EUnetHorse

POLICY BRIEF

Recognising the Equine Sector: Unlocking its Contribution to Europe's Climate, Rural and Competitiveness Goals

€100 billion annual economic value*

800,000 jobs*

7 million equines*

The European equine sector is a vital socio-economic force. The equine sector encompasses all activities related to breeding, keeping and use of equines. It covers the training and use of horses for races, sport, healthcare services, leisure as well as agricultural work and food production. The sector is supported by a broad ecosystem of associated professions and services, including veterinarians, farriers, specialised service providers and equipment suppliers.

Historically rooted in agriculture, it now contributes to public health, social inclusion, rural revitalisation and sustainable land management. However, amid climate change, economic volatility, and evolving societal expectations, the sector is at a crossroad.

Strategic EU-level support is essential to unlock the full potential of the equine sector

* The European Horse Network is currently conducting a survey to update these figures.

Key Contributions of the Equine Sector to EU Objectives



01 Common Agricultural Policy (CAP) 2028-2034

- Attracts young and female farmers.
- Strengthens rural income diversification.
- Maintains grass-based systems that enhance environmental biodiversity and farm resilience.

02 Research & Competitiveness (FP10, 2028-2034)

- The European equine sector is a global leader, delivering high quality horses, expertise, services and products across sport, breeding and working equines.
- Supporting innovation across the entire value chain reinforces Europe's global leadership and competitiveness in the equine sector.

03 European Green Deal (Climate Neutrality by 2050)

- Manages 2.6 million hectares of permanent grassland, the second-largest carbon sink after forests.
- This makes the sector highly relevant to EU decarbonisation objectives and to the "clean transition & decarbonisation" priority of the European Competitiveness Fund (ECF, 2028–2034).

04 Biodiversity Strategy & Nature Restoration

- Horse grazing preserves fragile ecosystems and improves biodiversity while providing several environmental services.

05 A Free and Democratic Europe – Living up to EU Values at Global Level

- The equine sector contributes directly or indirectly to nearly all of the 17 UN sustainability goals (in particular 3, 5, 8, 9, 10, 12, 13, 15) and, as such, plays a major role in EU's attempt to live up to their values at global level.

06 Farm to Fork Strategy

- Naturally low pesticide use in pastures and forage production for horses. Provision of organic manure as a sustainable fertiliser alternative.

07 Long-Term Vision for Rural Areas

- Offers non-offshorable, inclusive jobs (e.g., 55% women in France).
- Boosts tourism, culture, and equine-assisted services.
- Equine farms strengthen the competitiveness and resilience of rural areas, a core objective of FP10.



Reaffirm the Agricultural Status of Equids

LEGAL COHERENCE

Under EU animal health and veterinary medicinal product legislation, equids may be classified as food-producing animals, while the FAO recognises them as livestock. Their agricultural status should therefore be consistently reflected across EU policies and regulations.

ACTION REQUIRED

In the negotiations on the CAP framework for 2028–2034 — 2025/0241 (COD) — EU institutions must ensure that the definitions of "farmer" and "agricultural activity" fully accommodate equine breeding, production and agricultural land management.

SUPPORTING RATIONALE AND RECOMMENDATIONS

- EU legislation defines agricultural activity as encompassing both livestock production and the maintenance of agricultural land. Equine holdings fulfil these functions through breeding, grazing, pasture and forage management, manure management and grassland maintenance.
- Consistent agricultural recognition is essential to ensure that eligible equine holdings can access CAP support, rural development measures, and EU research and innovation programmes.
- The future CAP framework should make grazing equine production systems eligible for coupled income support, similarly to other grazing livestock sectors, particularly cattle, sheep and goats, in recognition of their comparable contributions to grassland maintenance, biodiversity conservation and rural vitality.
- Equine production systems experiencing economic difficulties or facing a risk of abandonment should have access to appropriate targeted support, particularly where they contribute to maintaining permanent grasslands, local breeds, vulnerable rural territories and environmentally valuable grazing systems.
- Equids should be explicitly eligible under relevant EU research and innovation programmes to address the sector's specific knowledge, sustainability and innovation needs.



Reintegrate Equids in Agricultural Statistics

THE DATA GAP

The ongoing revision of Regulation (EU) 2018/1091 risks excluding equids from the EU agricultural statistics framework for 2030–2039.

IMPACT

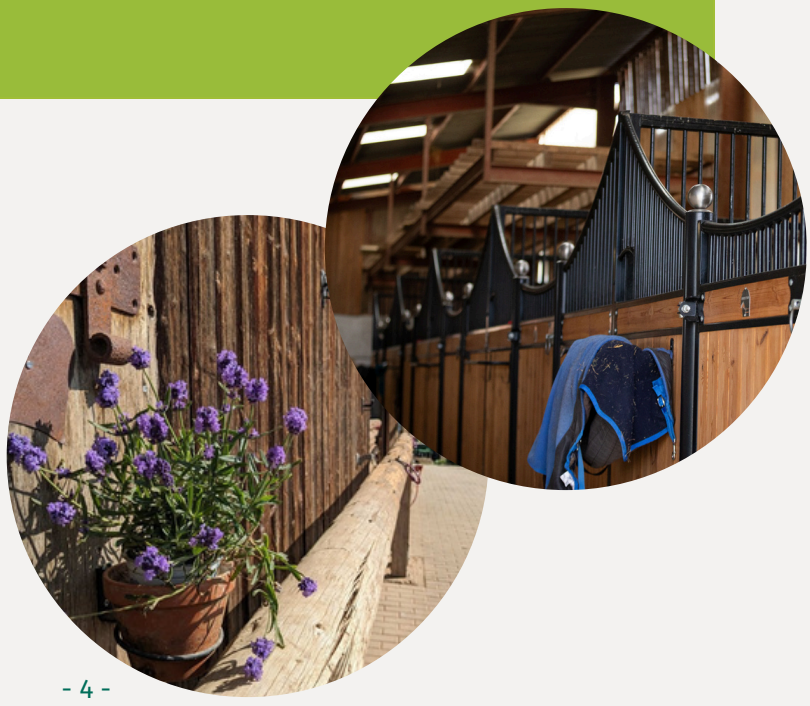
Without reliable and clearly identifiable data, the economic, social and environmental performance of the equine sector cannot be properly assessed, weakening the evidence base for agricultural policymaking.

ACTION REQUIRED

Explicitly include equids and equine holdings in the revised Integrated Farm Statistics framework and ensure their appropriate representation in the Farm Sustainability Data Network.

SUPPORTING RATIONALE AND RECOMMENDATIONS

- The revision of Regulation (EU) 2018/1091 will shape the EU agricultural statistics framework for 2030–2039. Maintaining equine data within its scope is essential to ensure continuity and comparability in EU-wide agricultural reporting.
- Equine holdings must be clearly identifiable as a distinct category. Although some are already included in farm-accounting systems, their data are often aggregated under other farm types, obscuring the sector's specific characteristics and performance.
- The Farm Sustainability Data Network should provide representative data on equine farms, enabling robust assessment of their economic viability and social and environmental sustainability.
- Improved visibility in EU statistics would also make it possible to evaluate and anticipate the effects of agricultural policy changes on the equine sector.



Strategic Research & Innovation Priorities

The next EU Framework Programme for Research and Innovation (FP10, 2028–2034) is under negotiation. The May 2024 report "Research and Innovation Solutions to Improve Livestock System Sustainability" highlights that equines have received very limited support under EU research and innovation programmes to date, compared to other livestock sectors. In their report, the independent experts even noted that 'among the 34 projects analysed, none of them carried out studies on equine species'.

Supporting the specific needs of the equine sector under the next EU Research and Innovation Framework Programme is a decisive opportunity to target funding addressing the following knowledge gaps (identified by EUnetHorse):

Digital Transition

Launch dedicated FP10 calls to support the digital transition of the equine sector, including the development, translation and large-scale deployment of digital tools already identified but requiring substantial IT investment to ensure EU-wide uptake.

Sustainable Systems

Include equines in FP10 topics related to carbon farming, grassland management, water management and reuse, manure valorisation and low-emission livestock systems.

Health and Welfare

Create FP10 research lines addressing equine-specific health challenges, prevention, surveillance, and welfare in sport, work and extensive systems.

Grassland Resilience

Integrate equine farming systems into FP10 calls on forage autonomy and grassland resilience.

Rural Innovation

Ensure that FP10 rural innovation calls consider equine-based business models, mixed farming systems, and the role of equines in territorial competitiveness and diversification.

Social Inclusion

Support research on equine-assisted services (health, education, social inclusion) as part of FP10's health and social innovation interventions.





Equine Welfare Standards

Support research and knowledge transfer projects to increase equine welfare standards and awareness of and adherence to existing welfare guidelines.

Capacity Building

Fund training, capacity-building and cross-border cooperation for equine advisors, trainers and professionals.

Cross-Sector Integration

In general, introduce a requirement that all FP10 livestock, pasture, welfare, climate or rural innovation calls include equines as case studies addressing diverse farming systems/approaches.

Conclusion

The equine sector is a **strategic partner**, and therefore, by recognising its agricultural status, securing its place in statistical monitoring, and investing in targeted research, the EU can **multiply the sector's public value** and secure its contribution to Europe's climate and rural goals.

For more info, see: www.eunethorse.eu

ENDORSED BY

The following organisations endorse the policy recommendations presented in this EUnetHorse Policy Brief.

PARTNERS

Views and opinions expressed are however those of the authors only and do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.

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