



NORTHERN IRELAND
HORSE BOARD

**Overview
of the
Northern Ireland
Sport Horse Industry**

1. Northern Ireland Horse Board Co-operative Society Limited

This overview has been prepared by the Northern Ireland Horse Board Co-operative Society Ltd (NIHB), which was formed in 1995 to give breeders a voice in decisions relating to the Irish Horse Register, and in the future direction of breeding within the sport horse sector. At present we have over 4,000 shareholders and are approved by DAERA as an equine Passport Issuing Organisation.

As well as maintaining the Irish Horse Register in Northern Ireland the objectives of NIHB include the improvement of the quality of stock bred in Northern Ireland, and highlighting the success of locally bred horses. The Board therefore has a strong interest in developing the horse breeding sector in Northern Ireland and want to encourage government support for the industry.

2. Overview

This report attempts to place the Northern Ireland Sport Horse Industry in economic terms, outlining the contribution of the industry to both the Irish and Northern Irish governments.

The majority of horses are registered with the Irish Horse Register and are categorised as Irish Sport Horses, this includes those bred in Northern Ireland. The Irish horse is marketed as an all-Ireland product. Our governing body Horse Sport Ireland, of which NIHB is an affiliate, represents riders and breeders from Southern and Northern Ireland, currently taking part in all levels of international competition, including the Olympics.

Northern Ireland has been the source of many successful horse and rider combinations, with representatives taking part in Nations Cup Teams, Olympics, FEI World Equestrian Games, Global Champions Tour and Pony European Championships.

3. Methodology

This overview compiles, updates and compares the following five reports:

1. Economic Contribution of the Sport Horse Industry to the Irish Economy 2012
2. The Contribution of the Sport Horse Industry to the Irish Economy 2017
3. Strategy for the Equine Industry in Northern Ireland 2007
4. CAFRE Baseline Study of the Northern Ireland Equine Industry 2015/16
5. Reaching New Heights Report of the Irish Sport Horse Industry Strategy Committee 2015

4. Horse Breeding in Northern Ireland

Ireland has an international reputation as a producer of high quality horses (thoroughbred, native breeds and sport horses) and Northern Irish breeders play an important role in maintaining that reputation. The island of Ireland is renowned for the quality of the foals produced, for standing top stallions and retaining quality broodmares.

Within Northern Ireland, although the highest concentration of stud farms is found in County Down, they can be found in every county and contribute to the employment and rural economy in every part of Northern Ireland. It is worth noting that there are a large number of farmer-breeders working outside formal stud farms.

We know from research conducted by University College Dublin in 2012 (Economic Contribution of the Sport Horse Industry to the Irish Economy¹) that in Ireland the sport horse sector alone contributed €708m to the Irish economy and provides work for some 11,417 people. The recently published report on The Contribution of the Sport Horse Industry to the Irish Economy² showed an increase in these figures with the sport horse sector

now contributing over €816million to the Irish economy with 14,057 full time jobs.

Research conducted in 2005 by DARD / BDO Stoy Hayward, during the preparation of the Strategy for the Equine Industry in Northern Ireland³ published in March 2007, estimated that the Northern Ireland equine sector as a whole spent £110m on services and directly employed 5,657 full time employees, these figures have increased significantly in recent years.

In short, the stud farms and horse breeding industry make a very considerable contribution to the vitality of the rural economy throughout Northern Ireland and does so with minimal financial support from Government.

5. Size of the Sport Horse Industry in Northern Ireland

The equine population in Northern Ireland is difficult to assess unlike in the Republic of Ireland where equine premises registration exists. The horse is not classified as an agricultural animal in Northern Ireland, however is included in the agricultural census.

In 2007 it was estimated that the equine herd was in excess of 35,500³, in 2016 the CAFRE Baseline Study of the Northern Ireland Equine Industry⁴ estimated a herd of 34,250. This overview therefore assumes that these figures form a reasonable base for further study.

The recent report on the Contribution of the Sport Horse Industry to the Irish Economy 2017² states that there are 135,715 horses in the Republic of Ireland, indicating that our herd in Northern Ireland is approximately 25% of that of the Republic of Ireland.

Equine Herd Size 2016/17	
Northern Ireland	34,250
Republic of Ireland	135,715



6. Breeding Expenditure

Estimate of the contribution from the breeding sector to the Northern Ireland economy in 2016. Figures based on those found in the Contribution of the Sport Horse to the Irish Economy 2017² report. Assuming 1,416 breeders and similar expenditure in Northern Ireland.

	Expenditure per Breeder (£)	Total National Breeders' Expenditure (£)
Bedding	777.65	1,101,152.40
Concentrates	1,481.41	2,097,676.56
Hay/grazing	1,253.92	1,775,550.72
Stud related	2,237.72	3,168,611.52
Tack & equipment	92.79	131,390.64
Farrier	463.32	656,061.12
Veterinary	1,776.54	2,515,580.64
Schooling	1,156.47	1,637,561.52
Registration	41.09	58,183.44
TOTAL	9,280.91	13,141,768.56

This is an average expenditure figure taking into account both small scale and commercial breeders

7. Affiliated Sport/Competition Expenditure

7.1 Registration Figures

2017 Registration Figures provided by individual organisations

	Showjumping Ireland	Eventing Ireland	Dressage Ireland
NI Members/ Ulster Region	1479	314	110
ROI Members	4763	877	456
No of NI horses registered	1852	286	94
No of ROI horses registered	6062	1002	368



7.2 Sport Expenditure

Of the approximately 10,000 registered sport horses on the island of Ireland, around 23% are based in NI.

Estimate of the contribution from the Sport Sector to the Northern Ireland economy in 2016. Figures based on those found in the Contribution of the Sport Horse to the Irish Economy 2017² report. Assuming 2300 registered sport horses and similar expenditure in Northern Ireland.

	Expenditure Per Competition Animal (£)	Total National Expenditure (£)
Basic Livery	3,940.68	9,063,564
Feed Supplements	374.77	861,971
Training/Schooling	114.94	264,362
Tack	789.43	1,815,689
Veterinary attention	621.83	1,430,209
Farrier	622.24	1,431,152
Entry Fees	978.08	2,249,584
Total Travel	1,600.05	3,680,115
Registration	147.25	338,675
TOTAL	9,189.27	21,135,321

This is an average expenditure figure taking into account both individual/hobby competitors and professional competitors

8. Associated Expenditure

8.1 Veterinary

There are a number of equine veterinary practices in Northern Ireland which carry out a range of routine and emergency treatments for both the breeding and sport sectors. Each of these practices employs veterinary surgeons, veterinary nurses and support staff.

Farriers

There are 23 farriers with addresses in Northern Ireland that are registered with the Farriers Registration Council and the Irish Farriery Authority.

Riding - Instructors/Coaches

The British Horse Society and Horse Sport Ireland operate a qualification and training structure in Northern Ireland. There are 33 BHS registered instructors and 13 HSI coaches at level 2 or above located in Northern Ireland.

Sport NI has previously provided funding to Horse Sport Ireland for training for athletes from Northern Ireland. It is hoped that this program can be reinstated in the future to ensure that our athletes are not disadvantaged.

As well as the previous mentioned professions both employing and providing rural services, we are aware of others such as, equine dentists, physiotherapists, trailer manufacturers/retailers, fencing manufacturers, insurance companies and those hiring out facilities all depending on a thriving equine sector.

9. Leisure

9.1 Scale of Leisure Sector

Inter-schools

Competitor numbers at Inter-schools competitions have continued to increase, making the events a major part of the sporting calendar for our schools. Contributing to cross-border integration for students as well as being one of the few sports where male and female riders compete on equal terms.

Riding Clubs

There are 34 riding clubs in Northern Ireland registered with the British Horse Society, compared to the 124 clubs registered in ROI with AIRC. These clubs give amateur riders the opportunity to take part in a range of activities, including the BHS National Championships.

Pony Clubs

There are 11 branches of the Pony Club in NI, catering for those up to 25 years old. The Pony Club encourages participation in all equine sports, including polo, mounted games and tetrathlon as well as showjumping and eventing. Members receive lessons in not just riding instruction but all aspects of caring for horses. Currently Pony Club members from Northern Ireland are taking part successfully in competitions across the UK on a very limited budget.

Riding Centres

There are 21 riding centres in Northern Ireland listed on the BHS website, although many more exist. These centres are essential for providing a safe environment where people can learn to ride, as well as offering training and competitions for more experienced riders. A total of 180 centres are registered in the Republic of Ireland with AIRE and are closely linked to equine tourism, there is great opportunity for growth in this sector in Northern Ireland.

Hunting

There are 112 hunt clubs in the Republic of Ireland and 15 in Northern Ireland listed in the Irish Field Directory 2017. There would be a notable income from those visiting Northern Ireland to take part in hunts. Many of the hunt clubs would contribute funds to our Pony Clubs to assist with training and local/national competitions.

Showing/County Shows

Based on figures found in The Contribution of the Sport Horse Industry to the Irish Economy 2017² it can be estimated that an average of 2000 spectators attend each agricultural show in Northern Ireland, with the largest, the RUAS Balmoral Show attracting over 115,000 visitors from all over the world.

Unaffiliated Competition

A large portion of each equestrian centre's business would be through unaffiliated competition. This accounts for a much larger volume of horses than those taking part in affiliated competitions.

The Contribution of the Sport Horse Industry to the Irish Economy² states that the total spend from the leisure sector in the Republic of Ireland is €103 million per annum. Based on the volumes of riding centres, hunt clubs, Pony Clubs and riding clubs in comparison to that of ROI, it can be estimated that 15% of the leisure sector activities take part in Northern Ireland, giving an approximate spend of £16 million.



9.2 Tourist Spend

The Reaching New Heights Report⁵ stated a figure of €79 million as the total spend in 2012 by visitors to Ireland who engaged in equestrian activities. These overseas visitors took part in a range of activities such as pony trekking, hunting, riding lessons and competitions.

In recent years there has been a decline in the number of international events in Northern Ireland in showjumping, dressage and eventing. This situation is due to the fact that there is a lack of venues with facilities capable of holding international events. The current premises rating system does not encourage individuals to invest in such facilities. International events also provide the opportunity for additional income not just for the equine sector but Northern Ireland as a whole through tourism, an opportunity which is currently being missed. Riding centres also experience this barrier, and could be encouraged to develop their facilities if taxes were lowered in line with Republic of Ireland system, resulting in increased jobs and income.

10. Education & Job Creation

The College of Agriculture, Food and Rural Enterprise provides a range of educational, training and technology transfer programmes for the equine industry. The college usually enrolls between 70 and 80 first year students each year, with a total of approximately 180 students studying equine courses. CAFRE receives a contribution of approximately £2 million per annum from DAERA towards the running of their equine programs.

DAERA input to CAFRE results in qualified staff for the equine sector, however many of these students seek employment overseas. If the Government could address the funding and tax issues that are holding the potentially buoyant sector back then many of the qualified students from CAFRE would be employed at home. There is also the major opportunity of attracting students to come to Northern Ireland for training due to the worldwide respect of Irish horsemanship.

11. External Trade - Sales

Because of the integration of the sector on an all-Ireland basis with all commercial sales of stock taking place in the Republic of Ireland, it is difficult to quantify the value to the local economy of the breeding sector in Northern Ireland. It is also worth noting that the Republic of Ireland offers an Inward Buyer Program which refunds air/ferry travel costs for those who purchase horses or ponies in Ireland at selected international shows and auctions. To encourage international buyers after Brexit we need to have an efficient and uncomplicated process in place for the export of horses from Northern Ireland, while a sales complex located in Northern Ireland would also be of benefit.

12. Animal Welfare

DAERA is the main body responsible for health and welfare in the equine sector. To improve disease control and traceability of the movement of equines a premises registration system similar to that in the Republic of Ireland would be of great benefit to the Department, especially with the onset of Brexit and impending new legislation.

13. Health

Participation in equestrian activities encourages a healthy active lifestyle and has a range of benefits. The industry should be made more accessible to all including those from disadvantaged backgrounds.

14. Riding for the Disabled

Although run on a voluntary basis this is an important part of equine life. Giving the opportunity for disabled people to come into contact with and enjoy the company of horses. Much greater government funding is required to develop this facility. There are 18 regions of the RDA in the United Kingdom of which Northern Ireland is the busiest region, with over 1000 participants taking part in group rides.

15. Funding of the Northern Ireland Equine Industry

Total Contributions from Government to the Equine Industry 2016	
ROI	€3.9 million ²
NI	-

Republic of Ireland

Total Irish government funding to Horse Sport Ireland in 2016 was €3.9million², consisting of funding from the Irish Sports Council and the Department of Agriculture, Food and the Marine.

Extra funding included in the figure above in the Republic of Ireland has allowed breeders to take part in Knowledge Transfer Groups and an Embryo Transfer Scheme.

Northern Ireland

DAERA do not give any funds directly to the sport horse industry in Northern Ireland, however individuals/businesses in the sector can avail of funding through the Leader Scheme.

NIHB has contributed more than £50,000 to the equine industry over the past five years, in the form of bursaries, athlete training, breeders prizes and competition sponsorship.

15. Conclusion

The equine industry is viewed from outside Ireland as an all island industry. The Irish Horse is a marketing brand that does not discriminate between North and South. We in the equine sector are being disadvantaged by the lack of Government support/funding. The industry has the capacity to increase the amount of employees and in equi-tourism there is great potential to see many more tourists coming to Northern Ireland. Increased funding and a more suitable premises rating scheme could make a huge benefit to the industry and in turn boost the economy.

NIHB Board members have attended industry seminars on Brexit including events hosted by the Royal Dublin Society. Opinion here was that terms and conditions would be determined by Europe, however a clear policy is needed regarding the transport of equines.

DAERA is to complete an in-depth review of the equine industry in Northern Ireland. It is hoped that this review will establish the total value of the equine industry to the Northern Ireland economy, and we look forward to reading the subsequent recommendations.

16. Summary

NIHB believe that if the following areas are developed it would result in major benefits for the equine industry and Northern Ireland economy:

- Re-classification of the horse within agriculture
- Premises registration and a suitable rating scheme on a par with the Republic of Ireland to allow the development of facilities
- Increased financial assistance for:
 - Leisure Sector - to include the Pony Club, Riding Clubs and RDA
 - Education - programs to educate breeders on new technology and subsidies to allow implementation of these advancements
 - Breeding Incentives - such as an embryo transfer scheme, mare and foal premiums
 - Competition - increased prize funds to encourage riders to travel to Northern Ireland to compete, as well as funds for young horse classes to encourage the breeding and production of high quality sport horses
- Reinstated athlete training program.

APPENDIX

- Farriers Registration Council <https://www.farrier-reg.gov.uk/>
- Irish Farriery Authority <http://www.irishfarrieryauthority.com/>
- British Horse Society <http://www.bhs.org.uk/>
- Horse Sport Ireland <http://www.horsesportireland.ie/>
- DAERA <https://www.daera-ni.gov.uk/>
- Showjumping Ireland <https://www.sji.ie/>
- Eventing Ireland <http://www.eventingireland.com/>
- Dressage Ireland <https://www.dressageireland.ie/>
- AIRC <https://www.airc.ie/>
- AIRE <https://www.aire.ie/>
- The Pony Club <http://www.pcuk.org/>
- College of Agriculture, Food and Rural Enterprise <https://www.cafre.ac.uk/>
- The Irish Field <https://www.theirishfield.ie/>
- RUAS Balmoral Show <http://www.balmoralshow.co.uk/>
- Riding for the Disabled Association NI <http://www.ridingforthedisabledni.org.uk/>

Disclaimer

Every effort has been made to ensure that all the data contained in this publication has been accurately collated. While the NIHB believe the information contained in this publication to be correct they cannot guarantee its accuracy, in particular where it is dependent on information supplied to them, and cannot accept liability for any loss resulting from any errors that may arise.



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