

Country Check (7): **Ireland**



The Celtic Tiger on horseback

Horses are an integral part of Ireland - the "Green Island", the "Land of the horse" - just like Guinness, folk music and rain. Nowhere else are there more racecourses and maybe even more (sport) horses per inhabitant than in Ireland. The country is basically one huge pasture. A circumstance that has also led to terrible consequences during the economic crisis.

On the other hand, Ireland continues to be Europe's largest producer of thoroughbred horses. The equestrian sport is an economically important factor, particularly in rural areas. Today, the industry is facing special challenges due to the Brexit. In part 8 of our "Country Check" series we are drawing a portrait of Ireland and its equestrian trade sector.



In many parts of the world, man's best friend is a dog, but in Ireland, man's best friend is a horse," says Claire Nulty, head of marketing at horse rug manufacturer Bucas, which was founded in 1981. Not for nothing did the National Tourism Development Authority "Failte Ireland" coin the term "Land of the horse" as one of its marketing slogans. "Ireland has been famous for its horses for many centuries," Diarmuid Hanifin explains. "For centuries, horses have been inextricably linked with the social, economic and political life in Ireland."

"Irish trainers, riders, grooms, vets and farriers are popular all over the world," the spokesperson of the Royal Dublin Society points out. And Claire Nulty adds: "The Irish have a special bond with the horse. We were raised with stories of how our grandparents drove to church with pony and cart every Sunday and how taboo it was for the pony not to be groomed. Or how our grandfather left the pub late at night, lay down on the cart to fall asleep and how the pony brought him home safely. The pony did not need any instructions. He knew exactly what to do."



"In Ireland, man's best friend is the horse."

Claire Nulty, head of marketing at BUCAS

THE SIZE OF BAVARIA

Ireland (official Irish name Éire, pronounced as eische) is an island state in the northern part of Western Europe comprising about five-sixths of the island of the same name. The rest belongs to Northern Ireland - a part of the United Kingdom, contrary to Ireland. In total, the Atlantic island is about 450 kilometres long and 260 kilometres wide - the third largest island in Europe and the third largest divided island in the world behind New Guinea and Borneo.

With 70,000 square kilometres, the Republic of Ireland is about the same size as Bavaria. It became independent in 1921. Six of the 32 counties of the island, named Northern Ireland, remained un-

der British rule, though. Although Ireland uses the euro as means of payment (in contrast to Northern Ireland), the whole island drives on the left. This is not the only peculiarity: the climate is strongly influenced by the North Atlantic Current, which provides for mild average temperatures that hardly fluctuate during the course of the year. And then, there is the rain, of course. It is down to the rain that very dense, green grass is growing almost everywhere.

LOTS OF WATER, HARDLY ANY FORESTS

Ireland, an island rich in castles, is not called the "Green Island" for nothing. On the other hand, there are hardly any forests. Large-scale deforestation at the beginning of the 20th century left only one per cent of the land covered in forests. At the beginning of the millennium, the share had increased to ten per cent, thanks to EU funding. Water is abundant, after all. The River Shannon with its approximately 370 kilometres is the longest river carrying the most water in the British Isles. Nearly 250 kilometres are navigable.

The only land border of the Republic of Ireland, which has been an EU member since 1973, is the one to Northern Ireland. Usually, there are no controls. When Great Britain leaves the EU single market and the Customs Union in 2019, however, the 500 kilometres will become an external border of the European Union. 30 years after the Good Friday Peace Agreement of 1998, all sides want to avoid border controls, which things could boil down to, but it is yet unclear as how to achieve this.

BREXIT CONSEQUENCES

Quite a few things could get in motion due to the Brexit. As a consequence of the Brexit agreement, Northern Ireland has been lacking its regional government since January 2017. The Catholic-nationalist party Sinn Féin considers the British EU exit as a perspective chance to associate itself with Ireland. In early 2018, the EU and



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Great Britain recorded in a 15-page negotiation paper that people in both parts of Ireland can choose whether they want to be citizens of Great Britain or the Republic of Ireland. Just as participants in the Olympic Games have been allowed to do for decades.

The capital and largest city of the Republic of Ireland is Dublin with slightly more than 550,000 inhabitants. The hometown of Oscar Wilde and the Guinness



Connemara - the Original

brewery is located on the Irish east coast - about 100 kilometres from Great Britain, separated by the Irish Sea. The metropolitan region of Dublin is home to about one third of the 4.7 million inhabitants of Ireland. Today, 60 per cent of the population live in urban areas.

Outside of the few centres (Dublin, Cork, Galway, Limerick), the country is very sparsely populated. Jobs are almost exclusively available in the cities. English is the language spoken by a majority of the

population. There are only few counties left where the original language of the Irish - Irish - is officially the prevailing language. In 2006, only 53,471 Irish stated to speak Irish in private on a daily basis.

LAND OF EMIGRANTS

The most influential factor for the decline of the Irish language probably was the famine ravaging the country in the middle of the 19th century. Several failed harvests followed by famines as well as reprisals by the British resulted in more than one million people dying between 1845 and 1852. Even more than that emigrated, a development that continued into the 21st century. In 1841, more than 8.1 million people lived on the island - by 1961, numbers had dropped to 2.8 million.

Since then, the population has been increasing again. By now, Ireland has 4.7 million inhabitants, or more than six million, counting Northern Ireland. The birth rate is 1.9 children per woman. This means the fertility rate is one of the highest in Europe. At the same time, the average age of the Irish is one of the lowest with 36.4 years.

THE ECONOMY - EXTREME DEVELOPMENTS

A majority of the population - almost 85 per cent - is committed to the Roman Catholic faith. Ireland has the strictest abortion ban in the EU. Leo Varadkar, Prime Minister since June 2017, was the first Irish minister to come out in 2015. In the catholic country, homosexual relations were actionable until 1993.

The Irish economy has experienced extreme developments, as well. Before its accession to the EU in 1973, Ireland was considered one of the poorhouses of Europe. In the 1990s, a long lasting recovery ensued with high growth rates and sinking unemployment rates. Ireland attracted dozens of companies from abroad - with low tax rates, among other things. Today, the corporate tax rate is still at only 12.5 per cent - one of the lowest values in the EU. Corporations such as Amazon, Apple, Facebook, Google, IBM, Ikea, Microsoft, Starbucks and Yahoo keep their tax burden low by applying the "Double Irish with a Dutch Sandwich" principle.



"The Brexit is holding special challenges for the equestrian industry."

Michael Duffy, managing director of the Royal Dublin Society (RDS)

SHOCK OF THE FINANCIAL CRISIS

Between 1995 and 2007, Ireland's gross domestic product increased by an average 6 per cent per year, which is why the country was called "Celtic Tiger" in analogy to the tiger economies of south-east Asia. However, from 2007, Ireland was hit hard by the global financial crisis due to the country's dependency on foreign companies. The real estate bubble burst. Many Irish households suffered from



The Curragh Racecourse - prestigious competitions

over-indebtedness. Ireland was the first country to receive billions in aid from the euro rescue fund EFSF. Around 2010, horses became the most visible victims of the economic crisis.

Up to 20,000 horses were left over, many of them were simply abandoned. Countless horses starved, many had to be put down. The way the Irish handled their horses reflected Ireland's ups and downs. A horse-mad nation since the year dot, the Irish had always celebrated their prosperity in the saddle. Average citizens tried to make some extra money with high-bred race horses. Horses first became a status symbol and then the object of speculation.

ABANDONED HORSES

Between 2009 and 2012, the number of horses slaughtered quadrupled to 24,000 animals per year. In 2016, about 1700 out of 2100 horses captured were put down. "Abandoned horses are still a big problem in Ireland," says Karen Keogh from the Irish Horse Rehoming Programme. "The authorities do not address the causes properly. Uncontrolled breeding is a problem. The law is often not enforced. Basically, a child can still buy a pony in the middle of an urban area and start breeding."

ECONOMIC CRISIS IS OVERCOME

In 2014, the economic crisis was largely overcome. And in 2016, Ireland evolved into the third richest country in Europe - and eight richest in the world - thanks to the largest economic growth in Europe according to the gross domestic product (adjusted for purchasing power). In the Global Competitiveness Index, Ireland, one of the world's most liberal economies, ranks in 24th place of 137 countries

GERMANY IS NUMBER FOUR TRADING PARTNER

The main trading partners are currently the US and Great Britain. Both with regard to exports and imports, Germany is the fourth important trading partner. In 2016, Ireland exported



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goods worth a total of 116.5 billion euros and imported goods worth 71.5 billion euros. 1.0 per cent of the gross domestic product of 275.6 billion euros were generated by the agricultural, forestry and fisheries sector in 2016.

The co-operative Ornua (“Kerrygold”) alone, representing 14,000 Irish dairy farms, has an annual turnover of 1.75 billion euros and exports products such as the golden butter to 110 countries. According to the UN Food and Agriculture Organization (FAO), the number of farms was on the decline from 2003 to 2013 in all EU Member States but Ireland. There, numbers increased by 2.9 per cent. In Ireland, the share of utilised agricultural land is almost 70 per cent. For comparison: the average value in the EU is 40 per cent.

SPORT UNITES THE NATION

Despite the changeable history of Ireland, one thing has hardly changed: the sport unites the unusual nation. The national rugby team, for example, has represented the entire island since its foundation in 1874. And of course, the championships in the two Irish national sports, that are basically only known on the island, have been all-Irish since 1887: the All-Ireland Senior Football Championship and the All-Ireland Senior Hurling Championship.

“Ireland has the highest rate of participation in sporting activities in the EU,” says Fine Gael member of the European Parliament and former GAA president Seán Kelly. “In Ireland, sport is heavily linked with volunteering and is organized by the people themselves.” Both Gaelic Football, probably one of most physical team sports in the world, and Hurling, which looks back at 3000 years of history, are pure amateur sports.

“STATE RELIGION” GAELIC FOOTBALL

Hundreds of thousands of Irish people (10.7 per cent) are a member of the Gaelic Athletic Association (GAA), which, apart from Gaelic Football and Hurling, promotes and oversees other Gaelic sports such as Gaelic Handball, Rounders and Wrestling. “The GAA is older than the Republic,” says GAA spokesman Alan Milton. “It

is one of the three pillars of the society, alongside the state and the Church, and the only one the reputation of which has not suffered in recent times.”

Thus, for the Irish, Gaelic Football is much more than just a game. It is the actual state religion of the country. There are 2800 clubs with approximately 180,000 players. The championship finals, held in September in Croke Park in Dublin, the largest stadium (82,000 seats) - cast a spell over the whole nation. It is regularly the most watched TV show of the year. For example, 1.3 million Irishmen (viewing figures of more than 80 per cent) were watching when the game was decided on 17 September 2017.



“The sport horse industry makes a significant yet largely unappreciated contribution to our economy.”

Simon Coveney, Minister for Agriculture, Ireland

About one third of the sporting events are Gaelic Football games, according to the “Irish Sports Monitor”. 7.5 per cent of respondents stated they had visited a Gaelic Football event in the past seven days. Despite the fact that more Irishmen stated to play football more often than Gaelic Football, Gaelic Football has by far the most volunteers. Of the 56 million euros the government made available by means of the “Capital Sports Programme” in 2017, 23.5 million euros went to the GAA.

HOLY IRISH LAWN

It has only been since 2007, by the way, that football or rugby players are allowed to tread the holy Irish lawn in the “Croker” - with exceptional permission. Up to then, the “English” sports had to content themselves with the smaller Lansdowne Road Stadium. Until 1972, participants in a football, rugby or cricket game were punished with a life-long exclusion of all Gaelic sports and sporting clubs. The GAA, more a keeper of the Irish identity than a conventional sports association, used to play an important role in the formation of the Irish national consciousness, similar to the Turnverein clubs in Germany.

When Ireland was occupied by the British, Hurling was prohibited in the way the Irish language was. Just like Gaelic Football, the team sport of Celtic origin, which is played with sticks and a ball, is an integral part of the national identity. Hurling (and the female variety, Camogie) is a symbol of the Irish culture. Looking back at 3000 years of history, Hurling is probably the oldest lawn sport in the world, but at least one of the fastest team sports. A well-beaten leather ball (“Slíotar”) can pick up a speed of up to 150 kilometres per hour.

EQUESTRIAN SPORTS - A SUPPLIER OF MEDALS

Behind Gaelic Football, golf (3.7 per cent), football (3.3 per cent) and swimming (2.1 per cent) are the types of sport with the most members. Despite the dominance of the Irish national sports, Gaelic Football and Hurling, and the great popularity of



The Dublin Horse Show - a special show highlight



Olympic bronze medal in London 2012: Cian O'Connor

football, rugby and golf, equestrianism is a very successful sport in Ireland. It was the only sport to win medals for Ireland at the Olympic Games (Cian O'Connor, bronze) and the Paralympic Games (team bronze, Helen Kearney, silver and bronze) in London in 2012.

Horses are part of the Irish tradition. The various equestrian sports have a large crowd of followers. The umbrella organisation of all equestrians is Horse Sport Ireland (HSI) - responsible for all 32 counties on the island (including Northern Ireland). In 2008, the HSI national association replaced the Equestrian Federation of Ireland (EFI, founded in 1931) and the Irish Horse Board (IHB). The backdrop of the new foundation was that a common body was to be created for equestrian performance and leisure sports as well as horse breeding.

The more than 20 affiliated organisations of Horse Sport Ireland include the Association of Riding Clubs (AIRC), the Federation of Irish Polo Clubs (FIPC), the Hunting Association of Ireland (HAI), the Irish Pony Club (IPC) and the Royal Dublin Society (RDS), founded in 1731, as well as associations for dressage, eventing and show jumping. The AIRC, for example, has 3400 members and about 130 affiliated clubs. The IPC, open for members up to the age of 25 years, counts about 3000 active young riders.

HORSE SPORTS - AN ECONOMIC FACTOR

According to a study by the University College Dublin (UCD), almost 50,000 Irishmen participate in weekly equestrian sports activities. The equestrian sports sector contributes more than 816 million euros per year to the Irish economy, featuring a growth rate of over 15 per cent between 2012 and 2016. Within the sector, breeding accounts for the largest share with 271 million euros, 14,830 active breeders and more than 70,000 horses. Competition riding accounts for 168 million euros (10,000 horses) and leisure riding for 103 million euros (36,000 horses). In 2016, a total of 5527 sport horses worth 48 million euros were exported.

There are more than 14,000 full-time employees working in the Irish sport horse industry, including about 4400 jobs only indirectly connected to equestrian sports such as veterinarians, saddleries and manufacturers of products for the equestrian sport. Another sector to be mentioned is horse-racing with 16,000 jobs. A significant share of the members of the Irish Traveller movement, who travel not only through Ireland but also throughout Europe, works as farriers or horse dealers. *dehändler*.

HORSE SHOWS AS DATING PLATFORMS

In the countryside, horse shows are a society event for many Travellers, and often also a kind of dating platform for young adults. A phenomenon closely linked with the Travellers, many of whom have settled in the suburbs by now, are the "urban horses" or "suburban equestrians". The "pony kids" of Dublin ride bareback through the city like suburban cowboys, staging races on the cobblestones. The animals have no stable nor pasture, as required by law since 1995, but are simply kept on public meadows or in the backyard. At Smithfield Market in Dublin, horses are traded like bicycles. 50 euros will get you a pony.

SPORT HORSES - THE SOCIAL KIT

The major part of the 816 million euros of turnover in equestrian sports is generated elsewhere, though. And that is in the countryside, Alan G. Fahey says. The UCD professor speaks of 14,000 jobs in the equestrian sports sector. "Thus, the equestrian sports sector not only makes a considerable economic contribution but is also important for the social and cultural fabric of rural Ireland," he explains. "In view of the growing economic uncertainty due to the Brexit, it is important that relevant steps are taken to protect this significant industry."

The current sport horse population in Ireland (racehorses excluded) is estimated at almost 136,000 animals. According to the "Spiegel" magazine, nowhere else in Europe are there more sport and leisure horses per capita than on the "green island". According to the "Reaching New Heights" strategy paper, there are 27.5 sport horses per thousand people. "This means that Ireland has the densest population of sport horses in Europe." Sport horses account for two thirds of the equine population there. Most horses (and most of the almost 15,000 breeders) are located in the western part of the island.

HORSE-RACING VERY POPULAR

"Coolmore Stud" in county Tipperary is the world's largest breeding station of Thoroughbreds. Owner John Magnier, who is also a senator in the Irish parliament, is considered the world's most influential man in racehorse breeding. In December 2017, "Coolmore Stud" paid 7.1 million euros for the four-year-old racehorse Marsha at Tattersalls - the highest price ever paid at an auction in Europe. In Ireland, horse-breeding is a tax-free business.

As in England, horse-racing is very popular in Ireland, as well. There is a total of 26 racecourses on the island - 24 in the Republic and two in Northern Ireland. They are visited by about 1.3 million people every year. One in three Irishmen watches horse races live on a regular basis. The betting industry has a reported annual turnover of approximately four billion euros.

The most prestigious races take place at the Curragh and Fairymore Racecourse. Another stronghold is Naas, famous for the Punchestown Festival, which is held in April and one of the annual highlights of the Irish sports and leisure calendar of events. The first race in Punchestown took place as long ago as 1824.

DUBLIN HORSE SHOW - AN INSTITUTION

The largest equestrian event in Ireland is the five-day Dublin Horse Show of the RDS - an institution and a celebration of Ireland's relationship with the horse. The five-day show, which is one of the biggest events in Ireland, contributing almost 50 million euros to the national economy, includes international five-star show jumping classes such as the Aga Khan Nations Cup, for example. The 144th edition (the first one took place in 1887) in August 2017 attracted more than 100,000 visitors, there were more than 300 trade stands and 1600 horses and ponies.

The Tattersalls International Horse Trials & Country Fair is Ireland's leading eventing show, taking place at the end of May/beginning of June and visited by up to 30,000 people. Manufacturers offer their goods at 90 stands in an outdoor village of tents. One remarkable fact: Irish Sport Horse is number one in the September 2017 stud book ranking of the WBFSH. In show jumping, Ireland is currently in 14th place - it is mainly hunting that has a long tradition. During the 1960s and 1970s, Ireland still regularly produced the best show jumping horses in the world.

HORSE SECTOR - STRATEGY 2025

In 2015, HSI, Teagasc and the RDS developed the 45-page strategy paper "Reaching New Heights" with the support of the ministries for agriculture, food and the navy and the ministry for transport, tourism and sport. The commission developed six core recommendations to bring the Irish horse sector back up front by 2025 and stop the "downward spiral of the Irish sport horse". For example, Irish horse breeding should learn from European stud books (KWPN and Holstein), for example, and place even more value on quality.



"The sport horse sector is important for the social and cultural fabric of rural Ireland."

Alan G. Fahey, UCD professor

One first step to achieve the objectives was that HSI created a new international marketing department. Ireland aims at "having a sport horse sector by 2025 that makes use of the latest scientific skills and abilities to produce and breed horses at the highest international level". The country wants to have a "lively, dynamic horse sports sector", which "considerably contributes to the economic and social life of the country, in which the well-being of the horse is the focus of the industry."

According to the stud book, 4766 foals were registered with Irish Sport Horse in 2016. The Irish Sport Horse was created by cross-

breeding the Irish Draught Horse (782 foals), the traditional Irish work horse, with English thoroughbred horses. To breed the Irish Hunter, a horse preferably used for show jumping and hunting, Irish Draught mares had been bred to English thoroughbred stallions. The Irish Draught Horse probably goes back to Connemara Ponies, Spanish horses and old English warmblood horses.

CONNEMARA - THE ONE AND ONLY

The Connemara Pony is also known as the "only originally Irish horse". Their home is the sparsely populated far western tip of Ireland. For many centuries, the small horses have lived there in the peaty swamps and scree slopes. During trail rides on the Connemara Trail, the animals sometimes are stuck in the mud up to their knees. Tinker horses, who usually feature a pinto pattern and features, full mane and tail and a little beard on the lower lip, were originally draught and working horses of the Travellers but have evolved into a fashion horse breed since the 1990s.

IRISH HORSE IS FORGIVING

"The Irish Horse has nerves of steel and a good character. It helps inexperienced riders and has a forgiving nature," says Sue Foley, director of the Clonshire Equestrian Centre in the county of Limerick, one of the largest equestrian centres in the country. Riding the probably most famous horse with Connemara origins, Hunter pony "Stroller" (145 cm at the withers), Marion Mould won individual Olympic silver in 1968 and, two years later, the perhaps most difficult jumping class in the world, the German show-jumping Derby. With a clear round.

"The image of the Irish sport horse industry reveals that it is a vibrant sector and an important part of rural life. The economic value of the industry is considerable," concludes the study "The Contribution of the Sport Horse Industry to the Irish Economy 2017". A similar view is held by Simon Coveney, Minister of Agriculture. The sport horse industry reached "deep into the municipalities of the country" and made a "significant but largely unappreciated contribution to our economy".

TEAM IRELAND EQUESTRIAN - SPONSORED BY MANUFACTURERS

Sponsors of the Team Ireland Equestrian (TIE) include well-known manufacturers from the Irish equestrian industry such as Berney Bros Saddlery from Kilcullen, Horsecare, market leader for horse rugs in Great Britain, and Gain Horse Feeds from Kilkenny. Equestrian clothes manufacturer Dubarry of Ireland, another sponsor of the team that was founded in 2009, has flagship stores in Dublin (and London) on top of the shop at the company's headquarters in Ballinasloe.

TIE sponsor TRM Ireland (Thoroughbred Remedies Manufacturing) from Kildare is the leading manufacturer and distributor of feed supplements and health products for horses, by their own account. Sister company TRI Equestrian, founded in 1984, describes itself as "Ireland's leading equestrian shop". Apart from the superstore next to the racecourse in Curragh, the largest equestrian retail store in Ireland, according to the company, TRI has another shop in Northern Ireland at Meadows Equestrian Centre in Lurgan.

Country comparison:



Ireland

| | |
|---|--|
| Square kilometres | 70,273 |
| Inhabitants | 4,7 million |
| Largest population group | 25 to 54 years (43,2 %) |
| Birth rate | 1,9 |
| Population growth | 1,2 per cent |
| Gross domestic product per capita | 63.761 Euro |
| Unemployment rate | 6,1 per cent |
| Utilised agricultural area | 4,9 million hectares (64,8%) |
| Largest city in terms of inhabitants | Dublin (0,55 million) |
| Number of large cities (more than 100,000 inhabitants) | 2 |
| Umbrella association (members) | Horse Sport Ireland/HSI (no data provided) - * |
| Number of riders | 0,35 million |
| FEI tournaments | 53 |
| Number of competition horses | over 10.000 |
| Total number of horses | 0,14 million |
| Equestrian trade fairs | - |
| Equestrian fair | Horse Show, Dublin |
| Number of equestrian magazines | 2 |
| Number of equestrian specialist | 70 |



Germany

| | |
|--------------------------------------|---|
| Square kilometres | 357.340 |
| Inhabitants | 82,2 million |
| Largest population group | 25 to 54 years (41,4 %) |
| Birth rate | 1,5 |
| Population growth | -0,2 per cent |
| Gross domestic product per capita | 40.408 Euro |
| Unemployment rate | 3,7 per cent |
| Utilised agricultural area | 16,7 million hectares (47,9%) |
| Largest city in terms of inhabitants | Berlin (3,5 million) |
| Number of large cities | 76 |
| Umbrella association (members) | Deutsche Reiterliche Vereinigung/FN (697.126) |
| Number of riders | 1,7 million |
| FEI tournaments | 331 |
| Number of competition horses | 147.000 |
| Total number of horses | 1,1 million |
| Equestrian trade fairs | spoga horse, Köln |
| Equestrian fair | Equitana, Essen |
| Number of equestrian magazines | 60 |
| Number of equestrian specialist | more than 1.500 |

* According to a study, 50,000 Irishmen participate in equestrian activities every week.
Sources: HSI, UCD, RDS, FN, FEI, GfA, estimates

turers Connolly's Red Mills and Bluegrass as well as Mackey Equestrian, John Ormonde Wexford and ComfyBed Equine Bedding. "Sports Direct", Britain's largest sports retailer, which also sells equestrian equipment and apparel, is present at 40 locations all over Ireland.

RETAILERS WITH PROFOUND PRACTICAL KNOWLEDGE

With regard to equestrian retailing, the eastern part of the country in the vicinity of Kildare, home of Irish horse-racing, or Wicklow and Dublin, is in a slightly stronger position compared to areas such as Kerry and Galway, according to Bucas marketing manager Claire Nulty. One particular feature of the equestrian shops in Ireland was the consistent "practical knowledge of the employees". "The majority are real horse-people with a wealth of equestrian experience. They usually have their own horses they groom and take part in competitions with. That means they have tried out many of the products they offer themselves and thus can offer first-hand advice."

With view to the near future of the Irish sport horse industry, Fine Gael politician Simon Coveney says: "I believe the industry's potential has been underestimated and not been fully exploited." Michael Duffy, managing director of the Royal Dublin Society (RDS), adds: "The Brexit is holding special challenges for the equestrian industry, which has very strong cross-border business relations and a specific export relationship with Great Britain."

STATIONARY AND ONLINE TRADING

TRI Equestrian is not the only company represented both in Ireland and in Northern Ireland. The same applies to Holmestead Saddlery with its locations in Downpatrick (Northern Ireland) and in Naas (Ireland). Several well-known, larger equestrian retail businesses are active both in stationary and online trading, the latter sometimes on a Europe-wide basis. These companies include the Horse Mad Store in Swords, Orchard Equestrian from Lime- rick and the Equine Warehouse in Clonmel Town, founded in 2001 and, with a 700 square meter showroom, one of the largest equestrian retail businesses in Ireland.

"In the past two years, the activities of equestrian retailing have increased in Ireland," says Claire Nulty from the well-known rug manufacturer Bucas. "This becomes obvious in some of the larger retailers, who have become much more active in on-line trading, for example." At the spoga horse in September 2017, ten exhibitors from Ireland were attending, including Horseware, Bucas, PC Eachaiocht, Horse First, Kilferia Pet Products/Dapple Equestrian, Mervue Laboratories, Celtic Equi-

ne Supplies, TRM Gain Equine Nutrition, Glanbia Agribusiness and JFC Equine Manufacturing. At the spring 2018 spoga in Cologne, Bucas and Horseware were the only Irish exhibitors.

SHOPS OPEN ON SUNDAYS

Other well-known shops, usually open on Sundays like the entire retail trade in Ireland, include Horseworld in Enniscrone and Equestrian World in Maynooth. Famous brands include the feed manufac-

