

Country Check (7): **Switzerland**

The world meets at the "Rösti ditch"

Every winter, impressive images of the frozen Lake St. Moritz are going around the world when the prestigious horse racing (White Turf), skijoring or polo competitions take place. Every Swiss family has probably at least once admired the six-in-hand of the Feldschlösschen Brewery with its decorated blonde Belgian heavy horses or made a tour with the horse-drawn Rössliträm through the children's zoo of the Swiss National Circus Knie. Last, not least, one of the world's best farriers is from Switzerland, and the number of horses and riders is on the increase. The country even has its own small trade fair.

In part 7 of our "Country Check" series we are drawing a portrait of Switzerland and its equestrian trade sector.



More than 100,000 people in Switzerland regularly pursue an equestrian activity and the number of horses continues to grow," Charles F. Charles Trolliet, president of the Swiss association for equestrian sports (SVPS) explains. With more than 100,000 horses, there are "as many horses as 100 years ago," the Swiss horse magazine "Kavallo", which has been published for more than 100 years and more than survived the drop in numbers of 40-50 years ago, reports cheerfully. "Switzerland has great potential as an equestrian country," business owner and trade fair organizer Christian Lüthi says. "We have a lot of equestrian knowledge in Switzerland."

Switzerland (officially: Confoederatio Helvetica (CH); Swiss Confederation) is a central European landlocked country and has a total of five neighbouring countries: to the north, it borders on Germany (347 km of border), to the east on Austria (180 km) and Liechtenstein (41 km), to the south on Italy (782 km) and to the west on France (585 km). The constitution does not define a capital city; de facto it is the Federal City of Berne, though. This is where the government and parliament is located.

FOUR OFFICIAL LANGUAGES

For comparison: Baden-Württemberg is only slightly smaller than the whole of Switzerland, in terms of surface area. Switzerland has about 8.3 million inhabitants. That is two million people less than the neighbouring South-West German federal state has inhabitants. Nevertheless, Switzerland is one of the more densely populated countries in Europe, with the population concentrating in the area between Jura and the Alps. It includes German, French, Italian and Rhaeto-Romanic language and cultural areas and, accordingly, has four official languages.

HIGHER THAN THE MATTERHORN

The confederation is divided into 26 sub-sovereign cantons. The name "Schweiz" is derived from the original canton Schwyz or rather from its eponymous capital. In Switzerland, there are about 3350 summits, each more than 2000 metres high. The highest point is the Dufour Peak at 4634 metres. Probably the most famous mountain, the Matterhorn (4478 metres), has around 150 metres less. In water-rich Switzerland runs the main watershed between the North Sea and the Atlantic Ocean (River Rhine), the Mediterranean (Po) and the Black Sea (Inn/Danube). The lowest point is on the shore of Lago Maggiore (193 meters).

INTERNATIONAL FROM THE UN TO THE FEI

(UN) and the headquarters of the International Red Cross (ICRC) are located, among others. In Zurich, the world football association FIFA is headquartered. Lausanne is home to the Fédération Eque-



White Turf St. Moritz

stre Internationale (FEI), the World Association of Equestrian Sports.

GERMANY IS MOST IMPORTANT TRADING PARTNER

Both with regard to exports and imports, Germany is by far the most important trading partner of the Swiss economy. In 2016, Switzerland exported goods worth a total of 274.2 billion euros and imported goods worth 240.2 billion euros. For Germany, Switzerland is the seventh most important trading partner regarding German imports and the ninth most important partner regarding exports.

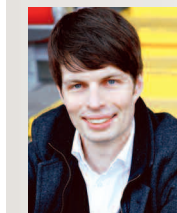
LUCRATIVE EQUESTRIAN SECTOR

0.7 per cent of the gross domestic product of 596.2 billion euros were generated by the agricultural, forestry and fisheries sector in 2016. According to the Agroscope study "Economic, social and environmental importance of the horse in Switzerland", there were around 12,900 full-time jobs directly or indirectly connected to the equine industry in 2012. That equals about one job per eight horses. The turnover of the Swiss horse industry is estimated at 1.67 billion euros.

COMPETITIVE SWITZERLAND

Switzerland is one of the most prosperous countries in the world with one of the world's most stable economies. Regarding the per capita gross domestic product (2016: 71,575 euro), the country is in second place. In the Global Competitiveness Report of the World Economic Forum, which measures the competitiveness of countries, Switzerland ranks in first place, as is the case in a ranking registering the country credit rating and in the Global Innovation Index (innovation capacity). The most valuable brands (and companies) are Nescafé (Nestle), Credit Suisse, UBS and Zurich Insurance Group, according to Interbrand.

OUR AUTHOR



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HIGH QUALITY OF LIVING HAS ITS PRICE

The general price level is high. The cost of living is among the highest in the whole of Europe. With Zurich (396,000 inhabitants), Geneva (194,000) and Berne (140,000), Switzerland has no less than three cities among the ten most expensive ones regarding the cost of living. At the same time, they are always up front in rankings measuring the highest quality of life worldwide. One in ten adults has assets worth more than a million dollars. 162,000 Swiss are employed in the agricultural sector (1996: 225,000), of which 45 per cent work full-time. According to the 2013 agricultural report, the country has a level of self-sufficiency of 100.4 per cent regarding animal products and meets the entire demand.

The umbrella association for all equestrian athletes in the country is Schweizerischer Verband für Pferdesport (SVPS) - French: Federation Suisse des Sports Equestrian (FSSE). In 2016, it counted 39,275 (active) members in 568 associations/clubs. The SVPS includes nine disciplines and 32 member associations (19 full members, 13 others). The SVPS' origins date back to the year 1900. At the time, the association of Swiss racing clubs was founded, which developed into the SVPS after a change of name in 1933. In 1922, the association became an FEI member. Since its founding, the national association has been based in Berne. The office employs 19 people.



"The Rösti ditch affects all aspects of life in Switzerland"

Martin Schmid, head of sales for Switzerland at the clipping expert company Heiniger

EQUESTRIAN SPORTS AMONG THE TOP TEN

a licence i.e. active competition athletes. 64 per cent of the people committed to equestrian sports in Switzerland are not organised, though. That means they are not a member of an association. According to the study "Sports clubs in Switzerland", the equestrian sports association is one of the associations to have gained the largest numbers of active members in the past 15 years. In terms of active members aged 60 years or more (10,000), the SVPS is in fifth place. As is the case almost everywhere in Europe, almost 80 per cent of equestrians are female.

"While the horse used to be a companion for the human development as a means of transport, draught animal or in the military, it is now mainly a partner for sports activities and nature experiences as well as a faithful companion that allows us to build on our history," SVPS president Trolliet explains. "Horses are undoubtedly fascinating for us. Through the horse, we experience unique moments in our life. We should be grateful for this! We want to promote the horse as a cultural heritage and pass on the traditional values of dealing with horses."



"The number of horses continues to grow"

Charles F. Charles Trolliet, president of the Swiss association for equestrian sports (SVPS).

MORE HORSES - MORE RIDERS

The number of (sport) horses in Switzerland has been on the rise, lately. While there were only 16,000 registered active sport horses in Switzerland in 1980, numbers were at 33,611 in 2011. In 2016, horse owners paid for registering more than 23,200 horses and ponies with the sport horse register. Most registrations concerned the Swiss Warmblood breed. The number of licenses redeemed rose from 5247 (1980) to 8995 (2011). Currently, the number is 9368. The number of equestrian sport events rose from 268 per year to almost 600.

"In our highly technological world, more and more people find their way back to nature on the back of a horse," the SVPS comments in its self-portrait. Overall, the number of horses living in Switzerland is estimated at 110,000. Swiss equestrianism has also profited from the success of Swiss athletes. Steve Guerdat jumped to win gold at the 2012 Olympic Games with Nino des Buissonnets, for example. It was the 23rd Olympic medal for Swiss equestrians since their first participation in 1924. In 2016, Guerdat came in fourth place.

DIVERSITY OF HORSE BREEDS

Since 2011, all horses, ponies, cobs, donkeys, mules and hinnies in Switzerland need to be registered. By the end of 2012, the Federal Office for Statistics (BFS) counted a total of 103,010 equidae in the central animal transport database (TVD). Thus, the stock rose by four per cent over the past ten years. Almost two thirds (64 per cent) of the animals are kept in Western Switzerland and the German-speaking parts of the Swiss Plateau. Accordingly, these areas are the heart of the Swiss horse industry.

In 2012, more than 150 different breeds were registered in the database. The largest part are warm-blood horses (40 per cent). The Freiberg horse, the last original Swiss horse breed, actually originating from the high plateau of Freiberg in Jura, and most important horse breed in the country (60 per cent of births), accounts for approximately one fifth of all equidae, with about 22,000 animals. Only one third of all registered horses are recorded as pet. That means they must not get into the food chain. Most of the animals are kept for leisure, sport and breeding purposes. On top of this, there is a trend in Switzerland to return to using more horses for agricultural work, a trend initiated by an association (IG Arbeitspferde) founded in 1992.

SHOPPING PARADISE FOR HORSE-LOVERS

Parallel to the traditional, large spring fair BEA in Berne, PFERD, the national horse show, takes place at the Bernexpo

site with tournaments, shows, a specialist arena and an exhibition. Next year, it will be held from 3 to 14 May for the 29th time in succession. Among the exhibitors are manufacturers of stable equipment, feedstuff, horse medicine, equestrian accessories and clothing as well as associations, trainers and service providers from the equestrian industry. According to the organiser, this is the "largest shopping paradise for horse-lovers".

Another public exhibition, the ExpoHorse in Zurich, which took place for the first time in 2016, has another superlative to offer. According to its own information it is the "largest Swiss horse show without living animals". More than 100 exhibitors from the entire horse industry present themselves on more than 5000 square meters of exhibition space. For the exhibition from 1 to 3 December 2017, a second hall was added. "For ethical reasons," the organiser says, "we leave our horses at home." The ExpoHorse was also launched in competition to the biannual "Pferd Bodensee" fair in Friedrichshafen.

TRADE FAIRS AND ORDER DAYS

Despite the relatively small market, a new trade fair - the Order Days in Sursee (located between Berne and Zurich) - was established after the EquiFair ended in 2013. It first took place in 2016 as a so-called table trade fair. In 2017, the event counted 12 exhibitors and 35 visiting specialist retailers. In 2018, it will take place for the third time on 25 and 26 February and is expected to grow further. With Christian Lüthi (proEqui, KompetenzHaus), Neukirch, the fair is operated by the same organiser as the ExpoHorse.



"Rössliträm" of Childrens-Zoo Circus Knie

Country comparison:



Switzerland

Square kilometres 41.277
 Inhabitants 8,3 million
 Largest population group 25 to 54 years (43,46 %)
 Birth rate 1,5
 Population growth 0,7 Prozent
 Gross domestic product per capita 71.575 Euro
 Unemployment rate 4,6 Prozent
 Utilised agricultural area 1,0 million hectares (37,0%)
 Largest city in terms of inhabitants Zürich (0,39 million)
 Number of large cities (more than 100,000 inhabitants) 6
 Umbrella association Schweizerische Verband für Pferdesport/SVPS (members) (39.275)
 Number of riders 0,1 million
 FEI tournaments 51
 Number of competition horses 23.200
 Total number of horses 0,11 million
 Equestrian trade fairs Order Days, Sursee
 Equestrian fair PFERD, Bern ExpoHorse, Zürich
 Number of equestrian 8
 Number of equestrian specialist shops 100



Germany

357.340
 81,6 million
 25 to 54 years (41,4 %)
 1,5
 -0,2 Prozent
 37.977 Euro
 4,1 Prozent
 16,7 million hectares (47,9%)
 Berlin (3,5 million)
 76
 Deutsche Reiterliche Vereinigung/FN (697.126)
 1,7 million
 331
 147.000
 1,1 million
 spoga horse, Köln
 Equitana, Essen
 more than 60
 more than 1.500

Sources: Swiss Olympic, SVPS, FN, FEI, GfM, estimates

Lüthi also operates an online shop, among other things, as well as an equestrian (sports) shop at the site of which a veterinary practice for pets and horses is run as well. "We want to bring together the Swiss equestrian trade, which is challenged by the strong Swiss franc," Lüthi explains his reasons for initiating the fairs.

According to insider estimates, there are currently a total of about 100 equestrian retail businesses in Switzerland. Together with the saddleries, there are about 150 shops. "Naturally, the Swiss market is much smaller than in Germany, but also more conservative," says Robert Siegrist of Rilewa AG, which has been active as an equestrian wholesaler since 1980. "The typical Swiss and particularly the German-speaking Swiss does not want to attract attention. They are discreet, not only in banking matters." Swiss retailers usually do not buy straight from the manufacturer but obtain their goods from intermediaries such as Rilewa.

STRONG SCENE OF SADDLIERIES

Overall, the market was no longer growing as spectacularly as a few years ago, Siegrist reports: "Keeping a horse in Switzerland is much more expensive than in Germany." Livery expenses could quickly rise to 900 euros per month. This is confirmed by Martin Schmid, head of sales for Switzerland at the clipping specialist Heiniger, who describes the market and the number of horses and riders as "static to slightly growing". Generally, even in Switzerland, a country with "associations for everything", the numbers of members in associations was on the decline, though.

Schmid also reports a special feature of the Swiss market: "We have a relatively strong saddlery section. There are not many saddleries left in Germany that can manufacture their own saddle." One of the best saddleries is Spirig in St. Gallen.

Founded in 1876, the family business is currently official saddle supplier of the Spanish Riding School in Vienna, for example.

SHOPPING PALACES IN THE MINORITY

Another one to have developed an outstanding position in his profession is the Thurgau-based farrier Stefan Wehrli from Heldswil. With the Wehrli Traction Shoe (WTS), he invented an individually adaptable and patented horseshoe for any horse. Even Olympic champion Ludger Beerbaum uses them for his horses. "Stefan Wehrli is a real expert. He is the best farrier in the world," says Martin Schmid, who, incidentally, is a trained farrier himself.

"Huge shopping palaces" like in Germany are not common in Switzerland. Rilewa employee Siegrist estimates that there are approximately 20 to 30 larger equestrian retail stores in Switzerland. Felix Bühler AG, with its beginnings in the year 1966, counts 16 branches alone, for example. In 2005, Krämer Pferdesport acquired the majority of Bühler shares. Since then, the retail chain was extended and mega-stores with a shop area of 800 up to 1200 square meters and a range of up to 10,000 articles were built. The Qualipet Group, on the other hand, is a purely Swiss company and the largest specialised supplier of pet products in the country. In 46 of 89 Qualipet branches, consumers can buy the "Quali-Horse" range of riding and leisure fashion launched in 2000. And what about the "Röstigraben", the ditch separating the German-speaking people from eastern Switzerland from their French-speaking fellow country-men? "The Röstigraben affects all aspects of life in Switzerland," Martin Schmid says. So, is it also noticeable in the equestrian trade? Yes, Robert Siegrist believes, although the differences had become smaller in the past few years. "Things are easier for French brands in the French-speaking parts of Switzerland. People there are more daring as regards colours." Schmid confirms: "People with Latin languages as their mother tongue simply dress more elegantly."