FORESIGHT STUDY

The European equine sector looking forward towards 2040

A study led by EHN with the support of 4Sing

EUROPEAN HORSE NETWORK

Executive Summary

The European Horse Network (EHN) is a non-profit network that unites 34 stakeholders from across the European equine sector to coordinate actions and strengthen their voice at all levels. It promotes the development of the equine sector in Europe and represents common interests to European institutions.

To create a robust strategy for ensuring that horses remain a key part of the European landscape in the years to come, the European Horse Network (EHN) promoted a co-creative process to generate scenarios of the future. Note, scenarios are not predictions, or expressions of desired futures. They are thought experiments that position how the future may plausibly develop, and how it would then impact all dimensions of the horse industry. They have then been used to create a strategy for EHN that will survive regardless of what actually then does happen. In our case, four scenarios were created around two axes: sustainability and the social acceptability of equine activities:

1. **A new place for horses in society** – Horses are well integrated in the countryside alongside of innovative agriculture – A pragmatic use of research and a strong implementation of welfare practices ensure the industry has a full license to operate.
2. **Horses must fight for their status** – The transition to a low carbon economy and climate changes impact food production which becomes the priority to the detriment of horses.
3. **The Horse comes last** – The industry faces strong criticism, costs to keep horses are increasing, transport possibilities extremely restricted.
4. **Horses for the Happy Few** – The industry is being managed by the wealthy categories and is marginalized. It is a very expensive leisure for only a small part of the population and highly criticized by the others.

The scenarios were built on similar exercises conducted in France, the Netherlands and an EHN Workshop organized in June 2023. These are extreme but possible futures. Each elaborated scenario comes with specific opportunities, risks and options.

Based on these scenarios, the EHN has carefully built its action plan for the coming years where specific tools will be developed, new research supported and a strong and specific communication expanded.

EHN wishes to play an important role in creating a sustainable horse world where horses, humans and the environment are all cared for.

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Introduction

In 2040, the future of horses in Europe is taking shape at the crossroads of major ecological, economic and societal disruption. In the face of evolving societal expectations regarding animal welfare, the challenges of climate change, the rise of technology, land use pressures and economic challenges affecting the sector, equine activities will need to address a wide range of complex issues. In such a multifaced and uncertain context, how can we ensure a lasting and recognized role for horses in the society of tomorrow?

To contribute to this global reflection, the European Horse Network (EHN) decided to launch a European foresight study of equine activities in 2040.

The study was structured in several successive stages:

- An initial workshop was held in June 2023, bringing together the directors and presidents of EHN member organizations (Annex 1).
- 2023/2024: targeted interviews were conducted with key personalities, including Hilde Vautmans (Member of the European Parliament and Co-President of the MEP Horse Group).
- These interviews enabled the EHN to target two main axes :
    - Axis 1 - Environmental sustainability: the environmental impact of equine activities is today the subject of increased attention, particularly in the context of sustainable development objectives.
    - Axis 2 - Social acceptability: social acceptability is declining, while the importance attached to animal welfare is rising sharply. This decline in confidence is partly fuelled by a negative image of equine activities in the media.

In the context of this report, it was established that the combination of these two axes is essential to maintaining the social licence to operate (SLO). It relies on both the environmental sustainability of equine activities and the social acceptability of horse use and work.

Based on the identification of two key strategic axes for the sector, a questionnaire was disseminated widely in September 2024, receiving 45 answers from 19 different countries (Annex 2). The answers came from a range of stakeholders, including national equine industry organisations, breeders' associations and individual equine professionals. This questionnaire helped assess the importance of various variables related to the two axes.

To structure the findings and develop concrete scenarios, EHN asked for the support of 4Sing, an external consultant, which built four potential futures for equine activities, using the data previously collected.

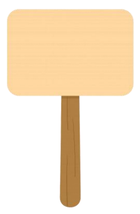
In collaboration with 4Sing, EHN organized a workshop at the Paris-Vincennes Racecourse on 8 April 2025 to collectively explore these scenarios and build a concrete action plan for the network. The workshop brought together 33 participants from 25 organizations: 10 European or international organizations and 15 national organizations representing the equine industry in their respective country (Annex 3).

The report presents the four potential futures for equine activities by 2040, enriched by the collective reflections and discussions that took place during the April 8 Workshop.

Trends and evolutions

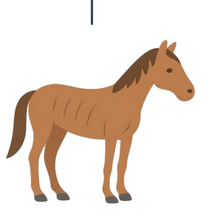
During the June 2023 workshop and through additional expert analysis, **key variables likely to influence the future of the European equine sector were identified.**

One possible trend is also the outbreak of an armed conflict in or affecting Europe. This possibility has been set aside in this study as foresight methodology seeks to explore plausible futures within a framework of continuity and transformation. An armed conflict would deeply alter the context and require a completely different analytical framework.



Social expectations and animalist movements regarding animal welfare: animal welfare has become a central societal concern across Europe, influencing perceptions of all animal-related activities, including those involving horses. Public expectations now go beyond technical standards and raise broader ethical questions about the legitimacy of using animals for sport, leisure, and work. At the same time, organised animalist movements are gaining strength. Through lobbying, campaigns, and social media, they shape public debate and push for regulatory changes. These movements increasingly target equestrian competitions, transport, breeding practices, and even the general use of horses by humans. This growing pressure could lead either to sectoral adaptations or to stricter legislative frameworks in the coming years.

Maintenance in the food chain: Horsemeat consumption has declined drastically across Europe over the past decades. Cultural differences between countries remain significant: in some, horsemeat is still part of culinary traditions, while in others, it has become largely unacceptable. Overall, societal acceptance of horse slaughter is falling, driven by shifting public perceptions of horses as companion animals rather than livestock. At the same time, maintaining horses within the human food chain carries important structural implications. The agricultural status of horses, the viability of certain breeding systems, and part of the sector's economic balance are linked to their inclusion in the food chain.



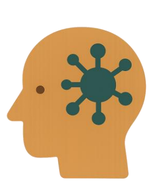
Management of ageing horses: The management of ageing horses is becoming an increasingly important issue for the sector. Several factors contribute to this trend: long lifespan after retirement, reduced consumption of horsemeat, and regulatory constraints that exclude many horses from human food consumption due to veterinary treatments. Caring for elderly horses over longer periods creates higher financial and logistical pressures, and raises broader questions about how to ensure ethical and sustainable management throughout the horse's lifetime.

Changing expectations of people regarding leisure activities: Driven by changing lifestyles, the demand for recreational activities has expanded. People now have a wide array of choices: sports, digital entertainment, social networks, travel, cultural events, and outdoor activities all compete for their attention. Within this expanding market, equestrian activities face increasing competition.

Social fragmentation: Social divisions are deepening across Europe, fuelled by economic inequality, cultural tensions, and diverging worldviews. Class-based and interest conflicts are becoming more visible. In this context, information is no longer shared neutrally. It is filtered through opposing narratives, emotional reactions and fragmented communities, particularly on social media. Public discourse becomes more confrontational, and interactions between groups grow increasingly tense. These shifts affect not only politics, but also how people relate to the legitimacy of different practices, including those involving horses.

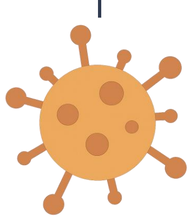
Employment and workforce renewal: The equine sector faces growing challenges in attracting and retaining a qualified workforce. The sector struggles to align with evolving expectations around sustainable work life, work-life balance, career progression and job security, which undermines its attractiveness. Physically demanding jobs, irregular working hours, relatively low wages, and the rising cost of living reduce the sector's appeal, particularly among younger generations. At the same time, the sector's need for skilled labour is increasing. The sector is confronted with an ageing workforce, increasing the urgency of renewal. Ensuring the attractiveness and renewal of the workforce will be critical to maintaining sectoral vitality and adapting to future challenges.

Political and economic instability: The international political environment is becoming increasingly unstable. Geopolitical tensions, trade disputes, and protectionist measures are reshaping global markets and creating greater uncertainty for many sectors, including the equine industry. At the same time, public debates within countries are becoming more polarised, with emotional narratives often taking precedence over technical expertise. Issues such as animal welfare and land use can quickly become politicised and subject to shifts in public opinion or regulatory priorities. This could lead to encourage a relocation of key parts of the horse industry between countries and even continents.



Artificial intelligence: Artificial Intelligence (AI) is transforming many sectors, including agriculture, health and animal management. In the equine industry, AI offers new opportunities: health monitoring, training optimisation, predictive maintenance of facilities and better understanding of horse behaviour. AI also changes the way data is collected, analysed, and shared, creating new possibilities for improving welfare, performance, and management practices. However, it raises challenges around access to technology, data ownership, and the digital skills required by professionals.

New technologies and digitalisation: Digital technologies are reshaping rural activities, including those related to horses. Tools such as smart sensors, digital identification, online platforms for training and services, and remote veterinary care are becoming more widespread. Beyond improving efficiency, traceability, and welfare monitoring, digital tools also support responses to environmental challenges. Smart farming technologies, precision pasture management, and data-driven monitoring systems contribute to more sustainable resource use, particularly water and land, helping the sector adapt to the effects of climate change. Moreover the biotech revolution is now taking off, with the ability to create, edit and repair horse genes being just one possibility. However, access to these technologies require significant investments and new skills, creating gaps between more and less connected actors.



Infectious disease outbreak: The risk of infectious disease outbreaks is rising due to increased mobility, climate change and global trade. Diseases such as equine herpesvirus or African Horse Sicknesscan lead to movement restrictions, cancelled events and high veterinary costs. These outbreaks also raise public concerns and can damage the sector’s image. Maintaining biosecurity, surveillance and emergency response capacity is becoming essential to ensure operational continuity and protect both horse and human health.

Climate change: Climate change is increasingly affecting Europe, with a growing occurrence of extreme temperatures, prolonged droughts, violent storms, and floods. The equine sector is directly affected: access to water, forage production, land availability, and the organisation of outdoor activities are all becoming more uncertain. Extreme heat periods can affect horse health, welfare and performance, while violent weather events disrupt the planning of outdoor activities. The exposure of the sector to these climatic hazards is now a structural reality, requiring constant adaptation in daily management practices and resource use.

Water management: Water is a critical resource for the equine sector. Horses require large volumes of water for drinking and cooling, particularly in periods of extreme heat. Beyond individual needs, water is essential for pasture maintenance, dust control in arenas, and the upkeep of competition infrastructures like racetracks. In many regions, droughts and heatwaves are becoming more frequent, making water supply unpredictable. Access to water is therefore emerging as a key operational and strategic challenge for equine businesses.

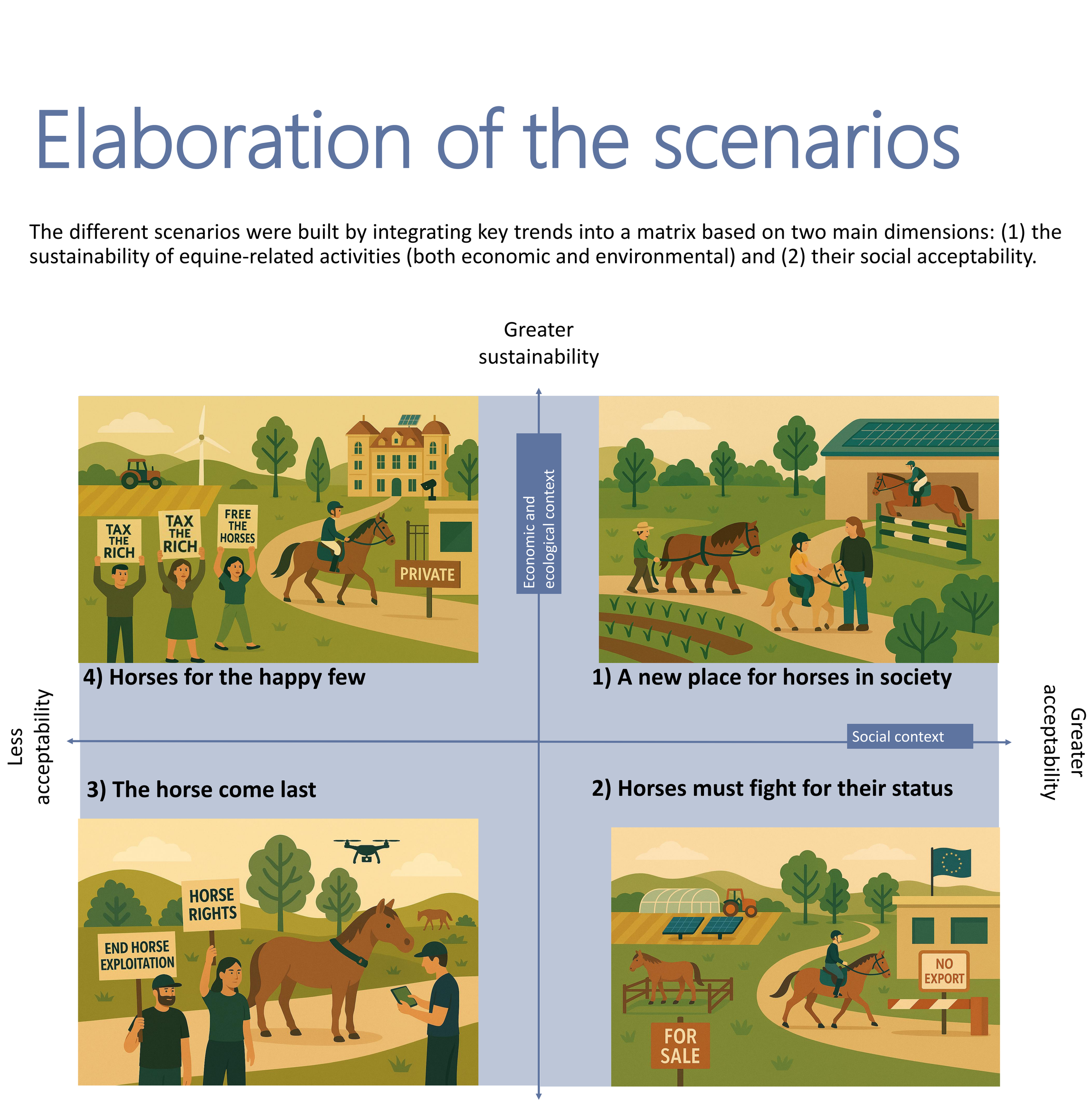
Land use and competition for land: Land is becoming a contested resource in Europe. The pressure to produce food, develop renewable energy infrastructures, preserve biodiversity and respond to urbanisation is intensifying competition between sectors, including agriculture, energy, conservation, and recreation. In many regions, horse-related activities struggle to justify their land use when compared to food production or energy production. This competition affects the availability and cost of land for equestrian facilities, breeding farms, and riding schools, and can limit the sector’s ability to expand or even maintain its activities.

Agroecology: Agroecology promotes a systemic reorganisation of farming practices to reduce environmental pressures, preserve natural resources, and maintain biodiversity. This approach is systemic: agricultural practices are seen as interacting components within broader ecological and socio-economic ecosystems. Even when horses are not used for food production, the equine sector can contribute to agroecological goals through pasture management, biodiversity support, low-impact grazing, and multifunctional land use. However, agroecology is not the only model of agricultural exploitation, and the recognition of horses within agroecological policies remains uneven. Hence the role of horses in future agricultural models is still under discussion.

Inflation: Inflation has become a major concern across Europe, with rising prices affecting both production and consumption. In the equine sector, the costs of feed, energy and equipment have significantly increased putting pressure on the financial stability of many operators. At the same time, households face reduced purchasing power, which can lead to lower spending on leisure activities, including riding lessons, tourism, or event attendance. This dual pressure impacts both the viability of equine businesses and the accessibility of horse-related activities for a broader public.

Elaboration of the scenarios

The different scenarios were built by integrating key trends into a matrix based on two main dimensions: (1) the sustainability of equine-related activities (both economic and environmental) and (2) their social acceptability.



This process led to four distinct scenarios:

1. **A new place for horses in society** – Horses are well integrated in the countryside alongside of innovative agriculture – A pragmatic use of research and a strong implementation of welfare practices ensure the industry has a full license to operate
2. **Horses must fight for their status** – The transition to a low carbon economy and climate changes impact food production which becomes the priority to the detriment of horses.
3. **The Horse comes last** – The industry faces strong criticism, costs to keep horses are increasing, transport possibilities extremely restricted.
4. **Horses for the Happy Few** – The industry is being managed by the wealthy categories and is marginalized. It is a very expensive leisure for only a small part of the population and highly criticized by the others.

Before moving into the narrative descriptions, the table on the next page provides a summary of how each trends is included across the four scenarios:

Trends	Scenario 1 - A new place for horses in society	Scenario 2 - Horses must fight for their status	Scenario 3 - The Horse comes last	Scenario 4 - Horses for the Happy Few
Social expectations and animalist movements	Equine activities remain accepted with good level of welfare	Welfare is monitored closely; any mistake causes backlash.	Most horse uses banned as an extreme reading of welfare dominates.	Welfare is high but the industry is questioned due to its elitist image.
Maintenance in the food chain	Horsemeat accepted and still consumed in some areas.	Consumption declines. End-of-life management is harder.	Horsemeat consumption banned.	Low consumption. Remain as it is.
Management of ageing horses	Managed carefully with structured end-of-life plans.	Becomes harder due to costs and lack of options.	Big issue. No slaughter, few alternatives.	The sector can afford the costs related to old horses.
Changing leisure expectations	Horses stay attractive among diverse leisure options.New leisure uses develop: e.g. tourism, therapy, education.	Regular riding drops. Occasional uses rise. Cheaper leisure activities develop.	Leisure drastically reduced. Very limited contact. Digital activities take over.	Riding exists but only for the wealthy few.
Social gap / fragmentation	Sector helps connect people and land.	Gap grows. Horses seen as non-essential.	Belief grows that horses should roam wild	Sector seen as elite and disconnected.
Employment and workforce renewal	New jobs in therapy, tech, and rural services.	Fewer workers. Jobs shift and are harder to fill.	Massive job losses. Few roles remain.	Fewer jobs, very specialised, hard to access.
Political and economic instability	Stable support and alignment with public policies.	High instability. Sector loses influence to other priorities and gets little support.	Policies focus on protection of the environment and animal welfare.	Sector vulnerable to backlash and populism.
Artificial intelligence	Supports welfare and efficiency.	Used for welfare and efficiency.	Used to monitor horses.	Used in elite stables for welfare and efficiency.
New technologies and digitalisation	Help reduce footprint, resources use, improve welfare.	Important to save costs and labour.	Used to monitor or to replace horses.	Helps high-end owners breed and manage horses better.
Infectious disease outbreak	Risk of strong impact on activities in case of an outbreak	Transport outside the EU is banned — the risk is limited.	No major events or competitions. Horses are rewilded and transport is banned — limited impact.	Strict biosecurity and health monitoring in place — limited impact on the sector.
Climate change	Hotter, drier. Sector adapts through innovation.	Droughts in the south, cold in the north.	Extreme weather everywhere in Europe.	Climate change intensifies ; water is a critical resource
Water management	Smart use and collaboration with others.	Pressure. Horses compete with farming and other productions.	High pressure. Less relevance of the sector as only limited activities still exist. Only socially valued activities are remaining.	The sector invests in infrastructure to handle droughts. Not a priority.
Land use and competition for lands	Horses integrated into agroecological systems.	Lose land to food, energy, and industry.	No longer justify land use.	Owned by a few. Others excluded.
Agroecology	Horses support biodiversity and land management.	Less priority. Self-sufficiency in food, energy and industry comes first	Not relevant. Sector too marginal.	Not a priority. Horses not used this way.
Inflation	Costs rise but sector is resilient and performant.	Costs rise and purchasing power decrease.	Limited impact. Most activities are banned; remaining ones are supported	No impact for elites. Others excluded.

SCENARIO 1 – A NEW PLACE FOR HORSES IN SOCIETY

World context

By 2040, Europe is engaged in a **positive ecological transition**. Climate change is real and brings undeniable challenges — notably higher temperatures and water scarcity — but these are being met with adaptation, innovation and collective will. The equine sector successfully manages this transition by embracing change while preserving its diversity.

Thanks to strong public support and a **renewed social licence to operate**, horses remain a respected and integrated part of European society. Their roles evolve in harmony with broader ecological and social priorities: they are present in agroecological agriculture, sustainable tourism, education, health, inclusion and sustainable sporting formats.

Rather than retreat, **the equine sector proves its capacity to adapt its infrastructure**, **its activities, and its workforce to a changing world**. It becomes a model of how tradition and innovation can coexist.

The sector is also aware of the **growing risk of infectious disease outbreaks**. Coordinated protocols, infrastructure adaptations and professional training are implemented to strengthen biosecurity and reduce vulnerability.

Still, this favourable momentum must not lead to complacency: strategic prospective and innovation remain essential to maintain relevance in the long term.

The place of the horse in society

In this scenario, **the horse maintains a strong and positive image in European society**. It is seen as a link between people, land, and nature, valued both culturally and functionally. **Horses are integrated into agroecological systems**, contribute to biodiversity, and support low-carbon land management.

Key indicators

S/E Europe drought,
N/W Europe warmer & wetter

Economic & ecological Context (sustainability)

Horses in the countryside alongside an agroecological model

Social context (acceptability)

Technology and science reveal what horses need

Mobility of Equids

Transport is very expensive given green taxes

Staff availability

Staff shortages but less so in periurban areas

Equestrian sport and racing still exist but they are challenged by climate constraints. Their survival depends on a radical adaptation of infrastructure to cope with heat, reduce water consumption and lower environmental impact. In addition, they need to revise competition calendars to avoid dry and hot periods. but also to optimise transport and logistics for greater sustainability.These transformations come at a significant cost and not all operators are able to make the necessary investments, leading to disparities across disciplines and regions.

At the same time, **activities such as equestrian tourism, therapy, and educational programmes continue to grow**, especially in peri-urban and rural areas. This diversification of equine uses helps ensure resilience, visibility and social value across a range of audiences.

Horses continue to be recognised as agricultural animals and their inclusion in the food chain is not contested.

The sector successfully maintains its social licence to operate with high welfare standards, proactive communication and alignment with broader sustainability goals. It continues to monitor public opinion and anticipate future shifts in values and expectations, in a context where information circulates quickly and societal attitudes can change.

Long horse lifespans and new welfare expectations also raise the need for **structured approaches to the management of ageing animals**.

💼 Labour

The labour market in the equine sector remains active, though its structure evolves. While some traditional roles become more demanding due to climate adaptation (e.g. new infrastructure standards, health management), **new job profiles emerge** around education, therapy, digital tools, agroecology and welfare management.

Cross-sectoral skills are increasingly valued: professionals must know how to work with horses and people, manage technology and operate within multi-functional rural systems. **Staff shortages persist in some areas**, but the sector remains attractive, particularly when supported by clear career pathways and modern training programmes. The growing diversity of equine activities also helps attract a broader range of profiles.

In summary, what this world look like?

- **Horses are integrated into agroecological farms and multifunctional rural landscapes**, where they contribute to biodiversity, low-carbon transport, organic fertilisation, and land management.

- **Equestrian sports and racing still exist, but they are under pressure dur to climate change.** To remain viable, operators must adapt infrastructure, reduce environmental impact, and shift calendars — a costly transformation not all can afford.

- **Tourism, therapy, and educational activities expand steadil**y, offering inclusive, meaningful experiences and strengthening the horse's place in health, well-being, and community engagement.

Press review

Hola!
October 2035

Ten more racetracks turned into horses sport centres

Horse racing is in decline as droughts harden the ground and water cannot be made available for watering vast courses at a time of severe limitations. New forms of indoor equestrian sport are gaining the attention of younger generations instead, especially when they do not then have to travel so far out of town...

De Standaard
January 2038

The horse will see you now

2037 saw medical insurance reimbursement for therapies involving use of horses reach a new record level. It is no longer just autists who are benefitting. The challenge is to find the qualified staff who can handle patients, technology and horses. Indeed, it is hard to find staff of any variety given the demographic shifts in Europe...

EHN report to the European Parliament - December 2040

Shifts in farming benefit horses

The big wave of farmer retirements leaves a younger generation in charge. They are shifting to agroecological principles. This includes a place for horses, as horses con tribute to the ecobalance of a farm. Also, as it is now usual to buy and sell horses at the click of a mouse, this market has become more lucrative. But that also means more owners without qualifications...

- **Technologies such as smart stables, welfare monitoring systems, and AI-based diagnostics support better care**, labour efficiency, and transparency, without replacing the human–horse relationship.
- **The sector communicates clearly about its social and environmental v**alue, maintaining public trust and benefiting from alignment with broader policy goals..
- **Land and water access remain strategic challenges**, especially in southern Europe, requiring collaboration with other rural actors and territorial planning.

Opportunities

- **Horses gain visibility and legitimacy** through integration into agroecological and sustainable farming systems.
- **The growth of equine-assisted services, slow tourism, and education opens stable and socially valued markets**. It also strengthens links with health, culture, and inclusion.
- **Smart infrastructure and digital tools** enable the sector to reduce its environmental footprint while improving animal welfare.
- **The diversification of uses** ensures resilience, allowing the sector to reach new audiences and reduce dependency on any single model.
- **New professional profiles emerge** at the intersection of technology, care, education, and rural development, attracting a younger, more diverse workforce.
- **Strong public support and alignment with climate and social policies** create political opportunities for recognition and funding.

Threats

- **Climate change puts increasing pressure on infrastructures**, particularly in equestrian sport and racing. Maintaining these activities requires **major investment** to reduce water consumption, improve heat resilience, and redesign facilities — changes that not all operators can afford, creating disparities within the sector.
- **Infectious disease outbreaks** could disrupt equine activities. Vigilance and investment in biosecurity measures are essential.
- **Inflation has an impact on costs and consumer budgets**. While the sector adapts, maintaining economic resilience remains a challenge, particularly for smaller operators.
- Despite public support, the sector remains partly dependent on racing-related income. **Illegal betting threatens this funding model**. This undermines the redistribution mechanisms that currently support broader equine activities.
- **The management of ageing horses becomes a challenge**, especially as longevity increases and public expectations around welfare grow. Without clear strategies for end-of-life care, there is a risk of rising costs and negative public attention.
- In a context of strong public support and relative stability, **the sector faces the temptation to remain passive**. A lack of long-term strategic vision or investment in innovation could lead to stagnation, making the sector vulnerable to future shifts in public opinion or policy priorities.

SCENARIO 2 – HORSES MUST FIGHT FOR THEIR STATUS

World context

We live in a Europe shaken by geopolitical disruptions. The climate has not followed the expected warming trend: the slowing of the Gulf Stream has led to a colder and more unstable climate in northern Europe, while southern regions continue to face drought and resource scarcity. These environmental pressures amplify already severe **geopolitical tensions and trade disputes**.

The transition to a low-carbon economy is urgent, but its implementation is hindered by mounting international tensions, trade barriers, and a steady decline in Europe's economic competitiveness. As part of this increasingly protectionist and fragmented context, **the export of live animals outside of the EU is now banned**. This has a dramatic impact on both sport and breeding activities, which historically relied on international mobility. **The internal market becomes fragmented and less lucrative, while access to global markets is effectively cut off.** In this context, the risk linked to infectious diseases is relatively limited. The ban on live animal transport outside the EU reduce exposure to international outbreaks.

At the same time, **Europe's purchasing power is shrinking**, reducing household consumption of non-essential goods and services, including many equine-related activities. Governments adopt a **logic of strategic prioritization**, where land, water and financial support are channelled toward sectors considered essential for national sovereignty: food production, energy, and industry. The horse sector, once a valued player in the rural landscape, is no longer perceived as a priority and must now **justify its presence** in an increasingly competitive and constrained rural environment

Despite these constraints, **scientific and technological advances have improved our knowledge about equine welfare**, reducing the need for new legislation. However, maintaining high standards in practice remains crucial, especially under the constant scrutiny of **social media**. Indeed, any lapse in welfare can quickly trigger public backlash and reputational damage for the entire industry.

Key indicators

The Gulf Stream slows: N. Europe is getting colder*

**Piecuch, C. G., & Beal, L. M. (2023). Robust weakening of the Gulf Stream during the past four decades observed in the Florida Straits. Geophysical Research Letters*

Economic & ecological Context (sustainability)

Absolute priority to certain key industries, e.g. food production

Social context (acceptability)

Few laws but welfare applied in practice

Mobility of Equids

Restrictions on international not local mobility

Staff availability

Hard to find staff, big shortages of farriers, vets

The place of the horse in society

In this scenario, equine activities are under pressure, but they adapt to survive.

Regular horse riding becomes an expensive activity. Rising costs of horse ownership, inflation, and the price of energy make it increasingly difficult for middle-class families to maintain horses or afford lessons. **Equestrian sport and leisure become more exclusive**, with a shrinking base of regular riders.

However, **occasional, experience-based equine activities are thriving**. Equestrian tourism, equine-assisted therapy and heritage experiences attract a broader audience seeking meaningful connections with animals and nature without the long-term cost or commitment of ownership.

Even these occasional activities face challenges, especially when it comes to land. **Most land is now used for agriculture, industry or energy**. Equine facilities struggle to compete with food production and often lose access. Professionals must adapt how they house, feed and care for horses on smaller plots, while still meeting high welfare standards expected by a watchful online public.

Even if equine activities still enjoy broad social acceptability, horsemeat consumption is still decreasing. Management of ageing horses becomes more challenging with rising maintenance costs and limited space to keep retired animals.

Labour

The equine sector is also facing a **growing labour shortage**. With rural populations ageing and fewer young people interested in these jobs. **Finding workers is increasingly difficult**. Other farming sectors, now a priority in Europe, attract more support and offer better conditions, making equine jobs less attractive.

The situation is worsened by the restricted mobility of foreign workers due to geopolitical tensions, stricter visa regimes and reduced international cooperation. Key roles such as farriers, grooms and veterinarians are harder to fill, undermining the sector's resilience.

In summary, what this world look like?

- **Land use policies are strict and strategic.** Most rural land is redirected to food, industry, or renewable energy. Equine professionals must compete for access, often unsuccessfully.

- **Export markets are effectively closed.** The ban on live animal transport beyond the EU has collapsed traditional trade routes, and internal markets remain fragmented and fragile.

- **Regular equestrian activity is in decline.** Horseback riding becomes a premium leisure product for the wealthy. In contrast, **tourism and therapeutic activities** flourish as occasional and affordable alternatives.

Press review

Eric Snodgrass MEP

Press Release, March 2037

We need more food!

Faced with decreasing yields and a hostile geopolitical and trading environment (you cannot even transport live animals out of Europe now!), all rural land must be given to food production. The equine industry is a luxury we cannot afford if we want to eat. I am afraid that arguments around biodiversity just do not make the cut in these circumstances...

Financial Times

November 2039

Europe qcontinues to lose economic competitiveness

It seems that across the board, from making aircraft to breeding top uality horses for export, Europe is losing competitiveness and its citizens are losing their purchasing power. And even if technology gains mean apps - anything from ridehailing to animal health - boost productivity, these apps are usually American...

Horse and Hound

June 2040

Horse tourism booms as the number of regular riders decreases

It seems everybody likes the idea of a holiday adventure on a horse, but the cost of riding a horse for your weekly pleasure has become too much for many in Europe today. Also, the use of social media to denounce poor welfare conditions means only well run operations are now left...

- **Welfare standards are under the microscope.** Social media acts as a constant monitor, forcing professionals to adapt and invest in transparent and high-quality care, even in challenging conditions.

- **Technology supports adaptation.** Digital tools improve stable management, health monitoring and customer interaction. However, most innovation is imported, reinforcing Europe's technological dependency.

Opportunities

- **Occasional equestrian activities such as tourism, equine-assisted therapy, and mediation expand significantly.** They offer meaningful experiences that remain accessible to a broader public and create new connections with sectors like health, social care and sustainable tourism.

- **Technological tools** (automated stable management, health monitoring, digital training) help mitigate labour shortages.

- **Evolution of international competitions and races' formats**: more regional events, rider-only travel, and mirrored competitions in different countries.

- **Training methods** can adapt, focusing on developing rider skills without necessarily relying on high-performance horses. This is an opportunity to innovate in training methods, both technically and pedagogically, especially in a context where horse mobility is restricted.

- **Complementarity with other livestock or land uses** (such as mixed farming systems) and the horse's contribution to food production (manure as fertiliser, horse milk, and horsemeat) help secure a place for horses in multifunctional agricultural models.

- **Breeding objectives may need to evolve** to reflect new societal expectations and economic realities with the development of multi-purpose horses. These horses should be adaptable enough to move between different roles over their lifetime : from competition to tourism, from equine-assisted activities to, eventually, meat or milk production

Threats

- Horses are increasingly perceived as **non-essential compared to food-producing animals**, limiting their political and economic support.

- **Access to land becomes a major obstacle** as agriculture, energy, and industrial uses are prioritised.

- **Traditional housing and grazing systems are no longer viable** in many areas, due to limited access to land. Entirely new models of equine accommodation must be developed to meet strict welfare expectations within smaller spaces. These adaptations require significant investment.

- **Commercial exchanges decline, especially with export restrictions**, undermining breeding, racing and sport-based models.

- The ban on live animal exports outside the EU has disrupted global horse sales. Combined with the rise of local sport horse breeding in countries like China, Namibia or South Africa, this has reduced international demand for European horses, undermining breeding-based business models.

- The sector **loses skilled professionals and riders**, threatening knowledge transmission and quality of care.

- **Changing breed expectations** may lead to internal divisions and the loss of genetic diversity.

- By focusing on **more generalist and multi-purpose horses,** there is a risk of losing excellence and technical specialisation, which could further reduce the competitiveness of European breeding in an already challenging global context.

SCENARIO 3 – THE HORSE COMES LAST

World context

Europe in 2040 is shaped by deep social and ecological transformations. **Animalist perspectives have gone mainstream**, reshaping legislation, public opinion and policy frameworks. The notion that horses should not be used by humans — whether for work, sport, or food — now dominates the debate.

At the same time, **climate disruption intensifies**: extreme weather affects the entire continent. These conditions strengthen **fears of zoonotic diseases**, leading to stricter biosecurity policies. Horse mobility is now strictly limited for welfare and biosecurity reasons. Horses can only be transported up to 100 km in their lifetime, tracked by a mandatory GPS chip.

Other forms of leisure and outdoor recreation have replaced equestrian activities, making horses increasingly invisible in the public space. The **economic viability of the equine sector is severely compromised**. Costs are rising, demand for equine services is shrinking and traditional uses — like racing, sport, or meat production — are disappearing under public pressure. Horse racing has been replaced by drone racing, now followed at home via immersive 3D holography.

Calls to **“release all horses into nature”** gain momentum. Social media campaigns glorify the idea of wild herds roaming rewilded European landscapes. The sector finds itself pushed to the margins, struggling to maintain relevance in a world where human-animal interaction is questioned.

Key indicators

Extreme weather regularly hits all of Europe

Economic & ecological Context (sustainability)

\- +

Economic viability of the horse industry is challenged

Social context (acceptability)

\- +

Animalist views go mainstream

Mobility of Equids

\- +

Big mobility restrictions for animal welfare reasons

Staff availability

\- +

Surplus of qualified staff

The place of the horse in society

In this scenario, the horse has lost much of its traditional role. Sport, breeding, transport, and even food-related uses are disappearing or forbidden. Horses are no longer slaughtered, but there is no structured alternative for managing ageing populations, raising concerns over care, abandonment and welfare.

Only **very limited and highly controlled forms of interaction** are tolerated. A small number of horses are still used in equine-assisted therapy or ecological land management. These niche uses may preserve part of the equine heritage, but **the connection between society and horses is fading fast**.

Technology plays a dual role: it helps monitor animal welfare, providing transparency and evidence to resist misinformation, but also contributes to replacing horse-based activities with digital or robotic alternatives.

Labour

In this scenario, **the equine labour market is collapsing**. As traditional activities like sport, breeding, and food production disappear or are restricted. Many professionals (riders, grooms, farriers, breeders) lose their jobs.

Some find **new roles in welfare monitoring, managing rewilded horses or working in public ecological programmes** but these opportunities remain limited.

A **surplus of qualified workers emerges** but their skills no longer match the few activities that are still allowed. Young people turn away from equine careers, seen as unstable and controversial. As a result, professional knowledge fades and fewer training opportunities remain, putting the sector's long-term expertise at risk.

In summary, what this world look like?

- **Most equine activities** — including sport, breeding, meat production, and leisure riding — **are banned or tightly regulated** due to growing public opposition and welfare concerns. Horses are no longer slaughtered, and their **movement is restricted to a 100 km** lifetime limit, tracked by GPS.

- The idea of **releasing horses into the wild** has gained public support. Rewilded horses now roam protected landscapes with minimal human interaction, creating new challenges for welfare and land management.

- Society's connection to horses has nearly disappeared. Few people have contact with horse, and knowledge about their care and value is fading. Equine use is seen as outdated and the **political support for the sector is minimal**.

Press review

HORSES TODAY
February 2039

Put your horse in the wilderness?

Yes, it is hard to pay for our horses. But the latest social media campaign, to put all horses into the large new European wilderness areas, is mad, even if widely supported. The animalist advocates of this obviously never saw pictures of wild horses starving. And what of biodiversity? We will lose many of the traits bred over generations…

Tagesblatt
October 2037

Transport of horses limited to 100km

Animal welfare regulations have been ratcheted up again. Given the added fear of new zoonotic diseases spreading with climate change, horses may now only be transported 100km in their lifetime, as measured on the GPS chip that all horses receive after birth...

FAKT
June 2040

Drone, not horses, race

Who wants to bake in the sun, to watch animals racing? Drone racing has exploded, especially profiting from fans who stay at home and watch the race in 3-D holography. This said, using technology to monitor animal welfare offers an opportunity to counter the animalist lobby claim that human interaction always hurts horses...

- **Technology plays a central role**, both **replacing horse-related activities** and **monitoring the remaining horse populations**.
- **The labour market has collapsed**.

Opportunities

- **Ecological services**: horses can be repositioned as contributors to biodiversity and landscape management (e.g. conservation grazing in protected areas).
- **Welfare-based innovation**: technology enables improved welfare monitoring, offering a potential counter-narrative to the most radical animalist claims.
- **New societal roles**: horses remain relevant through therapy, educational programmes or nature-based services, particularly if publicly supported.
- **Specialised training and employment**: new professions emerge around the supervision of horses in semi-wild or managed environments.
- **Reframing the narrative**: emphasising the historical, emotional and ecological connection between humans and horses may help rebuild legitimacy.

Threats

- **Loss of political support**: the sector has minimal visibility on the political agenda and is seen as outdated or non-essential.
- **Drastic transport restrictions**: Movement of horses is limited to 100 km in their lifetime, cutting off competition, breeding, and sale possibilities.
- **Collapse of traditional markets**: no more horsemeat, no racing, almost no breeding — the economic foundation of the sector crumbles.
- **Disconnection from society**: most people no longer interact with horses. Societal support and understanding disappear.
- **Loss of excellence and skills**: professional knowledge and equine culture are lost with each generation of inactive or rewilded horses.
- **Illegal practices**: banned or unregulated equestrian activities may persist underground, escaping welfare control.
- **Genetic erosion**: with fewer horses and less structured breeding, genetic diversity is at risk.
- **Lack of end-of-life solutions**: horses are no longer slaughtered but no public policy replaces it, leaving ageing horses in limbo.
- **Biosecurity issues**: In the wild, horses may gather in specific ares, leading to localised soil degradation and hygiene problems.

SCENARIO 4 – HORSES FOR THE HAPPY FEW

World context

By 2040, Europe is shaped by two powerful and parallel forces**: the rapid rise of smart, technology-driven agriculture, and a growing social divide**. On one hand, rural areas are increasingly equipped with precision farming tools, automated systems and environmental monitoring, transforming land management into a high-tech, capital-intensive activity. On the other, inequality deepens, with visible tensions around access to land, resources, and opportunity.

Climate change intensifies and **water becomes a critical resource**. However, wealthy sectors adapt through investment in infrastructure and technology. These actors succeed in keeping their operations green, efficient and compliant with new environmental standards. In this world, **horse ownership is sustainable but expensive**.

The risk of infectious disease remains present, but the sector has the financial and technological capacity to implement strict biosecurity protocols, advanced monitoring systems and rapid response strategies.

The **symbolic role of the horse changes**. Horses now represent privilege. Owning horses is seen as being similar to owning a yacht. While the industry shrinks and professionalises, its social image becomes more fragile. **Public frustration with elites and inequality** finds a target in the equine world, where **animal welfare concerns merge with social critics**. The sector's vulnerability no longer lies in its footprint, but in its **disconnection from mainstream society**.

The place of the horse in society

In this scenario, horses are closely associated with **wealth and exclusivity**. Their roles are centred on **elite sport, prestige breeding and luxury ownership**. Though fewer in number, horses are maintained in excellent welfare conditions on few major estates, supported by advanced technologies and private investment.

Key indicators

Big problems with water scarcity

Economic & ecological Context (sustainability)

Horse ownership is green but costly

Social context (acceptability)

Equine welfare fuses with a "hit the rich" war

Mobility of Equids

Few restrictions on mobility

Staff availability

Staff available but hi-tech skills come at a high price

Horses are no longer part of everyday rural life or widely shared culture. They are admired from afar but increasingly seen as **symbols of privilege**. The emotional connection between people and horses weakens, replaced by a perception of distance and inaccessibility. Horses are now largely associated with luxury, and access to equestrian activities is limited to those with substantial financial means.

This shift takes place in a broader context of **social tension and political polarisation**, where animals held in elite environments attract criticism. Welfare is no longer questioned in terms of quality but in terms of meaning. **Why and for whom** horses are kept becomes a central debate. They are increasingly sparking online outrage, going viral under hashtags like #FreetheAnimals and #DownWithTheRich.

As traditional uses fade, the **diversity of participants, breeds, and practices** narrows. Fewer equestrian activities are visible in public spaces. While the sector remains technically excellent and visually appealing, it struggles to justify its role in society and risks becoming **increasingly isolated from the public it once served**.

Rising costs related to breeding, training, and keeping horses have made it increasingly difficult for smaller or community-oriented operations to survive. At the same time, the **horse population is ageing**: with fewer foals born and horses living longer under high standards of care.

💼 Labour

The labour market reflects this concentration of value and access. The sector **employs fewer people** but those who remain are highly specialised and well paid: experts in equine genetics, elite training, stable technologies and high-level communications. Technical skills are prioritised over traditional experience and many **entry-level jobs have disappeared**.

This shift raises structural concerns. **Fewer young people enter the sector** discouraged by financial barriers, lack of inclusive career paths and a perception that horses are no longer “for them.” Knowledge and expertise remain within the system but the **pathways to access and transmission are shrinking**.

In summary, what this world look like?

- **Ownership is limited to wealthy individuals and organisations** who can afford cutting-edge facilities and private land access.
- **Animal welfare standards are high but welfare is politicised**: debates centre on the meaning and legitimacy of keeping horses in elite spaces.
- **Rural landscapes are dominated by high-tech farming and large-scale energy or food produ**ction; horses are absent from most agricultural systems.
- **Recreational and leisure activities involving horses have become rare and exclusive**. Other forms of digital and nature-based entertainment dominate.

Press review

Dagesblad
January 2037

Europe’s great reshuffle of land

As many farmers retire, land ownership is being consolidated. On the one hand, large firms are investing in high tech agriculture, On the other, wealthy Europeans are investing in the horse breading and rearing sectors, consolidating the sector into a few big estates, at a time where the cost of breeding and keeping horses is reducing the number of horse aficionados...

Forbes
October 2037

The perfect horse for 2 million Euros

DNA sequencing, CRISPR, and AI is now showing what is possible, even if it is controversial, you too can insert all the attributes you want in a horse. And using AI, the perfect training programme can be put into place for further million. And of course to access all this, you need access to the latest digital market platform - at a price...

Rizospastis
June 2040

The class struggle is alive

t was supposed to be the wedding of the year, with all those guests transported by horse-drawn carriages through the streets. But the social media shit storm drowned out all positive reporting of the event with hashtags around “free the animals” and “down with the rich”...

- The equine sector is **professionally managed but culturally distant.**
- **Fewer competitions** take place and participation is limited to a small number of high-level athletes and horses.
- **Equine culture is less diverse**: local breeds, heritage uses and traditional practices have disappeared.
- **The public is divided** between fascination and frustration. Horses inspire aspiration but also reinforce social inequality.
- **The equine population is older** raising questions around welfare management and economic viability.

Opportunities

- The sector becomes **more professionalised** with increased use of technology and expertise across breeding, care and training.
- **Environmental performance improves** thanks to fewer horses, concentrated facilities and smart infrastructure.
- Strong consolidation allows for **strategic investment**, innovation and consistent standards.
- **Health risks are mitigated through technology**. Horses are monitored using advanced health diagnostics, ensuring early detection and containment of disease.

Threats

- The sector's **social legitimacy erodes**, as it is seen as serving only a privileged minority.
- **Public criticism intensifies** combining animal rights concerns with social frustration toward luxury and exclusion.
- **Fewer career pathways** exist discouraging youth from entering the sector and weakening generational renewal.
- **Illegal betting reduces the amount of betting money that comes back to the sector**. As a result, the costs of owning and caring for horses increase significantly, and the sector becomes increasingly reliant on private funding.
- **European sport horses face growing international competition.** Emerging breeding programmes in countries such as China, Namibia and South Africa gain visibility and quality, making it harder for European breeders to maintain their leadership.
- The loss of traditional uses, breeds and rural presence leads to a **decline in diversity**.
- The disconnection between the equine world and broader society may lead to **policy backlash or loss of support**.

Conclusion

The workshop held on April 8, 2025, dedicated to exploring the four scenarios presented in the report, highlighted common challenges that a European equine sector may face. It also initiated a collective reflection on potential actions to better anticipate and address these challenges.

The first challenge identified was the need to **strengthen coordination within the EHN**, in order to provide proactive, cross-cutting and unified responses on key issues for the sector, with the goal of having a greater impact in the European public debate. More broadly, discussions among participants emphasized the importance of enhancing **cooperation with other sectors**. To increase the resilience of the equine sector and reinforce its political influence. Particularly at the European level, it will be crucial to build strategic partnerships with sectors in which horses contribute to creating shared value.

Several scenarios point to a potential decline in the social acceptability of horses in the future and highlight the need for **stronger political influence**. To address this, it will be essential to adopt a clear, positive and coordinated communication strategy that is based on facts and scientific research, paired with structured advocacy efforts. This will help promote the role of horses more effectively, both to the general public and to national and European policymakers. Enhanced recognition of equine activities can also be supported by building a truly European research ecosystem, which would bring greater legitimacy to the sector.

In addition, the growing pressure on land use and the impacts of climate change call for a **rethinking of equine infrastructure**, in order to ensure that horses continue to have sustainable access to appropriate spaces and facilities. These challenges also led participants to identify a complementary issue: the need to adapt equine activities so they align more closely with upcoming transitions.

The analysis of the four scenarios also underscored **the increasing role of technology in shaping the future of the equine sector**. While the digital transition carries a risk of fragmentation, it also presents opportunities to improve transparency in animal welfare and to modernize practices. In this context, the development of smart technologies and shared data systems was identified as a key area for action

Finally, the discussions highlighted a central challenge for the future of the sector: **ensuring its long-term financial viability** in a context marked by a growing imbalance between rising costs and limited funding resources. To meet this challenge, equine activities will need to diversify their sources of funding, relying on public support and developing mechanisms tailored to the specific needs of the sector.

The report, including the scenarios and the resulting action plan, is presented at the EHN General Assembly on June 3, 2025.

For EHN and its members, the study is the beginning for adapted actions corresponding to more than one scenario and reconsider the situation in which the sector is now.

Annexes

Annex 1 – List of participants in the workshop held on 8 June 2023 in Brussels, during the EHN Presidents' Conference.

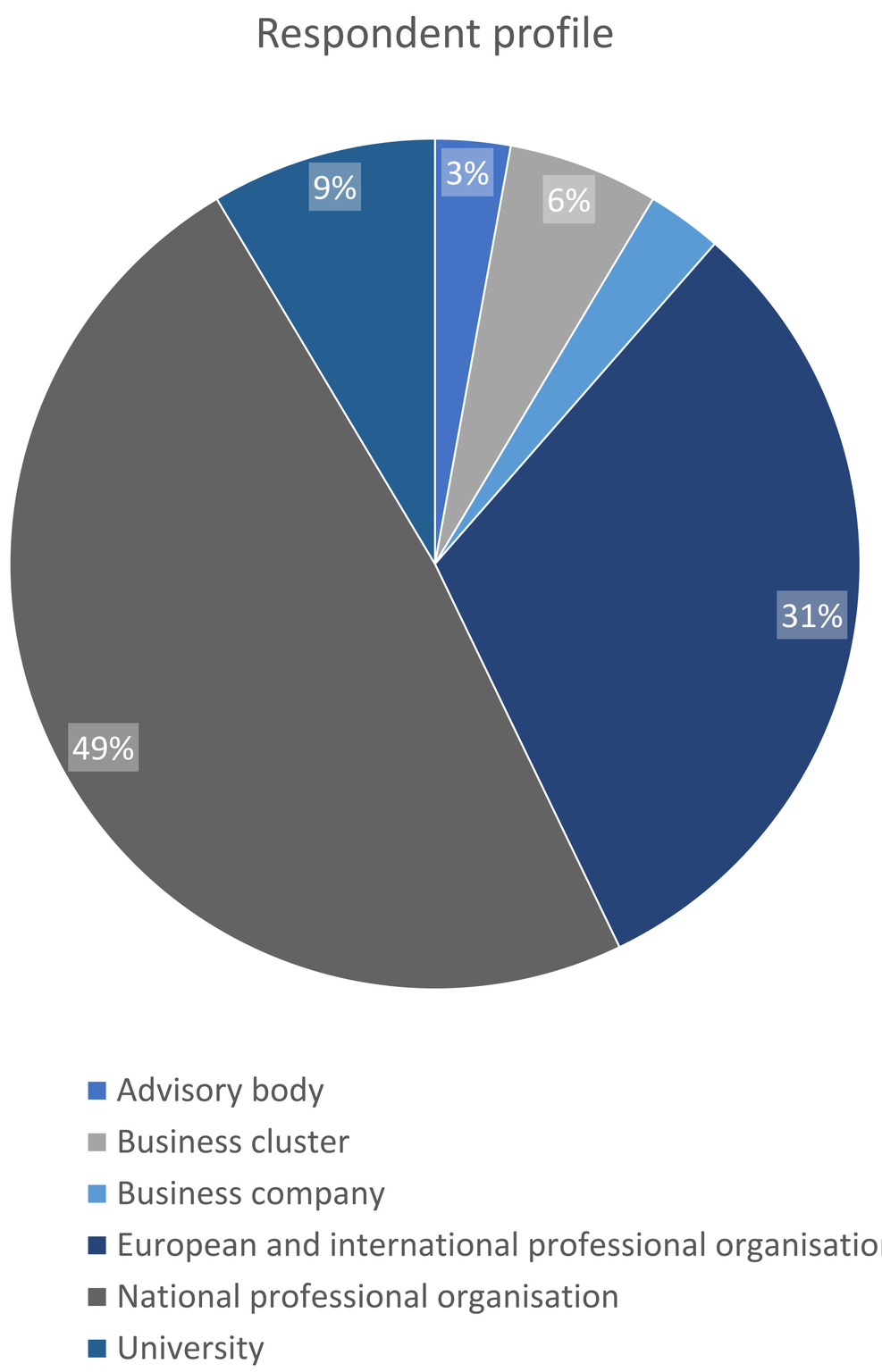
During this session, the 33 participants were invited to identify major trends across six key areas: social, demographic, political, technological, ecological, and economic.

Name	Organisation	Position
Mark Wentein	European Horse Network (EHN)	President
Florence Gras	European Horse Network (EHN)	Secretary general
Ingmar De Vos	International equestrian federation (FEI)	President
Francisco Lima	International equestrian federation (FEI)	Director Governance &. Institutional Affairs
Haike Blauw	Dutch Equestrian Centers Federation (FNRS)	Managing director
Robert van Almkerk	Dutch Equestrian Centers Federation (FNRS)	Coordinator - Sector Development
Nico Bezemer	Dutch Equestrian Centers Federation (FNRS)	Chairman
Roly Owers	World Horse Welfare	Chief Executive
Sandra Pérez Zafra	World Horse Welfare	Public Affairs Officer
Jessica Stark	World Horse Welfare	Director of Communications and Public Affairs
Marjaana Alaviuhkola	European Trotting Union (UET)	President
Isabelle Gizardin	European Trotting Union (UET)	Secretary executive
Carina Mayer	European Equestrian Federation (EEF)	Secretary general
Charles Trolliet	Equi-scope	President
Marianne Orlianges	Interbev	Manager of Animal Production Sectors
Guy Arestier	Interbev	Chair of the Equine Section
Marko Mazeland	International Federation of Icelandic Horse Associations (FEIF)	Representative of FEIF at the EHN
Julius Peters	Federation of European Equine Veterinary Associations (FEEVA)	President
Lauran Schreiber	Equisfair cluster	Poject manager
Lumi Amélie Drozzin	Central Union of Agricultural Producers and Forest Owners in Finland (MTK)	Senior advisor
Minna Peltonen	Equestrian federation of Finland	Stable business development specialist
Muriel Coppin	International Group for Equestrian Qualifications (IGEQ)	Secretary
Karolina Lagerlund	Swedish Horse Industry Foundation (HNS)	CEO
Jeff Segers	Animal Transportation Association (ATA)	Expert animal shipper

Name	Organisation	Position
Guillaume Blanc	French horse and riding Institute (IFCE)	Director of Support for the Equine Sector
Amandine Julien	French horse and riding Institute (IFCE)	Manager of the international department and European affairs officer
Elodie Martin	French horse and riding Institute (IFCE)	Intern
Astrid von Velsen-Zerweck	European State Studs Association (ESSA)	President
Catherine Bonnichon - de Rancourt	European equestrian association (EEF) and fédération international de Tourisme équestre (FITE)	Director of European and Institutional Affairs
Alexia Bret-Morel	French equestrian federation (FFE)	Ethologist
Marie Orard	Hippolia cluster	Director
Peter Bollen	European Equine health and Nutrtition Association (EEHNC)	President
Stephan Detry	Belgian Equestrian Federation (FRBSE)	President
Nadine Brandtner	World Breeding Federation for Sport Horses (WBFSH)	General manager & events

Annex 2 – Questionnaire

A questionnaire was distributed in September 2024 and received 45 responses. The types of organisations are described in the graphic below :



Questionnaire:

Last name :	
First name :	
Email adress :	
Your organization’s name :	
Your country :	

<u>Remarks</u> : Data collected within this survey will be anonymised. Results will only be used for this prospective study.

The questionnaire is structured along two axes : environmental sustainability (section I) and social license to operate (section II). For each of these axes, you are asked three types of question: intensity question, multiple choice question and open question.

For the first type of question, you must indicate on a scale of 0 to 5 :

1. the impact of the variable on the main axis
2. its probability of occurrence by 2040

For these questions, please select one value only.

Environmental sustainablity

To which degree will global warming impact on climate change? What is the level of probability that climate change will affect the equine activities by 2040? *(0 = no impact : 5 = high impact)* ***Only one possible answer***
To which degree will climate change impact on access to water? What is the level of the probability that access to water will affect the equine activities by 2040? *(0 = no impact : 5 = high impact)* ***Only one possible answer***
To which degree will climate change generate extreme weather events (droughts, floods, etc.)? What is the level of the probability that extreme weather events will affect the equine activities by 2040? *(0 = no impact : 5 = high impact)* ***Only one possible answer***
How much impact will climate change have on the well-being of horses? *(0 = no impact : 5 = high impact)* ***Only one possible answer***
How much impact will climate change have on the health of horses? *(0 = no impact : 5 = high impact)* ***Only one possible answer***

Which tool(s) do you think will be the most effective in the fight against global warming? ***Several answers possible***	1. Legislations, standards, restrictions 2. Public awareness of sustainable development issues (best practice guide, organisation of forums, digital communication campaigns, etc.) 3. Communication on best practice 4. Public funds to support professional investments 5. Incentives measures (Subsidies, credits, labels, certifications ...)

Open-ended question :

1. Could you describe the main legislative proposals in your country concerning the environment ? (Describe the impact of climate change on equine activities).

Social acceptability

To what degree do you estimate the impact of animalist organizations on the global perception of equine activities ?

What is the level of probability that animalist organizations will have an impact on equine activities by 2040 ?

(0 = no impact : 5 = high impact)

Only one possible answer

How will the attraction of outdoor activities affect the global perception of equine activities ?

What is the level of probability that attraction of outdoor activities affect equine activities by 2040 ?

(0 = no impact : 5 = high impact)

Only one possible answer

How will the rise in animal welfare expectations affect the global perception of equine activities ?

What is the level of probability that the rise of animal welfare expectations affect equine activities by 2040 ?

(0 = no impact : 5 = high impact)

Only one possible answer

How will the increase in interest in equine activities focused on the human/animal bond impact on the global perception of equine activities ?

What is the level of probability that interest in equine activities focused on the human/animal bond affect the equines activitie by 2040 ?

(0 = no impact : 5 = high impact)

Only one possible answer

How will the development of artificial intelligence impact on the global perception of equine activities ?

What is the level of probability that development of artificial intelligence affect the equine activities by 2040 ?

(0 = no impact : 5 = high impact)

Only one possible answer

To what extent can working horses (agricultural works, logging, vineyard ...) affect the global perception of equine activities ? What is the level of probability that working horses affect equine activities by 2040 ? *(0 = no impact : 5 = high impact)* ***Only one possible answer***	
How can massive access to information (social networks, internet, forums, etc.) impact on social the global perception of equine activities ? What is the level of probability that massive access to information affect equine activities by 2040 ? *(0 = no impact : 5 = high impact)* ***Only one possible answer***	
What tools could have an influence on the perception of equine activities ? ***Several answers possible***	1. Lesgislation, standards, restrictions 2. Promoting awareness of animal welfare (best practice guide, organisation of forums, digital communication campaigns, etc.) 3. Communication on best practice 4. Public funds to support professional investments 5. Incentives measures (Subsidies, credits, labels, certifications ...)

Open-ended question :

1. Could you describe the main legislative proposals in your country concerning animal welfare ?
2. How are equine activities considered in your country ?

Annex 3 – List of participants in the workshop held on 8 april 2025 in Paris (Vincennes racecourse)

The 30 participants worked on the scenarios, identified opportunities and threats for the sector and contributed to building the EHN roadmap

Name	Organisation	Position
Mark Wentein	European Horse Network (EHN)	President
Florence Gras	European Horse Network (EHN)	Secretary general
Emmanuelle Morvilliers	Society for the promotion of French Trotter (SETF)	Manager of the international department
Marianne Simonnot	Society for the promotion of French Trotter (SETF)	Project Officer – International Department
Sandie Jarrier	French horse and riding Institute (IFCE)	Head of Development, Innovation and Research Unit
Marlène Addes	French horse and riding Institute (IFCE)	EUnetHorse Project Coordinator - Engineer for Technical and Innovative Projects
Amandine Julien	French horse and riding Institute (IFCE)	Manager of the international department and European affairs officer
Louise Rosier	French horse and riding Institute (IFCE)	European affairs officer
Haike Blaauw	Dutch Equestrian Centers Federation (FNRS)	Managing director
Marko Mazeland	International Federation of Icelandic Horse Associations (FEIF)	Representative of FEIF at the EHN
Karolina Lagerlund	Swedish Horse Industry Foundation (HNS)	CEO
David Van Dooren	Belgian Federation of horseracing	
Jan De Boitselier	Belgian Horse Confederation (CBC-BCP)	
Marie Orard	Hippolia cluster	Director
Alycia Rousset	European center of Mont-le-Soie	Agronomist
Lauran Schreiber	EquisFair cluster	Poject manager
Aude Malherbe	French horse society (SHF)	Regional coordinator
Sylvine Pickel-Chevalier	National Institute of Tourism (ESTHUA)	Professor
Tanguy Courtois	Filière Cheval	Public Relations Manager
Catherine Bonnichon - de Rancourt	European equestrian association (EEF) and fédération international de Tourisme équestre (FITE)	Director of European and Institutional Affairs
Quentin Simonet	French equestrian federation (FFE)	Sports manager
Jessica Stark	World Horse Welfare	Director of Communications and Public Affairs
Filip Vande Cappelle	Animal Transportation Association (ATA)	Former president
Charles Trolliet	Equi-scope	President
Michael Köhler	Federation of European Equine Veterinary Associations (FEEVA)	Vice-president
Gabriella Torell Palmquist	Equine Educational Network (EEN)	University teacher
Claire Scicluna	Equ'Institut	Founder
Peter Bollen	European Equine health and Nutrtition Association (EEHNC)	President
Francisco Lima	International equestrian federation (FEI)	Director Governance &. Institutional Affairs
Victoria Lewis	International Group for Equestrian Qualifications (IGEQ)	Treasurer

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