

Country Check (1): **France**

# Equestriennes in France

## – number 1 in sports

“According to a survey, 14 million French people would like to ride a horse. That means that in terms of membership, horse riding is the main female sport in France.” Not only Babette Schily, Cluster Manager at SO Horse Alliances, thinks that the largest EU country is one of the most important equestrian nations of Europe, alongside Great Britain and Germany.

In part 1 of our “Country Check” series we are drawing a portrait of France and its equestrian trade sector.

### FRANCE - GERMANY'S MOST IMPORTANT TRADING PARTNER

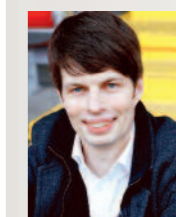
12 million French people - that is one in five - live in the metropolitan area of Paris. Apart from the capital with its 2.25 million inhabitants, Marseille (850,000), Lyon (472,000), Toulouse (447,000) and Nice (344,000) are among the largest cities. Following a reform in early 2016, France is now divided into 19 regions. Before that, there were 27 regions.

Both with regard to exports and imports, Germany is the most important trading partner of the second largest EU economy (and fifth largest of the world). In 2014, France exported goods worth 438.5 billion euros and imported goods worth 510.1 billion euros.

5.1 per cent of the gross domestic product of 2,132.4 billion euros were generated by the agricultural, forestry and fisheries sector in 2014. The agricultural area has hardly changed in the past 50 years; however, the number of agricultural holdings and the number of people working in the agricultural sector have decreased drastically in the past.

### FFE - LARGEST SPORTS ASSOCIATION FOR WOMEN

The Fédération Française D'Equitation, which was founded in 1921, is the umbrella association for all riders, carriage drivers and vaulters in France. Counting 689,000 members, the FFE is the third largest sports association in



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Next Country Check:  
**Netherlands** (RB issue no. 7/16)

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France and the second largest umbrella association in the international umbrella organisation FEI. Only the French associations for football (1,725,000 members) and tennis (1,085,000 members) have more members. In 1984, only 145,000 people had an FFE membership.

“In the past 20 to 30 years, the equestrian sport in France has been democratised,” Manfred Hödl of HEXA Horse explains. The French company produces riding accessories such as whips or special baggage. “Due to its roots in the military sector and the courts, horse riding used to be a sport for the upper society. That is no longer the case. The many newly developed riding centres see many

children, whose families couldn't afford keeping a horse otherwise.” A beneficial factor had been that, until recently, riding centres didn't have to pay the full VAT rate.

The absolute majority of the 2.2 million horse-riding French people is female. That is demonstrated by the FFE numbers: 83 per cent of members (557,821) are female. With view to the number of female members, the FFE is actually the biggest sports association of France. A total of 84,000 FFE members are tourist riders. Three quarters of the license holders are younger than 21 years. The association has the largest numbers of members in the Paris area and in the





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north of the country. The peak value can be found in the former region of Picardy. There, 1000 inhabitants have 14 licenses, statistically. In 2014, more than 54,000 people bought at least one horse.

### HORSE INDUSTRY GENERATES 180,000 JOBS

The French association is the one organising the largest number of FEI tournaments in the world. In 2015, there were 582 tournaments. Apart from that, the Société Hippique Française (SHF) organised a total of 8717 classes for ponies and young horses (up to 6 years) in 2014, and in addition there were 102,919 further competitions for other horses. Recently, the number of SHF classes has decreased considerably, though. In 2004, the Société Hippique had organised almost 5500 tournaments.

The French horse industry provides approximately 180,000 jobs, including 57,000 full-time employees. In this regard, the horse industry is the number one sport in France. The French equestrian sports industry generates a total estimated turnover of 14 billion euros.

France maintains stud books for 66 horse breeds. There are approximately 35,000 breeders, 80 per cent of which have one or two broodmares. Most breeders are located in the north-west of the country. The Institut Français du Cheval et de l'Équitation (IFCE) registers 6568 breeders in the former Lower Normandy region alone. There are 72,600 reproductive broodmares registered with the IFCE. For cows and pigs, these numbers amount to 7.6 million and one million animals, respectively.

Apart from the breeders in Normandy (14,678 covered mares) and in Pays de la Loire (8551), the former region of Aquitaine with the capital city of Bordeaux was the region with the most covered mares (6230) in 2014. The former region in the south-west counts approximately 2300 breeders and 45,000 horses. 40 per cent of breeders with more than ten mares live in Lower Normandy or Aquitaine. Two thirds of the equestrian stock are ponies and riding horses. 20 per cent are race horses.

### EQUESTRIAN TRADE - TWO DOMINATING CHAINS

The major (annual) fairs for the equestrian trade are Salon du Cheval de Paris, Equita Lyon, Cheval Passion in Avignon and Bordeaux ShowJumping. The year starts with the fairs in Avignon (next date: 18 to 22 January 2017) with 250 exhibitors last time and Bordeaux (next date: 3 to 5 February 2017) with 120 exhibitors. Bigger by far are the fairs in Paris (1 to 30 November 2016) and Lyon (26 to 30 October 2016) with approximately 140,000 visitors each (according to the organisers) and 450 to 650 exhibitors. Most companies now regard the show in Lyon as the more important one, compared to the Expo in Paris.

“Horsewood” (32 stores) and “Padd” (55 stores) are two major retail chains specialising in equestrian sports equipment. “Apart from the independent saddle shops, these two retail chains are dominating the scene,” Babette Schily of SO Horse Alliances says. “Their stores boast large sales areas of approximately 300 to 400 square metres.” Both chains belong to the Ekkia group of companies managed by Jean-François Vignion.

### THE FRENCH LOVE THEIR INDIVIDUALITY

Another powerful player in the French equestrian trade sector is Decathlon with 258 retail stores. The company, which was founded in 1976, also sells clothing, equipment and accessories for riders and horses in its stores, as is the case in its 23 German branches. Decathlon has its own research and development centre to see to their own products (of the “Fouganza” brand). “Decathlon has stores in about 60 per cent of all major French cities,” is the estimate of Aurélien Guillon of “Horse Pilot”. The French manufacturer of equestrian clothing was one of eleven French exhibitors at the spoga horse in Cologne in February.

Marie-Line Buessard estimates the number of equestrian specialist shops to amount to 300 to 500. “We cooperate with 50 specialist shops in France,” the Charles de Nevel designer explains. According to her, most specialist shops are located in the Paris area and in Normandy. “The smaller shops position themselves



with a better quality of products as well as consultation and

service,” Babette Schily explains. “In the south we notice a strong influence of Italian and Spanish manufacturers on the retailers. The north, on the other hand, is closer to Germany,” Horse Pilot managing director Guillon says.

In contrast to Germany, France has no professional publications for the equestrian trade sector and no professional association. “The French love their individuality,” Babette Schily says. “Looking at the smaller shops in particular, you have to say that

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retailers in Germany are much better organised than those in France,” Manfred Hödl confirms.

SO Horse Alliances is one organisation to look after the necessary cooperation, exchange of experience and international business of the individual players. The regional cluster in the south-west brings together manufacturers, experts, breeders, trainers and equestrian sport schools in order to promote the economy, engage in location marketing and develop new products. Caen in Normandy is where “Pôle Hippolia” is located, one of 70 state-run “Pôles de compétitivité”, which has similar interests: the objective of the national competence network with more than 150 members is to boost innovation in the French equestrian trade industry and strengthen its competitiveness.

Facts & Data:	France	Germany
Square kilometers	544,000	357,340
Inhabitants	64 Millionen	82 Millionen
Largest population group	25 to 54 years (38,3 %)	25 to 54 years (41,4 %)
Number of births	12,4	8,5
Population growth	0,4 per cent	0,4 per cent
Gross domestic product per capita	33.000 Euro	37.000 Euro
Unemployment rate	10,4 per cent	4,7 per cent
Utilised agricultural area	30 million hectares (55 %)	6,7 million hectares (47,9 %)
Largest city in terms of inhabitants	Paris (2,25 million)	Berlin (3,5 million)
Number of large cities (more than 100,000 inhabitants)	39	77
Equestrian umbrella association (members)	Federation Française D'Equitation/FFE (689.000),	Deutsche Reiterliche Vereinigung/FN (697.126)
Number of riders	2,2 Millionen	1,7 Millionen
FEl tournaments	582	331
Number of competition horses	150.000	147.000
Total number of horses	1,1 million	1,1 million
Equestrian trade fairs	none	spoga horse, Cologne
Most important equestrian fair	Equita Lyon, Salon du Cheval, Paris	Equitana, Essen
Number of equestrian magazines	approx. 10	more than 60
Number of equestrian specialist shops	Up to 500	Up to 1.500

Sources: Information provided by FFE, FN, IFCE, Germany Trade and Invest (GTAI); estimates

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