

**Report submitted to the British Society of Animal Science
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**AN ANALYSIS OF THE EQUINE SECTOR IN THE NETHERLANDS:
HOW DOES IT COMPARE TO THE BRITISH EQUINE SECTOR
AND WHAT CAN WE LEARN FROM IT?**

DETAILS OF THE SCHOLARSHIP

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BACKGROUND AND PURPOSE OF SCHOLARSHIP

In recent years, the British Sport Horse breeding industry has been in decline, while our competitors have gained strength. Simultaneously, the number of people riding, and interested in the Equine Sector, in Britain has increased. The annual turnover of the British Equine Sector is just over £4 billion – in the rural sector second only to agriculture. This study will examine the Dutch Equine Sector, identifying aspects which would advance our knowledge and contribute to the socio-economic sustainability of land-based businesses in rural areas in this country, thereby leading to the enhancement and maintenance of the rural sector, the objective of the Murray Black Award.

RESEARCH REPORT

Introduction to the Netherlands

The Netherlands, formerly known as Holland, is in Western Europe. A small country, it covers 41,526km² in total: 33,889km² land and 7,643km² water.¹ More than half of the area of the Netherlands is farmed.² To the north and east it borders Germany, and to the south Belgium. To the west is the North Sea, separating the Netherlands from Britain. The population of the Netherlands is 16,645,000 people.³

The Dutch Horse Sector

Quantifying the Dutch Horse Sector

Published, current, information about the Dutch horse sector is not as readily available as it is in other countries, for example Sweden. However, it is known that in the past few years the horse sector has grown: the horse population is estimated to have increased from 400,000 in 2000, to 450,000 in 2008.⁴ In 2000, it was suggested that the annual turnover of horse activities in Holland was €900,000 million, providing employment for 12,000 people working in the sector.⁵ The turnover in 2006 had increased to just over €1 billion.⁶

In the year 2000 the most important activities for the horse sector were considered to be horse breeding, riding schools and sport activities.⁷ Horse breeding is an important area for the sector, and is discussed in a later section. The growing importance of riding schools and sport activities are illustrated below, providing an indication of sector growth in recent years.

Table 1: **Approximate equestrian business numbers and club membership in the Netherlands in 2000 and 2006⁸**

	2000	2006	Percentage change 2000 to 2006
Businesses relating to horse riding	1,181	1,500	+27.01
Customers of horse riding businesses	206,604	219,000	+6.00
Equestrian clubs	1,619	1,700	+5.00
Equestrian club membership	113,514	126,000	+11.00

¹ Encyclopaedia of the Nations, *The Netherlands*, <http://www.nationsencyclopedia.com/economies/Europe/The-Netherlands.html> [accessed 30.11.2008] and Encyclopaedia of the Nations, *United Kingdom*, <http://www.nationsencyclopedia.com/economies/Europe/United-Kingdom.html> [accessed 30.11.2008]. England 130,373 km², Wales 20,767km² and Scotland 78,775 km², total 229,915km².

² Ministry of Agriculture, Nature and Food Quality, *Facts and Figures 2008 of the Dutch Agri-Sector*, [The Hague: Ministry of Agriculture, Nature and Food Quality, 2008]: 7.

³ International Data Base, *Country Summary: Netherlands*, <http://www.census.gov/ipc/www/idb/country/nlportal.html> [accessed 30.11.2008]

⁴ Helgesson, A. and Hedberg, A., *The Horse Industry in the European Union*, [SLU: Uppsala, Sweden, 2001]: 13. Koeleman, E., "Horse feed is mainly bought by young women," *Feed Tech*, [12th June 2008]: 17.

⁵ van Lenthe, A. H. and van Markus, R. C., "The social and economic significance of horse production in the Netherlands," In: *Book of Abstracts No. 6, The 51st Annual Meeting of the European Association for Animal Production 2000*. The Hague, The Netherlands, 21 – 24 August, 2000. [Wageningen Press: Wageningen, 2000]: 367.

⁶ ZKA Consultants and Planners, *Paardensportonderzoek 2006*, [Ermelo: KNHS, 2006]: 25.

⁷ van Lenthe *et al*: 367.

⁸ Statistics Netherlands, *Equestrian sports increasingly popular*, Statistics Netherlands, <http://www.cbs.nl/en-GB/menu/themas/vrije-tijd-cultuur/publicaties/artikelen/archief/2008/2008-2535-wm.htm> [accessed 11.09.2008, last updated, 12.08.2008]

The table above shows an increase in all areas between 2000 and 2006. The greatest expansion was in businesses relating to horse riding, with equestrian club membership also showing a substantial development. In 2000 equestrian sport in the Netherlands was the fifth most important of all sports.⁹ There are currently about one million Dutch equestrian sport enthusiasts including 450,000 active athletes, with the majority involved in recreational sport and riding. The demographic profile of those actively involved is mainly female (80 per cent), young (42 per cent are under 20 years of age) and 20 per cent have their own horse or pony.¹⁰ The most popular disciplines, for both Dutch recreational and competitive riders, are dressage and show jumping. Of the competitive riders 78 per cent take part in dressage, and 38 per cent in show jumping, of the recreational riders 48 per cent take part in dressage and 28 per cent in show jumping.¹¹

The KNHS

The KNHS (Royal Dutch Equestrian Federation or Koninklijke Nederlandse Hippische Sportfederatie) is the key equestrian organisation in Holland for horse sport, as it directly represents Dutch interests to the International Equestrian Federation (FEI), the worldwide governing body for horse sports (excluding Thoroughbred and Arabian racing and trotting/harness racing). The KNHS has over 195,000 members, and is one of the largest sport federations in the country. Eight equestrian disciplines are affiliated to the KNHS: dressage, eventing, show jumping, endurance, driving, carriage driving, vaulting and reining.¹²

The KWPN

The KWPN (Koninklijke Warmbloed Paardenstamboek Nederland or Royal Warmblood Studbook of the Netherlands) was founded in 1970 when the NWP (North Netherlands Warmblood Horse Studbook) and VLN (Organisation for the Advancement of Agricultural Harness Horse Breeding in the Netherlands) merged.¹³ The studbook has an open breeding policy based upon horses from a variety of breeds including Oldenburger, Gelderland, Hannover, Trakehner and Thoroughbred.¹⁴ It has four main breeding goals:

1. Horses must be able to perform at Grand Prix [or equivalent] level
2. Horses must be of good character
3. Horses should have a good constitution and be durable
4. The horses' conformation should be correct, functional and appealing¹⁵

⁹ van Lenthe *et al*: 367.

¹⁰ KNHS, *About KNHS*, <http://www.knhs.nl/defaultUK.asp> [accessed 07.10.2008].

¹¹ ZKA Consultants and Planners: 7.

¹² KNHS.

¹³ KWPN, *History*, KWPN, http://www.kwpm.nl/content_uk.php?line=001-022-069 [accessed 04.12.2008]

¹⁴ Knaap, J., "Successful breeding of dressage horses," [presentation given at The Global Dressage Forum, Hooge Mierde, The Netherlands, 27 October 2008].

¹⁵ Knaap.

Today, the KWPN is one of the most successful studbooks in the world, ranked first for show jumping horses by studbook and second for dressage horses by studbook in 2008 by the World Breeding Federation for Sport Horses (WBFSH).¹⁶ The results of the last five Olympics: Barcelona, Atlanta, Sydney, Athens and Hong Kong (Beijing), illustrate the success of their breeding policy. This success has had positive consequences for the Sector as the numbers of Dutch horses exported has increased, and the professional development of riders, equine education and equestrian organisations have also been beneficially influenced.¹⁷

Trotting

The Netherlands has a very small Warmblood trotting industry in comparison with some of its European counterparts. The table below shows the number of races held in the Netherlands between 2003 and 2007.¹⁸

Table 2: **Warmblood trotting races held in the Netherlands and in the countries of the European Trotting Union 2003 to 2007**¹⁹

	2003	2004	2005	2006	2007	Percentage change 2003 to 2007
Netherlands	1,532	1,421	1,338	1,306	1,344	-12.27
Total ²⁰	64,064	62,821	61,633	60,947	59,348	-7.36
Dutch races as a percentage of the total	2.39	2.26	2.17	2.14	2.26	

Just over 2 per cent of the total annual trotting races held in the European Trotting Union were held in the Netherlands between 2003 and 2007. During this time there was a fall in the number of races held in Holland, the lowest number being held in 2006. In the same period there was a drop followed by a small rise in the overall number of horses registered, which can be seen in the table below.

Table 3: **Warmblood trotting horses registered in the Netherlands and in the countries of the European Trotting Union 2003 to 2007**²¹

	2003	2004	2005	2006	2007	Percentage change 2003 to 2007
Netherlands	1,388	1,384	1,361	1,110	1,423	+2.52
Total ²²	66,757	67,916	66,844	66,362	67,084	+0.49
Dutch horses as a percentage of the total	2.08	2.04	2.04	1.67	2.12	

¹⁶ WBFSH, *FEI/WBFSH World Ranking List – Jumping horses by studbook, 01.10.2007 to 30.09.2008*, KWPN and FEI: Harderwijk, 2008; WBFSH, *FEI/WBFSH World Ranking List – Dressage horses by studbook, 01.10.2007 to 30.09.2008*, KWPN and FEI: Harderwijk, 2008.

¹⁷ Loomans *et al*: 162.

¹⁸ Members of the European Trotting Union are: Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Italy, Hungary (from 2008), Malta, The Netherlands, Norway, Russia, Slovenia, Spain, Sweden and Switzerland.

¹⁹ UET Union Europeenne du Trot, *Statistics 2007*, [Paris: UET Union Europeenne du Trot, 2008]: 6.

²⁰ Total number of horses registered with the European Trotting Union.

²¹ UET Union Europeenne du Trot: 7

²² Total number of horses registered with the European Trotting Union.

The number of Warmblood trotting horses in the Netherlands fell between 2003 and 2006, before reaching a five year high in 2007. The total number of horses registered with the European Trotting Union also slightly rose during this time.

The horse and agriculture

Horses on farms

The numbers of grazing livestock on farms in the Netherlands is recorded on 1st April every year. These figures include horses and ponies, although the majority are not used for agricultural purposes. The table below shows these numbers, alongside cattle, goats and sheep.

Table 4: **Grazing livestock on farms, 1 April ('000 animals)**²³

	2000	2005	2006	2007	Percentage change 2000 to 2007
Cattle	4,070	3,799	3,745	3,763	-7.54
Goats	179	292	310	324	+81.01
Horses and ponies	118	133	128	134	+13.6
Sheep	1,308	1,363	1,376	1,369	+4.66

Between 2000 and 2007 there was an increase of nearly 14 per cent in the number of horses recorded as grazing livestock on farms, although the growth was not constant during that time. Over the same period the number of cattle dropped, while the largest increase was seen in goats.

Horse meat

A small proportion of horses every year in the Netherlands are slaughtered for meat. In 2002 approximately 3,000 horses (just under 1 per cent of the total horse population) were slaughtered. This figure had fallen from 4,000 in 2000.²⁴

Diversification

The growth in the numbers of horses on farms described above could be partly attributed to farm diversification. For many farms and horticultural businesses in Holland secondary activities are very important. In 2007, of the 76,741 farm enterprises with secondary activities, 2,321 enterprises (3.0 per cent) offered “storage of caravans/boats and stabling for animals of other owners”, while a further 510 enterprises (0.7 per cent) rented “canoes, bicycles, horses, covered wagons etc.”²⁵

Pairing “stabling for animals of other owners” and “storage of caravans/boats” together is incongruous. Categorising items rented from farms and horticultural enterprises to include canoes and bicycles alongside horses and covered wagons is also unusual. Organising the activities in this way makes it hard to accurately identify the role of the horse in diversification in the Netherlands.

²³ Statistics Netherlands, *Statistical Yearbook 2008*, [The Hague: Statistics Netherlands, 2008]: 18.

²⁴ Statistics Netherlands, *Statistical Yearbook 2004*, [The Hague: Statistics Netherlands, 2004]: 148.

²⁵ Statistics Netherlands, *Statistical Yearbook 2008*: 14.

Animal welfare

There is currently no formalised horse welfare legislation in the Netherlands.²⁶ Since the mid 1990s animal welfare, and the welfare of farm animals in particular, has gained prominence on the political agenda due to pressure from different groups in Dutch society. More recently this focus has included the welfare of horses.²⁷ However, during 2009 the lack of animal welfare legislation will be rectified. The horse industry, at the request of the Ministry of Agriculture, Nature and Food Safety are currently drafting a strategic plan to improve the welfare of the horse in the Netherlands. The plan will include details of correct training methods and housing, feeding and transport requirements.²⁸

The Netherlands and Great Britain: a quantitative comparison

There are a number of ways in which the horse sector of a given country can be quantified. The table below shows some basic statistics from the British and Dutch sectors.

Table 5: **Basic horse sector statistics**²⁹

	Great Britain ³⁰	The Netherlands
Estimated horse population	1,000,000 ³¹	440,000 ³²
Population	58,845,800 ³³	16,645,000 ³⁴
Area (km ²)	229,915 ³⁵	33,889 ³⁶
Horses/1,000 people	17.0	26.4
Horses/km ²	4.3	13.0
Annual turnover	£4.2 bil ³⁷ or €6.1 bil ³⁸	€1 bil ³⁹
Direct employment	40,000 ⁴⁰	12,000 ⁴¹

²⁶ KNAW Research Information, *Project: Assistance in preparing a strategic plan to importance welfare of horses in the Netherlands*, <http://www.onderzoekinformatie.nl/en/oi/nod/onderzoek/OND1331097/> [accessed 25.11.2008, last updated 23.10.2008].

²⁷ KNAW Research Information, *Project: Animal welfare of horses: just a matter of know-how?* <http://www.onderzoekinformatie.nl/en/oi/nod/onderzoek/OND1330995/> [accessed 25.11.2008, last updated 22.10.2008].

²⁸ KNAW Research Information, *Project: Assistance in preparing a strategic plan to importance welfare of horses in the Netherlands*.

²⁹ It should be noted that the statistics within this table are not all from the same year.

³⁰ "Great Britain" is England, Wales and Scotland.

³¹ BETA, *National Equestrian Survey 2005/06 Structural Report*, [Weatherby: BETA, 2006]: 23 and National Equine Database, *Passport Count by Issuing Organisation*, <http://www.nedonline.co.uk/public/Reports/RecordCountByPIO.aspx> [accessed 17.12.2008]. Horse population estimated from these two, combined, sources.

³² Loomans *et al*: 163.

³³ Office for National Statistics, *Population and vital statistics by area of usual residence in the United Kingdom, 2006*, [Basingstoke: Palgrave Macmillan, 2008]: 10. England 50,763,000, Wales 2,965,900, Scotland 5,116,900, total 58,845,800 in 2006.

³⁴ International Data Base, *Country Summary: Netherlands*.

³⁵ Encyclopaedia of the Nations, *United Kingdom*, <http://www.nationsencyclopedia.com/economies/Europe/United-Kingdom.html> [accessed 30.11.2008]. England 130,373 km², Wales 20,767km² and Scotland 78,775 km², total 229,915km².

³⁶ Encyclopaedia of the Nations, *The Netherlands*. Figure excludes 7,643km² of water.

³⁷ BETA: 37.

³⁸ OANDA Corporation, *FXHistory: historical currency exchange rates*, <http://www.oanda.com/convert/fxhistory> [accessed 15.12.2008]. Conversion rate for 1st January 2006 €1.45570:£1.

³⁹ ZKA Consultants and Planners: 25.

⁴⁰ BETA: 46.

⁴¹ van Lenthe and van Markus: 367.

In total there are more horses in Britain than the Netherlands. However, as the Netherlands is a relatively small country, when horse density is considered, there are more horses per 1,000 people and km² in the Netherlands than Britain.

Lessons learned from the Netherlands

The main area of the Dutch horse sector that Britain can learn from is Sport Horse breeding and the KWPN. Historically, Warmblood breeding in Britain has been disorganised and at the lower end of the hierarchy of European Warmblood breeding.⁴² However, in 2005 the Strategy for the Horse Industry in England and Wales stipulated that a number of lead bodies should be created to assist in the improvement of the quality of horses and ponies.⁴³ As a result of this, *British Breeding*, the breeding arm of the British Equestrian Federation, and the Sport Horse sector (including Sport Horse and Pony studbooks and individual breeders), are in the process of setting up the Lead Body for British Performance Sport Horses and Ponies (PSHP).⁴⁴ The progress that the KWPN has made, in a relatively short period of time, should encourage the British Sport Horse and Pony breeding industry and the PSHP. The strict breeding goals, and the ethos behind them, are one of the main reasons why the KWPN studbook has bred a number of world class horses and have helped the Dutch Sport Horse breeders rapidly ascend the rankings of Warmblood breeders.⁴⁵

Conclusion

The horse sectors of both Britain and the Netherlands have grown in recent years. Although the British sector is greater in magnitude, when country area and population size are considered the Dutch sector is larger. The British Sport Horse and Pony breeding industry could learn from the breeding model utilised by the KWPN to great advantage. The adoption of certain aspects of this model would contribute to the socio-economic sustainability of horse and other land-based businesses in Britain, leading to the enhancement and maintenance of the rural sector.

⁴² Clarke, C., "Warmblood Breeding in the United Kingdom," in *The International Warmblood Horse: a worldwide guide to breeding and bloodlines*, edited by Wallin, D., Kidd, J. and Clarke, C. [Buckingham: The Kenilworth Press, 1995]: 183.

⁴³ BHIC and Defra, *Strategy for the Horse Industry in England and Wales*, (Product code PB11323) [London: Defra, 2005]: 89.

⁴⁴ BEF, *Lead Body Process*, http://www.bef.co.uk/British_Breeding/Lead_Body_Process.html [accessed 16.12.2008].

⁴⁵ Knaap. In five generations of breeding (a horse generation is ten years) the KWPN have changed the type of horses they were breeding from an agricultural animal to a top class Sport Horse.

EXPERIENCE GAINED, CONTACTS MADE and FOLLOW UP PLANS

The Scholarship has enabled me to gain experience of being a visiting researcher in a foreign country. During the trip I completed six formal semi-structured interviews with key policy makers and others involved with the sector. I also held a number of informal discussions with relevant people. These were conducted according to the regulations of the HuSS (School of Humanities and Social Sciences) Ethics Committee (University of Exeter), therefore interviewee names and the organisations they are associated with cannot be disclosed. Through these interviews and discussions I have acquired an understanding of the strengths and weaknesses of the structure of the Dutch horse sector and the problems that it faces. Furthermore, I have an appreciation of the networks that exist within the sector and how they relate to the horse sector in Britain, which is of great value to my PhD.

I made contacts at Van Hall Larenstein, Wageningen University, and delivered two guest lectures. The first, "The British Horse Sector", was to third year International Bachelors in Equine, Sports and Leisure students, the second "The Horse Sector in selected European countries", was to first year International Bachelors in Equine, Sports and Leisure students. Links between Van Hall Larenstein and institutions in Britain are also being explored.

I attended the Global Dressage Forum, at Academy Bartels, Hooge Mierde, on Monday 27th and Tuesday 28th October. Through this I made many contacts within the horse sector and the organisations associated with the industry, not just in the Netherlands but also in other countries. These contacts will be very valuable to me in my future career.

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