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Introduction

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Although horse riding is no longer a necessity, there is growing enthusiasm for recreational riding and keen interest in betting has bolstered horseracing. In this evolving context there are uncertainties about the future due to current trends and practices affected by the launch of online betting; increases to the VAT; declining State subsidies; growing European and international competition on the sport horse market; and the reliance of horse-related activities on economically fragile micro-enterprises and amateurs. These uncertainties compound the numerous challenges already facing the French horse industry, including sustainable employment; integrating new technologies like genomics or the internet; producing horses in line with the demand; maintaining the diversity of breeds and their presence in certain areas; safeguarding animal welfare; and ensuring the long-term contribution of horses to preserving agriculture and the social and cultural fabric.

For the last few years, INRA and IFCE have collaborated in joint equine research and analysis that addresses industry concerns. A certain resistance to scientific and technological innovation is however also observed throughout the industry. While certain breeders have overwhelmingly embraced new reproductive technology, in recent years, other technological advancements, such as genetic indexes, have come under criticism. Yet, the industry can expect significant shifts linked to technological advances and societal trends, which it will be preferable for it to anticipate rather than to endure. Changes include the emergence of new information technology for sanitary traceability; the development of medically monitored training; the appearance of genomics and its consequences on the objective characterisation of horses; the selection process, support to the industry and its users; accommodating horse behaviour and welfare; and the need for transparency with regard to economic information.

In order to help industry professionals anticipate future trends beyond the current economic situation, to improve the supply of services and to plan for future knowledge and innovation needs, INRA and IFCE have joined forces to consider the medium-term outlook for the horse industry. The foresight study defined a variety of future scenarios for the French horse industry in 2030. The research explored possible shifts, highlighted emerging challenges and initiated debate on possible or existing ways to help the industry maintain momentum. The study provides a decision-making tool to (i) define strategies to guide and support the industry, (ii) steer public policy and research and (iii) improve possible partnerships with other economic activities pertaining to the environment, education, social inclusion, sport, culture and tourism, etc.

The full results of this participatory work, which, in addition to a panel of experts, involved ~100 economic and institutional industry stakeholders through individual interviews and regional workshops, are presented in this report. After describing the foresight approach and reviewing the current state of the horse industry in France, the main elements determining the industry's future are examined. Possible trend scenarios are then presented, which inform the report's recommendations in terms of future courses of research and public policy action.

Suggesting paths of strategic analysis.

As a result, decisions may be reactive, responding to an anticipated situation – 'if this scenario were to occur, how could we best be prepared?' – or proactive, to increase the likelihood of a desirable scenario or the unlikelihood of an undesirable one occurring.

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