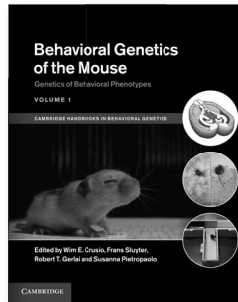


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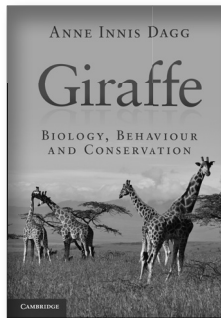
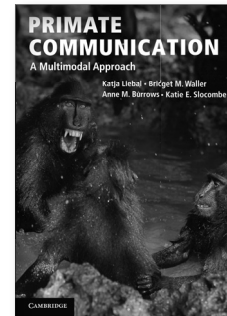
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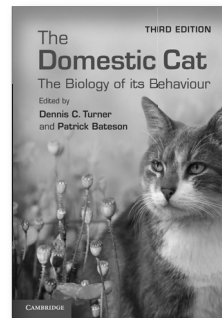
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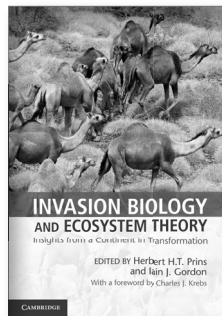
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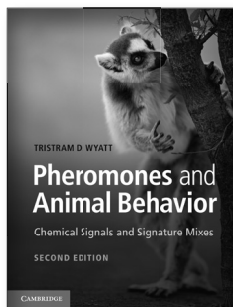
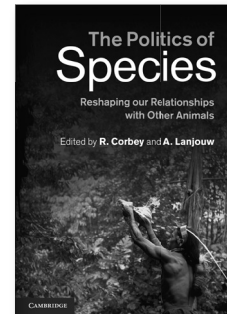
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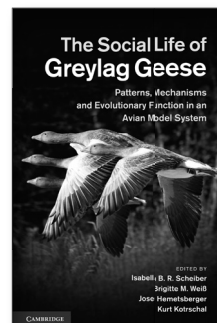
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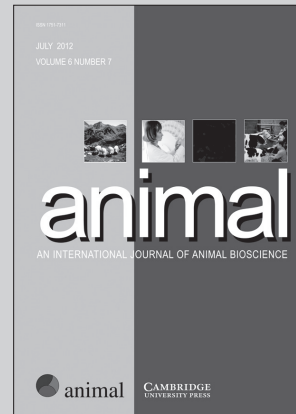
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The French Horse Industry: Scenarios 2030

In France, the horse population has been expanding since 1995 to reach 950,000 heads in 2010, representing about 15% of the total European horse population today. This growth is the result of the development of pony-riding for children and the increasing interest of French people in recreational riding and horse-betting. These changes offer major advantages to the different horse sectors, especially in the context of declining State support, increasing international competition on the horse market, societal changes regarding animal welfare, decreasing horse-meat consumption and harmonization of regulations at European level. To shed some light on possible directions for research and public policies, but also to help equine industry stakeholders to prepare for upcoming changes, the French National Institute for Agricultural Research (INRA), together with the French Horse and Riding Institute (IFCE), have conducted a collective scenario-building exercise for the French equine industry to 2030. The study is based on “morphological analysis”, a method which explores past and current trends, and potential shifts in order to consider possible future developments. It has led to four strongly contrasting long-term scenarios (“Everyone on Horseback”, “The High Society Horse”, “The Civic Horse” and “The Companion Horse”), characterized by differing horse usages, different horse populations, and jobs. However, they all raise shared concerns in terms of (i) the relationship between man and horse, (ii) economic efficiency, (iii) environmental issues, (iv) the preservation of breeds and pressure on surfaces, and (v) health, welfare and caring for animals up to and beyond death. These questions call for research development in the fields of animal behaviour, economic and social sciences, breeding and genetic improvement. They also emphasize the need to enhance knowledge and innovation transfer.

This document presents the full results of this participatory work which, in addition to a panel of experts, involved approximately one hundred economic and institutional industry stakeholders through individual interviews and regional workshops. After describing the foresight approach and reviewing the current state of the horse industry in France, the main elements determining the industry’s future are examined. Possible trend scenarios are then presented, which inform the paper’s recommendations in terms of future courses of research and public policy action.

