

KEY FIGURES 2020



ANNIVERSARY
EDITION

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STATISTICAL REVIEW OF THE FRENCH EQUINE SECTOR - 2019 DATA **Breeding Trade Uses socio-economic Statistics**

This leaflet is also downloadable on the website www.equipedia.ifce.fr

For more information, consult the online version of the ECUS 2020 yearbook. This document is only available in French.

EQUINES, EMPLOYMENT AND CASH FLOWS

Equine herd at the end of 2019



1 051 000

EQUINES IN FRANCE

15%

OF RACE HORSES

18%

OF DRAFT HORSES AND DONKEYS

67%

OF SADDLE HORSES AND PONIES

Employment in 2018



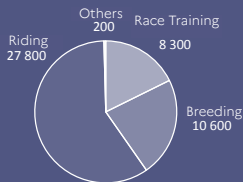
66 000

MAIN JOBS INCLUDING :

INCLUDING

46 900

JOBS RELATED TO HORSE BREEDING AND USE OF HORSES



INCLUDING

28 000

EMPLOYEES, APPRENTICES AND INTERNS

Cash flows in 2019



ALMOST €11 BILLION GENERATED BY EQUINE ACTIVITIES INCLUDING :

RACES :

€9 767 M

(OF WHICH 6 600

RETURN TO THE BETTERS)

SPORT-LEISURE :

€1 052 M

MEAT :

€147 M

WORK :

€26 M

EXPORTS :

€229 M

BREEDERS AND HERDS

General decrease in the number of breeders except in sport-leisure

Number of breeders by type of product	2014	2019 (p)	% of changes 2018/2019 (p)
Gallop	4 250	4 358	-2%
Trot	6 850	6 008	-4%
Sport horses and ponies*	11 098	12 534	2%
Work	7 331	6 167	-1%
Other sport-leisure	618	1 108	14%
Recorded origin	5 949	4 219	-2%
Total**	32 720	30 170	-1%



30 170

BREEDERS, OWNERS OF COVERED MARES IN 2019

77%

OF BREEDERS OWN 1 TO 2 MARES

8%

OF BREEDERS OWN MORE THAN 5 MARES

Number of stallions and brood mares in decline

Breed type	Stallions			Brood mares		
	2014	2019 (p)	% of changes 2018/2019 (p)	2014	2019 (p)	% of changes 2018/2019 (p)
Gallop	320	301	-1%	8 937	10 124	-4%
Trot	506	445	-3%	16 065	14 733	-4%
Sport horses and ponies*	2 636	2 617	1%	17 924	20 253	1%
Work	2 577	2 274	-1%	18 611	16 744	0%
Other sport-leisure	1 031	723	-3%	2 154	1 518	6%
Recorded origin	8	9	13%	12 517	9 986	-5%
Total	7 078	6 369	-1%	76 208	73 358	-2%



6 369

STALLIONS IN 2019

73 358

BROOD MARES IN 2019

Sources : IFCE-SIRE

(p)=preliminary 2019 data, some files not yet administratively closed

* Breeds managed by the SHF

** A breeder producing different breeds is counted in each breed they produce, hence a number of breeders of all breeds which differs from the sum per breed.

FOAL BIRTHS

Decrease in births in 2019

Number of breeders by type of product	2014	2019	% of changes 2018-2019
Gallop	5 747	6 708	-1%
Trot	11 219	10 137	-0,1%
Sport horses and ponies*	12 296	13 561	-1%
Work	10 638	9 277	3%
Other sport-leisure	1 907	1 950	-10%
Recorded origin	7 670	6 366	-2%



47 999

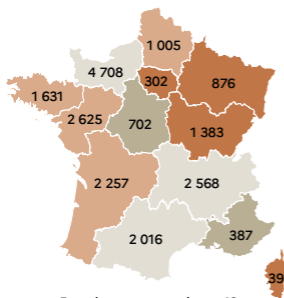
BIRTHS IN 2019

-1%

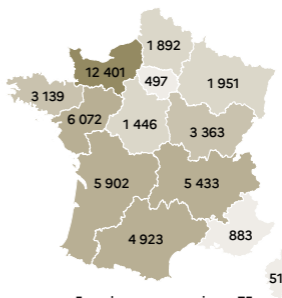
BETWEEN 2018 AND 2019

20 280 breeders in France, all breeds combined

47 918 registrations in France all breeds combined



French overseas regions: 42



French overseas regions: 75

Percentage of changes 2018/2019

- from 1,9% to 2,1%
- from -0,4% to 0,2%
- from -4% to -1%
- -6% and below

Sources : IFCE-SIRE

(p)=preliminary 2019 data, some files not yet administratively closed

* breeds managed by the SHF

TRADE

Slight increase in transactions except for trotting horses and working equines

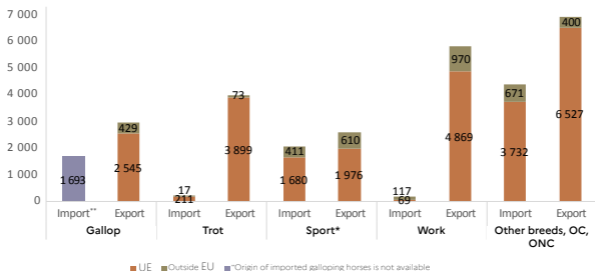
Number of breeders by type of product	2019	% of changes 2018-2019
Gallop	9 520	2%
Trot	12 367	-2%
Sport horses and ponies*	22 489	5%
Work	6 689	-1%
Other sport-leisure	4 771	3%
Recorded and non-recorded origin (OC and ONC)	25 403	-0,4%
Total	81 239	1%



81 239

OWNER CARD
RENEWALS

8 600 equines imported and 22 300 equines exported in 2019



22 300
EXPORTED HORSES
IN 2019

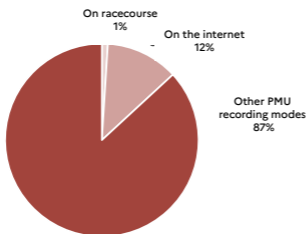
89%
OF EXPORTS
WITHIN THE EU

Sources : IFCE-SIRE, IFCE-OESC according to TRACES, DDCSPP, France Galop

*breeds managed by the SHF

RACES: BETTING AND OWNERS

99% of bets come from off-course betting in France



Amount of bets (in EUR million)

	2014	2019	% of changes 2018-2019
On racecourse	118	91	2,5%
Outside racecourse	9 350	9 030	-0,3%

Bets in the world in 2018*

Bets (in EUR million)	2018	% of changes 2017-2018
Japan	26 692	9%
Australia	16 931	-5%
Great-Britain	15 713	20%
Hong Kong	13 917	5%
United States of America	9 841	8%
France	8 883	-3%
Total	109 756	4%

9.1 
BILLION€
OF BETS IN 2019



MORE THAN
9 000
OWNERS OF
RACE HORSES IN
FRANCE, STABLE
POPULATION
IN 2019



MORE THAN
109
BILLION€
BET IN THE
WORLD IN 2018

RACECOURSES AND TRAINING

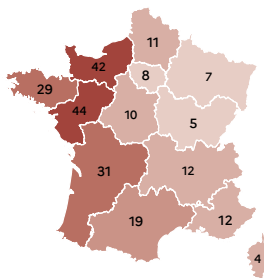
Races in France : a stable activity despite a decrease in incentives for trotting

Discipline	Number of races		Number of riders		Amount of incentives (M€)		
	2019	2014	2019	% of changes 2018/2019	2014	2019	% of changes 2018/2019
Hurdle racing	2 067	22 978	18 489	0%	83	76	-1%
Flat races	4 918	54 779	51 167	0%	193	181	0%
Trotting races	11 088	150 934	149 558	-1%	294	256	-12%



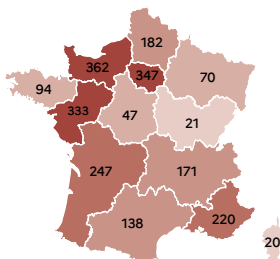
29 000 HORSES IN TRAINING IN 2019

236 active racecourses in 2019



French overseas regions : 2

2 275 meetings in 2019



French overseas regions : 23



236 ACTIVE RACECOURSES IN 2019

20%

OF MEETINGS ARE ORGANISED IN THE 5 MOST ACTIVE RACECOURSES

HORSE RIDING —

Number of licensed riders still in decline in 2019

	2014	2019	% of changes 2018-2019
Horse	265 822	257 475	-1%
Pony	335 812	287 637	-2%
Tourism	87 409	72 412	-3%
Total	689 043	617 524	-1,7%



RIDING

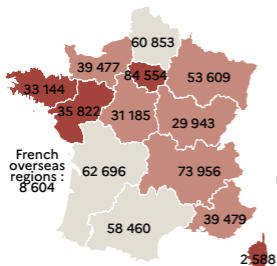
4TH

NATIONAL SPORT
IN 2019

Stable number of equestrian establishments

	2014	2019	% of changes 2018-2019
Number of associations	2 806	2 661	-3%
Number of private establishments	6 076	6 779	2%
Total	8 882	9 440	0,5%

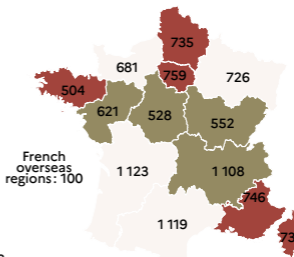
Nearly 1 in 4 riders licensed in Ile-de-France and Hauts-de-France



Percentage of changes 2018/2019

- from -3,1% to -2,6%
- from -2,2% to -1,9%
- from -1,2% to -0,2%

1 in 4 establishments located in Nouvelle-Aquitaine and Occitanie



Percentage of changes 2018/2019

- from 1,1% to 2,8%
- from 0,5% to 0,9%
- from -2,1% to -0,7%

EQUESTRIAN COMPETITIONS —

Increase in activity in 2019

	2014	2019	% of changes 2018-2019
Number of organisers	2 452	2 507	3%
Number of events	97 607	126 609	8%
Number of riders	1 528 727	1 618 746	6%
Amount of distributed winnings	28 530 640	32 390 514	4%



163 802

RIDERS HAVE A
COMPETITION LICENCE

78%

IN CLUB
CATEGORY

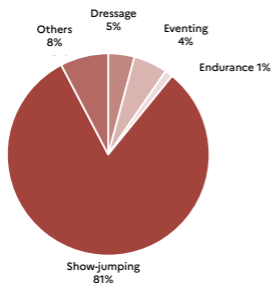
20%

IN AMATEUR
CATEGORY

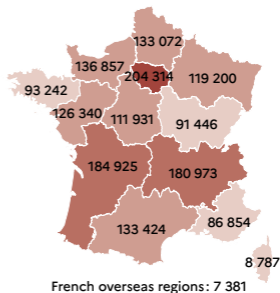
2%

IN PRO
CATEGORY

Show-Jumping, the 1st discipline in number of participants



Over 1.6 million participants in competitions in 2019



HORSE MEAT

Slaughters are still declining in 2019

	2014	2019	% of changes 2018-2019
Number of equines (by head)	17 088	8 033	-13%
Volume (in tec*)	4 885	2 192	-13%

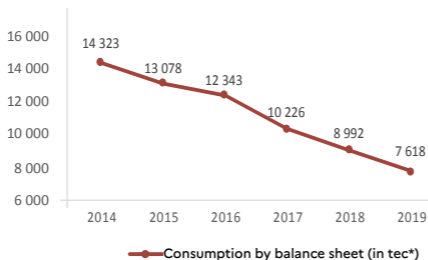
*tonnes carcase weight equivalent



8 033

EQUINES
SLAUGHTERED
IN 2019

The reduction in horsemeat consumption continues in 2019



7 600

TONNES OF
MEAT CONSUMED

9.4 %

OF FRENCH
HOUSEHOLDS
BOUGHT HORSE
MEAT IN 2019

Horsemeat is the most expensive meat (on average)

Average purchase price (EUR/kg)

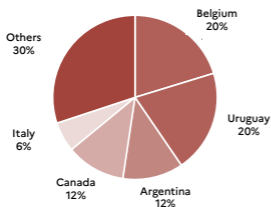
Beef	14,8
Veal	16,1
Sheep	14,9
Pork	7,6
Horse	17,7
Poultry and rabbit	8,3

FOREIGN MEAT TRADE

Increase in exports of horses intended for slaughter

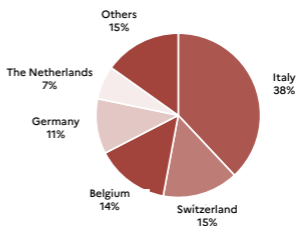
		2014	2019	% of changes 2018-2019
Horses intended for slaughter (number of heads)	Import	2 170	0	-
	Export	5 425	5 887	4%
Meat (tonnes)	Import	13 830	9 021	-14%
	Export	4 388	3 485	-11%

France mainly imports horsemeat from America



Meat imports by origin in 2019 (tonnes)

Italy, the main importer of French horsemeat



Meat exports by destination in 2019 (tonnes)

9 021 IMPORTED TONNES
IN 2019

3 485 EXPORTED TONNES
IN 2018

Trade deficit of €12.6 million in 2019 : France is not self-sufficient in horsemeat

Value (in EUR million)	Strong foreign trade	External meat trade
Export	9,4	18,5
Import	0	40,6

Source : TDM



+9.4 M€
BALANCE OF
EXTERNAL TRADE IN
LIVE ANIMALS

-22 M€
BALANCE OF
EXTERNAL TRADE
IN MEAT

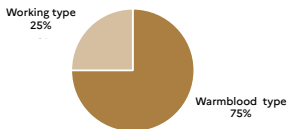
RETROSPECTIVE 1980-2019

BREEDING

Increase in the production of warmblood horses,
Decline in the production of draught horses



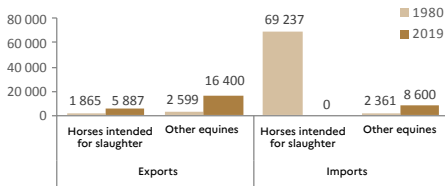
83 064 mares bred in 1980



73 358 mares bred in 2019

TRADE

The improvement of export competitiveness



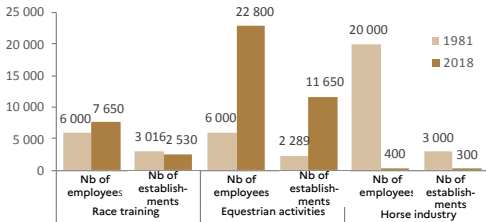
BALANCE
EXPORTS - IMPORTS

1980
- 67 200
EQUINES

2019
+ 13 700
EQUINES

USES

A significant development of equestrian activities,
generating an increase in employment



1980
136 708
HOLDERS OF THE
NATIONAL RIDER
CARD

2019
617 524
LICENSE HOLDERS
IN THE NATIONAL
EQUESTRIAN
FEDERATION (FFE)