

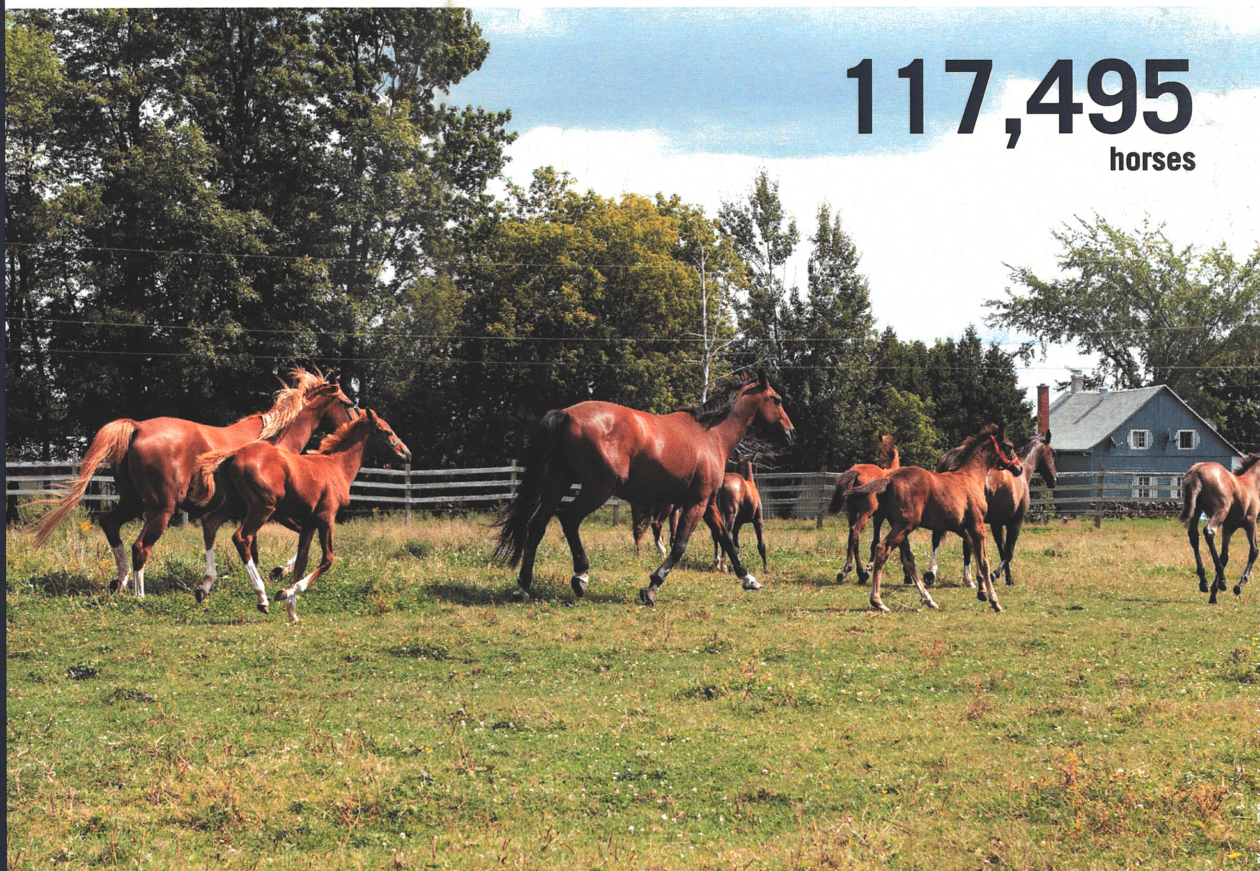
FCQ

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QUEBEC HORSE INDUSTRY TRENDS, EXPERIENCING RAPID EXPANSION

117,495
horses



The *Filière cheval du Québec* has identified performance indicators in order to obtain an accurate portrait of the horse industry in Québec and to track its development, both as a whole and for each of its sub-sectors. These indicators have been consolidated into four separate sections. The *Filière* included data for all horse industry sectors in the first section, while the remaining three deal specifically with horseback riding, breeding and racing.

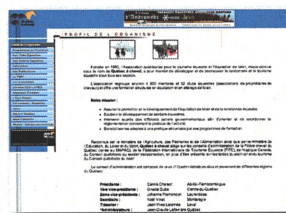
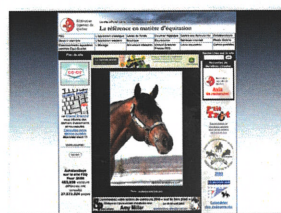
The results for 2007 are presented below.

GENERAL INDICATORS

General indicators were developed to include all sectors of the horse industry and the strengths that emerged have a positive impact on anyone actively involved with this industry.

COMMUNICATIONS

The equestrian industry in Québec boasts **two specialized magazines**, with a total readership of 15,000 per edition and two Webzines with 9,500 members. Québec is also served by a number of Websites, including three major sites: that of the *Fédération équestre du Québec*, *Québec à cheval* and *Filière cheval du Québec*. The three sites combined attracted over **560,000 site visitors** in 2007.



Press run: **15,000**
copies

560,000 site visitors

PROFESSIONNELS

Veterinarians (79) and farriers (148) are the horse professionals in greatest demand. We question why these professionals are not more represented, since they provide essential services. It is also important to note that the *Institut de technologie agroalimentaire* trains 24 equine technicians annually.

227
professionnels

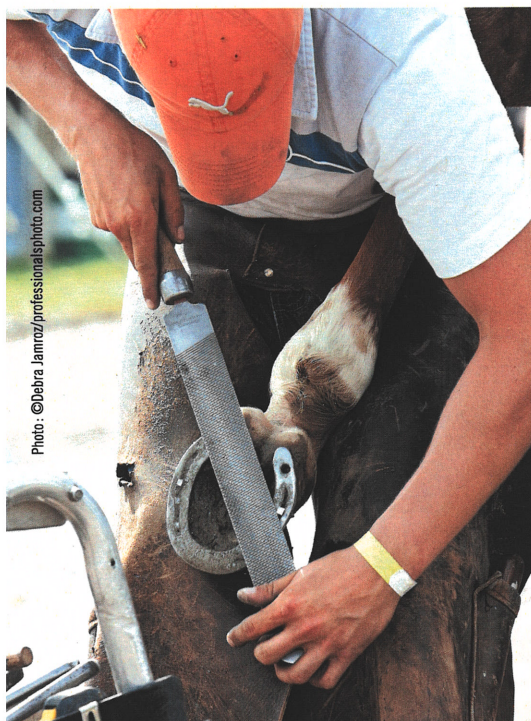
TRAINING ACTIVITIES

As a general rule, ongoing training is essential to ensure health and renewal in any business sector. In this regard, the horse industry continues to hold its own: **769 people took part in professional training activities in 2007.**

769 people attended
one-day training sessions

IMPORTS AND EXPORTS

Québec exported over **3 million kg of horse meat**, mainly to Europe, in 2007, a year which also posted a 25% increase over 2006 exports as a result of the closing of US horse processing plants. In previous years, exports remained relatively stable. As regards to the export of live horses, the current financial situation in the US could mark the beginning of a new trend. **We currently export about twice as many horses (384) as we import.** However, the availability of greater numbers of American horses, at lower cost, could boost our import figures.



EQUESTRIAN SECTOR INDICATORS

417
competition days

HORSES AND STABLES

There are 117,495 horses in Québec, most of them (96%) falling under the equestrian and pleasure riding sector. The horse herd is spread across the province, and is largely found near major urban centres, such as Montréal, Québec City, Trois-Rivières and Sherbrooke. A large proportion of owners (80%) have their own stables, while the remaining 20% board their horses at commercial stables offering a variety of services.

There are an estimated 646 public and 2,357 private stables in Québec. Sixty-eight (68) of the public stables, offering services such as riding lessons, riding camps or boarding facilities, have received Équi-Qualité certification. This certification program was created to help Quebecers choose the equestrian operation best suited to their needs. Certification criteria include general safety practices, equine wellbeing and operator qualifications. **The 68 Équi-Qualité equestrian centers alone employ nearly 450 people, serve 106,427 customers (regular and occasional) and provide 108,651 hours of services (horse rentals, riding lessons and beginner lessons) a year.** Sales are steadily increasing and Équi-Qualité establishments now account for 11% of business for all public stables in Québec. There are 777 people working at various levels in the equestrian sector, most of them as instructors (690). Nearly 15,000 people belong to the two largest equestrian organizations: two-thirds are with the *Fédération équestre du Québec* and the remainder are with *Québec à cheval*. Over the past several years, *Québec à cheval* has incorporated 54 trail riding clubs, whose members enjoy access to nearly 3,000 km of trails.

HORSE SHOWS

Competitions are held on weekends with 87 people acting as officials. Horse shows begin in May and run through the end of September. **During this time, horse shows (417 days) are held at the regional, provincial and national level in a number of disciplines.** The number of events has increased over the past several years, and enthusiasts have a considerable choice of venues.



Photo: ©Debra Lammaz/professionalsphoto.com

108,651 hours
of service



Photo: ©laurienem.com

3,000 km.
of riding trails

646 public stables and
2,357 private stables

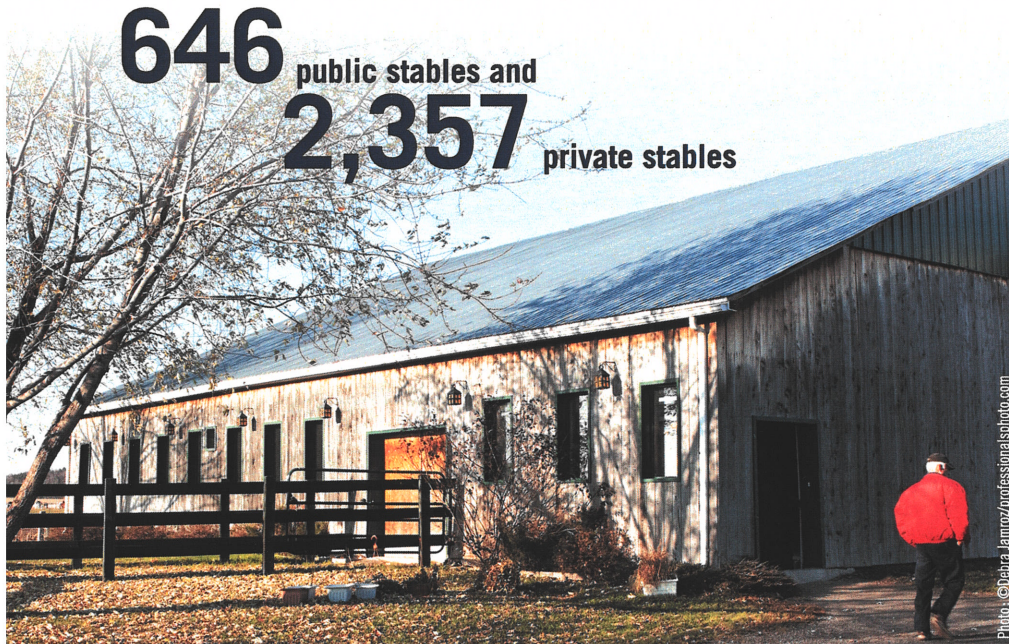


Photo: ©Debra Lammaz/professionalsphoto.com

106,427 customers

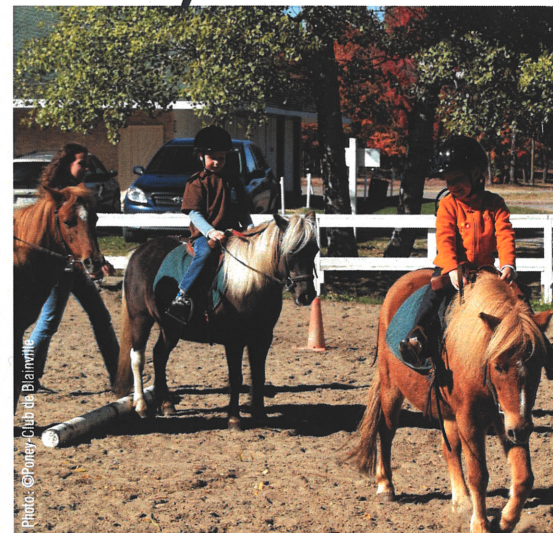


Photo: ©Money Club du Blainville

BREEDING SECTOR INDICATORS

Since 2005, **1,675 purebred colts** have been registered in Québec. Purebred associations boast 2,340 members and in 2007, **740 persons indicated that they were involved in horse breeding (purebred and mixed breeds)**. While this sector is holding its own, it is not presently experiencing significant growth.

1,675
purebred colts



RACING SECTOR INDICATORS

Québec's racetracks were privatized in late 2006. Takeover by the new operator brought an influx of real estate investments to racetrack venues, resulting in the temporary suspension of racing activity. As such, in 2007 there was a major decrease in the number of race programs (265) and total purses offered (\$18.8 M).

The race sector accounted for roughly **5,000 horses**, about half of them ran at least one race in 2007. In this sector, 1,600 people hold one or several of the 6,000 licences issued by the Régie des alcools, des courses et des jeux (trainers, riders, officials, owners, etc.).



5,000 horses