪ **Territorial level:** France

Resources: a collective and interdisciplinary effort

▪ INRA-IFCE Steering Committee and Project team
▪ A panel composed of 16 experts
▪ Targeted interviews with 62 industry stakeholders
▪ Regional workshops to illustrate diversity (42 participants in 3 regions)
The Foresight Approach

An exploratory approach designed to bring clarity to current action in light of possible futures

- Description of present situation
- Analysis of past and current events

Key driving forces

Possible trends = Hypothesis

- Main current trends
- Areas of uncertainty
- Possible shifts

Possible trends =

- Scenario writing = images of the future
- Implications/Issues/Challenges
- Workshops, deliberation

Decision-thinking
Decision-making
(groups, individuals,...)

The French Horse Industry in 2030
## From Hypotheses to Scenarios

### Drivers of Change

<table>
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<tr>
<th>The economic and societal context</th>
<th>Users’ and society’s expectations</th>
<th>Horse uses</th>
<th>Public policy and regulation</th>
<th>Horse producer structure and strategy</th>
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**The French Horse Industry in 2030**

**HYPOTHESIS TO 2030**

- **Economic context**: favouring leisure activities + strong concern for animal welfare
- **Strong concerns for animal protection**: Above all, a sentimental relationship
- **Public policy and regulation**: Decentralised government action supporting initiatives encouraging the use of horses
- **Horse producer structure and strategy**: The dream of a prizewinning horse, recreational horses an afterthought
- **Horse uses**: Horses as a preserve of the elite, more affordable recreational activities for the middle classes: Horses are a social marker
- **Users’ and society’s expectations**: Strong desire for contact with horses and gambling
- **The economic and societal context**: Slow recovery after economic crisis. Improved purchasing power

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**ECOLE NATIONALE D’ÉQUITATION**

**Le Cadre Noir de Saumur**

**INRA**

**SCIENCE & IMPACT**

**Institut français du cheval et de l’équitation**
# The French Horse Industry in 2030

## Drivers of Change

### The Economic and Societal Context
- **Slow recovery after economic crisis.** Improved purchasing power.
- **Persistence of the economic crisis.** (Any economic context)
- **Priority to quality of life and solidarity.**
  - Habitat, personal development, social ties.
- **Economic context favouring leisure activities.** Strong concern for animal welfare.

### Users’ and Society’s Expectations
- **Horses uses.**
  - Strong desire for contact with horses and gambling.
  - The horse is a medium for recreation.
  - Horses as a preserve of the elite, more affordable recreational activities for the middle classes.
  - Desire for contact with nature, harmony, personal development, social ties.
  - The horse as a source of individual and collective well-being.
  - Strong concerns for animal protection.
  - Above all, a sentimental relationship.

### Public Policy and Regulation
- **A financially withdrawn regulatory State.**
- **Decentralised government action supporting initiatives encouraging the use of horses.**
- **A financially withdrawn regulatory State.**

### Horse Producer Structure and Strategy
- **Specialisation and segmentation, production channels marked different.**
- **Small producers more professionally oriented, judiciously passionate.**
- **Professionalism enforced, breeding limited by permits.**
- **The dream of a prizewinning horse, recreational horses an afterthought.**

## Hypothesis to 2030

### Two Scenarios Based on Opposite Evolutions of the Economic Conditions:
- Towards an improvement or a deterioration of middle class purchasing power?

### Two Scenarios Based on Evolutions of Society

- **Everyone on Horseback.**
  - The High Society Horse
  - The Civic Horse
  - The Companion Horse
Four Constrasted Scenarios...

Horses in the leisure market, buoyed by a wide variety of businesses
- Horse is a medium for recreation
- Horse number ↗
- Segmentation of breeding activities

SC1 Everyone on Horseback

SC2 The High Society Horse
- Horse is a social marker
- Horse number ↗
- Professionalization of breeding activities

From exploiting to caring for animals – the quest for animal welfare
- Above all, a sentimental relationship
- Horse number ↘
- Breeding: a leisure activity for owners

SC3 The Civic Horse

SC4 The Companion Horse
- Horse is a vehicle for social bonding, useful for society
- Horse number ↗
- Tech. professionalization of breeding activities

The French Horse Industry in 2030
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...But Shared Issues and Concerns

- To attract a growing number of riders
- To resist the economic crisis
- To develop non-profit horse usage
- To care for old horses

Human-Horse Relationship

- Health monitoring, animal welfare,
- Development of emerging hazardous diseases
- Caring for animals up to and beyond death

Health, welfare

Economic efficiency

- Contribution to enhancing landscapes
- Preservation of grassland areas no longer used by ruminants

Preservation of breeds, Pressure on surfaces

- Loss of genetic heritage
- Competition with other activities that require a lot of space

Environmental issues
Outlook for Public Policy

- Equine promotion in the Common Agricultural Policy
- Development of high level equine expertise to participate in EU regulatory frameworks design
- Facilitation of economic development
- Regulation: gambling policy, horse racing
- Professional training, innovation, R&D
- Health monitoring, traceability, identity databases
- Development of specific regional plans for the horse industry
- Agreements with community-based agencies or other structures to deliver services
Outlook for Research and Development

1. **IMPROVE KNOWLEDGE TRANSFER TO END USERS**

2. **DEVELOPMENT AND STRENGTHENING OF FOUR RESEARCH PATHWAYS**

- **Animal behaviour:** analyse temperament traits, factors and indicators of wellbeing to understand human/horse relationship, develop innovative training methods and optimise performance.

- **Users and stakeholders:** analyse their needs and organisation at technical, economic and social levels to understand representations, expectations, production costs, labour force management.

- **Genetic improvement** to help determine abilities of horses at an early stage and match genetic types with the expectations of the users.

- **Stud-farm management** to integrate the horse in an approach based on sustainable development (grassland management, assessment of environmental impact and ecosystem services).
THANKS

http://www.paris.inra.fr/depe/Projets/Filiere-equine