Role of horse industry in regional development in France

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Introduction

General context

• Interest for horse industry is growing up in most developed countries.
• It is difficult to estimate the importance of this industry
  – difficulties to obtain actual data from various organizations,
  – horse activities are included in different economic sectors.
• So horse industry mostly excluded from public policies and strategies on regional development.

Aims of the presentation

• Data available in France to assess the role of horse industry in regions.
Method: Presentation of 3 regions (NUTS 2)

Selected according to the weight of horse industry in regional economy

- Basse-Normandie
- Auvergne
- Languedoc-Roussillon

The horse industry / GDP of the region:
- 23 %
- 5 %
1) **Breeding**:
   - 1,100 breeders

2) **Riding schools**:
   - 400 firms

3) **Races**:
   - 2 race courses

4) **Other related businesses**:
   - 60 farriers, 46 professional riders, 30 veterinarians, 100 suppliers, ...

**IFCE**: French Institute on Horse and Riding

**SIRE**: (French Identification System indexing Equidea)

**French Equestrian Federation**

**National organizations of races**

**National organizations**

**Regional observatory** (regional horse council)

**National methodology**:
- Economic data

**National observatory (OESC)**
## Languedoc-Roussillon

<table>
<thead>
<tr>
<th></th>
<th>Breeding</th>
<th>Riding schools</th>
<th>Race courses</th>
<th>Other businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Horse (number)</strong></td>
<td>16 500</td>
<td>13 000</td>
<td>0</td>
<td>1 800</td>
</tr>
<tr>
<td><strong>Employments (WU)</strong></td>
<td>870</td>
<td>980</td>
<td>0</td>
<td>310</td>
</tr>
<tr>
<td><strong>Turnover (millions €)</strong></td>
<td>17.2</td>
<td>40.0</td>
<td>0.3</td>
<td>29.5</td>
</tr>
</tbody>
</table>

**Total horse industry:**
- 42 500 horses
- 2 800 employments
- 1 800 firms
- **87 M€ turnover**
  (+ 246 M€ from PMU)
Auvergne

Horse industry:
- 35,000 horses
- 4,400 employments
- 2,700 firms
- 85 M€ turnover

% Languedoc-Roussillon
- 18%
- +57%
- +50%
- -2%

Turnovers of different horse industry sectors

- Breeding: Auvergne = 7 M€, Languedoc-Roussillon = 8 M€
- Riding schools: Auvergne = 35 M€, Languedoc-Roussillon = 40 M€
- Races: Auvergne = 25 M€, Languedoc-Roussillon = 20 M€
- Other businesses: Auvergne = 30 M€, Languedoc-Roussillon = 35 M€
Auvergne

Horse industry:
- 35,000 horses
- 4,400 employments
- 2,700 firms
- 85 M€ turnover (+91 M€ from PMU)

% Languedoc-Roussillon
- -18
+57
+50
-2
(-63%)

National methodology with regional data

2,200 employments in agriculture

Turnovers of different horse industry sectors
Auvergne

Agricultural census 2010:

17% of farms with horses

4 105 farms with horses

3% horse specialized

97% Other productions (cattle, crops, ...)

REFERENCES used to:
set up farmers in horse productions
draw up regional measures from the 2nd pillar of CAP
Basse-Normandie

<table>
<thead>
<tr>
<th></th>
<th>Auvergne</th>
<th>Languedoc-Roussillon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horses (number)</td>
<td>93 600</td>
<td>35 000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>42 500</td>
</tr>
<tr>
<td>Employments (WU)</td>
<td>12 600</td>
<td>4 400</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 800</td>
</tr>
<tr>
<td>Firms (number)</td>
<td>5 600</td>
<td>2 700</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 800</td>
</tr>
<tr>
<td>Turnover (M€)</td>
<td>882</td>
<td>85</td>
</tr>
<tr>
<td></td>
<td></td>
<td>87</td>
</tr>
<tr>
<td>+ PMU (M€)</td>
<td>218</td>
<td>91</td>
</tr>
<tr>
<td></td>
<td></td>
<td>246</td>
</tr>
</tbody>
</table>

The first « stud farm » in France: 20 % of the total French production

national horse suppliers located in Basse-Normandie

Leadership used by the regional Horse Council
to promote its industry in France and abroad
Basse-Normandie

Regional Horse Council
Public Communities:
- regions (NUTS 2): Basse-Normandie, Haute-Normandie
- departments (NUTS 3): Calvados, Manche, Orne
- local administrative unit: Caen

French Ministry for sports

300 projects:
- Investments in infrastructure,
- To develop horse industry: equestrian centers, tourism organizations and events
- To strengthen research clusters and international exchange
- Creation of the « Horse Home »: headquarter of regional committees of horse industry, of research cluster and foundation to optimize the training of men.

15 MONTHS BEFORE
15 DAYS EVENT
15 YEARS IN HERITAGE
Conclusion

• The weight of horse industry in France and in regions is available through association of Professional Organizations and National Institutes.

• These national and regional observatories must perform to appreciate the growing impact of horse industry in all components: economic but also environmental and social.

The reasons why this industry could contribute to territorial developments regardless local contexts.
THANK YOU FOR YOUR ATTENTION