



The Contribution of the Sport Horse Industry to the Irish Economy 2017

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INDUSTRY TO THE IRISH ECONOMY 2017**

CONTENTS

	PAGE NO.
LIST OF TABLES	vii
LIST OF FIGURES	vii
LIST OF ABBREVIATIONS	viii
ACKNOWLEDGEMENTS	ix
EXECUTIVE SUMMARY	x
SUMMARY FINDINGS	xi
INTRODUCTION	1
Background	1
Government support	2
1. METHODOLOGY	4
1.1 Areas for study	4
1.2 Methodology and study design	5
1.3 Data collection and analysis	5
2. THE SPORT HORSE POPULATION	8
2.1 Official data	8
2.2 Affiliated competition population	14
2.3 Leisure sector population	15
2.4 Total sport horse population	15
3. EXPENDITURE IN THE BREEDING SECTOR	18
3.1 Profile of the breeding sector	18
3.2 Expenditure on the breeding sector	20
3.3 Use of AI in the sport horse sector	24
4. EXPENDITURE IN THE COMPETITION SECTOR	28
4.1 International equestrian competitions in Ireland.	31
4.2 Total competition sector.	32
5. EXPENDITURE IN THE LEISURE SECTOR	34
5.1 Hunting	34

	PAGE NO.
5.2 Membership of hunts	35
5.3 Showing and country shows	41
5.4 Equestrian Inter-Schools Ireland	45
5.5 AIRE approved equestrian centres	47
5.6 Riding clubs	48
5.7 Pony clubs	49
5.8 Leisure horses' maintenance costs	50
5.9 Structured leisure sector - total expenditure	50
6. THE EXTERNAL SPORT HORSE TRADE	52
6.1 External trade	52
6.2 CSO data	52
6.3 Sales at auction	53
6.4 Private sales and total value of horse transactions	54
7. EMPLOYMENT IN THE IRISH SPORT HORSE INDUSTRY	56
7.1 Direct employment	56
7.2 Additional employment	60
7.3 Involvement	61
8. AGGREGATE CONTRIBUTION TO THE ECONOMY OF THE IRISH SPORT HORSE INDUSTRY	64
BIBLIOGRAPHY	66



LIST OF TABLES

LIST OF FIGURES

1.1 Horse Sport Ireland funding 2008 to 2016	2
2.1 Estimate of the equine population by region in 2016	9
2.2 Foal registrations in approved studbooks in 2016	12
2.3 Affiliated competition population adjusted for duplication in 2016	15
2.4 Total sport horse population in Ireland in 2016	16
3.1 Total breeding sector contribution to the economy in 2016	22
3.2 Mean number of farrier visits per breeder per category of horse in 2016	23
3.3 Annual veterinary expenditure reported by breeders, including worming and vaccinations in 2016	24
4.1 Aggregate contribution of national competition sector to the economy in 2016	29
4.2 Aggregate contribution of international competition sector to the economy in 2016	31
4.3 International eventing competitions held in Ireland in 2016	32
5.1 Membership details of hunts in Ireland in 2016	35
5.2 Frequency of hunting attendance and cap fees per hunt meet	36
5.3 Mean expenditure by visitors to mounted hunts	38
5.4 Estimated numbers of active hunting participants in 2016	39
5.5 Grossed-up expenditure by the participants involved in hunting in 2016	40
5.6 Grossed-up direct hunt employment of mounted hunts	40
5.7 Total expenditure for mounted hunts in 2016	41
5.8 Mean prize fund per class in various disciplines in 2016	43
5.9 Aggregate contribution of county shows to the economy in 2016	43-44
5.10 Aggregate contribution of equestrian Inter-Schools Ireland to the economy in 2016	46
5.11 National and mean expenditure per equestrian centre in 2016	47
5.12 Expenditure related to riding clubs in 2016	48
5.13 Expenditure related to pony clubs in 2016	49
5.14 Summary of the national contribution of the structured leisure sector to the Irish economy in 2016	50
6.1 CSO data: Exports and imports of sport horses for 2007–2016	52
6.2 Sales of sport horses at auction in Ireland in 2016	53
6.3 Private and auction horse values, exports and imports in 2016	54
7.1 Direct employment in registered establishments: Full-time job equivalents by sector and wages value	58
7.2 Distribution of breeders and competitors by county in 2016	59
7.3 Competition sector: Employment details	59
7.4 Leisure sector: Employment details	60
7.5 Involvement in the sport horse industry	61
8.1 Aggregate sport horse industry contribution to the economy in 2016	64
1.1 Structured elements of the sport horse industry	4
2.1 Estimate of the equine population by region in 2016	10
2.2 No of coverings and foals in IHR in the period 2012–2016	13
3.1 The distribution of employment per sector	18
3.2 Length of horse ownership profile for breeders surveyed in 2012 and 2016	19
3.3 Breeding objectives of broodmare owners in 2016	20
3.4 Composition of the breeding sector used in this study	21
3.5 Usage of AI in sport horse studbooks in 2005	25
3.6 Percentage of mares covered naturally and by AI in 2016	26
5.1 Origin of hunt visitors in 2016	38
5.2 Numbers of classes per discipline at county shows in 2016	42
7.1 The distribution of employment per sector	56
7.2 Distribution of breeders by county in 2016	57
8.1 Distribution of expenditure in the sport horse sector in 2016	64

LIST OF ABBREVIATIONS

AI	artificial insemination
AIRC	Association of Irish Riding Clubs
AIRE	Association of Irish Riding Establishments
CSO	Central Statistics Office
DAFM	Department of Agriculture, Food and the Marine
DI	Dressage Ireland
EI	Eventing Ireland
ET	embryo transfer
HRI	Horse Racing Ireland
HSI	Horse Sport Ireland
IHB	Irish Horse Board
IHR	Irish Horse Register
IMFHA	Irish Masters of Foxhounds Association
IMHA	Irish Masters of Harriers Association
IPC	Irish Pony Club
ISA	Irish Shows Association
RDS	Royal Dublin Society
SI	Sport Ireland
SJI	Showjumping Ireland
Sport NI	Sport Northern Ireland
UCD	University College Dublin

ACKNOWLEDGEMENTS

The authors would like to acknowledge the contribution and co-operation of a range of organisations and individuals to this research, including all those who participated in the breeders, equestrian centre and competition sector surveys and those who took the time to assist in the completion of surveys at shows and events throughout Ireland.

Specifically, the authors would like to thank the following for their generous co-operation in providing valuable resources by giving us access to their records; these include: Horse Sport Ireland, The Irish Horse Board members, The Department of Agriculture, Food and the Marine, Goresbridge Horse Sales, Cavan Equestrian and Horse Marketing Centre, Monart Event Horse Sale, The Association of Irish Riding Clubs, The Association of Irish Riding Establishments, Dressage Ireland, Eventing Ireland, The Hunting Association of Ireland, The Irish Farmers' Association, The Irish Pony Club, The Irish Pony Society, The Irish Shows Association, The Kerry Bog Pony Society, Tattersalls Ireland, Teagasc, Kildalton College, The Royal Dublin Society, The Secondary Schools Equestrian Championships and Showjumping Ireland.

INTRODUCTION

This report was managed and authored by Alison Corbally B.Ed, M.Eq.S., PhD scholar and was prepared under the guidance of Prof. Alan G. Fahey, UCD School of Agriculture and Food Science. Research assistance was provided by Antonette Doran and Deidre Harty in the showing and hunting sections, respectively. Copy-editing and proofreading services were provided by Anne Downes.

The report was commissioned by Horse Sport Ireland (HSI) and was funded by the Department of Agriculture, Food and the Marine (DAFM), Equine Infrastructures. The objective of this report was to evaluate the economic impact of the sport horse industry in Ireland in 2016 and to chart the progress of the industry in recent years.

Every effort has been made to ensure that all the data contained in this publication have been accurately collated. The authors believe the information contained in this publication to be correct, but they cannot guarantee its accuracy, in particular where it is dependent on information supplied to them, and cannot accept liability for any loss resulting from any errors that may arise. The authors shall not be responsible for any inaccuracies herein.

EXECUTIVE SUMMARY

The findings of this report show that the Irish sport horse industry provided a major contribution of more than €816 million to the Irish economy. This contribution is a 15.25% increase over the contribution of €708 million estimated by the UCD Report in 2012. The industry continues to provide over 14,000 jobs in the sport horse breeding, competition and leisure sectors. While economic contribution of the sport horse industry in 2016 has improved by €108 million since 2012, this has been achieved in part with a relatively low level of investment of €3.96 million from the government.

The majority of the €816 million expenditure and the 14,000 jobs employed by the sport horse sector were achieved in rural Ireland. The sport horse sector continues not to make only an important economic contribution, but it is also important to the social and cultural fabric of rural Ireland. With the growing economic uncertainty due to Brexit, it is important that significant steps are taken to help protect this important industry.

An increase in funding is required from the Irish Government to help support the growth of the Irish sport horse industry in both domestic and global markets. In a time of economic uncertainty due to Brexit, the Irish sport horse industry provides the government with an excellent opportunity to yield a high return for their investment and increase employment in rural Ireland.

Prof. Alan G. Fahey, UCD

SUMMARY FINDINGS

1.

The contribution of the sport horse industry to the Irish economy is more than

€816 million per annum.

2.

There are **14,057 full-time job** equivalents in the Irish sport horse industry.

3.

The current sport horse population is estimated at **135,715** animals in Ireland.

4.

Breeding is the largest sector and accounts for a total expenditure of **€271 million** within the economy and there are **14,830 active breeders** in the sport horse sector.

5.

The competition sector accounted for **€168 million expenditure** in the sport horse sector

6.

A total of **€103 million** was spent within the affiliated leisure sector, of which €32 million was expenditure on hunting.

7.

A total of **5,527** sport horses to the value of **€48 million** were exported in 2016, with net exports amounting to €43 million.

8.

There were 144 county shows held in 2016, which attracted over **286,500 spectators**, and **5%** of visitors attended from overseas.

9.

The number of people involved with sport horses was determined by survey and when extrapolated for the entire industry, it amounts to **46,799 people**.

INTRODUCTION



This report was commissioned by Horse Sport Ireland (HSI) and was funded by the Equine Infrastructures Programme of the Department of Agriculture, Food and the Marine (DAFM). It aims to evaluate the economic impact of the sport horse industry in Ireland in 2016 and to chart its progress in recent years.

This is the fourth in a series of collaborations between UCD and the sport horse industry. In 1996, the UCD Corbally report evaluated the contribution of the sport horse industry to the Irish economy for the first time; it was updated by the UCD Report, authored by Alison Corbally and Prof. Alan Fahey in 2012 and again in 2017 – this report includes a detailed profile of expenditure, employment and net exports. In 2007, the UCD Quinn and Hennessy report profiled the sport horse industry. It was estimated that the expenditure within the sport horse industry in Ireland was over €400 million per annum in 2005. In 2012 the sport horse industry made an estimated economic contribution to the Irish economy of €708 million and provided 12,512 full-time job equivalents.

In addition to its formal and structured elements, the sport horse industry has significant informal and unstructured elements. For the study, the sources of data were confined to the formal, structured elements of the industry to provide a firm basis for an evaluation, which included formal and informal elements and ancillary activities.

The definition of sport horses adopted for the purpose of this study was as follows:

The sport horse is a riding horse or pony of a single breed or a combination of breeds used for, or intended to be used for, recreational and competitive activities other than racing.

Government support

Horse Sport Ireland (HSI) was established in 2007 from the amalgamation of the Equestrian Federation of Ireland and the Irish Horse Board (IHB). HSI is a 32-county body and is a limited company run by a board of directors, nominated by the various affiliated bodies.

It has responsibility for both the sport and breeding sectors and accordingly is in receipt of funds from the Department of Agriculture, Food and the Marine (DAFM), the Department of Transport, Tourism and Sport, through the Sport Ireland (SI) grant and Sport NI.

DAFM transferred responsibility for maintaining the Irish Horse Register (Irish Sport Horse and Irish Draught studbooks) to HSI in July 2008.

The budget income for HSI of €6.17 million in 2016 consisted of €3.96 million exchequer funds and €2.44 million generated from earned income as shown in the table below.

Table 1.1 Horse Sport Ireland funding 2008 to 2016

Table 5.1: Horse Sport Ireland funding 2008-2016									
	2016	2015	2014	2013	2012	2011	2010	2009	2008
Breeding:									
DAFM grant (€ million)	1.870	1.820	1.220	1.220	1.220	1.283	1.35	1.512	1.781
DAFM NDP/ES (€ million)	0.543	0.557	0.559	0.640	0.607	0.498	0.505	0.585	0.766
DAFM total grants (b) (€ million)	2.413	2.377	1.779	1.860	1.827	1.781	1.855	2.10	2.55
Own income (€ million)	1.184	1.279	1.084	1.218	1.062	1.171	1.190	1.22	1.648
Total	3.597	3.656	2.863	3.077	2.889	2.952	3.075	3.317	4.195
Sport:									
ISC grant (b) (€ million)	1.547	1.436	1.320	1.308	1.287	1.368	1.490	1.589	1.767
Sports capital (€ million)		0.015	0.030						
Own income (€ million)	1.026	1.020	0.836	0.66	0.619	0.594	0.776	0.682	0.848
Total	2.573	2.471	2.186	1.965	1.906	1.962	2.266	2.271	2.615
(a) Total income (€ million)	6.170	6.127	5.049	5.237	4.795	4.914	5.341	5.588	6.81
(b) Total Irish government funding (€ million)	3.960	3.838	3.129	3.168	3.114	3.15	3.41	3.69	4.31
(b) Government funding as % of income	64.20%	62.50%	61.90%	63.20%	65%	64%	63.80%	66%	63.30%

Source: HSI



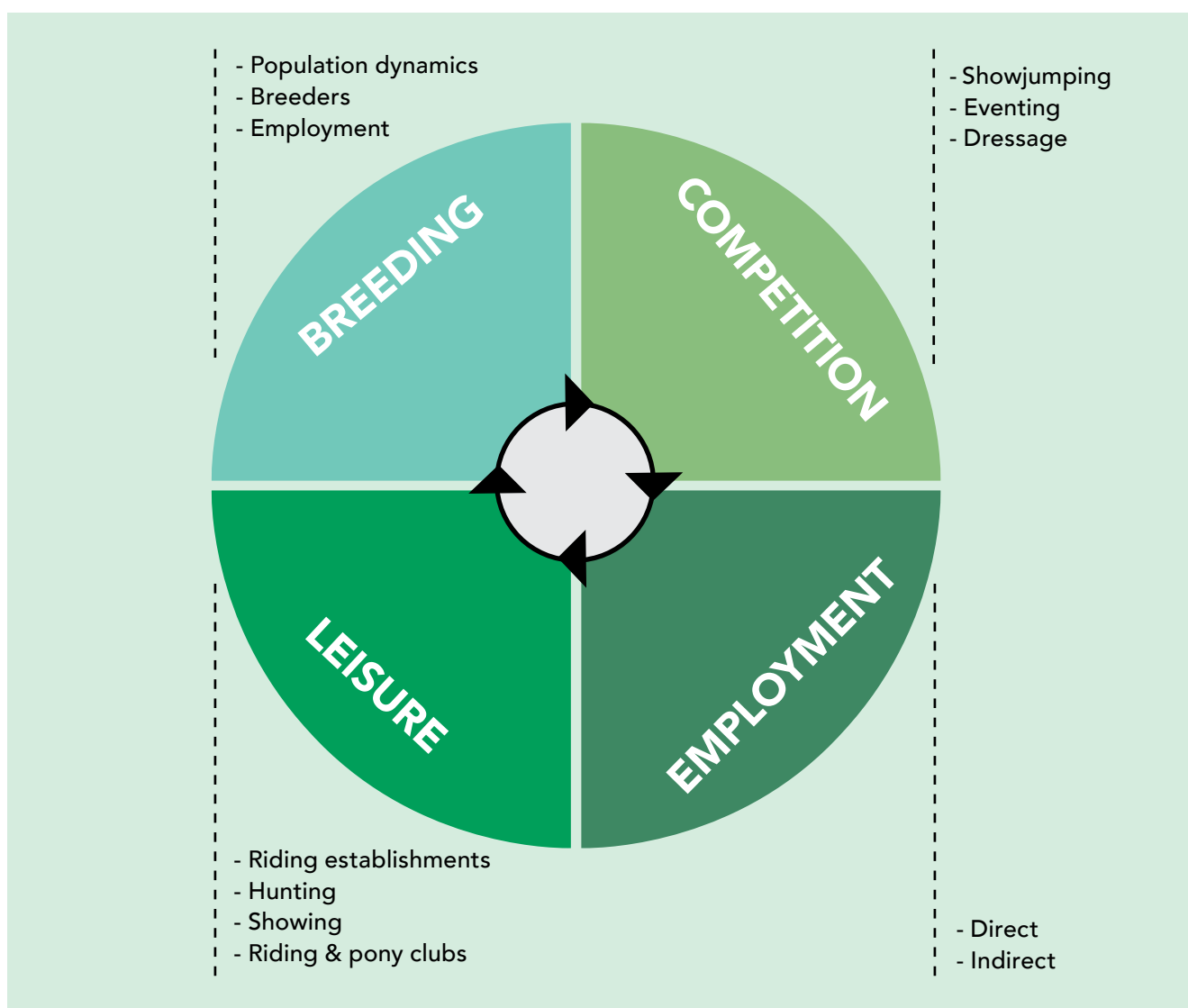
1. Methodology

1.1 Areas for study

A study of the structures in the sport horse industry readily identified four distinct areas: breeding, competition, leisure and employment.

The breeding, competition and leisure areas each have a distinctive structure with their own affiliation and regulatory bodies. For these three areas the study was confined to registered animals and establishments.

Figure 1-1 Structured elements of the sport horse industry



1.2 Methodology and study design

In assessing the economic contribution of a sector to the national economy, three established approaches can be used: **output**, **income** or **expenditure**.

- **Output** – the value of all types of production (products and services)
- **Income** – the value of all incomes received by individuals and firms
- **Expenditure** – the total expenditure on goods and services

Conceptually, each of these economic approaches produces the same value. Each has its own strengths and weaknesses in terms of accessibility and processing of data, and the selection of approach for a particular study is determined by the circumstances of the case. For this study, the determining factor was the feasibility of obtaining reliable data.

For this study, there would be serious difficulties in obtaining basic data using the output approach. For the “product value” element, most superior quality animals (i.e. higher priced ones) are usually sold privately in both domestic and export transactions, and so public sales results only reflect the less valuable end of the market. The available data are not reliably representative of the total product value. In relation to the value of the services element of output, data on service supplier’s income is not in the public domain and is a notoriously sensitive and unsatisfactory area for survey methods.

These latter considerations also ruled out the income approach as a basis for the study. Therefore, the expenditure approach was selected as the most effective approach to assess the economic contribution of the sport horse industry to the Irish economy. It was judged that responses to queries about expenditure would be less affected by defensive attitudes and statistical problems than either income or output approaches.

1.3 Data collection and analysis

The main methods of data collection were using a survey questionnaire (postal and phone). The breeding, competition and leisure sectors of the industry each received a specifically designed survey questionnaire on expenditure. Following a review of the relevant literature, the data headings were selected, and appropriate questions were devised and confined to unambiguous factual matter. To ensure reliability, questions were pretested on a small sample of respondents and were refined as necessary before general issue.

The breeders’ survey questionnaire was distributed to current members of the IHB. The data collected by survey was for the two main sport horse competition activities – showjumping and eventing. Showjumping Ireland (SJI) and Eventing Ireland (EI) provided data on their members over 18 years of age, and 100% of this list was surveyed. The Association of Irish Riding Establishments (AIRE) provided a list of approved equestrian centres and each received a postal survey questionnaire. For this study, data were collected in the form of survey questionnaires from the Irish Shows Association (ISA) and spectators and horse exhibitors at county shows and the results were extrapolated to show national expenditure in the county show sector. The data collected to establish spectator and exhibitor expenditure included travel and accommodation costs, expenditure at the show, and the number of accompanying people. Similar surveys were distributed to collect information from riding club and pony club members.

From the survey results, a total of 1,044 national values were extrapolated for the total affiliated and registered population for each sector, and the sum of these national values provided the value of overall expenditure for the structured element of the industry. The net value of sport horse exports (i.e. exports minus imports) was added as the external expenditure to be considered. The net value of sport horse

exports does not include the value of exports of equine related goods and services, (e.g. feed exports, coaching services) and therefore is an underestimation. In addition to the expenditure value, the research data provided the basis for estimating the extent and value of employment in each sector, and in the industry.





2. The sport horse population

2.1 Official data

Introduction

As a prerequisite to the study of the economic contribution of sectors of the sport horse industry, an attempt was made to identify the total sport horse population together with a breakdown across the three domestic sectors – breeding, competition and leisure. As no single source of adequate data exists, as well as the survey data in the study, we examined information from the following sources:

- Central Statistics Office data (CSO)
- Other published reports
- Equine studbook registration data from DAFM and the Irish Horse Register (IHR)

Central Statistics Office data

The most accessible source of information is the Central Statistics Office. The CSO conducted the last relevant full Agricultural Census in 2010, drawing information from all operational farms in the country. A farm is defined by CSO as:

“a single unit both technically and economically, which has a single management and which produces agricultural products .. Agricultural production covers the growing of all crops and the raising of all livestock”.

(CSO, 2010)

Additionally the CSO (1991) classified the horses that are most relevant to this study in a category called “other” which includes all non-thoroughbred horses and ponies.

There are three sources of information on the size of the overall horse population in Ireland from the CSO:

- Crops and livestock survey – June every year
- Farm structure survey – a number of times before each full census (last done in 2013)
- Census of agriculture carried out – every 10 years (last done in 2010).

TABLE 2.1 Estimate of the equine population by region in 2016

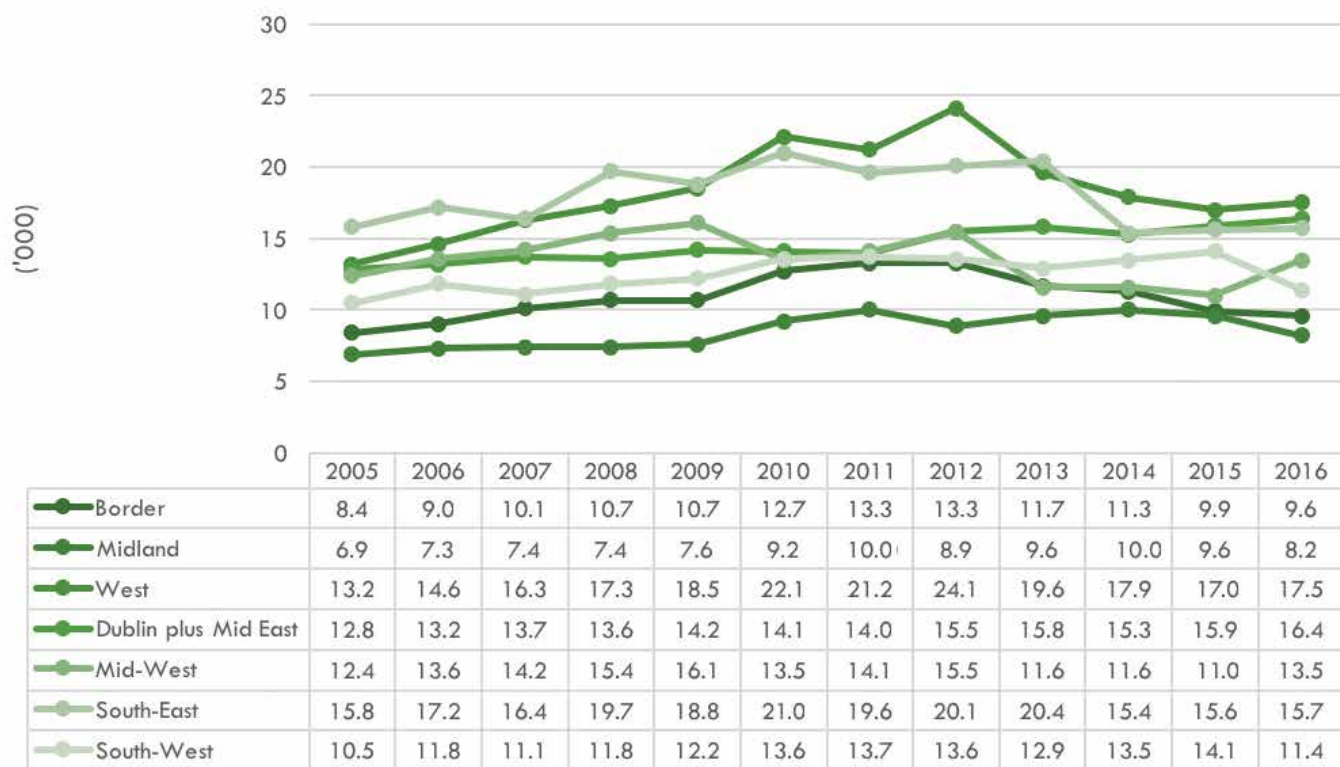
REGION	COUNTY	HORSE POPULATION
<u>Border</u>	Cavan Donegal Leitrim Louth Monaghan Sligo	9,600 
<u>Midlands</u>	Laois Longford Offaly Westmeath	8,200 
<u>West</u>	Galway Mayo Roscommon	17,500 
<u>Dublin and Mid-East</u>	Dublin Kildare Meath Wicklow	16,400 
<u>Mid-West</u>	Limerick Clare Tipperary North	13,500 
<u>South-East</u>	Waterford Carlow Kilkenny Wexford Tipperary South	15,700 
<u>South-West</u>	Cork Kerry	11,400 
TOTAL		92,300

Source: CSO

Although the CSO data have been the most consistent data available, not all horse and pony owners are farmers and hence the recorded data under-represents the true value of the sport horse population. Our surveys showed that only 47% of breeders completed the CSO Farm Survey and only 26% of our respondents completed the Teagasc National Farm Survey in 2015.

The highest concentration of horses was in the West region with large concentrations also found in Dublin and the Mid-East, followed by the South-East region. The horse population has increased dramatically since 2005, after a period of relative stability in numbers. Between 2010 and 2011, this rise in population levelled off and was likely to be due to a combination of a reduction in foaling rates and an increase in equine slaughter rates. Current CSO estimates indicate that the equine population has dropped by 13% since 2011 to a current figure of 92,300 in 2016.

Figure 2.1 Estimate of the equine population by region in 2016



Source: CSO



CSO data summary

The CSO equine population data provide the overall picture annually, but identification of the sport horse element is less satisfactory. For the particular needs of this study it is insufficiently detailed on the distribution of the sport horse population, as all horse and ponies are grouped together. This together with the fact that only 47% of our survey respondents completed the CSO Farm Survey and only 26% of our respondents completed the Teagasc National Farm Survey in 2015, indicates that many horse owners and breeders are not from farming backgrounds. Therefore, as an increasing number of people from non-farming backgrounds own and breed sport horses, the CSO data is less representative for equine population data and statistical information.

From our survey, 53% of respondents had not completed the CSO farm census. Therefore, if the CSO figure is 92,300 and we add an additional 53% (48,919) to this figure, we arrive at an estimated figure of 141,219 horses in Ireland in 2016.

Consequently, additional data were examined from the other sources mentioned above as well as some survey data generated by the study.

Other published reports

In 2012, the UCD Report estimated the Irish horse population to be 124,000. A report called *Removing the Blinkers, Health and Welfare of European Equidea* in 2015 by the World Horse Welfare and Eurogroup for animals, estimated the horse population in Ireland to be 159,000 in 2015.

A report *Overview of the Equine Industry* was researched by Elizabeth Lane for DAFM in 2010. It separated the sport horse data and the thoroughbred data. The report estimated that in excess of 276,000 non-thoroughbred horses and ponies are entered in Irish Studbooks (all registers). The Irish Horse Register (IHR) is the largest register of sport horses in Ireland. Excluding new registrations in 2010 and based on search criteria that horses were less than 30 and greater than 1 year, and were not reported dead or exported, 224,071 horses were entered in the register. If horses owned by residents of counties in Northern Ireland are excluded, the total number of horses entered in the Irish Horse Register is 188,929.

On examination of the thoroughbred data (both breeding (Weatherby's) and racing (Horse Racing Ireland)) the total population of thoroughbreds in Ireland in 2016 was estimated at 34,821 horses.

Equine registration data

There are two registration methods available within the sport horse sector. The majority of horses are registered with pedigree information in DAFM approved studbook but a number of breeders opt to receive identity documents. These animals do not have their sire and or dam recorded in the ID document and are not therefore not fully DNA verified. Within the industry, studbook passports are commonly referred to as "green books" whilst identity documents are referred to as "white books".



The size of the breeding sector of the sport horse population in Ireland was determined through an analysis of the horse numbers within the studbook registered sector and the identity documented sector.

Studbook registered breeding population - Broodmares and Foals

Estimates on the breeding population were derived from data in the Irish Horse Register (IHR), currently maintained by HSI, data received from DAFM for studbooks operating under their approval and responses to the breeder survey.

The main categories of horses within the breeding sector are broodmares, young stock and stallions.

Table 2.2 foal registrations in approved studbooks in 2016

	NUMBER OF FOALS: 	ESTIMATED NUMBER OF ACTIVE BROODMARES: 
Irish Sport Horse	4,766	10,104
Irish Draught Horse	782	1,658
Connemara	1,564	3,316
Irish Cob Studbook	113	240
Irish Piebald & Skewbald Society	2,262	4,795
Irish Sport Pony	37	78
Irish Standardbred Trotter/Pacer	40	85
Kerry Bog Pony	45	95
Warmblood Studbook of Ireland	8	17
TOTAL IN APPROVED STUDBOOKS 2016	9,617	20,388
TOTAL IN APPROVED STUDBOOKS 2012	9,324	19,839
TOTAL IN APPROVED STUDBOOKS 2005	9,311	22,000

The number of foals registered in 2016 in studbooks approved by the DAFM was 9,324 across the nine studbooks. As all broodmares in the sport horse population are not covered each year and not all foals are born alive and registered immediately, the total number of broodmares is higher than the number of foals registered. The ratio of foals to broodmares on a landholding was estimated using breeder survey responses and registration data, and based on this, the number of broodmares in the studbook registered breeding sector was estimated at approximately 20,000. Overall foal registration levels were similar to those observed in 2012, although there were differences observed within studbooks.

Figure 2.2 No. of coverings and foals in IHR in the period 1996–2016



Non-studbook identification documented breeding population - Broodmares and Foals

Owners may opt for less informative identification documents (ID) for their horses to comply with the minimum legislative identification requirements. These animals do not have their sire and or dam recorded in the ID document and are not therefore not fully DNA verified. The ID documents require a microchip and horse markings only.

There were 8,169 Identification documents issued by Horse Sport Ireland and Leisure Horse Ireland in 2016, which would account for an estimated 11,273 broodmares. This figure is a significant increase on the estimate in 2012 and represents a very serious issue for the sport horse sector in Ireland.

As DNA is not a mandatory requirement for ID documents, there is a lower level of traceability with these animals. The progeny of these animals are not eligible for studbook entry, as their sires and dams are

unknown. They represent lost potential to the studbooks and overall in value terms to Ireland. Many of these animals are registered with ID documents as foals and their parentage is likely to be known, but for other reasons their owners opt for ID documents.

If a Statutory Instrument was introduced requiring all equines registered in Ireland to have a DNA sample processed and recorded in the database, this would ensure greater equine traceability and more complete pedigree information in Ireland.

Taking both studbook and ID document animals into account, it is estimated that the documented sport horse foal population in Ireland for 2016 was 17,786, with a broodmare population of 37,625 and a total young stock population of 30,588 of horses up to 3 years of age, when mortality and exports were taken into account.

Stallions

Accurate measurement of the number of sport horse stallions and colts used for breeding in Ireland is difficult outside of the studbook registered sector, as their availability may not be known; for example, they may be dead, infertile, exported or unavailable for breeding due to competitive activities or some other reason. Based on the breeders' survey, however, it is estimated that there were 1,800 stallions standing in Ireland in 2016.

Total registered population in the breeding sector

For the purpose of this study, the total registered sport horse population in the breeding sector is taken to comprise stallions, mares, foals, yearlings, 2-year-olds and 3-year-olds. From the information above, the overall 2016 total registered breeding population was 87,769 sport horses.

2.2 Affiliated competition population

Competition is the second area where organisations are an important source of data.

The principal competition organizations are:

- Showjumping Ireland (SJI)
- Eventing Ireland (EI)
- Dressage Ireland (DI)

The data obtained from the authorities were adjusted to take account of any duplication between the competition and breeding sector; it was also adjusted to reflect the horses found to be competing in more than one discipline. The overall 2016 total registered competition population is 10,152 sport horses.

Table 2.3 Affiliated competition population adjusted for duplication in 2016

OWNERS	HORSES	PONIES	TOTAL HORSES & PONIES
6,812	7,800	2,352	10,152

2.3 Leisure sector population

For horses in the leisure sector registration is not obligatory and as a consequence, the data available from the relevant associations are not comprehensive. The sources of data used in arriving at an estimate were the surveys of AIRE, AIRC and IPC members.

The results of the survey of equestrian centres estimated a national figure of 2,800 horses when grossed for the total approved number of equestrian centres.

The survey of riding clubs that were members of AIRC provided an estimate of the number of horses whose primary usage was in riding clubs events. This provided an estimate of 1,677 horses. This estimate has been adjusted to avoid duplication arising from horses that may be registered for both riding club and affiliated competition activities.

In addition to this estimate, survey results indicated that there was an estimated 22,215 sport horses between the hunt, showing and unaffiliated leisure sectors and 5,800 retired/recuperating horses. These categories include horses documented at birth but who were outside the breeding and affiliated competition and leisure sectors.

The overall total from the above is 32,692 sport horses in the leisure sector.

2.4 Total sport horse population

The overall estimate of horses in each sector is outlined in Table 2.4. In addition, survey responses indicated that 4% of the horses owned by members of affiliated organisations were unregistered. This represents a total of 4,625 horses. The number of unregistered horses with unaffiliated owners has not been estimated or included in this study.

Table 2.4 Total sport horse population in Ireland in 2016

CATEGORY	NO. OF HORSES & PONIES
BREEDING SECTOR	
Broodmares	37,625
Foals	17,786
Young stock	30,558
Stallions	1,800
Breeding sector total	87,769
COMPETITION SECTOR	
Affiliated SJI, EI, DI	10,152
Competition sector total	10,152
LEISURE SECTOR	
AIRE	2,800
AIRC	1,677
Hunting, showing, other	28,692
Leisure sector total	33,169
Unregistered horses with affiliated owners	4,625
TOTAL NATIONAL EQUINE POPULATION	135,715

The sport horse population in 2016 based on survey responses, integration of national databases, studbook data, competition data, and adjusted to remove duplication was 135,715.

This estimate is considerably higher than the "other horse" population figure from the CSO population estimates. The most likely explanation for the disparity is in the CSO definition of a farm, which excludes many equestrian establishments and non-farming horse owners.

However, it is similar to the estimates calculated on the basis of respondents who completed the CSO survey and the addition of the horses owned by those who did not complete the CSO survey. This total estimate was 141,219 sport horses in Ireland.



3. Expenditure in the breeding sector

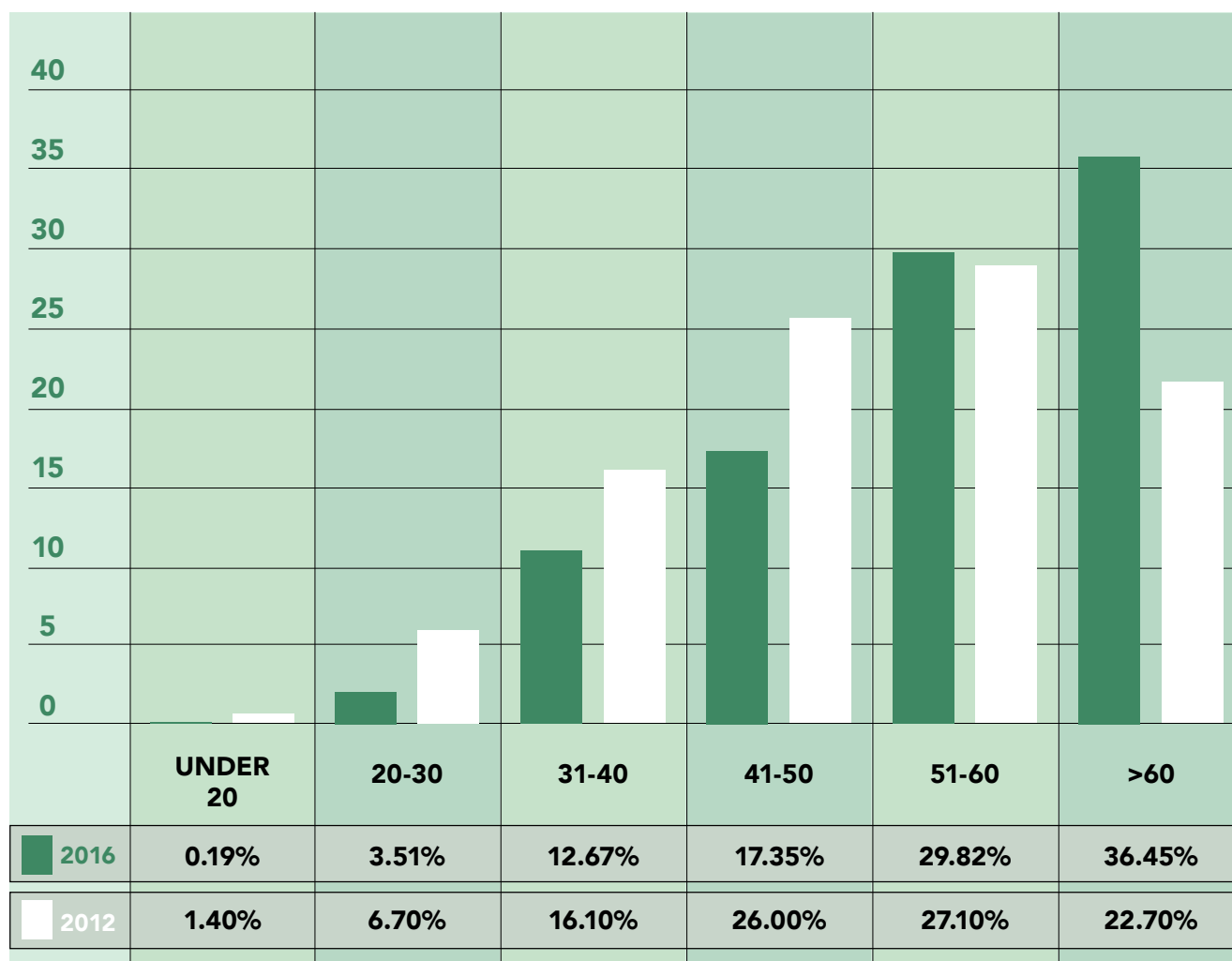
3.1 profile of the breeding sector

The breeders who replied to the postal survey provided information on the numbers of broodmares kept and the numbers by breed of horses kept up to 3 years of age.

The mean number of broodmares kept by respondents was 2.6 in 2016, but this varied from just 1 broodmare to over 100. The mean number of animals kept by each breeder on the premises was 6.10 animals. There are 14,830 active sport horse breeders in Ireland.

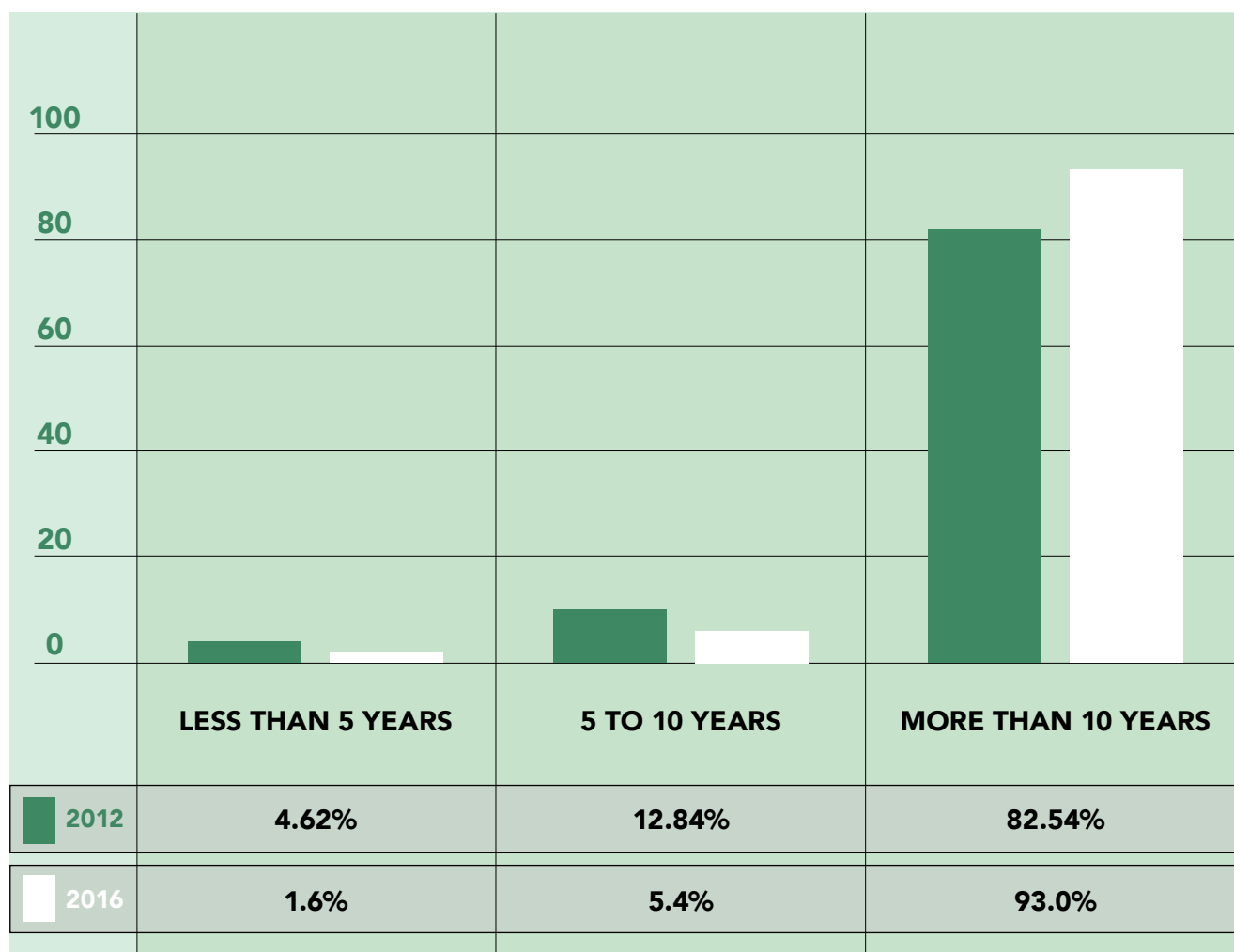
The age profile of breeders identified through the surveys is shown in Figure 3.1.

Figure 3.1 The distribution of employment per sector



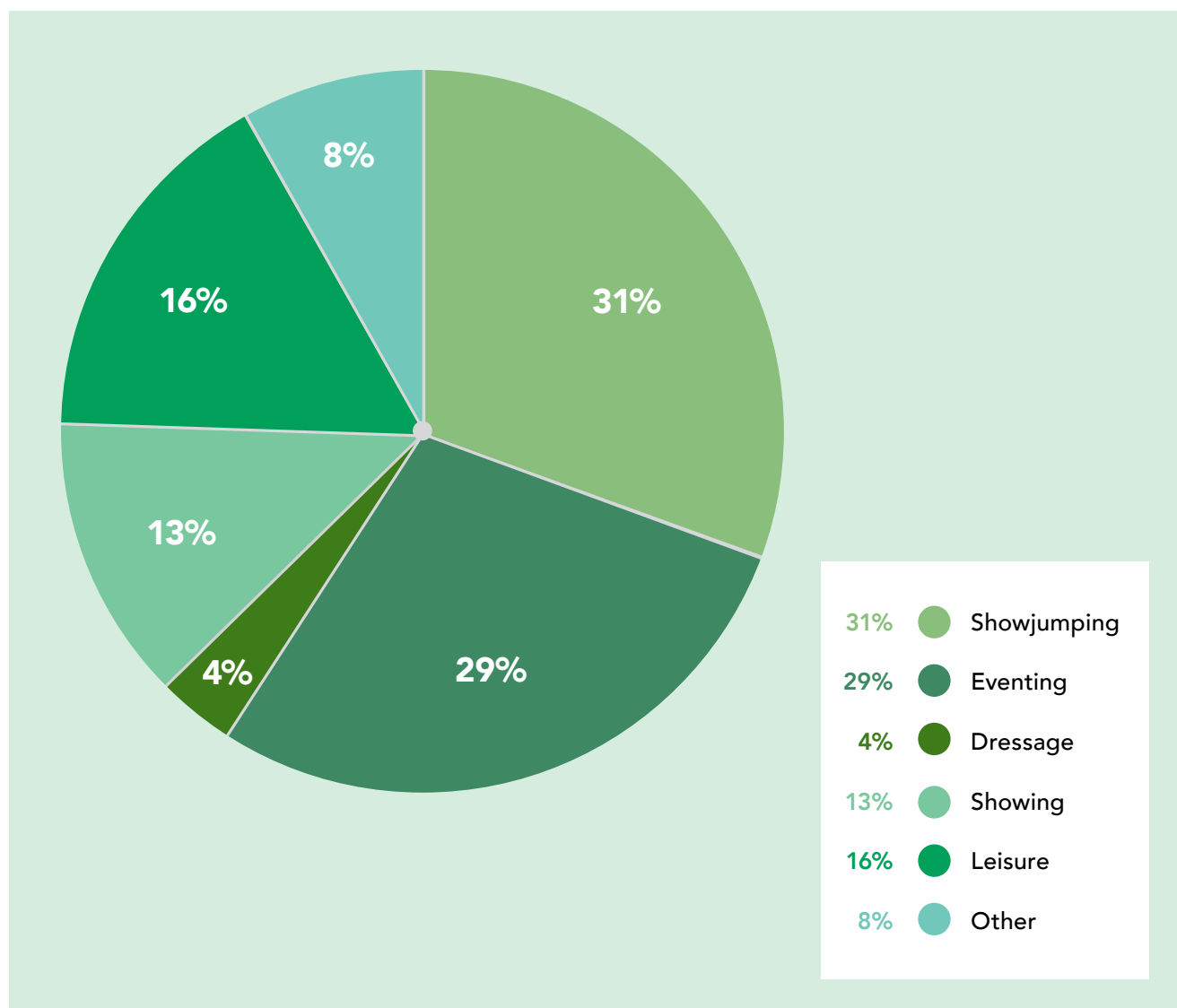
Results from the survey showed that only 3.7% of breeders (8.1% in 2012) were less than 30 years of age and almost 36.5% (23% in 2012) were over 60 years of age. The length of ownership profile showed that only 1.6% (4.62% in 2012) of breeders had owned horses for less than 5 years and that 93% (83% in 2012) of breeders have owned horses for more than 10 years. Interestingly, 34% of breeders had a third level qualification.

Figure 3.2 Length of horse ownership profile for breeders surveyed in 2012 and 2016



Breeders were asked to indicate which disciplines they were aiming to breed their foals for in 2016. The findings were similar to the research findings in 2012; the majority of breeders reported breeding foals for showjumping, followed by eventing.

Figure 3.3 Breeding objectives of broodmare owners in 2016

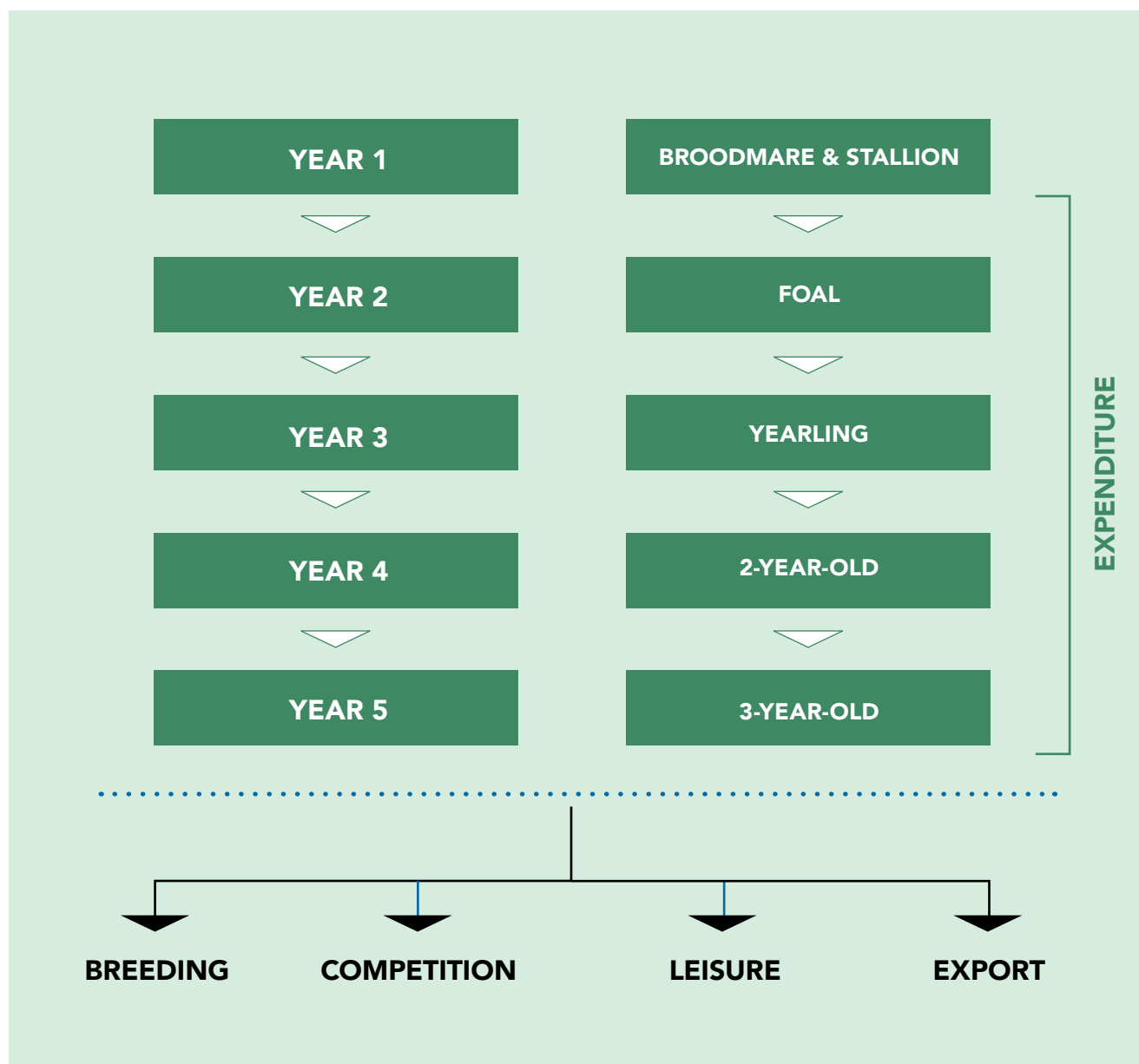


3.2 Expenditure in the breeding sector

The data requested related to the costs per breeder for 2016 and was based on the broodmare unit, i.e. one mare and her progeny. The total contribution to the economy from all 14,830 breeders currently active (DAFM Approved Studbooks) was extrapolated from the sample survey data.

This sector examined expenditure on horses up to 3-year-olds, as illustrated in Figure 3.4, after which the horses moved on, as indicated, to other sectors.

Figure 3.4 Composition of the breeding sector used in this study



The respondents to the survey owned an average of 2.6 broodmares per breeder, (2.8 in 2012) and had 6.1 equine animals (5.1 in 2012) on their premises.

Breeding sector expenditure

The contribution to the economy of the breeding sector are summarised in the following table (Table 3.1).

Table 3.1 Total breeding sector contribution to the economy in 2016

	EXPENDITURE PER BREEDER	TOTAL NATIONAL BREEDERS' EXPENDITURE
CAPITAL EXPENDITURE	(€)	(€)
Depreciation of broodmare population	789.37	11,706,357
Depreciation of equine only equipment	1,879.29	27,869,871
Depreciation of housing	5,280.00	78,302,400
CURRENT EXPENDITURE	(€)	(€)
Bedding	863.16	12,800,663
Concentrates	1,647.53	24,432,870
Hay/grazing	1,394.53	20,680,880
Stud related	2,488.65	36,906,680
Tack & equipment	103.20	1,530,456
Farrier	515.30	7,641,899
Veterinary	1,975.86	29,302,004
Schooling	1,286.22	19,074,643
Registration	45.70	677,731
TOTAL	18,268.81	270,926,452

Feed data expenditure was requested for concentrates and hay. The mean expenditure data on concentrates per breeder was €1,647.53. Those breeders who also had 3-year-old horses incurred an additional mean expenditure of €427.22 on concentrates, which was removed from this breeding sector calculation to prevent double counting in the competition or leisure sectors.

Stud related expenditure covers stud fees, keep fees and travel expenditure. The mean stud fee was estimated to range from €20 to €6,000, with €700 being the most frequent fee reported. Interestingly, the breeders reported that only 35% of mares were left at stud and thus incurred keep fees. The mean keep fee (i.e. livery charges) for mares while at stud was €389.02 per week.

Travel expenditure, computed on the basis of distance travelled to and from stud, accounted for €236.49 on average per breeder (using Automobile Association cost per km). The mean distance travelled to and from studs was 298 km per mare, and 85% of owners used their own horse boxes for transport.

The survey indicated clearly that expenditure on tack and equipment such as replacement rugs, head collars and lead ropes was a very small item for breeders, which was consistent with the 2012 findings. The survey sought information on the number of farrier visits in 2016, and the associated costs. Table 3.2 shows the mean number of visits per category of horse.

Table 3.2 Mean number of farrier visits per breeder per category of horse in 2016

CATEGORY OF HORSE	MEAN NO. OF FARRIER VISITS PER BREEDER IN 2016
Mares	4.00
Foals	3.00
Yearlings	3.19
2-year-olds	3.28
3-year-olds	4.69
Stallions	3.79

Veterinary expenditure, including worming and all vaccinations, was requested. Table 3.3 shows the level of veterinary expenditure which has increased since the 2012 report. For breeders, this may be related to the increased use of AI and frozen semen and the resulting increase in veterinary intervention. For stallion owners, the mean veterinary expenditure reported for stallions was €319.63 in 2016.

Table 3.3 Annual veterinary expenditure reported by breeders, including worming and vaccinations in 2016

CATEGORY OF HORSE	MEAN VETERINARY EXPENDITURE (€)
Mares	459.01
Foals	212.37
Yearlings	175.08
2-year-olds	137.83
3-year-olds	225.86

Showing data for breeders was collected for travel and entry fee expenditure. The results indicate that 28% of breeders showed animals in 2016. This expenditure was included in the showing section of this study.

On schooling, 28% of breeders reported having their horses schooled professionally, at a mean cost per week of €128.62 for 10 weeks per horse. Breeders' time spent schooling was costed conservatively at the basic statutory adult pay rate for agricultural workers of €9.15/hour in 2016.

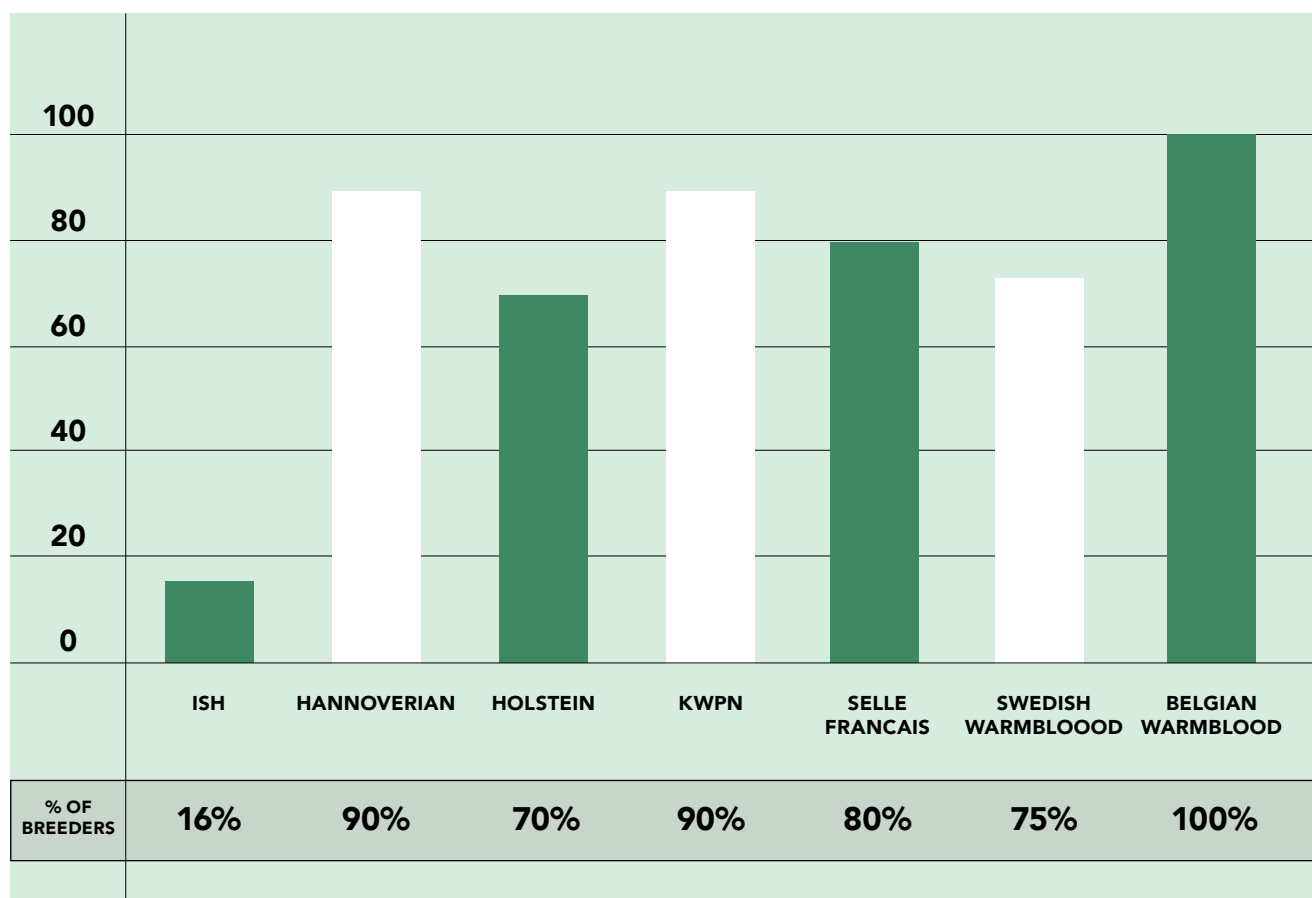
Breeders had 7.04 horses less than 4 years of age per enterprise. Overall, the mean current expenditure estimate per breeder was **€18,268.81** for all horses less than 4 years old on their premises and the total expenditure estimate for all breeders nationally in 2016 was **€270,926,452**.

3.3 Use of AI in the sport horse sector

The usage of artificial insemination (AI) in Ireland was investigated initially in the 2005 study by comparing records from the Irish Horse Register with information supplied by other sport horse studbooks through the Interstallion website (www.interstallion.org).



Figure 3.5 Usage of AI in sport horse studbooks in 2005

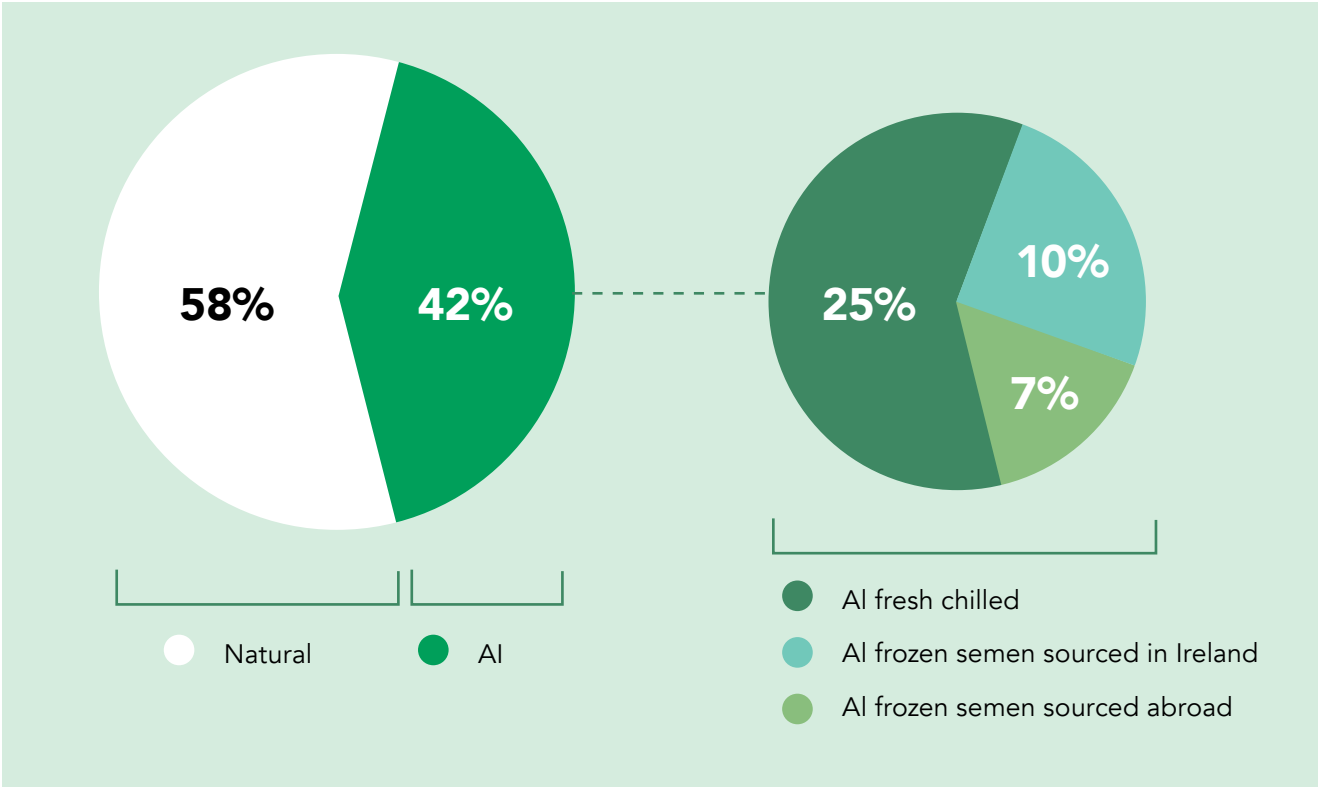


In 2005, the usage of AI in Ireland was significantly lower than in other European countries, with 16% of Irish sport horse foals born being bred by AI compared to between 70% and 100% in other European sport horse breeds (Figure 3.5).

However, in 2016 breeders were asked whether they covered each of their mares naturally or through AI and if through AI, which type of semen was used (Figure 3.6). Interestingly, 42% of breeders covered their mares through AI; this is an increase of 10% since 2011 when the research was last conducted. Of that percentage, 25% of mares were covered using fresh semen, a further 10% were covered using frozen semen from Ireland and just 7% used frozen semen imported from abroad. The overall use of frozen semen has increased from 12% in 2011 to 17% in 2016 and the use of frozen semen from abroad has increased by 3% in the same period.

While the use of AI has significantly increased in Ireland in the last 6 years, the use of this technology still lags behind its use in the main European studbooks. It would be interesting to know whether this is due to traditional attitudes to AI or if logistical factors and additional cost are influencing Irish breeders' reticence to use AI when covering their mares.

Figure 3.6 Percentage of mares covered naturally and by AI in 2016





4. Expenditure in the competition sector

The competition sector in Ireland comprises both national and international events. The national data was collected from competitors whose main livelihood was derived from schooling and competing on customers' horses. This ensured a population capable of providing accurate and identified costs, compared to casual recreational competitors who, although subject to similar costs, would not usually keep detailed records.

With the co-operation of Showjumping Ireland (SJI) and Eventing Ireland (EI), survey questionnaires were sent to all members over 18 years who matched this description. Everyone on this list was surveyed, and the results were extrapolated to show national expenditure in the competition sector.

Data was collected to establish the average horse owners' expenditure on maintaining a competition horse for 2016, including all related costs such as, livery, labour, entry fee registrations and travel expenditure.

The survey results indicated that 5.2% of members of Showjumping Ireland are also members of either Eventing Ireland or Dressage Ireland.

In total, across the three disciplines there were 9,793 registered competition animals (using registration figures from SJI, EI and DI). The responses to the survey covered a sample of 357 yards in the country that had 3,182 horses and ponies.

The sample yards provided data on their livery service and charges. Expenditure on basic livery averaged €107.50 per week. Livery covered, as a minimum, feed without supplements, bedding and stabling, and the associated labour in almost all yards. Data showed that owners left their horses on livery for an average of 9.2 months of the year, giving a total annual expenditure of €4,422.62 per horse. This gave a national total for livery of €43,310,718.

Feed supplements were charged as extra by 60% of establishments, while training/schooling and tack/equipment were extras charged by 52% and 65%, respectively of the respondent establishments. Veterinary attention, including vaccinations, farrier attention and travel and entry fees were charged as extra by almost all the establishments.

The travel expenditure shown was based on the information from the respondents on the average road transport expenditure and overnight stabling expenditure of riders or owners.

The registration expenditure below represents both membership and registration costs. Horses were required to be registered annually to compete in showjumping, eventing or dressage. Additionally, owners and riders were required to be members of the affiliated bodies for these sporting disciplines.

The survey results showed that on average, the expenditure related to producing a competition horse in Ireland was €10,312.68 per annum.

The aggregate national contribution to the economy was €100,992,075 as shown in Table 4.1.

Table 4.1 Aggregate contribution of national competition sector to the economy in 2016

	EXPENDITURE PER COMPETITION ANIMAL	TOTAL NATIONAL EXPENDITURE
BASIC LIVERY	(€)	(€)
Basic livery	4,422.62	43,310,718
EXTRA LIVERY EXPENDITURE	(€)	(€)
Feed supplements	420.60	4,118,936
Training/schooling	129.00	1,263,297
Tack	885.91	8,675,717
Veterinary attention	697.82	6,833,751
Farrier	698.28	6,838,256
Entry fees	1,097.61	10,748,895
Total travel	1,795.59	17,584,213
Registration	165.25	1,618,293
TOTAL	10,312.68	100,992,075



4.1 International equestrian competitions in Ireland

In 2016 there were 15 international equestrian events held in Ireland, of those the largest were the RDS Dublin Horse Show, Tattersalls event and the European Showjumping Championships for Young Riders (under 21) Juniors (under 18) and Children on Horses (under 14) held in Green Glens, Millstreet. The contribution to the economy of such events is significant and includes expenditure by exhibitors, spectators and overseas visitors.

Table 4.2 Aggregate contribution of International showjumping events held in Ireland in 2016

NAME OF EVENT	DATE (2016)	TOTAL NO. OF INT. SJ HORSES	NO. OF HORSES WITH IRISH RIDERS	NO. OF HORSES WITH FOREIGN RIDERS
Millstreet	25–27 March	56	52	4
Millstreet	31 March–3 April	73	67	6
Balmoral	11–13 May	68	42	26
Mullingar	3–6 June	144	128	16
Dublin	20–24 July	192	84	108
Millstreet	26–31 July	276	15	261
Millstreet	11–14 August	87	65	22
Millstreet	28–30 October	71	64	7
Cavan	9–13 November	98	88	10
TOTAL		1,065	605	460

An Indecon report estimated that the Royal Dublin Society (RDS) Horse Show contributed €43 million to the national economy in 2010. The increased costs estimated by the RDS Dublin Horse show, since that report have been included to reflect a 2016 figure of €49.8 million. The Dublin Horse Show contributes direct expenditure of €21.23 million and a further €28.65 million in indirect expenditure, giving a total expenditure of €49.8 million into the economy, of which €3.48 million was identified as from overseas tourists. The RDS Dublin Horse Show has more than 1,600 horses and ponies on its premises over the 5 days of the event.

Table 4.3 international Eventing Competitions held in Ireland in 2016

NAME OF EVENT	DATE (2016)	TOTAL NO. OF HORSES	NO. OF HORSES WITH IRISH RIDERS	NO. OF HORSES WITH FOREIGN RIDERS
Ballindenisk	22-25 April	144	80	64
Tattersalls	1-5 June	322	163	159
Kilguilkey	2-3 July	102	93	9
Camphire	27-31 July	209	157	52
Millstreet	26-28 August	241	166	75
Ballindenisk	15-18 September	182	92	90
TOTAL		1,200	751	449

Due to the commercially sensitive nature of the data involved, detailed breakdowns of the financial data of the other 14 international events have not been published and are not shown in this report. However, based on entries, private communications and estimates of the bed nights, visitor numbers etc., they were conservatively estimated to be worth €17 million in direct expenditure to the economy.

The RDS Dublin Horse Show and the other international equestrian events held in 2016 were estimated to contribute in excess of €67 million in direct expenditure to the Irish economy.

4.2 Total competition sector

When combined, the national and international competition sector is worth a total **€167,992,075** to the Irish economy.





5. Expenditure in the leisure sector

The leisure sector is a significant element of the Irish sport horse industry, comprising 35,882 sport horses. The sport horse leisure sector research covers expenditure in hunting, showing and county shows, the Association of Irish Riding Establishments (AIRE), Association of Irish Riding Clubs (AIRC), and the Irish Pony Club (IPC).

5.1 Hunting

In a previous report *Economic Contribution of the Sport Horse Industry to the Irish Economy*, published in 2012, the expenditure for hunting was based on David Scallan's research on hunting entitled *Socio-economic Assessment of Hunting in the Republic of Ireland* which was completed in 2007 by the Department of Geography, National University of Ireland, Galway.

For this report, hunting expenditure was calculated using the results of various stakeholders involved in hunting activities of fox hunts, mounted hunts with harrier hounds, and the Ward Union stag hunt. The requested information related to the numbers of people involved in hunting with hounds, the frequency of the hunting activity, and the levels of income and expenditure by hunts in Ireland.

Fox hunting

At present, there are 42 fox hunts in the Republic of Ireland. Each hunt is affiliated to the Irish Masters of Fox Hounds Association (IMFHA). The hunting season runs from September to March.

Mounted hunting with harrier hounds

Mounted hunting with harrier hounds is the hunting of foxes whilst mounted on horseback with a pack of harrier hounds. Harrier hunting takes its name from the type of hound used. The activity is governed by the Irish Masters of Harriers Association (IMHA) which currently represents 47 hunts. The hunting season runs from September to March.

Ward Union stag hunt

The Ward Union stag hunt is the only mounted hunt in the Republic of Ireland that hunts deer and has a long history dating from the nineteenth century. The hunting area comprises of north county Dublin together with the lands of south and east Meath. Hunting takes place 2 days a week during the season from November to March each year.

5.2 Membership of hunts

The mean number of adult and child members and membership costs are outlined below in Table 5.1. The mean number of members per fox hunt was 103 members (84 adults and 19 children), with the largest fox hunts having up to 60 child members and 200 adults members.

The mean annual membership fees were €425 for adults and €14 for children. Hunts differed with regard to the membership packages they had on offer e.g. some hunts offer family membership rates and some offer reduced membership rates for members inside their region or to farmers that own land available to the hunt. The total membership fees for all the hunts in 2016 was €2,764,050.

Table 5.1 Membership details of hunts in Ireland in 2016

	FOX HUNTING	MOUNTED HUNTING WITH HARRIER HOUNDS	WARD UNION STAG HUNT
Number of hunts	42	47	1
Mean number of adult members	84	90	135
Mean membership fee for adult (€)	425	250	500
Mean number of child members	19	23	0
Mean membership fee for child (€)	175	0	N/A
Total no. of members – adults	3,528	4,230	135
Total no. of members – children	798	1,100	0
Mean annual income from membership/hunt (€)	39,025	22,500	67,500
Total annual expenditure on membership fees by members (€)	1,639,050	1,057,500	67,500

Frequency, attendance and cap fees during hunt meetings in 2016

Table 5.2 outlines the mean number of meets per week, the mean number of meets per year, the total number of meets per year and the mean attendance per meet. It also outlines the total number of caps paid or the total number of times people followed the course of the hunts during 2016.

Table 5.2 Frequency of hunting, attendance and cap fees per hunt meet

	FOX HUNTING	MOUNTED HUNTING WITH HARRIER HOUNDS	WARD UNION STAG HUNT
Average no. of meets/week	2.18	1.12	2
Average no. of meets/year	65.4	53	52
Total no. of meets	2,747	2,491	52
Average no. of participant/meet	35.21	30	45
Average cap fee/participant	€25 per adult €14 per child	€25 per adult €0 per child	€40 per adult €20 per child
Expenditure on cap fees/meet (€)	1,256	750.00	1,000
Total annual expenditure on cap fees (€)	2,417,870.70	1,868,250.00	93,600.00

Note: Data was supplied by hunts.

As Table 5.2 indicates, all hunts met at least once per week during the hunting season. The fox hunts and the Ward Union hunt met on average twice per week. The total expenditure on cap fees by participants in hunting was €4,379,721 in 2016.

All hunts organised additional equestrian activities to increase their income; the primary non-hunting event is the annual point to point. The results showed that almost every mounted hunt organised a point-to-point event during 2016. Other sporting events organised by the hunts included hunter trials, hunt team chases, gymkhanas and horse shows.

Expenditure by participants involved in hunting: Mounted followers

The breakdown of expenditure on goods and services by the participants involved in hunting with hounds is shown in Table 5.6. The expenditure relating to stabling and livery fees for maintaining horses for hunting was the largest expenditure category by the followers of the mounted hunts in Ireland. Such expenditure consisted of horse food, stabling fees and veterinary expenses. The second largest expenditure category was from hunt-related social and recreational activities. Such expenditure included events such as point to points and hunt balls. Payments to hunts in the form of cap fees and subscriptions were also a significant expenditure category.

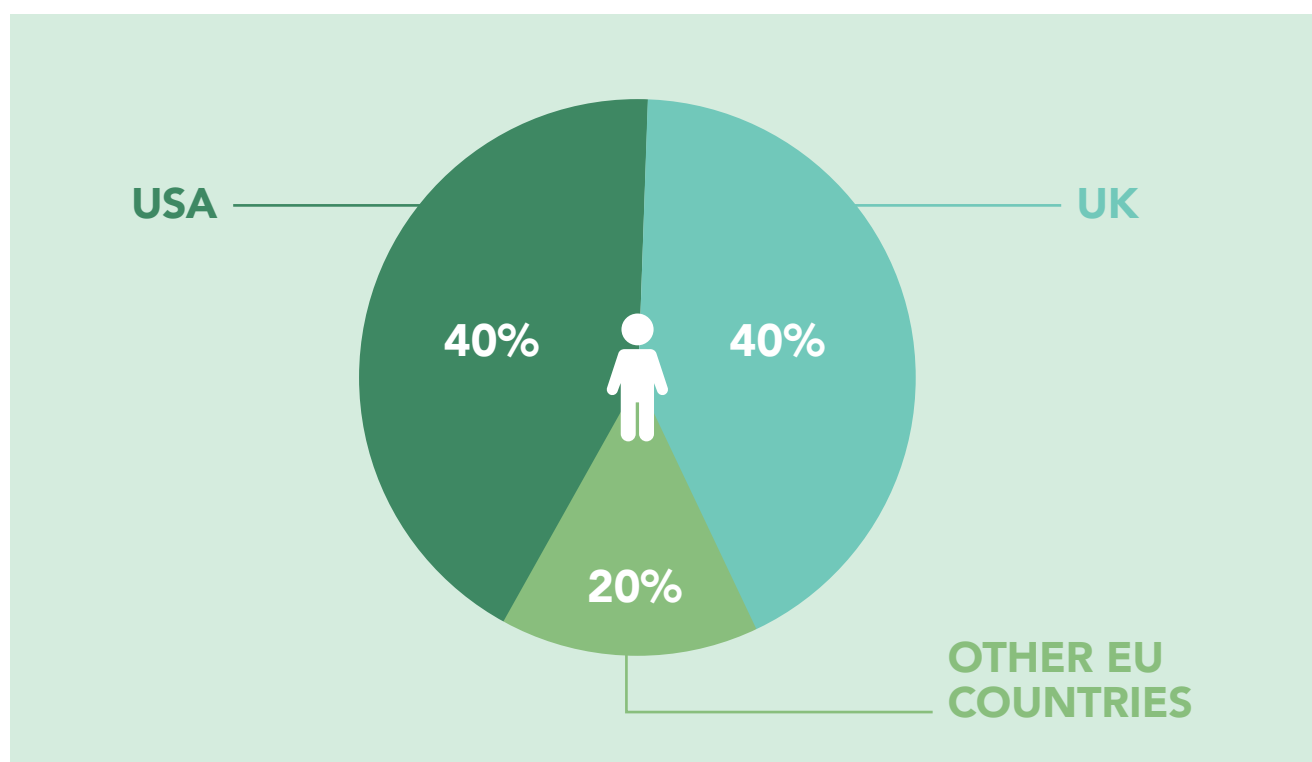
The mean annual expenditure per hunting participant was €6,460 and a summary of the main items of expenditure is provided in Table 5.6 below..

Expenditure by visitors

The expenditure by overseas visitors was determined through input from stakeholders in this area of the tourist industry and through information gathered during the surveys from individual hunts. A conservative estimate of approximately 400 overseas visitors travel to Ireland each year to pursue hunting activities and spend in excess of €1 million. Of these visitors, 40% came from the USA, 40% came from the UK and the remaining 20% were from other EU countries (mainly Germany).



Figure 5.1 Origin of hunt visitors in 2016



The mean stay for visitors was 5 nights but this varied depending on the nationality of the visitor (e.g. visitors from the UK often travelled for a weekend, while US visitors usually stayed for at least 1 week). The mean number of hunts attended per visitor was 3.5.

Table 5.3 Mean expenditure by visitors to mounted hunts

	MEAN ANNUAL EXPENDITURE PER VISITOR (€)	TOTAL EXPENDITURE (€)
Cap fees	392	156,800
Horse hire	560	224,000
Accommodation	825	330,000
Care hire	200	80,000
Food/other	750	300,000
TOTAL	2,727	1,090,800

Total expenditure by participants involved in hunting with hounds

The participant expenditure estimates were grossed-up in an attempt to generate a number of conclusions from the data.

In order to estimate the number of active hunting participants in 2016, hunt secretaries were asked to state the number of members that were active (hunting) and dormant (not hunting) in 2016. This information was then used to estimate the total number of active hunting participants in 2016. In respect of this, the study only considered the active participants registered with the hunts when generating economic estimates (Table 5.5).

In addition, only 42.2% of participants said they kept a hunter only for hunting, others participated in show jumping eventing etc. also. The costs of keeping a hunter were only attributed to 3,788 participants for expenditure purposes from a total recorded participation in hunting of 8,974 people to avoid any double counting.

Table 5.4 Estimated numbers of active hunting participants in 2016

	MEAN ACTIVE MEMBERSHIP PER HUNT	GROSSED-UP ACTIVE HUNT MEMBERSHIP
Fox hunts	84	3,528
Mounted harrier hunts	113	5,311
Ward Union hunt	135	135
TOTAL	-	8,974

Table 5.5 Grossed-up expenditure by the participants involved in hunting in 2016

	AVERAGE ANNUAL EXPENDITURE PER PARTICIPANT (€)	TOTAL EXPENDITURE (€)
Maintenance of hunter (livery/grazing)	2,708	10,257,904
Depreciation of hunter	651	2,465,988
Tack and riding equipment	500	1,894,000
Veterinary fees	617	2,337,196
Farrier fees	375	1,420,500
Travel to hunts	607	2,299,316
Other hunt activities (hunt ball, hunter trials etc.)	1,002	3,795,576
Hunt membership (Table 5.1)		2,764,050
Cap fees (Table 5.2)		4,379,721
TOTAL (€)	6,460	31,614,251

Employment by hunts

Table 5.6 Grossed-up direct hunt employment of mounted hunts

	FOX HUNTING	MOUNTED HUNT- ING WITH HARRIER HOUNDS	WARD UNION STAG HUNT	TOTAL
Total no. of full-time employees	67	6	3	76

Total hunting expenditure

Table 5.7 Total expenditure for mounted hunts in 2016

(€)	
Total expenditure by participants (€)	31,614,251
Total expenditure by visitors (€)	1,090,800
TOTAL HUNTING EXPENDITURE (€)	32,705,051

The total annual hunting with hounds participant and visitor expenditure amounted to **€32,705,051** in 2016.

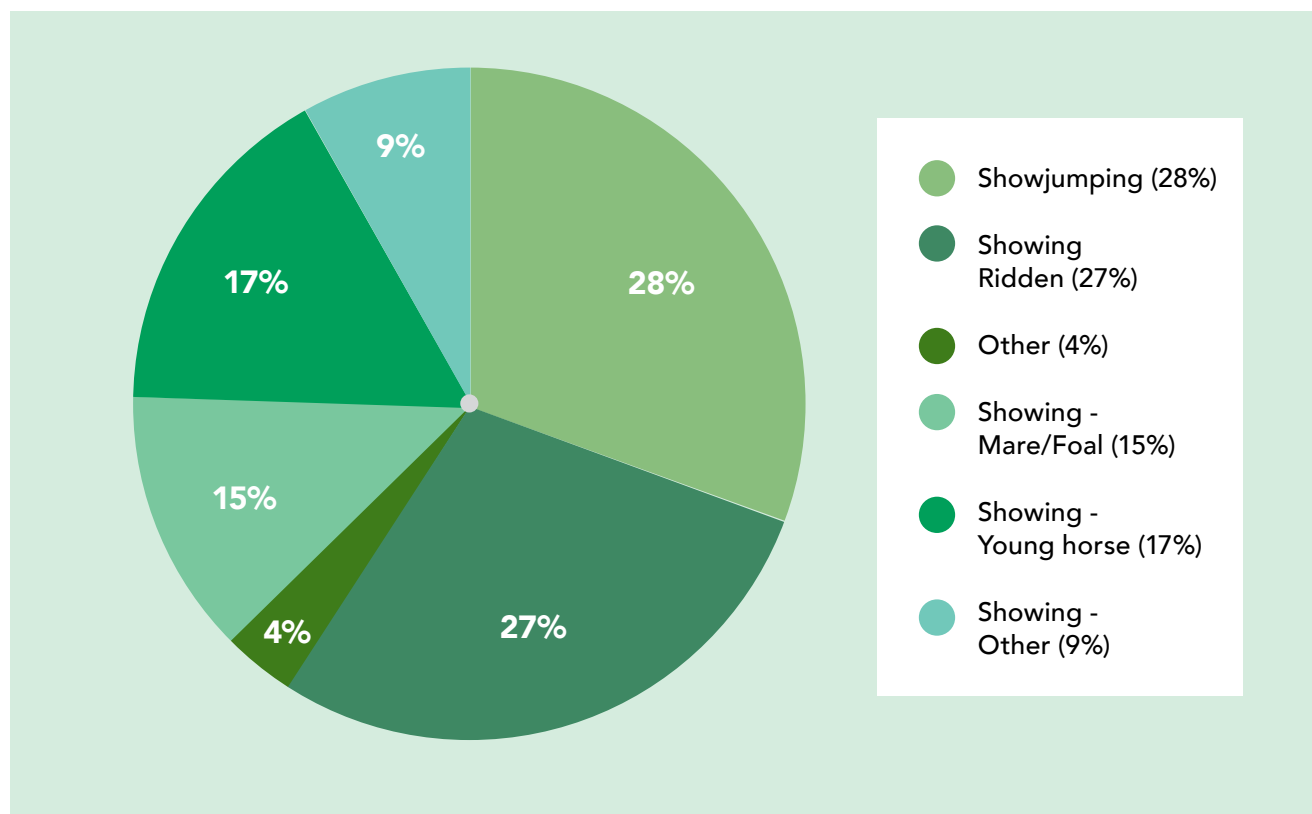
In addition, there is an employment contribution, which was estimated as 76 people employed on a full-time basis. The wages have been based on the mean agricultural wage of €9.15 per hour, to give a total of €1,251,720.

5.3 Showing and county shows

Each year, approximately 144 county shows take place in Ireland and 140 of them are affiliated to the Irish Shows Association (ISA). In 2016, it was estimated that 286,500 spectators attended shows with 5% of the spectators coming from overseas. The ISA reported that approximately 50% of spectators attended county shows specifically to view equestrian events and classes. Accordingly, only 50% of the spectator expenditure has been attributed to the sport horse industry's contribution to the economy.

Equestrian classes are extremely important to county shows with some shows consisting solely of equestrian classes and events. On average there are 81 equestrian classes per county show, including showjumping, in-hand showing and ridden showing classes for horse and ponies. Approximately 11,644 equestrian classes take place at county shows each year with showjumping and showing being the most popular type of equestrian class.

Figure 5.2 Numbers of classes per discipline at county shows in 2016



For this study, data was provided by the Irish Shows Association and this data was supplemented with 100 surveys from spectators and horse exhibitors at ISA county shows and the results were extrapolated to show national expenditure in the county show sector. The data collected to establish spectator and exhibitor expenditure included travel costs, accommodation costs, expenditure at the show, and number of accompanying people.

For domestic spectators, most attended as a family group; the mean family size attending county shows was 2.5 individuals and the mean expenditure per family was €82.98. Overseas visitors also had a mean family size of 4.5 size of overseas individuals per family but had a mean expenditure of €1,010.12. Overseas visitors stayed a mean of 7 nights in Ireland during their visit and 1.5 of these overnight stays were included in the estimation of expenditure for overseas spectators. The overseas visitors surveyed came from several different countries including Australia, the United Arab Emirates, France, the UK and the US.

It was estimated that there were 2,400 individuals that exhibit horses at county shows in Ireland (this estimate does not include individuals that competed in showjumping competitions as their contribution was already included in the competition sector analysis). On average, horse exhibitors attended shows in a family unit of 3 individuals and exhibited at 8.7 shows per year, entering on average 13.11 classes per annum.

The mean number of entries per class varied depending on the discipline. The highest entries in 2016 were for showjumping classes at 16.74 entries per class, followed by ridden showing classes at 6.3 entries per class. There were 1,120 dedicated horses for showing in Ireland in 2016 at a total value of €1,720,320 (this excludes mares, foals and young stock whose contribution is included in the breeding sector analysis).

Table 5.8 Mean prize fund per class in various disciplines in 2016

DISCIPLINE	MEAN PRIZE FUND PER CLASS (€)
Carriage driving	140
Showing – Ridden	150
Showing – Mares/foals	140
Showing – Young horses	120
Showing - Other	120

The aggregate contribution of the sport horse industry from county shows to the economy was **€30,392,266** as shown in Table 5.10.

Table 5.9 Aggregate contribution of county shows to the economy in 2016

	EXPENDITURE PER FAMILY (€)	TOTAL NATIONAL BREEDERS EXPENDITURE (€)
Domestic spectator families	82.98	4,754,754
Overseas spectator families	1,010.12	3,215,549
TOTAL SPECTATOR EXPENDITURE		7,970,303

	EXPENDITURE PER EXHIBITOR PER SHOW (€)	TOTAL NATIONAL SHOWING EXHIBITOR EXPENDITURE (€)
Mileage, accommodation, food	214.09	4,470,199
Entry fees	147.78	3,085,646
Professional preparation of horse/handling	11.71	244,505
TOTAL EXHIBITOR EXPENDITURE	373.58	7,800,350

Table 5.9 Aggregate contribution of county shows to the economy in 2016 (continued)

CAPITAL EXPENDITURE ¹		(€)
Depreciation of show horses		172,032
CURRENT EXPENDITURE ¹		
Basic livery		5,603,199
Feed supplements		581,195
Tack & equipment		570,269
Farrier fees		1,240,333
Veterinary fees		1,699,831
TOTAL EXPENDITURE ON SHOW HORSES		9,866,859
TOTAL COUNTY SHOW EXPENDITURE		25,637,512

¹ Expenditure figures are for dedicated show horses only and have been adjusted to avoid duplication with any sector of the report



5.4 Equestrian inter-schools Ireland

Organised equestrian competition between secondary schools began in 1982 and ultimately led to the formation of Equestrian Inter-Schools Ireland. Each year, up to 30 competitions for secondary school students aged between 12 and 19 years are run by Equestrian Inter-Schools Ireland. Over 2,000 students compete at these events annually.

At present Equestrian Inter-Schools Ireland holds two annual championships, the All-Ireland Inter-Schools Hunter Trial Championships and the National Inter-Schools Showjumping Championships. In 2016, 484 competitors took part in the All-Ireland Inter-Schools Hunter Trials. A total of 141 participants in teams of three competed at the event and junior (aged 12 to 15 years) and senior (aged 16 to 19 years) individual competitions were held with up to 233 competitors. On average 1,500 spectators attended the competition and 20% of spectators and competitors stayed overnight for the event.

The National Inter-Schools Showjumping Championships is run on a league basis and approximately 35 league competitions are held throughout the country between September and May each year. The league culminates in a national final. There are approximately 200 competitors per league competition, including 35 teams of four and individual entries for junior and senior competitors. An average of 600 spectators attended each league competition. Approximately 300 competitors took part in the final, including 50 teams of four and individual entries from junior and senior competitors. On average, 900 spectators attended the final and 20% of spectators and competitors stayed overnight for the event.

The aggregate contribution that the Equestrian Inter-Schools Ireland made to the economy in 2016 was estimated at **€1,168,106** as shown in the following table.



Table 5.10 Aggregate contribution of equestrian Inter-Schools Ireland to the economy in 2016

INTER-SCHOOLS HUNTER TRIALS	TOTAL EXPENDITURE
Entry fees	10,275.00
Expenditure at event by competitors & spectators	98,984.00
Overnight expenses	11,185.00
Travel costs	24,465.00
TOTAL EXPENDITURE	144,909.00

INTER-SCHOOLS SHOWJUMPING CHAMPIONSHIPS	EXPENDITURE PER LEAGUE COMPETITION (€)	TOTAL EXPENDITURE (€)
Entry fees	4,605.00	161,175.00
Expenditure at event by competitors & spectators	19,931.91	697,616.85
Travel	2,500.00	87,500.00
TOTAL EXPENDITURE	27,037.00	946,291.85

INTER-SCHOOLS SHOWJUMPING CHAMPIONSHIPS FINAL	TOTAL EXPENDITURE (€)
Entry fees	5,605.00
Expenditure at event by competitors & spectators	48,250.00
Overnight expenses	4,620.00
Travel costs	18,430.00
TOTAL EXPENDITURE (€)	76,905.00
OVERALL TOTAL EXPENDITURE (€)	1,168,105.85

5.5 Association of Ireland riding establishments (AIRE)-approved equestrian centre expenditure

The total equine population (horses and ponies) in the 177 equestrian centres approved by AIRE in 2016 was 2,800, giving a mean of 16 animals per centre, of which 84% were owned by the centres. The total market value of the animals, as provided by the respondents was a mean of €17,401.00 per centre.

Table 5.11 National and mean expenditure per equestrian centre in 2016

	MEAN EXPENDITURE PER EQUESTRIAN CENTRE	NATIONAL EXPENDITURE
CAPITAL EXPENDITURE	(€)	(€)
Depreciation of animals	2,067.40	365,930
Depreciation of stabling	1,946.88	344,598
Depreciation of tack/equipment	1,865.00	330,105
Depreciation of facilities	8,200.20	1,451,435
CURRENT EXPENDITURE	(€)	(€)
Feed	6,830.60	1,209,016
Bedding (straw/shavings)	1,522.80	269,536
Yard/tack upkeep	1,257.25	222,533
Farrier fees	3,285.20	581,480
Veterinary fees	1,788.00	316,476
Insurance	4,653.00	823,581
Rates	2,070.00	366,390
TOTAL	35,486.33	6,281,080

To calculate the depreciation of the animals; a mean working life of 10 years was used “Horses aged 5–12 years seem to be at their best for trekking etc., but many may still be useful up to 18 years of age”. (Cross, 1992)

Depreciation of stabling was calculated on the same basis as for the breeding sector, and tack and equipment were written off over 7 years, also on a straight-line basis. Respondents provided information on their facilities indicating under each heading the estimated replacement value and expected life. An annual depreciation value (as shown in Table 5.13) was calculated for each type of facility using the respondents’ estimates in each case. The most common services offered by the centres were: instruction, schooling, livery, hacking and trekking. Trail riding, residential courses, hiring for hunting and a tack shop were less commonly offered.

The feed expenditure followed the same categories as the breeding sector, i.e. concentrates and hay. The results indicated that on average equestrian centre animals were fed concentrates for 7 months of the year. Bedding was broken into four categories: straw, shavings, paper and other. Straw followed by shavings proved most popular for 2016, with 75% of respondents reporting its use.

Farrier visits were broken down into riding school horses and livery horses. The mean results were 15 visits for riding school horses and 12 visits for livery horses. The equestrian centres reported their veterinary expenditure for both riding school and livery animals, including worming and all vaccinations. The mean veterinary expenditure per equestrian centre was €1,788 in 2016.

Insurance and rates comprised one of the largest overheads at an average of €4,653.00 per equestrian centre. In total, the 177 AIRE-approved centres accounted for a total expenditure of **€6,281,080**.



5.6 Riding clubs

From data provided by the Association of Irish Riding Clubs (AIRC), it was established that in 2016 there were 121 riding clubs with an estimated 3,233 members. The expenditure by individual members of the riding clubs was examined in this sector and the results are shown in Table 5.13.

Table 5.12 Expenditure related to riding clubs in 2016

	AVERAGE EXPENDITURE PER MEMBER (€)	NATIONAL EXPENDITURE (€)
Membership fees	65.00	210,145.00
Training fees	132.58	428,631.14
Competition fees	360.58	1,165,755.14
TOTAL FEES TO RIDING CLUBS	558.16	1,804,531.28
TOTAL TRAVEL BY MEMBERS	378.96	1,225,177.68
Horse expenditure ¹		
Basic livery	3,460.01	11,186,212.33
Extra expenditure		
Feed supplements	173.31	560,311.23
Training/Schooling	589.02	1,904,301.66
Tack	371.26	1,200,283.58
Veterinary attention	337.09	1,089,811.97
Farrier	398.21	1,287,412.93
TOTAL HORSE EXPENDITURE	5,328.90	17,228,333.70
NATIONAL TOTAL		20,258,043

Note

The figure for maintenance of the horses was estimated - using data obtained elsewhere in this study. The number of horses owned by riding club members was estimated from the survey of riding club members. This figure was adjusted to avoid duplication and only horses whose primary usage was in riding clubs were included, i.e. horses also affiliated to SJI, EI, DI or a hunt were disregarded in this analysis as they were already included in the competition sector.

5.7 Pony clubs

From data provided by the Irish Pony Club (IPC), it was established that in 2016 there were 58 pony clubs with an estimated 3,063 members. The expenditure by individual members of the pony clubs was examined in this sector and the results are shown in Table 5.14.

Table 5.13 Expenditure related to pony clubs in 2016

	AVERAGE EXPENDITURE PER MEMBER (€)	NATIONAL EXPENDITURE (€)
Membership fees	100.00	306,300.00
Training fees	265.25	812,460.75
Camp fees	142.90	437,702.70
Rally fees	115.60	354,082.80
TOTAL FEES TO PONY CLUBS	623.75	1,910,546.25
TOTAL TRAVEL BY MEMBERS	568.20	1,740,396.60
NATIONAL TOTAL	1,191.95	3,650,942.85

Note

The figure for maintenance of the ponies was not included in this section to avoid duplication, as a large proportion of the ponies have already been included in previous sections.

5.8 Leisure horses' maintenance costs

The keep or maintenance costs for hunting, equestrian centre, riding club and showing horses have already been accounted for in the sections above. However, the keep for the remaining 13,689 leisure horses - from the total estimated leisure horse population of 32,692, has not already been included. The keep for these horses was estimated at a lower maintenance level and it includes feed, bedding, farrier and veterinary costs. It was calculated from the breeding sector data at €1,050 per horse in 2011. The basic keep expenditure for these leisure horses was €14,373,450 in 2016.

5.9 Structured leisure sector: Total expenditure

The total contribution of the structured equestrian leisure sector to the economy in 2011 is summarised in Table 5.15 below. The grossed up national expenditure figures for equestrian centres, hunting and riding clubs together gave a total contribution of **€102,983,385**.

Table 5.14 Summary of the national contribution of the structured leisure sector to the Irish economy in 2016

ESTIMATED EXPENDITURE 2016 (€)	
Hunting	31,614,251
County shows	25,637,512
Inter-Schools Ireland	1,168,106
Equestrian centres	6,281,080
Riding clubs	20,258,043
Pony clubs	3,650,943
General leisure horse keep	14,373,450
TOTAL (€)	102,983,385

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6. The external sport horse trade

6.1 External trade

The sport horse industry gives rise to the sale and purchase of horses abroad. These sales represent a contribution to the economy, which must be offset by the outflow of funds on imports. Consequently, net exports are the correct measure of the contribution to the economy from these movements. These net exports must be added to the internal expenditure content, already examined, to calculate the total contribution to the economy of this industry.

6.2 Central Statistics Office data

As the figures in Table 6.1 show, there were remarkable fluctuations in the values and numbers of both exported and imported horses reported to the CSO in the years in question. During the research, these figures from the CSO - were queried many times, due to the peculiar nature of the trends in both horse figures and values.

Table 6.1 CSO data - Exports and imports of sport horses for 2007–2016

YEAR	NO. OF EXPORTS	VALUE OF EXPORTS (€)	NO. OF IMPORTS	VALUE OF IMPORTS (€)
2007	448	5,212,000	3,606	7,054,000
2008	1,552	5,970,000	6,731	4,224,000
2009	342	3,138,000	939	2,412,000
2010	800	3,927,000	336	3,612,000
2011	2,469	3,780,000	291	3,790,000
2012	630	5,685,223	418	43,087,712
2013	412	4,494,713	391	40,358,446
2014	427	3,634,792	331	39,623,026
2015	661	13,562,863	305	47,152,213
2016	667	11,373,399	301	38,363,245

While the trends in the published figures are useful, there is movement of horses through Northern Ireland which is not captured in the published numbers. The other considerations concern the recorded number of horses traded and their monetary value. There is a question mark over the whole subject of published monetary values, given that they are widely believed to be consistently understated, perhaps because of tax considerations. Bearing all this in mind, additional data was sought through the survey process to aid in the measurement of the sport horse export contribution.

6.3 Sales at auction

Owners have two main options when seeking to sell a horse: either to sell privately or to sell through a sales auction, mart or fair. Cavan Horse Marketing Centre, Goresbridge Sport Horse Sales and Monart Event Horse Sale are the three major sales complexes in the country catering for the sport horse sector. There are other sales, marts and fairs conducted around the country but figures on the volume and value of those sales are not known. A description of the sales at auction in Ireland in 2011 and 2016 are given in Table 6.2.

Table 6.2 Sales of sport horses at auction in Ireland in 2016

	2011	2016	% CHANGE
Number of horses sold	3,761	3,007	-20.04
Percentage of horses exported (%)	56	56.2	+0.36
Mean value of horses sold ¹ (€)	2,295.60	3,677.03	+60.17
Value of all horses sold (€)	8,633,752	11,056,830	+28.07
Value of horses exported (€)	4,834,901	6,213,938	+28.52

Note ¹

Figures for the value of sales include both sport horse and monthly auctions and include commission and Value Added Tax, where appropriate.

The auction statistics show an increase in the mean value of sport horse been sold by public auction from €2,295.60 in 2011 to €3,677.30 in 2016 at all sales. The increased confidence of owners in selling higher value sport horses through public auction is very helpful in obtaining increased accuracy in the overall value of the sport horse export trade.

The value of sport horses sold at auction nationally increased by approx. 28.06% from €8.63 million in 2011 to €11 million in 2016. The value of horses sold at auction for export increased by approx. 31.23% from €4.8 million to €6.2 million.

A comparison of the 2016 figures with those from 2011 show a reduction in the overall number of horses being sold at auction by 20.04%, however, there was an increase in the number of higher value horse sold through the elite auctions and the overall mean price achieved. The percentage of sport horses sold at



auction for export has remained stable between 56% and 56.2% in the same time period. The mean value of sport horses sold at performance and elite auctions previously peaked in 2007 at €4,285. However, in 2016 this mean value of an adult sport horse at performance and elite sale increased to €7,324 and the mean value for elite foals was €9,012 in 2016.

6.4 Private sales and total value of horse transactions

Owners have two main options when seeking to sell a horse: either to sell privately or to sell through a sales auction, mart or fair. Cavan Horse Marketing Centre, Goresbridge Sport Horse Sales and Monart Event Horse Sale are the three major sales complexes in the country catering for the sport horse sector. There are other sales, marts and fairs conducted around the country but figures on the volume and value of those sales are not known. A description of the sales at auction in Ireland in 2011 and 2016 are given in Table 6.2.

Table 6.3 Private and auction horse values, exports and imports in 2016

ESTIMATES FOR 2016	PRIVATE	AUCTION	TOTAL
Percentage of horses sold	75.86%	24.10%	
Percentage of horses exported	44.01%	56.20%	
Average price per horse sold	€10,905.02	€3,677.03	
Number of horse transactions	8,720	3,007	11,727
Value of transactions	€95,091,731	€11,056,829	€106,148,560
Number of horses exported	3,837	1,690	5,527
Value of horses exported	€41,840,362	€6,213,938	€48,054,300
Number of horses imported ¹	831		831
Value of horses imported ¹	€5,345,158.20		€5,345,158
Net Imports			4,696
Value of net imports			€42,709,141

Note ¹

The number and value of horses imported was calculated using the ratio of exported to imported horses from information provided by respondents to the postal surveys

Respondents indicated that 75.86% horses were sold privately, an increase from 73% in 2011. This is also validated by the decrease in the number of horses being sold through public auctions. This corresponds to a ratio of 2.9 horses sold privately for every one horse sold at auction. By applying this ratio, this indicates that 8,720 horses were sold privately in 2016, giving a minimum of 11,727 horse transactions in 2016 with a net export value of **€42,709,141** and a total value of **€106,148,560**.



7. Employment in the Irish sport horse industry

7.1 Direct employment

The study established, as a core item of data, the level and distribution of direct employment in registered establishments and activities (Figure 7.1). From this core, estimated levels for the industry were derived.

For these registered establishments, employment was identified under the headings of full-time and part-time paid employees, and members of the household who provided labour. The numbers involved under each heading, the hours per week and the number of weeks per year were ascertained by survey. To assign a monetary value to the labour involved, the statutory age-related minimum pay rates for agricultural workers of €9.15 per hour in 2016 was used.

Figure 7.1 The distribution of employment per sector

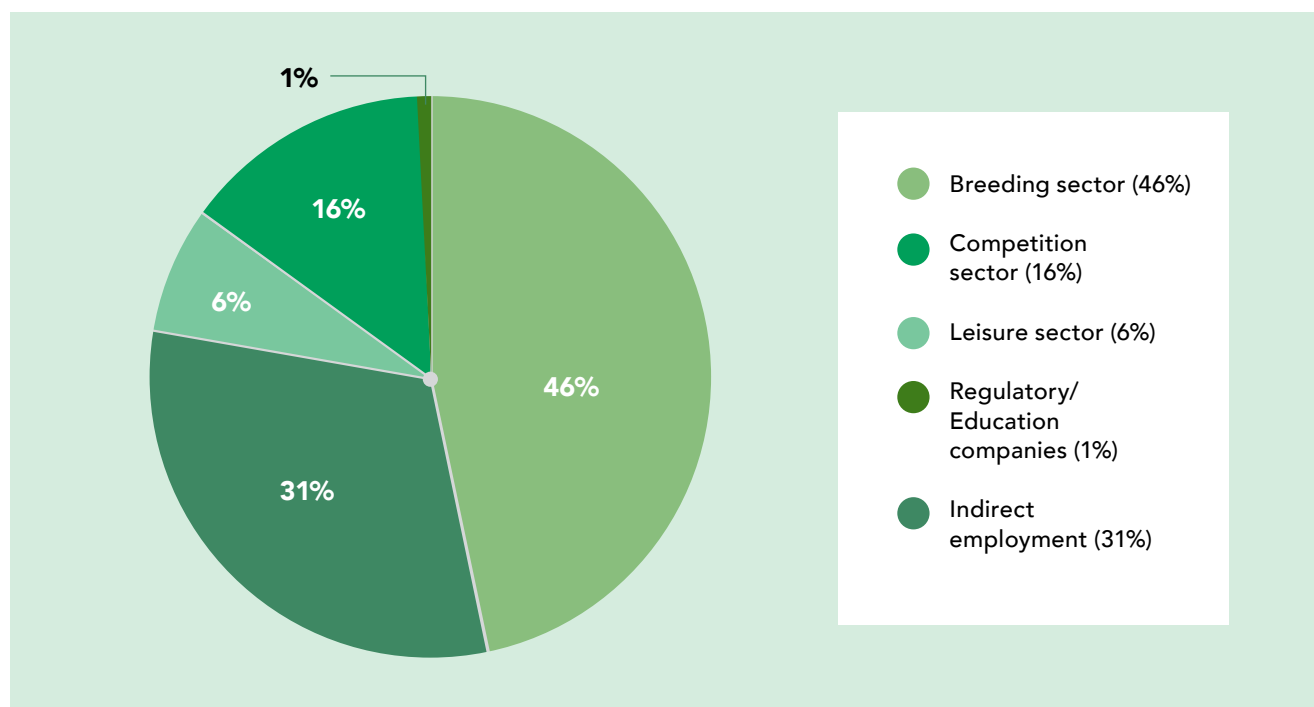
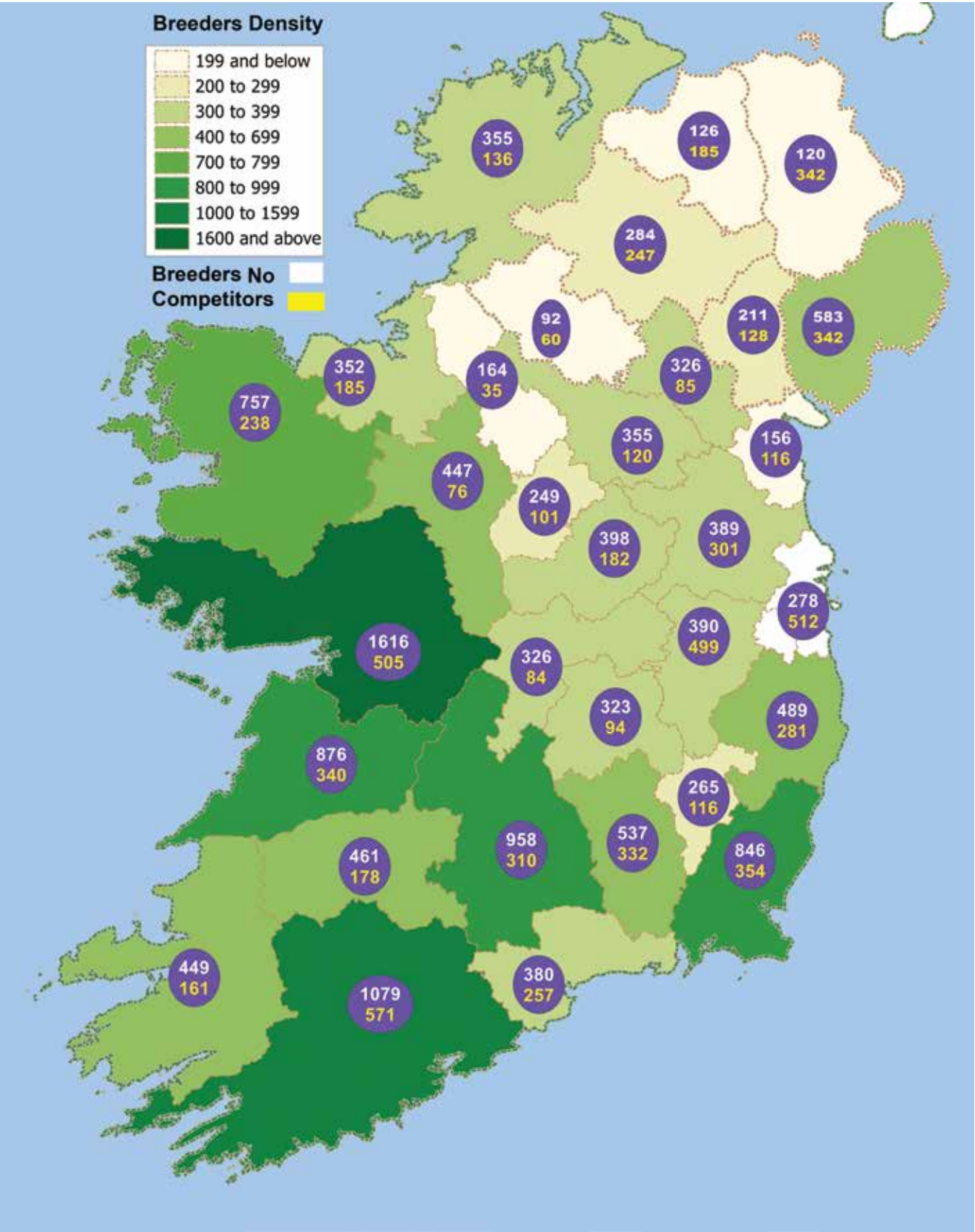


Figure 7.2 Distribution of Breeders and competitors by county in 2016



Please note: competitors represent showjumping and Eventing only

As shown, the breeding sector is the driver of the industry in terms of employment. It employed 42% of the total numbers employed of 14,057 full-time job equivalents. Indirect jobs, in veterinary, feedstuffs, tack and other product and service providers made up the next largest employers. The competition sector was the next most significant employer, followed by the leisure sector.

Overall, as employment in the sport horse sector reaches every corner of rural Ireland means that its impact is even more important to the overall economy. This employment reaches areas where there are very few other forms of employment and jobs available. This is demonstrated by the map below showing the breeders and competition sector employment impact by county (Figure 7.2).

As shown in the following table, the total numbers of full-time equivalents employed directly in the registered establishments/activities in 2016 was 14,057.

**Table 7.1 Direct employment in registered establishments
Full-time job equivalents by sector and wages value**

SECTOR	NO. OF FULL-TIME JOB EQUIVALENTS	WAGES VALUE (€)
Breeding	6,446	106,165,620
Competition	2,258	37,189,260
Equestrian centres	787	12,961,890
Hunting & showing ¹	78	1,284,660
HSI and affiliated bodies ¹	52	
Contractors ¹	5	
Education ²	20	1,133,340
Indirect employment	4,411	72,649,170
TOTAL EMPLOYMENT	14,057	231,383,940

Note ¹

The wages for hunting were derived from the membership subscriptions, and their economic significance has already been recorded under the hunting section. For the registered bodies and activities, the study identified the number of full-time job equivalents in the registration/regulatory bodies for the industry. There were 49 such jobs, and 5 contractors; their monetary value is already included in memberships/government funding for the sector and they are therefore not double counted here.

Note ²

The wages for the education sector were calculated assuming an annual salary in the third level education sector of €56,667 (Source: OECD, Education at a Glance, 2013).

Breeding sector employment

An analysis of employment in the breeder's sector shows that 34% of breeders employed some paid staff including full- or part-time employees and those self-employed on a full-time basis. The reliance on the labour of household members, accounting for 61% of the workforce, is a significant characteristic of the breeder sector, and represents of course a real value to the economy. It is of interest to note that the ratio of horses to workers was 6.9 broodmare units (i.e. broodmare and her progeny) per full-time job equivalent and the ratio of horses to workers was 12.4 mares and young stock units (i.e. all horses up to 3 years of age) per full-time job equivalent.

Table 7.2 Distribution of Breeders and competitors by county in 2016

	NATIONAL FULL-TIME JOB EQUIVALENTS	%	AVERAGE COST OF LABOUR PER BREEDER (€)	TOTAL NATIONAL BREEDERS' WAGES VALUE (€)
Full-time including self-employed	2,484	38.54	2,758.70	40,911,480
Part-time employees	402	6.24	446.46	6,620,940
Family	3,560	55.23	3,953.69	58,633,200
TOTAL	6,446	100.00	7,158.85	106,165,620

Competition sector employment

In the **competition** sector, 63% of professional yards employed staff on a full- or part-time basis. The horse/ labour ratio in this sector was 4.9 horses per full-time job equivalent. This averaged a labour cost of €4,309.63 per horse per year. Grossed up on the basis of expenditure per horse using national competition horse numbers. This gives a national total of €43,777,260.

Table 7.3 Competition sector employment details

	NATIONAL FULL-TIME JOB EQUIVALENTS	%	AVERAGE COST OF LABOUR PER COMPETITION HORSE (€)	TOTAL NATIONAL COMPETITION WAGES VALUE (€)
Full-time including self-employed	1,020	45.17	1,653.81	16,799,400
Part-time employees	265	11.74	429.67	4,364,550
Family	973	43.09	1,577.60	16,025,310
TOTAL	2,258	100.00	3,661.08	37,189,260



Leisure sector employment

The **leisure** sector has four components, equestrian centres, recreation and showing, from whom data were collected by survey, and hunting, with data gained from David Scallan's, study entitled A Socio-economic Assessment of Hunting in the Republic of Ireland which was completed in 2007 by Department of Geography, National University of Ireland, Galway.

Of the equestrian centres, 75% employed staff on a full- or part-time basis. The horse/labour ratio in the centres was 5.8 horses per full-time job equivalent.

Table 7.4 Leisure sector: Employment details

	NATIONAL FULL-TIME JOB EQUIVALENTS	AVERAGE COST OF LABOUR PER EQ CENTRE, HUNT (€)	TOTAL NATIONAL LEISURE WAGES VALUE (€)
Equestrian centres	787	73,231.02	12,961,890
Hunting	76	16,470.00	1,251,720
Showing	2		32,940
TOTAL	865		14,246,550

7.2 Additional employment

A further significant amount of employment exists, comprising a multiplicity of **indirect employment** in related services of one kind or another.

For an estimate of full-time job equivalents in the indirect employment area, a useful guide is the standard ratio of 0.46. This ratio takes account of veterinary, farrier, saddlery, horsebox manufacture/sales as indirect services. On this basis, a further 4,411 indirect full-time job equivalents may be added, bringing the total in the registered area to **full-time job equivalents**.

7.3 Involvement

The previous sections quantify the number of full-time equivalents involved in the sport horse industry. However, the total number of people involved is much higher, as many are involved on a part-time basis. The number of people involved with sport horses was ascertained by survey and when extrapolated for the entire industry amounted to 47,799 people. This figure is conservative as it does not include leisure riders who do not own their own horse. Of the 47,799 people involved, it was estimated that involvement with sport horses affects the household income of 29,850 people.

Table 7.5 Involvement in the sport horse industry

SECTOR	NO. OF PEOPLE INVOLVED
Breeding	26,280
Competition	2,520
Leisure	17,999
TOTAL	46,799







8. Aggregate contribution to the economy of the Irish sport horse industry

The registered components alone of the sport horse industry show an aggregate economic contribution of €816 million to the Irish economy.

Table 8.1 Aggregate sport horse industry contribution to the economy in 2016

SECTOR	TOTAL SECTOR EXPENDITURE (€)
Breeding	270,926,452
Competition	167,992,075
Leisure	102,983,385
Employment	231,383,940
Net horse exports	42,709,141
TOTAL	815,994,994

Figure 8.1 Distribution of expenditure in the sport horse sector in 2016

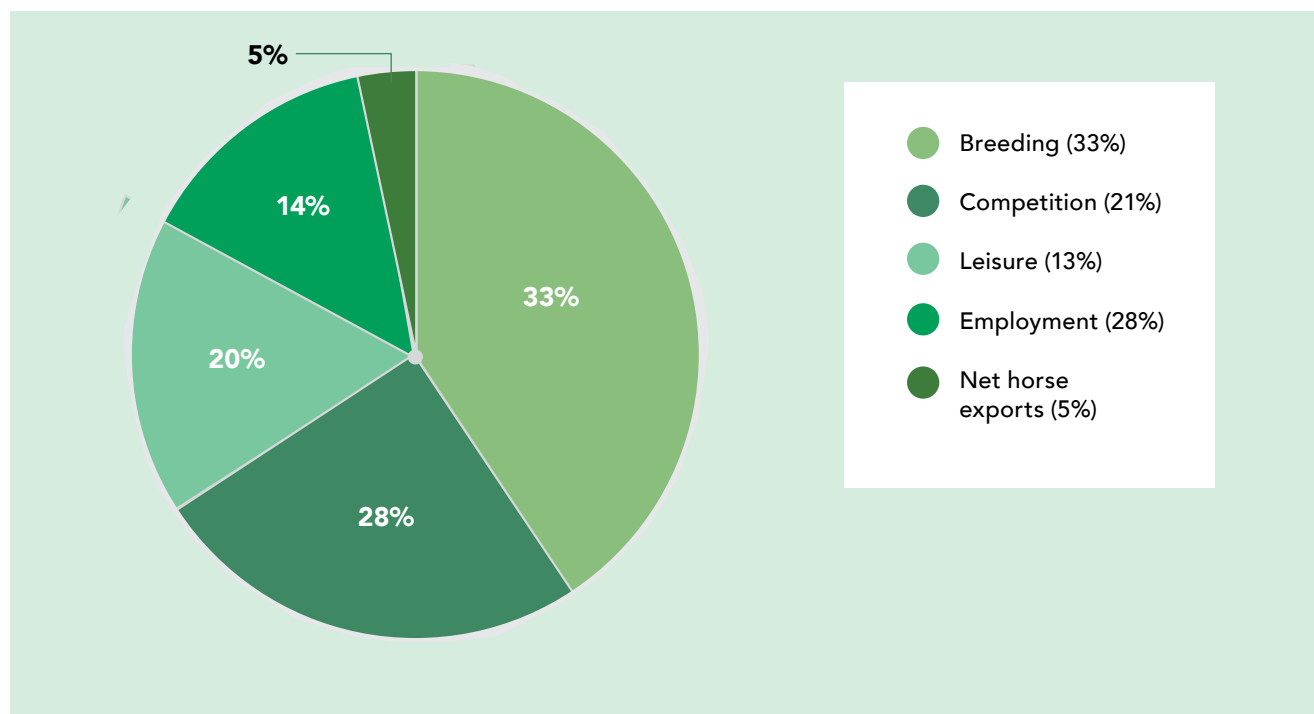


Figure 8.1 shows the breeding sector accounts for the largest portion of the sport horse industry expenditure at 33%, with competition contributing 20% and leisure 13%, and net exports accounting for 5%. The document presented here provides a review of key data and trends in the industry as it currently stands.

While separate sectors exist in the sport horse industry, they have a strong symbiotic relationship in which the well-being of one sector depends upon and contributes to the well-being of the others. Development of the leisure sector and the competition sectors means a better market for the breeders, and a vibrant breeding sector ensures choice and quality for the future.

The picture that emerges of the Irish sport horse industry is that it is a vibrant sector and an important component of Irish rural life. The economic value of the industry is also considerable.



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