

# REFErences, the equine network reference

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**Réseau Économique de la Filière Équine**



*EAAP - 2010*

# A multi-partnership network

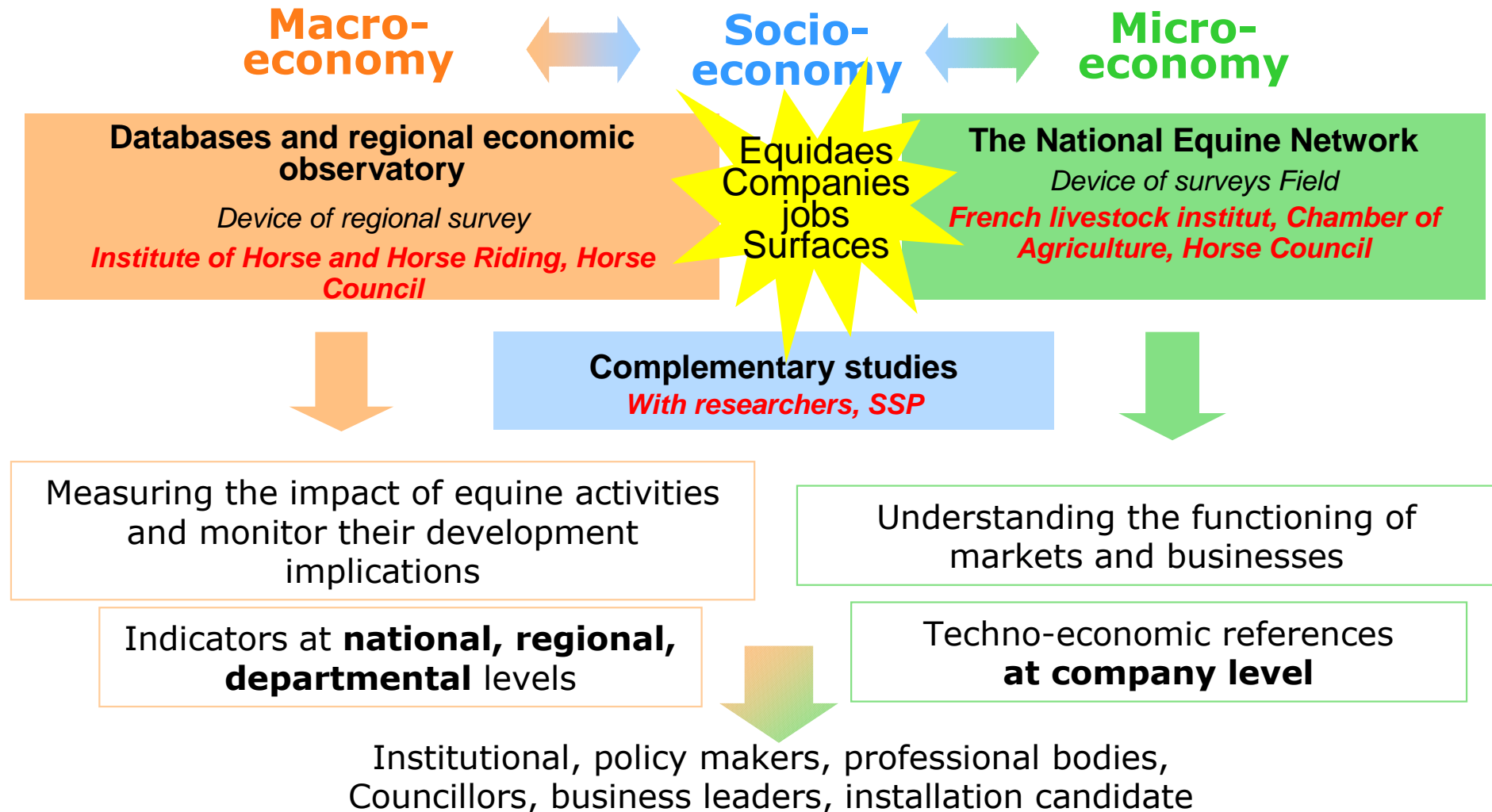
## Partnership created in 2006

- Before 2006 : several institutes had economic missions
  - 4 partners :
    - French Institut of Horse and Horse Riding
    - French Livestock Institut
    - Chambers of agriculture
    - Horse Councils
- } National level
- } Regional level

## Headed by a steering committee

- collect the expectations of the branch, give an opinion on the actions, organisation and human and financial means
- Contain partners members, socio-professionals, prescribers, funders

# Organisation and objectives



# Objectives of REFERENCEs

- ✓ Produce indicators about the equine industry's impact : databases and regional observatory
- ✓ Produce techno-economic references : the equine network
- ✓ Lead complementary studies
- ✓ Offer a wide results dissemination

# Produce indicators about the equine industry's impact

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# Methodological principles

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## 2 sources of data

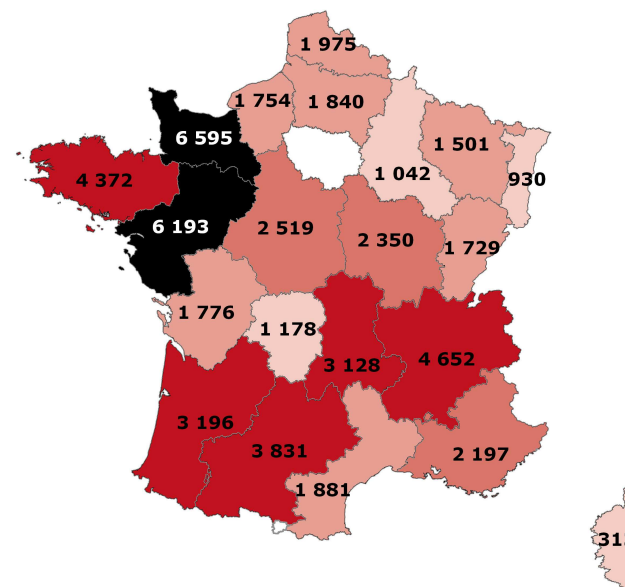
- Existing databases (IFCE)
  - Collect from >30 suppliers
  - Consolidate data as time series
- Regional economic observatory (IFCE, CC)
  - A device of survey with a national method
  - Collection of additional statistical indicators
  - 8 activity sectors surveyed, agricultural or not

→ **Modelling indicators on equestrian enterprises, their jobs, equidaes, area, economy**

# The regional economic observatory

## 3000 surveys between 2005 and 2008

- Whole census prior to making the surveys :
  - 35 000 breeding farms and 20 000 others enterprises
  - 1 enterprise on 3 is located in Basse-Normandie, Pays de la Loire or Rhône-Alpes
- Some firms characteristics :
  - Small structures, often recent
  - Frequent multi-activity
  - Very variable turnover
- Some indicators of horse impacts:
  - An annual turnover about 2 billions €
  - 41 000 agricultural jobs, 28 000 FTE related
  - 900 000 equidaes in France,
    - 700 000 in agricultural firms



# Produce techno-economic referencials

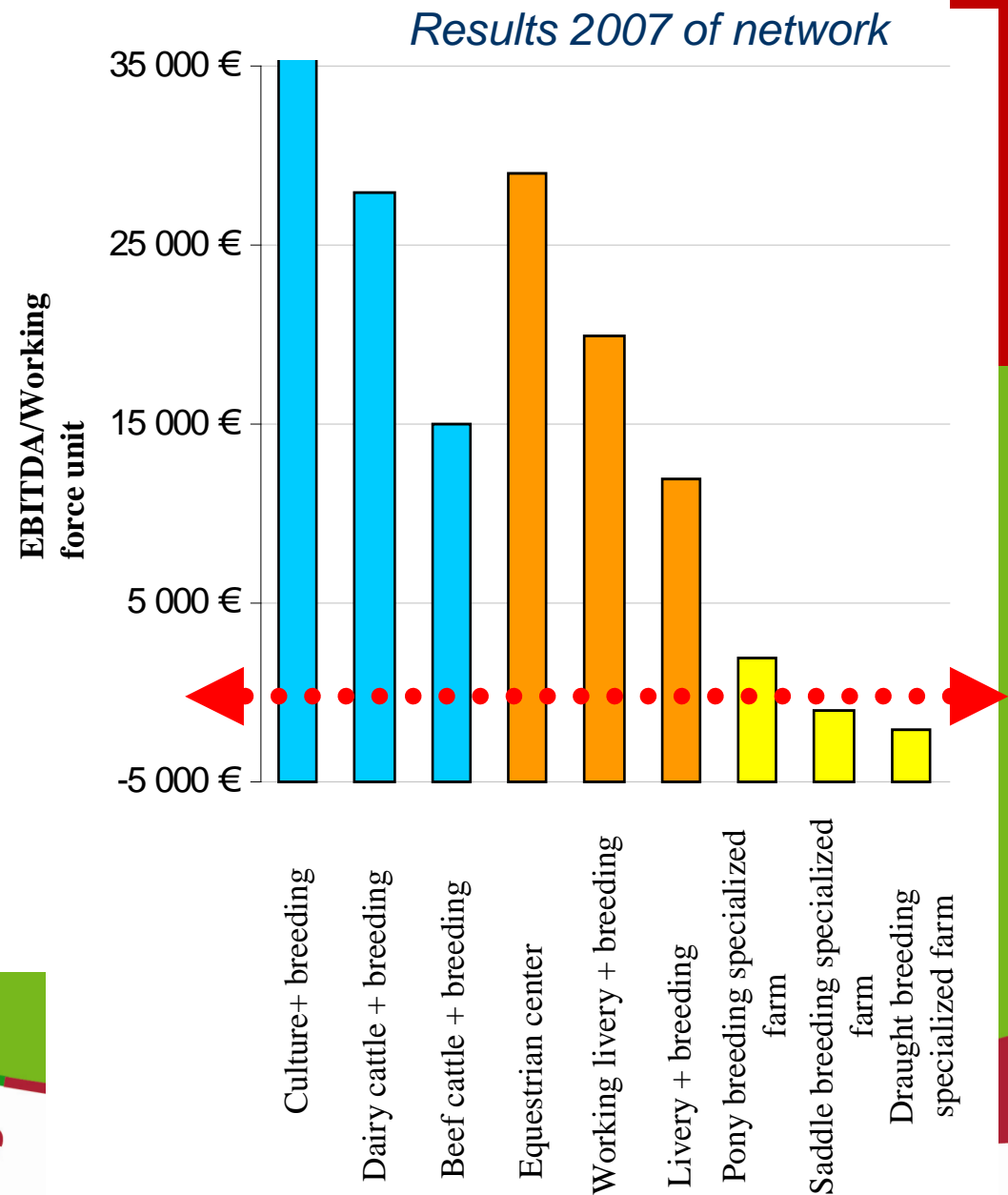
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# Methodological principles

- **Farms network :**  
265 followed farms  
Only farms with more than 5 mares, with an economic objectives and a reasoned management
  - 2 annual visits
  - Technical and economic data collection
  - Producing references
- **First economic results**
  - Results vary depending on the activities
    - Low input in specialized farms
  - Way of progress
    - Diversification of activities



# Lead complementary studies

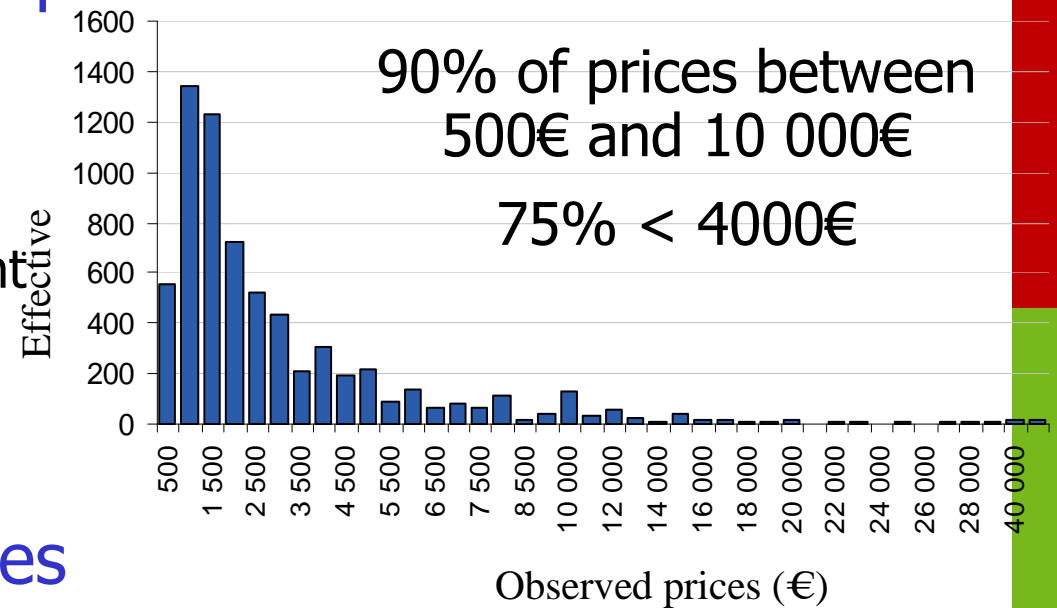
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# The saddle horses market

## Quantitative surveys on horse prices

- 8000 prices recorded by surveys
- 2/3 going to leisure
- Widespread prices
- Several market segments differ  
sport, instruction, trekking, agreement  
0-3 y-o, 4-6 y-o, 7-10 y-o, + 10 y-o



## Sociological survey on practices

- Finding : growth market, but breeders are not satisfied
- 2/3 of breeders produce horses for professional sport
- Cost price of a 3 year-old sport horse : 5000 to 6000€

➔ **A mismatch between supply and demand**

# A wide results dissemination

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# Results dissemination

## A national day return

- Aimed at decision makers
- About 140 participants in January 2010
- PowerPoint and videos of conference online
- 4<sup>th</sup> national day : January 19, 2011

## Many publications

- An annual statistic report (l'Annuaire ECUS)
- Available online on partners websites

[www.haras-nationaux.fr](http://www.haras-nationaux.fr)

[www.inst-elevage.asso.fr](http://www.inst-elevage.asso.fr)

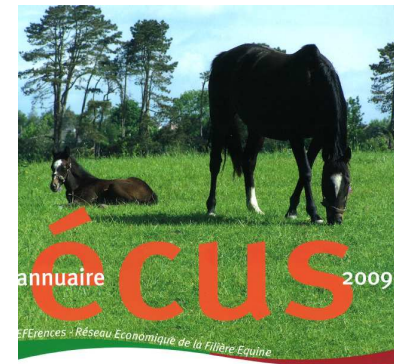


Tableau économique, statistique  
et graphique du cheval en France  
Données 2008

Élevage  
Commerce  
Utilisations  
Statistiques socioéconomiques