

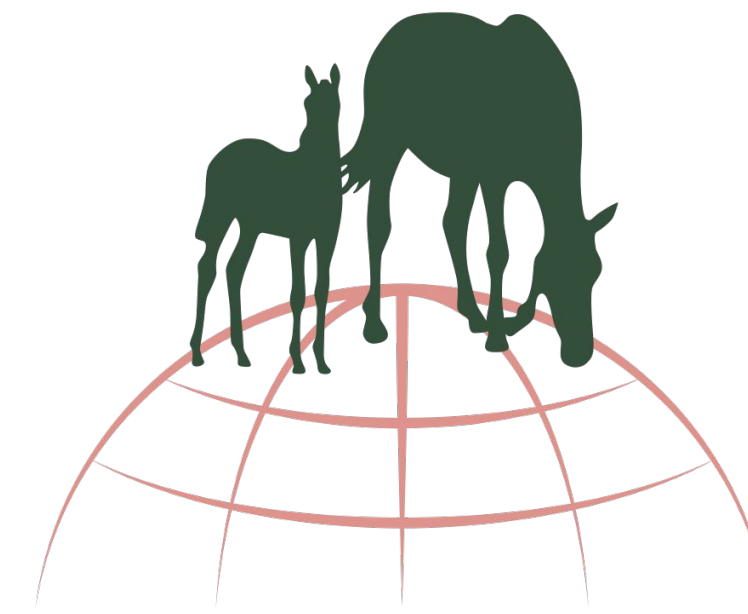
# WBFSH presents: *the State of the Industry*

Presenter:  
Chris Gould, Vice President,  
Department of Development

211012



# Preamble

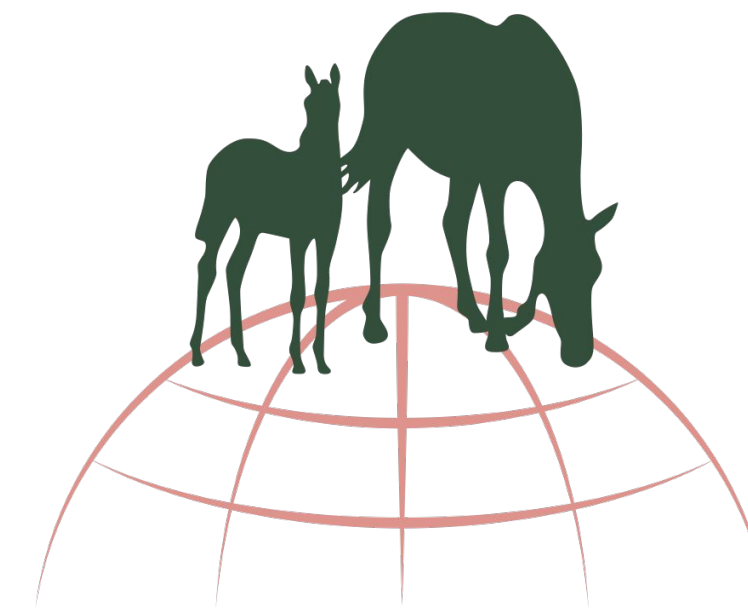


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- A State of the Industry Report will endeavour to describe the industry, its scope and the issues facing it.
- Collecting and reporting annually will create a body of valuable information that we hope will inform decisions by breeders, breed societies and public policy makers to help sustain the industry, improve the welfare of the horse and ensure future generations can continue to enjoy the benefits of an ongoing relationship with these amazing animals.

# Scope of the Report



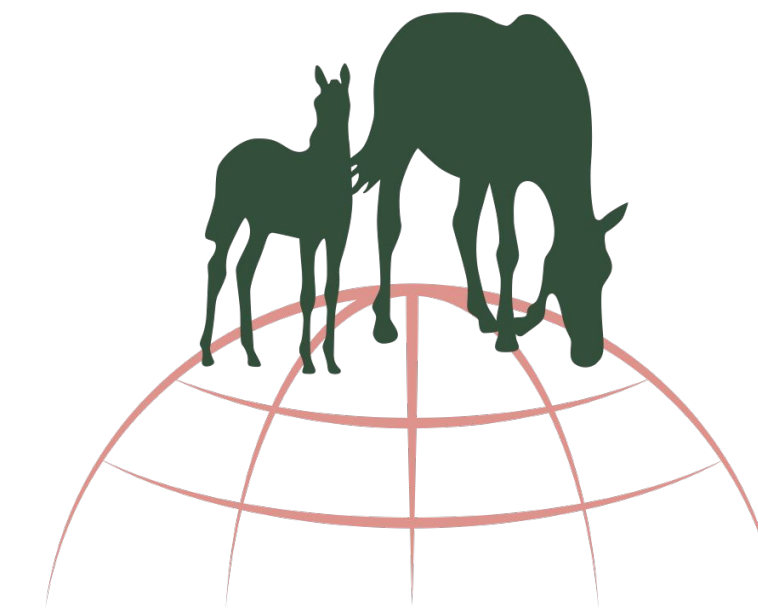
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- Captures data on production and use of horses for sport.
- Identifies important transportation, zootechnical and health regulations
- Examines allied horse activity (racing, western riding, leisure)
- Considers social license and the environment

# Data Gathering

## What we did



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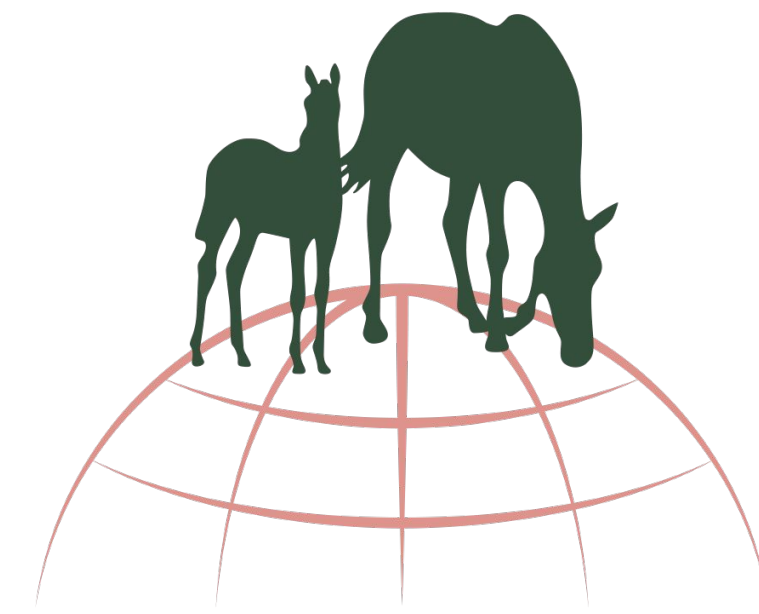
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- Committee: Ana Filipe (summer intern), Nadine Brandtner, Chris Gould, Edward Kendall
- Collected data from:
  - Online from published annual reports
  - FEI data extracts on competitions by Nation.
  - Surveys: Carolin Kathmann (graduate student) breeding practices (extracts, thank you!), Covid survey (office), SOI survey (design improvements required)
  - interview with Roly Owers (World Horse Welfare) to discuss social license

# Report Status

**As of now!**

- It's not ready but in data analysis phase.
- We intend to publish it before year end.
- We intend to host a pre-release seminar presenting highlights and fielding questions
- We are already planning for next year!



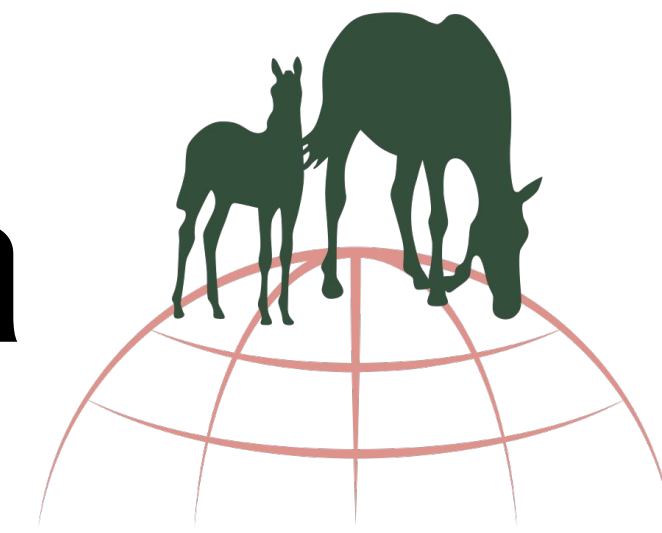
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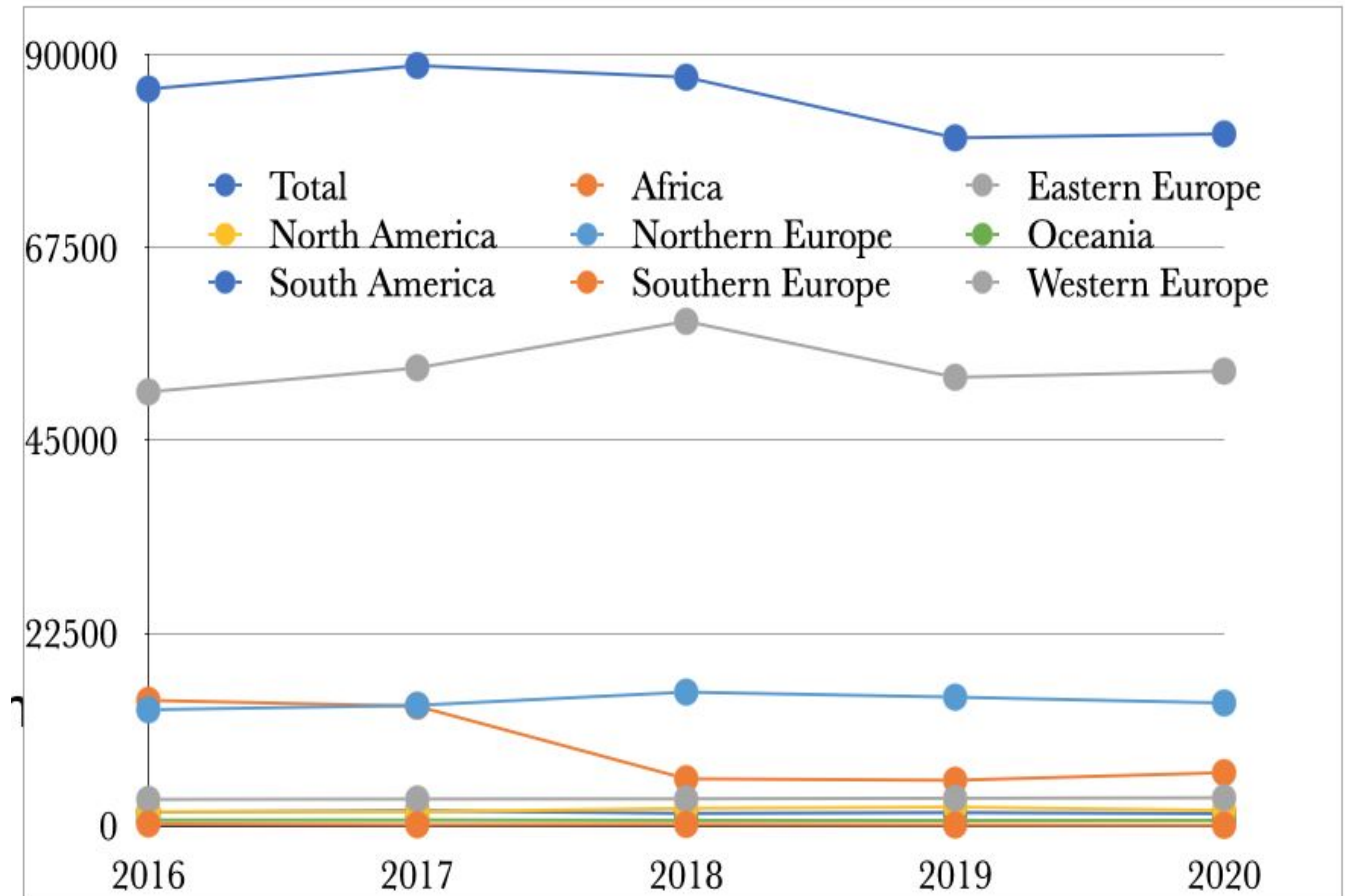
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# Registrations by geographic area

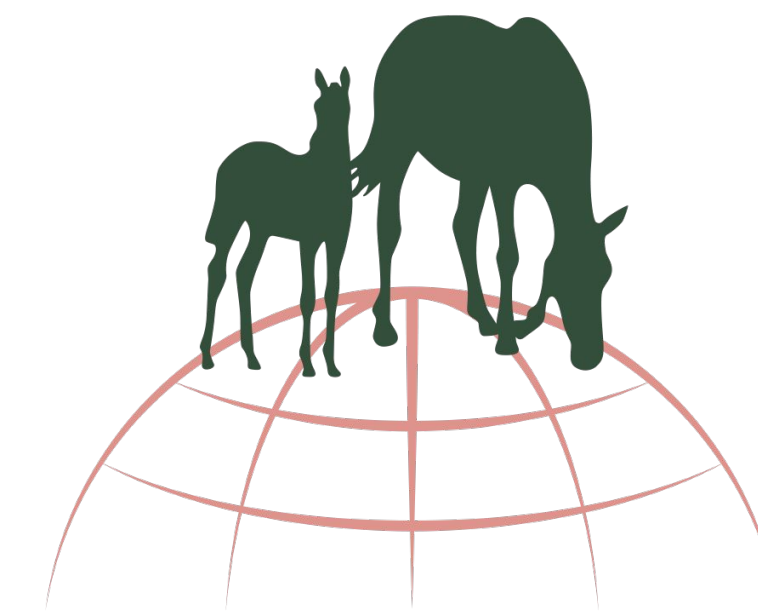


- Europe is the volume producer of warmblood horses (68%)
- Production seems stable
- Total production and Southern Europe production in particular declined in advance of covid.



# Registration Activity by geographic region

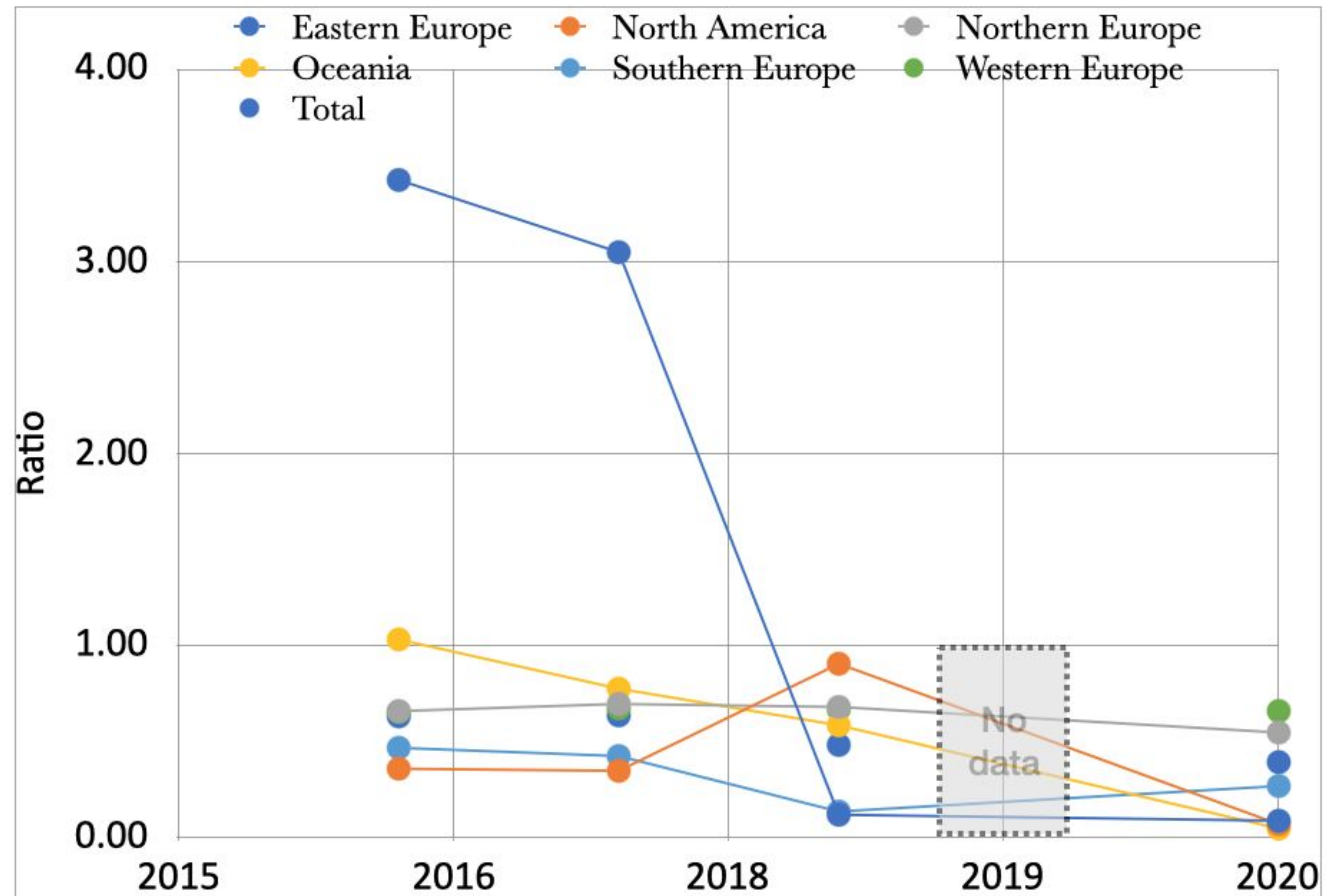
## Registrations per member



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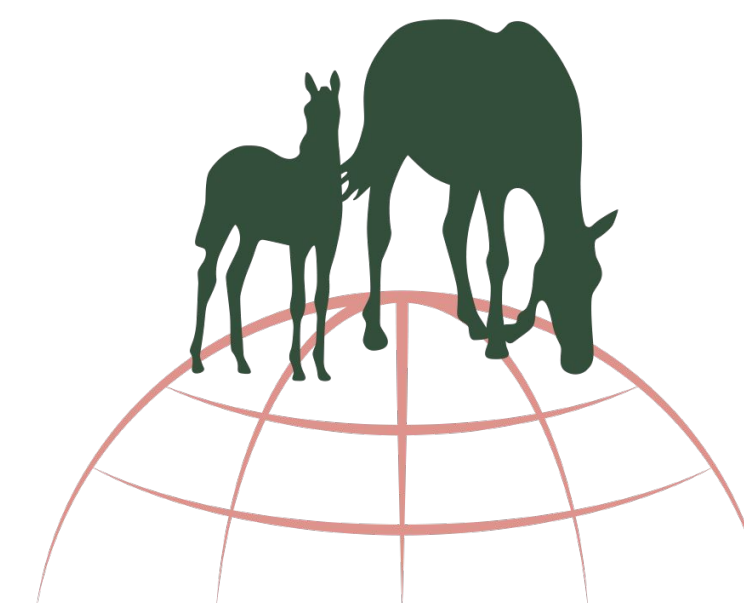
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- Variation in the number of members reported here may be due to differences in membership definition
- WBFSH does not currently collect membership information



# Industry activity

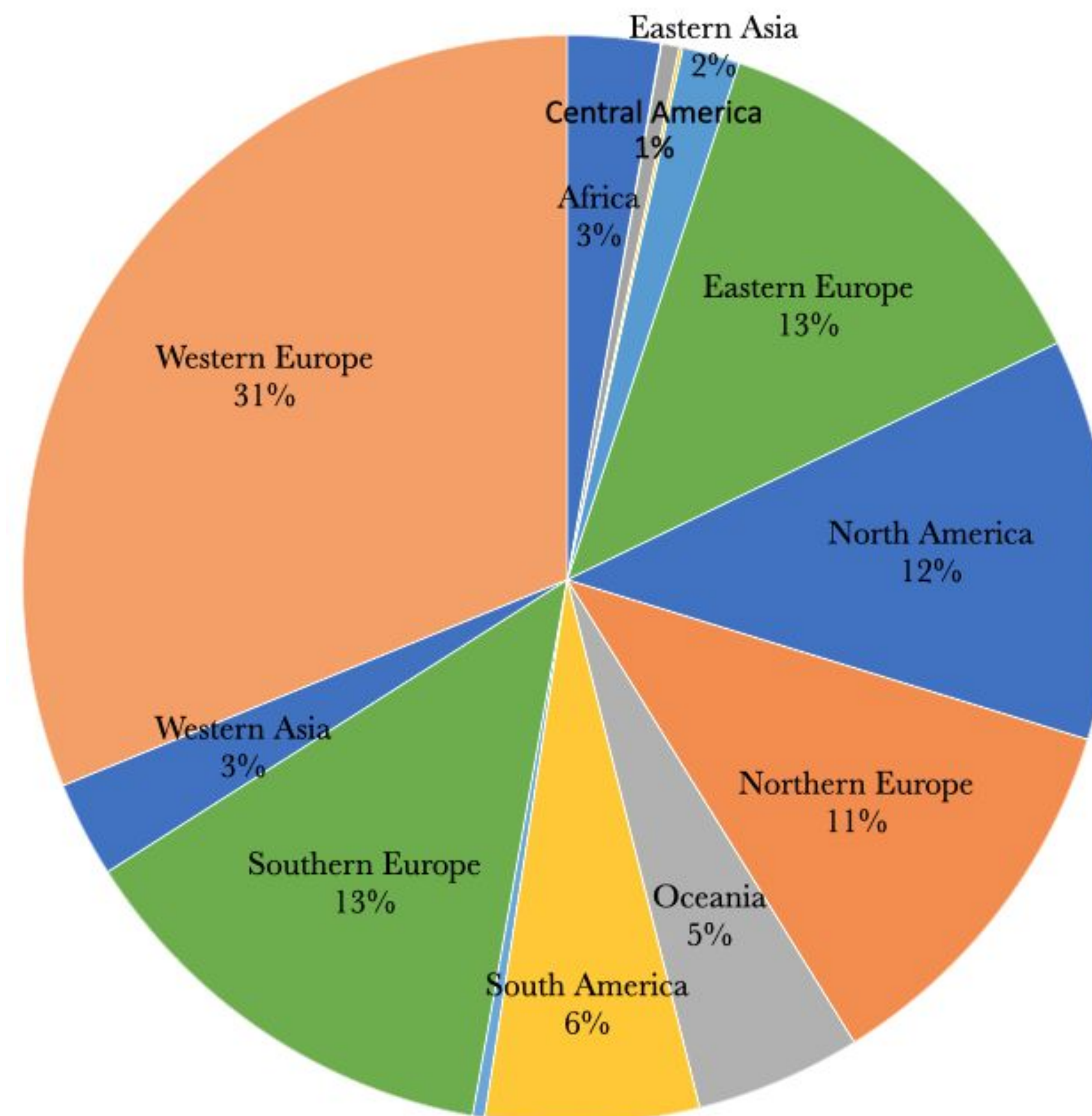
## FEI events by geographic region



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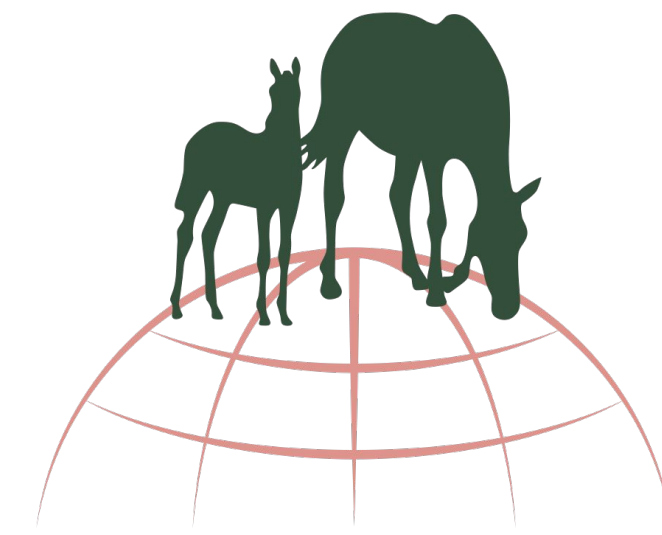
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- This section should contain sales activity, recreational activity, national and international competitions, off-label usage!
- We were unsuccessful in collecting information from the National Federations.... not a single response.
- Because of our relationship with the FEI we were able to get data extracts on FEI competition activity.
- The vast majority of FEI events occur in Europe
  - mostly Western Europe





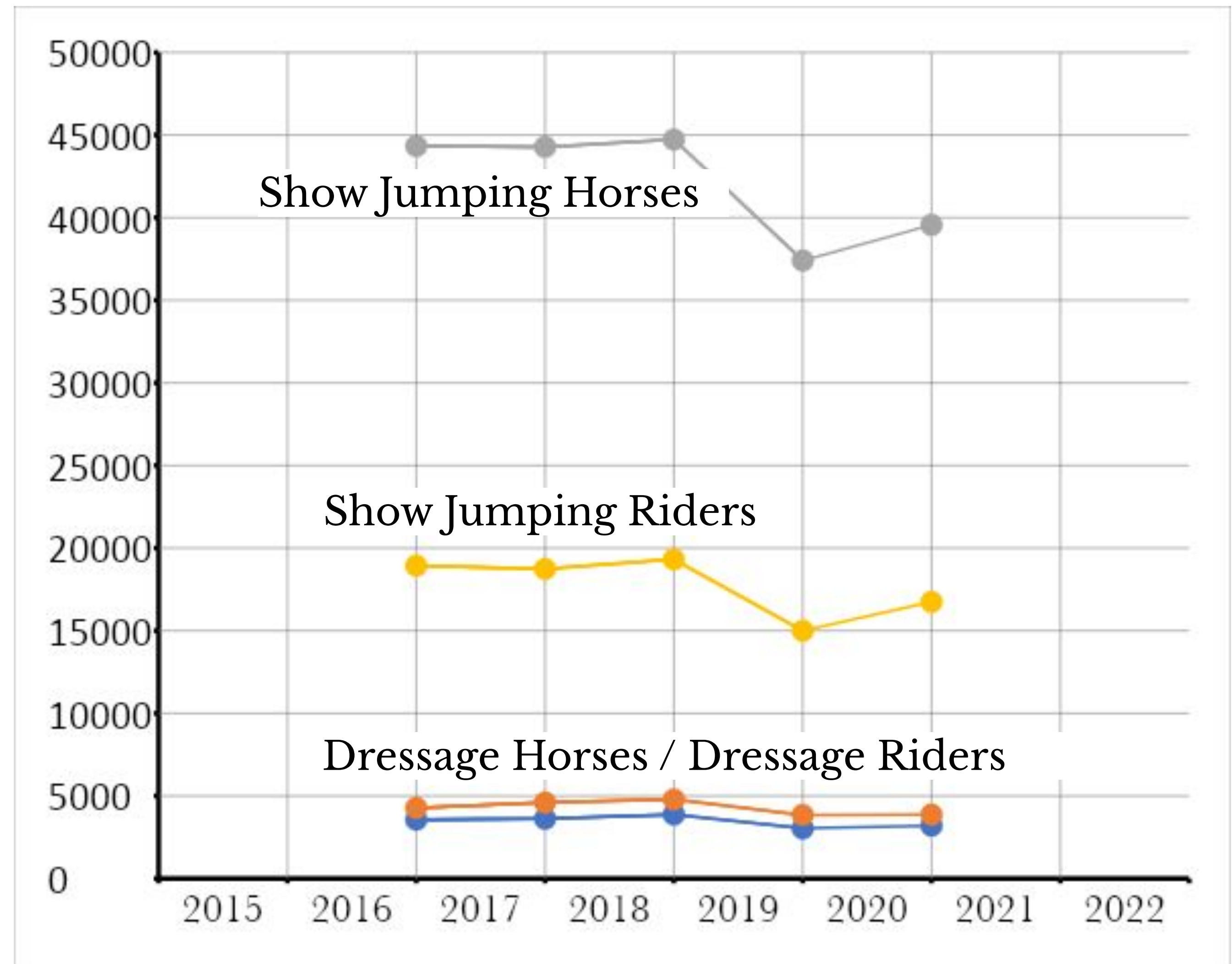
# Athlete trend (FEI data)



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**we have two athletes to consider**

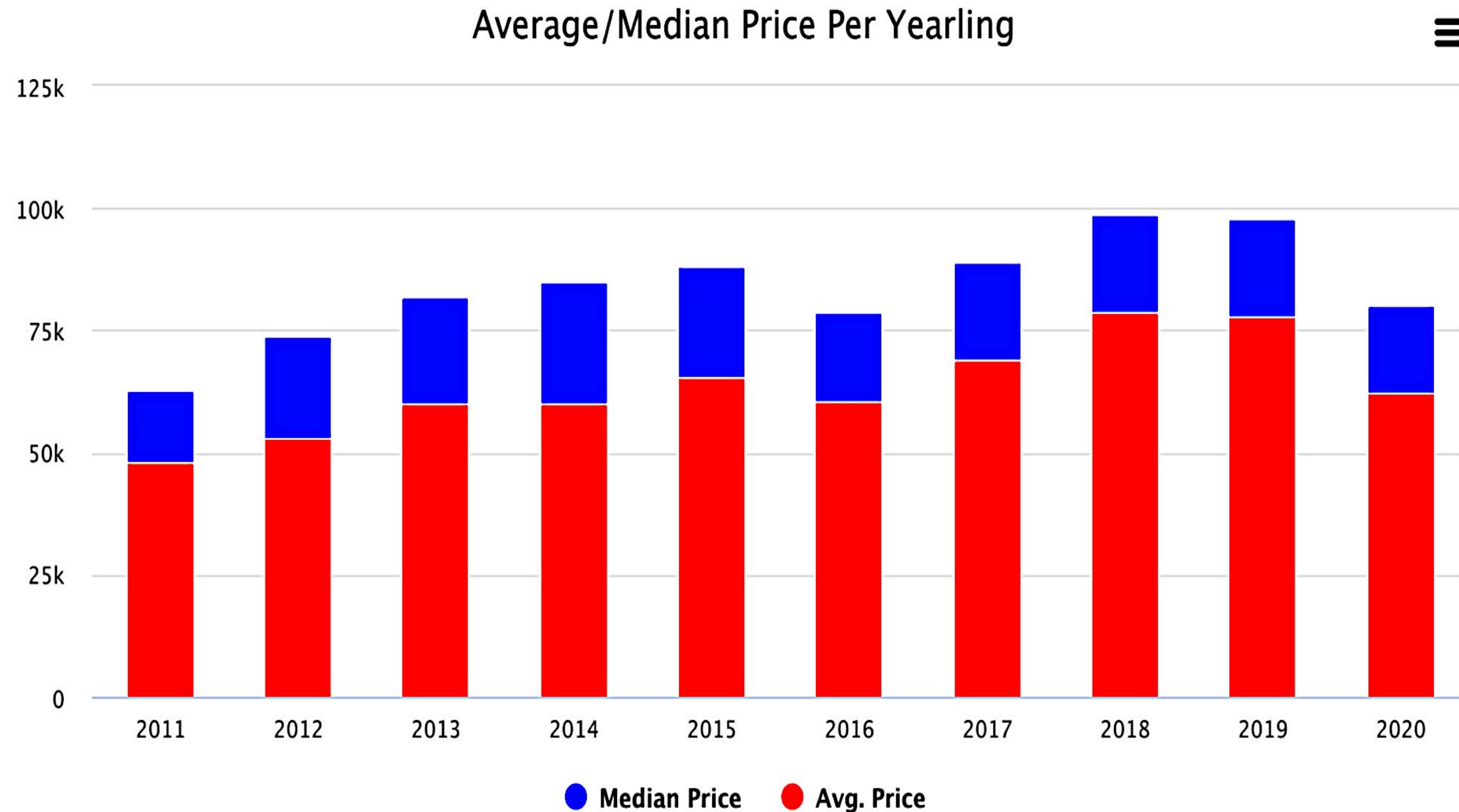
- During the observation period the ratio of horses to riders competing did not change significantly.
- the ratio is near 2.4 for Jumping and 1.2 for dressage
- there were no obvious growth trends in the number of horses or riders
- the impact of COVID is obvious



# Thoroughbred production from the Jockey Club

- This slide is an example of the type of market information we want to include in the report...

AVERAGE/MEDIAN PRICE PER YEARLING

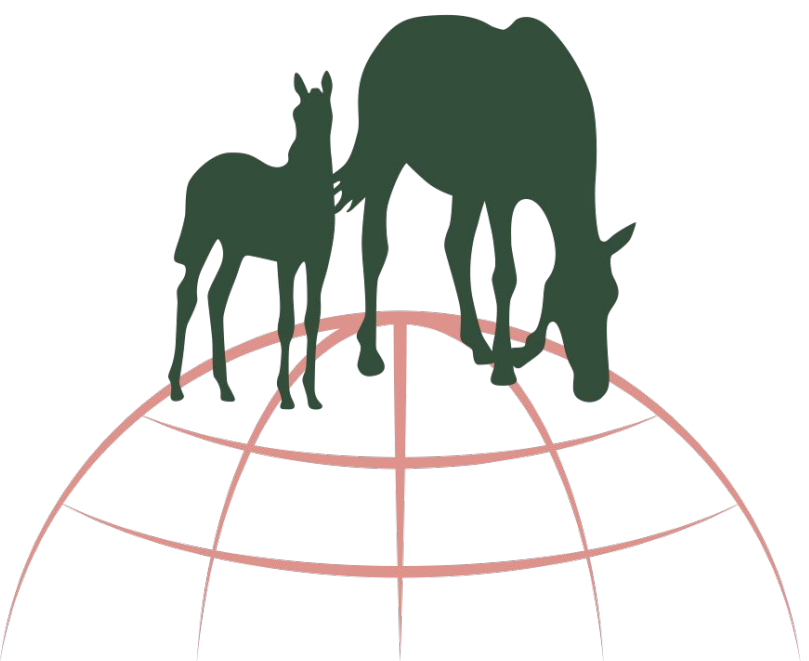


Average/Median Price Per Yearling

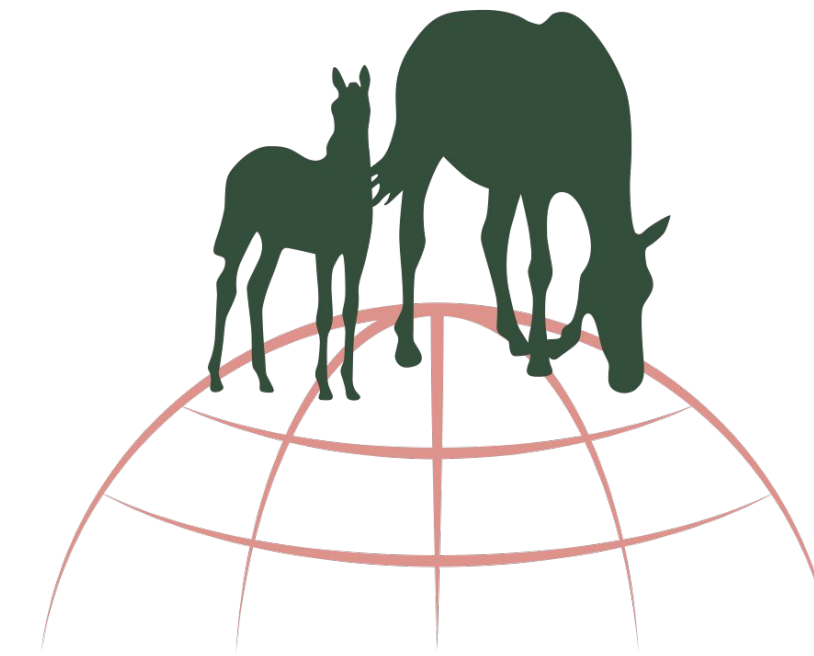
Highcharts.com

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# Social License

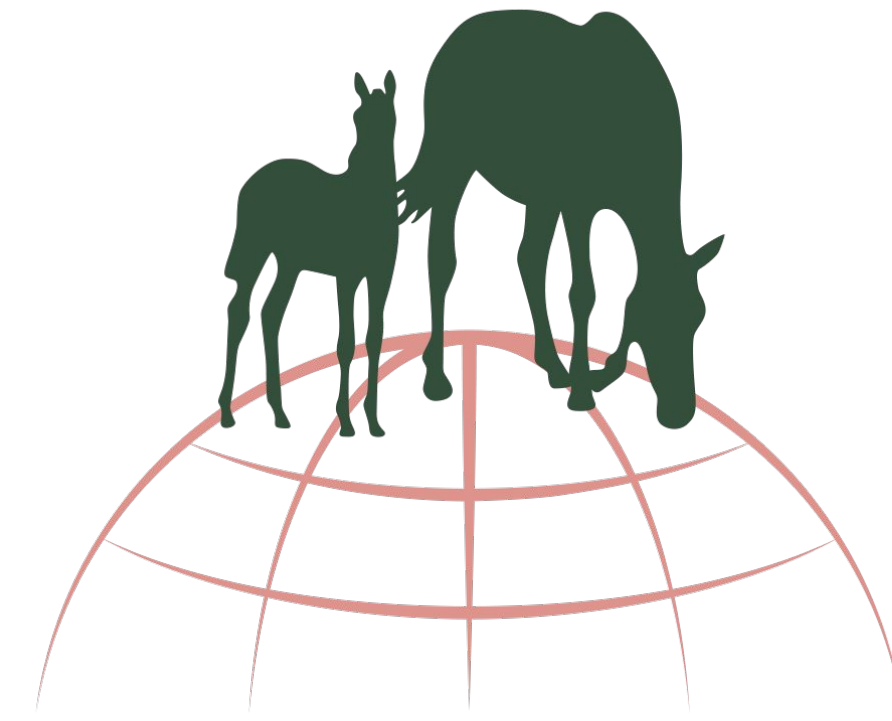


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- Activities, such as horse sport, that are relatively specialized or that have relatively narrow participation are increasingly subject to scrutiny and censure by the society at large.
- Society reacts to events and special interest groups
- Industry must respond on many fronts
  - Welfare: codes of practice in production and use, myth debunking
  - Climate change: greening horse production and use by reducing environmental impact
  - Social & Economic benefits: rural revitalization, psychological well being, exercise.

# SOI report Challenges



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- Need cooperation of national federations
- Need information on changes of ownership
- Need more efficient survey tools
- Need more consultation and feedback from stakeholders