

Country Check (5): **Great Britain**

Because the Queen cannot be wrong...



There is probably no other country in Europe that has more equestrian retail stores than the UK. And there is a reason for that. Great Britain is the home to horse racing. English Thoroughbreds are considered to be the fastest (and most expensive) race horses in the world. One simply cannot imagine Great Britain without its wealth of horses - from top performance horses down to small family ponies. Horses are an essential part of the British heritage. About five per cent of the British (more than three million) ride a horse at least once a year. And the head of state is leading the way! Aged 90 years, Queen Elizabeth II still spends time in the saddle.

In part 5 of our "Country Check" series we are drawing a portrait of Great Britain and its equestrian trade sector.

Great Britain has a long and illustrious equestrian history," says Deborah Hayward, press spokeswoman of the British trade fair BETA International. "All Thoroughbreds can be traced back to the same three Arab stallions. Horses play a key role in leisure, sports and commercial activities." "Riding and particularly hunting has been a sport of our landed gentry for centuries," Malcolm Ainge, chairman of the executive board of the British company Shires Equestrian Products, adds. And Simon Middleton, managing director of Zebra Products, says: "Horse racing is also known as the 'Sport of Kings'. It is tightly intertwined with the Monarchy."

EUROPE'S LARGEST ISLAND STATE

With around 65.6 million inhabitants, Great Britain (correct full name: United Kingdom of Great Britain and Northern Ireland) is the second most populous European state behind Germany and, according to the latest figures, just ahead of France, and the largest island state in Europe. The nuclear power, which is located on the British Isles off the north-west coast of continental Europe, is a union consisting of England, Wales, Scotland and Northern Ireland. At a referendum in June 2016, 51.8 per cent of the electorate voted for a withdrawal from the European Union ("Brexit"). Experts expect the UK to actually leave the EU in March 2019.

84.1 per cent (54.3 million) - i.e. most - of the inhabitants live in England. Apart from London, the capital, with 8.7 million inhabitants, Birmingham is the only city with more than one million inhabitants (1.1 million). More than 500,000 people live in Liverpool, Bristol, Manchester and Sheffield, respectively. England is divided into 27 counties, 56 unitary authorities, six metropolitan counties and Greater London. Wales is divided into 22 districts, Scotland into 32 and Northern Ireland into eleven.

EXPORT: GERMANY IS NUMBER ONE TRADING PARTNER

Great Britain has been a member of the European Union (EU) since 1973 but never introduced the euro as a means of payment and kept the British pound instead (1 Pound = 100 Pence). Currently, one pound is about 1.17 euros. Regarding exports, Germany is the most important trading partner of the second largest EU economy (followed by China and the US). Regarding imports, only the US is more significant for the UK, according to current figures. 0.6 per cent of the gross domestic product of 2577.3 billion euros were generated by the agricultural, forestry and fisheries sector in 2015. For Germany, the UK is the third most important trading partner. Every second car that received a new license in the UK in 2015 was made by a German company. In 2015, the UK exported goods worth a total of 414.8 billion

euros and imported goods worth 564.2 billion euros.

The umbrella organisation for all equestrians is the British Equestrian Federation (BEF), which was founded in 1925. The federation is composed of 19 equestrian sports organisations (and not individuals), including, for example, British Dressage (BD), British Eventing (BE), British Show Jumping (BS) and The Pony Club (PCUK), but also the British Equestrian Trade Association (BETA). Of the 19 BEF organisations, the British Horse Society (BHS) has the largest membership, i.e. 91,000. The Pony Club is an international youth charity organisation founded in 1929. It has about 30,000 members, operates 345 branches and 480 centres in the UK and thus is the world's largest youth riding organisation, according to the Club.

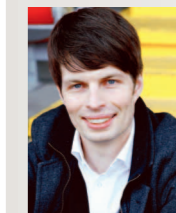
WOMEN WEAR THE BREECHES

Unlike in Germany, riders do not have to be a member of the umbrella association or its organisations to participate in competitions, BETA told Reitsport BRANCHE. According to its own statement, the British national association represents the interests of about 210,000 riders or equestrian sports enthusiasts. However, there are much more people mounting a horse in Great Britain: 4.3 per cent of the Brits are stating they ride at least once a year. According to BETA ("National Equestrian survey"), the number of regular riders decreased by 300,000 within four years from 1.6 million in 2011. 74 per cent (i.e. 962,000) of the current total of 1.3 million Brits riding regularly are female. Only netball - a basket ball game without body contact - has a larger share of women in the country. 300,000 women even ride at least once a week. Almost nine times as many women as men ride on a weekly basis.

HORSE RACING - A ROYAL THRILL

At the 2016 Olympic Games in Rio, the Equestrian Team GBR won two gold medals and one silver medal. The Paralympic riders even managed to gain eleven medals. At the 2012 Games on London home ground it was especially the teams that stood out: silver for the eventing riders, gold for

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Your criticism and suggestions are most welcome.

the dressage and show jumping riders. In addition, Charlotte Dujardin and Laura Bechtolsheimer gained gold and bronze medals in the individual dressage tests.

Despite not being Olympic, horse racing is the sport in Britain with the most spectators after football, according to the BHS. Four of the ten most popular sports events in 2012 (with the exception of the Olympic Games) were horse races. "I know the thrills participating as a race horse owner entails," Queen Elizabeth II said on the occasion of opening the traditional Royal Ascot horse race at the famous course near Windsor in 2015. The top-ten show jumping events are visited by more than 1.2 million people every year.

BADMINTON - THE LIVING LEGEND

Polo competitions such as the Queen's Cup and the Gold Cup attract thousands of spectators every year. Among the most famous players in Great Britain are Prince Charles and his sons Prince William and Prince Harry. The UK also plays a leading role in the development of eventing and show jumping, though. Two of the four annual three-day-events of the highest category of the World Equestrian Fe-



The Queen in Ascot

deration (FEI) take place in Great Britain - the Badminton Horse Trials and the Burghley Horse Trials.

Up to a quarter million of spectators come to see the cross-country in Badminton; this makes it the most visited sporting event in the country charging entry fees. "In Great Britain, eventing plays a much more important role than in Germany," says Dennis Brömlage, marketing director at Schockemöhle Sports. The company has been active on the British market since 2009. "And the atmosphere at the big shows is truly amazing. The community there is very easy-going."

HORSE RACING - A SPECTACLE

Horse racing has always been and will always be the number one equestrian sport, though. All over the country, there are 62 race courses attracting about six million visitors per year. The most famous race is probably the Grand National at Aintree Racecourse near Liverpool. And the most famous breeder of race horses is the Queen. Indeed, her thoroughbreds win quite a lot of prizes.

In 2012, the British horse racing sector generated about 4 billion euros (with a tax amount of 324 million euros). According to BETA, Great Britain's entire equestrian industry is currently estimated at approximately 7 billion euros per year. This includes 3.8 billion euros from the leisure and sports market as well as 3.2 billion euros from horse racing. People spend about 3.3 billion euros per year for the maintenance of their horses - 3700 euros per horse. Other indirect consumer spending connected to equestrian activities is estimated at 642 million euros.

SPECIALIST TRADE - INDEPENDENT RETAILERS

In 2012, about 85,000 people lived on a job directly or indirectly related to horse racing. In total, 250,000 people are directly or indirectly employed in the equestrian industry. There are about 2800 blacksmiths working in

„Racing is also acknowledged as being 'The Sport of Kings' and is also tightly intertwined with the Monarchy.“

Simon Middleton, Managing Director Zebra Products Ltd

Country comparison:

	Great Britain	Germany
Square kilometres	243.610	357.340
Inhabitants	65.6 million	82.2 million
Largest population group	25 to 54 years (40.7 %)	25 to 54 years (41,4 %)
Number of births	12.1	8,5
Population growth	0,5 per cent	0,4 per cent
Gross domestic product	39,584 Euro	37.000 Euro
Unemployment rate	5.3 per cent	4,7 per cent
Utilised agricultural area	17.1 million hectares (71.3%)	16,7 million hectares (47,9%)
Largest city in terms of inhabitants	London (8.7 million)	Berlin (3,5 Millionen)
Number of large cities (more than 100,000 inhabitants)	74	77
Umbrella association	British Equestrian Federation/BEF	Deutsche Reiterliche Vereinigung/FN
(members)	(210,000)	(697.126)
Number of riders	1.3 million	1,7 million
FEI tournaments	183	331
Number of competition horses	- *	147.000
Total number of horses	0.9 million	1,1 million
Equestrian trade fairs	BETA International, Birmingham	spoga horse, Köln
Main equestrian fair	Your Horse Live, Stoneleigh Park	Equitana, Essen
Number of equestrian magazines	50	more than 60
Number of equestrian specialist shops	2.600	more than 1.500

* 59 per cent of the 1.3 million Brits riding every month take part in competitions - i.e. 767,000.

Sources: FEI, BETA, BEF, BHS, FN, GTIA, estimates

the UK, for example - about the same number of people work in this profession in Germany. The British Equestrian Trade Association (BETA) represents more than 800 member companies. They include about 400 retail shops but also wholesalers, manufacturers, representatives and many service companies.

"The main characteristic of the British equestrian specialist trade is the number of independent retailers," says Malcolm Ainge of Shires Equestrian Products. According to BETA estimates, there are about 2600 equestrian retail shops in total. Alongside the retailers there are several chains, some of which have developed out of agricultural cooperatives, including "Countrywide Farmers", "Country Store" and "Mole Valley Farmers". In their up to 50 branches, equestrian equipment accounts for a main part of the product range.

However, there are no larger chains exclusively selling equestrian products. One specialist dealer with four superstores is "Robinsons". The chain was taken over by "Sports Direct" (Slazenger, USC, Everlast, Dunlop, Lonsdale) in 2015, the largest British sporting goods retailer that operates around 670 branches all over the world. Other companies with large stores are "Ride-away" and "Thomas Irving", for example. "Several well-known foreign companies tried to build up retail chains but backed out in the end," Ainge explains.

"There does not tend to be a great deal of regional difference in retail," says BETA-International spokeswoman Deborah Hayward. According to surveys, most equestrians in England are based in the south-east and south-west of the country. "Of course, there are more specialist retailers catering for specific needs such as racing in the areas around the famous race courses such as Newmarket and Malton. In general, Great Britain is highly regarded for its innovation, new products and precision manufacturing. We also have a fine reputation for our saddlery and garments that promote rider safety."



LEATHER: MAIN PRODUCTION AREA IN WALSALL

A focal point of the international leather production is the 170,000-inhabitant city of Walsall, situated about 20 km north of Birmingham in an up-country location. Currently, there are still about 40 companies manufacturing riding saddles and bridles, including Fairfax, County, Exselle, Albion, Kent, Thorowgood and King's, among others. "Historically, Walsall is where many of our tanneries were based," Hayward explains.

The indirect expenditure for equestrian sports products such as helmets, safety vests, clothing, books and magazines amounted to 645 million euros, according to BETA's "2015 National Equestrian Survey" (2011: 642 million euros). The purchases of equestrian sporting goods have increased both in brick-and-mortar stores and in online trading. 97 per cent (2011: 83 per cent) ordered equestrian sporting goods in retail stores, 64 per cent (2011: 49 per cent) ordered online.

SHOWS AND COMPETITIONS: WATCH AND SHOP

"In England, shopping at the major shows tends to have a greater importance than in Germany," says Dennis Brömlage of Schockemöhle Sports. "Maybe the British have a slightly different mentality regarding their shopping behaviour. The shows are real happenings. The spectators watch the competitions and afterwards, they go shopping. In Germany, people at shows tend to focus more on the sport." For Schockemöhle Sports, Great Britain has become a very important market in the past five, six years. "It is the most important market in Europe for Schockemöhle Sports apart from Germany."

That is why the company based in Lower Saxony signed a three-year contract as coffee shop sponsor at BETA International running until 2018. The world-wide leading trade fair for equestrian, outdoor and pet articles (according to the organisers statement) takes place every year just before the spoga horse spring fair in Cologne. "BETA is a very important platform for us to market our products of the Schockemöhle Sports and Tonics brands particularly in Great Britain and beyond," the

Schockemöhle Sports marketing director explains.

In 2017, 3500 visitors came to the British three-day trade fair at Birmingham National Exhibition Centre (NEC) with 300 exhibitors, according to the organisers. The spoga horse spring, on the other hand, counted 3700 trade visitors and 184 exhibitors. "BETA has a more national character," Brömlage says. "It is predominantly a platform for the English market."

THE BRITISH MARKET - IN FOR A SURPRISE

And how are the trade relations with Germany going to develop in the wake of Great Britain's withdrawal from the EU, which is expected to begin at the end of March 2017? "Apart from the British pound losing in value, which for us has advantages as well, nothing has happened yet," Brömlage says. "There is no major impact to be noticed yet, although there is a psychological element, of course. Regarding its future importance for us, the British market is indeed a bit of a surprise package. The Brexit certainly holds the risk of new trade barriers. And that would have negative consequences for both sides."

Finally, a supposedly secondary note regarding the "horse country of Great Britain": in the UK, eating horse meat is off-limits. That means that it is not simply an ignored food; on the contrary, eating horses is strongly rejected by most inhabitants and horse meat is considered "inedible". The British consider geldings and their likes not as a source of food but as a noble, even royal animal - a view that is certainly shared by the monarch, who was given her first pony at the age of four.



Shires
Shires Equestrian Products

Sales person required to represent well known British manufacturer and distributor of equestrian equipment and riding wear.

Initially responsible for the German market, the position could develop into a role for sales across the EU.

Knowledge of equestrian equipment and contacts with German retailers would be an advantage, plus the ability to speak English and other European languages.

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