

Country Check (14): **Spain**

Where horses are part of the culture



Elegant Andalusians, lending their name to the Spanish Riding School, bullfighting and pilgrimages on horseback, traditional craft saddlery, a venue for one of the largest equestrian fairs of the world – Spain is a country where traditional culture and horses are closely entwined. This can be seen in history, and it is still evident today.

Clearly, the heart of Spanish equestrianism beats in Andalusia, where horse breeding has flourished since the Middle Ages. In part 14 of our “Country Check” series we are presenting Spain and its equestrian sector.



Historically, our society is strongly connected with horses,” Jaime Gómez, spokesman for the Asociación Nacional de Criadores de Caballos de Pura Raza Española (ANCCE) tells Reitsport BRANCHE. “In many regions and cities, horses are an essential part of festivals, pilgrimages and messes.”

Venancio García Ovies, Secretary General of the national equestrian federation, Real Federación Hípica Española (RFHE), adds: “Spain is the cradle of the Pura Raza Española, which is ideally suited for all equestrian disciplines, but particularly for the Doma Clásica – dressage.”

The kingdom of Spain, the Reino de España, is a state that shares the Iberian Peninsula in south-western Europe with Portugal. With its 46.7 million inhabitants, the country, which is the second largest EU nation in terms of area, is among the 20 largest export (17th) and import nations (15th). It is also the second most visited country in the world after France.



“(…) Decathlon has led to many traditional retailers in Spain having had to close down.”

(José María Cases Pey, Office for Economy and Trade, Spanish Consulate General, Düsseldorf)

SPANIARDS HAVE A LONG LIFE EXPECTANCY

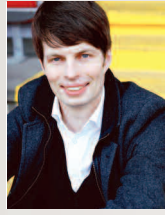
With an average life expectancy of 83.5 years in 2018, Spain has the highest life expectancy in the EU. With a height of 3482 m, the Mulhacén in the Sierra Nevada near Granada is the highest point on the Iberian Peninsula, exceeded only by the Pico del Teide (3715 metres) on the island of Tenerife.

After the Iberians, the Phoenicians settled on the southern coast of the Iberian Peninsula in the 11th century BC. The name ‘Spain’ is derived from the Latin name Hispania (Phoenician: country of the rock hyrax). In the eighth century, the peninsula was conquered by the Moors. With the fall of Granada, the last Moorish state disappeared in 1492. When Christopher Columbus “discovered” America in the same year, Spain rose to become a world power.

After the Habsburgs, a branch of the Bourbons came to the throne. Since 19 June 2014, Felipe VI of the Bourbon-Anjou dynasty has been King of Spain. His father, Juan Carlos I, had led Spain from the Franco dictatorship (1936 to 1975) to democracy. Incidentally, the elder sister of the king emeritus, María del Pilar – was FEI President for twelve years. The Princess, who died on 8 January 2020, held the post from 1994 to 2006.

THREATENED BY CLIMATE CHANGE

For Spain, the consequences of climate change are more dramatic than for many other countries in Europe, and in the short to medium term at that. Among other things, the important viticulture is already under threat from global warming, as Spain is threatening to turn into desert. Due to the relatively sparse



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population, Spain’s wildlife is extremely rich in species: the country is home to wolves, brown bears, ibex, ocellated lizards, vultures, land and sea turtles and flamingos, for example.

With Madrid (3.2 million) and Barcelona (1.6 million) there are two cities with over a million inhabitants. The 17 Autonomous Communities are economically quite different. While in highly industrialised regions (Basque Country, Madrid, Navarre, Catalonia) the gross domestic product per capita is above the EU average, it is far below average in more agricultural regions (Extremadura, Castile-La Mancha, Andalusia). However, Andalusia is the most important region as regards horses. 257 of the 946 equestrian sports clubs are located there, as well as 71,000 horse farms.



After the Canary Islands and Catalonia, Andalusia is also one of the most important tourist destinations. In 2016, tourism created revenues of over 55 billion euros. According to the Travel and Tourism Competitiveness Report 2019 of the World Economic Forum, Spain has the most competitive tourism sector in the world. No wonder that it is also one of the most popular destinations in Europe for riding holidays.



Jerez de la Frontera

PRIVILEGED FOR EQUESTRIAN SPORTS

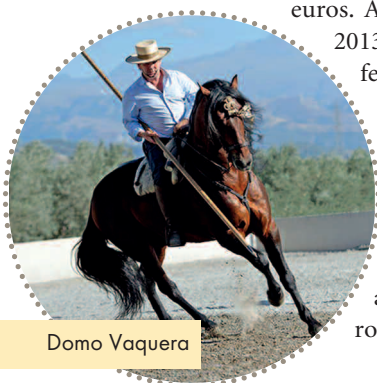
Whether he talks about riding through the mountainous Andalusian countryside with its white mountain villages, through cork oak forests or past lagoons - RFHE Secretary General Venancio García Ovies goes into raptures: “Our country offers the opportunity to ride in a privileged climate.” Recently, a national equestrian tourism association was formed. In October 2019, a congress for equestrian tourism was held in Córdoba.

The economy as a whole is heavily dependent on international trade. In 2018, Spain had a gross domestic product of 1208 billion euros (fourth place in the EU). In terms of GDP per capita, the country achieved a value of 26,444 euros in 2019 - 13th place. The EU average is 31,080 euros per capita. In 2018, Spain exported goods worth a total of 278.2 billion euros and imported goods worth 318.5 billion euros. Germany is the most important supplier and the second most important customer (after France).

According to the RFHE data, the horse industry’s turnover amounts to a total of 5303.6 million euros per year. This corresponds to 0.51 per cent of the gross domestic product (2012 figures). 61,000 people are employed in 175,000 companies. About 300,000 people ride. According to the Ministry of Agriculture, there are about 700,000 horses in the country (200,000 of them in Andalusia). Approximately 250,000 to 300,000 of the horses are pure-bred horses of the Pura Raza Español (PRE) bred registered with the studbook.

HORSES AS AN ECONOMIC FACTOR

According to foreign trade statistics, Spain exported horses worth 11.7 million euros in 2019 (including PRE horses worth 8.5 million euros), while importing horses worth 10.3 million euros. According to a Deloitte study from 2013, the economic impact of the horse feed industry amounts to more than 557 million euros per year and that of equestrian competitions to 103 million euros, of which 80 per cent are accounted for by jumping events. Companies that produce or distribute equestrian equipment account for a share of 44 million euros.



Domo Vaquera

Bullfighting is a national cultural asset, in which, traditionally, horses take a leading role. Although it is becoming increasingly controversial, bullfighting still plays a significant role economically. There are also Corridas – the Rejoneos – which are completely carried out on horseback. According to the Deloitte study, a total of 199 Rejoneos were held in 2012, using 4000 horses and counting 700,000 visitors. In 2012, Rejoneos had an economic impact of more than 18 million euros.

Since the beginnings of bullfighting, horse breeding has also flourished. The Royal stables of Cordoba were founded in 1570 by decree of the Habsburg King Felipe II - 18 years before his Spanish Armada was defeated in the naval battle against England. Noble Andalusian horses are still an Iberian symbol today. Since 1912, the breed name for pure-bred Andalusian horses has been Pura Raza Español (PRE). The Spanish Riding School in Vienna is so called because horse breeds from Spain have proven to be particularly talented for classical equitation and haute école.

Genetic tests have proven that the Iberian horse is descended from the original type of the Sorraia horse. Later, Arab and Berber horses strongly influenced the breed. The ANCCE stud book currently includes about 2000 registered Andalusian mares. There is no uniform branding. Many of the thousands of breeders - including 16,000 PRE breeders in Andalusia alone - each use their own brand.



Carthusian monastery

MECCA OF ANDALUSIAN HORSE BREEDING

Carthusian horses are considered to be a particularly noble subcategory of the Andalusian. The Carthusian monastery near Jerez de la Frontera - a mecca of Andalusian horse breeding - was intent on pure breeding since the beginnings in the 15th century and maintained this despite orders to the contrary (for example from Napoleon). The oldest and purest bloodline, the Cartujano line, goes back to this institution. Jerez de la Frontera is also the place where the Real Escuela Andaluza del Arte Ecuestre, the Royal Andalusian Riding School, was founded in 1973. There, classical equitation is taught in the form of the Doma Clásica.

During the local horse show “Como bailan los Caballos Andaluces”, which attracts 130,000 spectators every year, exercises of the Doma Vaquera are shown as well. This traditional way of riding includes the use of the Garrocha. With the help of this



Spanish Riding School

three-metre-long wooden pole, the shepherds in Andalusia once used to handle their herds of cattle on horseback. Later, elements from the Doma Vaquera were also integrated into the Rejoneo. Doma Vaquera elements are also taken up in the still relatively young equestrian discipline Working Equitation (Equitación de Trabajo).

Apart from the mostly grey Andalusian, another horse to be bred in Spain is the always black pure-bred Menorquín horse. Since 1989, the Pura Raza Menorquina (PRM) has its own studbook. Even smaller than the population of the Menorquín horse (3500) is that of the Pura Raza Mallorquina (PRMa). The Cavall Mallorqui breed, which admits only black horses for breeding, only counts about 350 animals. The Majorcan police is obliged by law to have at least 50 per cent Pura Raza Mallorquina in their stables.

SPECTACULAR SHOWS

National and international equestrian shows are estimated to attract about 730,000 spectators every year.

“Few countries can boast of having 5000 show jumpers compete in one week,” RFHE Secretary General García Ovies says, referring to numerous international competitions in all disciplines such as the Sunshine Tour or Mediterranean Equestrian Tour (MET), which are among the most important equestrian events in the country.

The Sunshine Tour is held between February and March at one of the largest show grounds in Europe, at Dehesa Montemmedio equestrian centre near Jerez de la Frontera. In 2020, the international horse show, which also features an exhibition area with 20 exhibitors, was cancelled before the final sixth week due to the corona crisis. Until then, 2500 horses took part in the 26th edition of the show.

The Centro Ecuestre Oliva Nova near Valencia, which holds the MET show jumping competitions in autumn and spring, also promotes a spacious “Shopping Village”. This exclusive equestrian centre was founded in 2012, has nine competition courses and an impressive location only 500 metres from the sea. The horse race of Sanlúcar de Barrameda has been held right on the beach for 175 years, attracting 12,000 visitors every year.



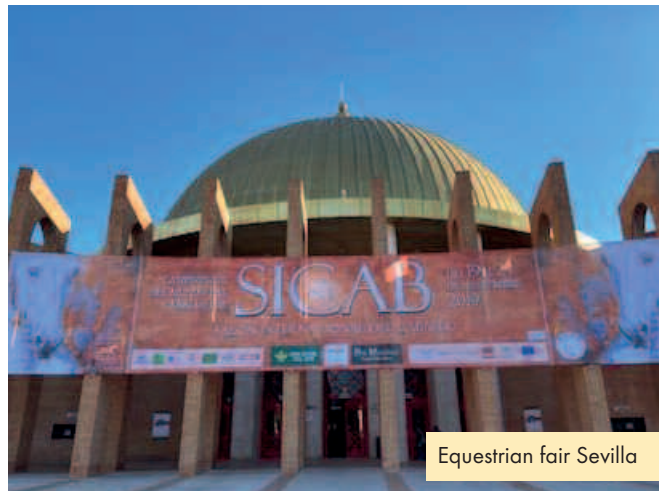
Sunshine Tour



Gran Premio Madrid

IMPORTANT EQUESTRIAN FAIRS

The Salón Internacional del Caballo de Pura Raza Española (SICAB) has been held in Seville in November since 1991. The six-day SICAB is economically the third most important event in the city and one of the most important equestrian fairs in the world. The focus is exclusively on horses of the Pura Raza Española breed. More than 1000 pure-bred PRE horses took part in the 29th edition in 2019. 332 accredited journalists from 10 different countries reported on the show.



Equestrian fair Sevilla

At the SICAB, which attracts almost 250,000 visitors every year and is thus at eye-level with the Equitana in Germany as the world's largest equestrian sports fair, the equestrian sports industry is also represented with 320 stands. The Madrid Horse Week in autumn is at a similar level. The last event counted 300 horses, 45,000 visitors watched the international jumping (CSI 5*), dressage (CDI-W) and vaulting competitions. The accompanying fair “Salón del Caballo” has about 80 stands.

The “Feria de Caballo” in Jerez de la Frontera, which takes place after the Feria de Abril in Seville with about 6000 horses, is a very traditional event. The highlight of the show is the spectacular horse parade “Paseo de Caballos”, where horses and riders present themselves in all their glory.

For the Romería del Rocío pilgrimage at Whitsun, 15,000 horses and a million visitors transform a southern Spanish village into the country's third largest city. The Gran Premio de Madrid is the most prestigious horse race in the Hipódromo de la Zarzuela. The grandstands of the racecourse, which was ope-

Salón Internacional del Caballo



ned in 1941, are under a preservation order. First held in 1907, the CSI de Madrid (CSI 5*) has been a stage of the Global Champions Tour since 2013.

The umbrella organisation of all Spanish equestrians is the Real Federación Hípica Española (RFHE), which was founded in 1924 and has been led by Javier Revuelta as president since 2014. According to its own information, the association currently has about 55,000 members. The only Olympic gold medal to date was won by the show jumping team in 1928. Fran-

cisco “Paco” Goyoaga was the first official show jumping World Champion in 1953.

EQUESTRIAN GOODS INDUSTRY IN CENTRAL SPAIN

While the south of Spain has many workshops producing horse trailers, the main factories for equestrian goods are located in central Spain, in Salamanca and Toledo, which is down to the area’s long tradition in leather and fur processing. At the autumn 2019 spoga in Cologne, however, no exhibitors from Spain were present.



Salamanca is also home to the three most important companies in the equestrian goods industry, Zaldi, Hispano Hípica and Marjomán. The saddle manufacturer Zaldi employs about 100 people. A regular spoga exhibitor, Zaldi exports about 70 per cent of its products abroad. Hispano Hípica and Marjomán are distributors.



Don Quixote and Sancho Panza – Cervantes monument in Madrid

Country comparison:



Spanien

Germany

Square kilometres	505.370	357.376
Inhabitants	46,7 million	83,0 million
Largest population group	25 to 64 years (56,0 %)	25 to 64 years (54,0 %)
Birth rate	1,3	1,6
Population growth	0,1 per cent	0,4 per cent
Gross domestic product per capita	26.012 Euro	40.341 Euro
Unemployment rate	3,9 per cent	3,4 per cent
Utilised agricultural area	15,3 million hectares (52,5%)	16,7 million hectares (47,9%)
Largest city in terms of inhabitants	Madrid (3,2 million)	Berlin (3,6 million)
Number of large cities (more than 100,000 inhabitants)	63	80
Umbrella association	Real Federación Hípica Española/RFHE	Deutsche Reiterliche Vereinigung/FN
(members)	(55.000)	(686.747)
Number of riders	0,3 million	3,9 million
FEI tournaments	183	331
Number of competition horses	200.000	147.000
Total number of horses	0,7 million	1,3 million
Equestrian trade fairs	-	spoga horse, Köln
Equestrian fair	Salón Internacional del Caballo de Pura Raza Española (SICAB), Sevilla	Equitana, Essen
Number of equestrian magazines	0	60
Number of equestrian specialist shops	750	more than 1.500

Sources: DOSB, FEI, FN, GTM, SRL, RFHE, ANCC, World Bank, estimates

According to the study “Estudio del impacto del sector ecuestre en España” published in 2013, there are 22 companies in Spain that produce equestrian goods. They employ a total of 419 people for an average monthly salary of 1800 euros. In addition, there are 750 shops selling equestrian products. At least 50 of them are specialised in equestrian sports equipment. The 750 shops, many of which are located in Andalusia, employ 797 people (average monthly salary: 1200 euros).

Recent years saw many (smaller) craft enterprises disappear, because they have lost the price war against companies that can produce mass goods more cheaply in third countries. The Deloitte study of 2013 states: “Large businesses, generalists as well as large sports dealers, are increasingly selling equestrian products as well. Traditional producers are therefore losing market share, especially among young riders.” The economic crisis that began in 2008 also claimed victims, including, for example, all printed equestrian sport magazines, according to ANCCCE spokesman Jaime Gómez.



Royal stables in Cordoba

“The ability to sell their goods online is very important for their survival,” says ANCCCE spokesman Jaime Gómez. This also applies to the specialist trade. “Online commerce is increasingly taking a large percentage of sales.” The fact that online sales are becoming increasingly important is also confirmed by Grupo El Molina. The company specialises in saddle and riding equipment, selling its products online. Grupo El Molina also has a shop which, according to its own information, has the largest shop area in Spain. The store in Coria del Río near Seville features an area of 800 square metres.

DECATHLON LEADING IN RETAIL

With 173 branches, the French company Decathlon is extraordinarily strong in Spain. The Decathlon sports shops also sell clothing, equipment and accessories for horse and rider. “In 2019, Decathlon was the leading sports goods retailer in Spain with a market share of 30 per cent,” says José María Cases Pey from the Office for Economy and Trade at the Spanish Consulate General in Düsseldorf. And Jaime Gómez adds: “The increasingly important role of Decathlon has led to many traditional retailers in Spain having had to close down.”



Spanish police in Madrid

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