

Movement of Horses

Speaker:

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RACING SOUTH AFRICA – representing the SA Equine Trade Council

The Importance of Improved International Movement of Horses for South Africa

Mr. Peter Gibson – CEO Racing South Africa



A Tale of 17 Years and 2 SAF Champions!



**LONDON NEWS wins the
Queen Elizabeth II Cup in
1997**



**VARIETY CLUB wins the
HK Champions Mile in
2014**



African horse sickness (AHS)

- WW I & II – South Africa exported 300 000 horses by sea – **No AHS**
- 1958 Outbreak of AHS in Middle East – **OIE declares Africa Infected**
- Exception: **USA develops 60 Day POST ARRIVAL Quarantine in New York**
- 1989 Outbreak of AHS in Spain – **1992 Barcelona Olympic Games**



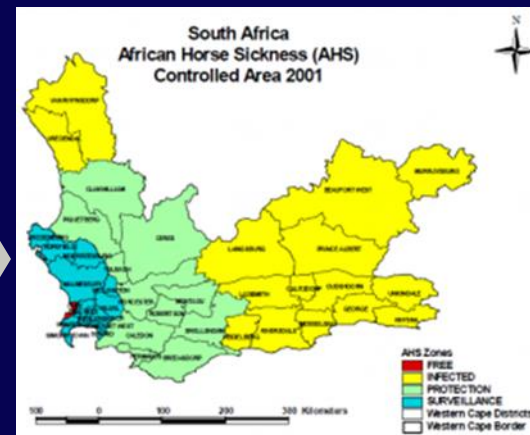


South African Horse Export Protocol

Conditions for horse imports from SA passed into EU legislation in 1997

Based on philosophy developed by the OIE for Barcelona Olympic Games

Establishment of “Free Zone” in Cape Town and surrounding districts

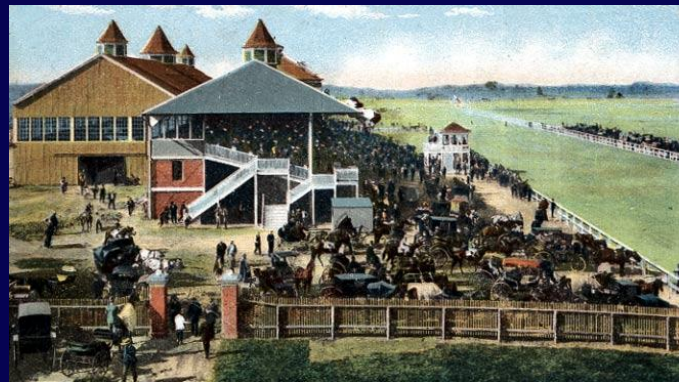


Outbreak of AHS = 24 month suspension!



Overview of South African Horseracing

- 1st recorded race meeting – 200 years ago on Green Point Common
- 1994 – Liberalisation of the Gaming Sector
- Horseracing's share of the gaming market : 100%→7%
- 5 racecourses sold – 9 tracks remain





Overview of South African Horseracing industry

- Breeding – declines across the board**

| | No of registered breeders | No of stallions | No of broodmares |
|------|---------------------------|-----------------|------------------|
| 1986 | 1100 | 310 | 7000 |
| 2010 | 350 | 105 | 3500 |

- Employment - unemployment in SA = 25 %**

| | No of people employed by horseracing in SA |
|------|--|
| 1995 | 100 000 |
| 2009 | 16 000 |

INTERNATIONALISATION IS THE KEY!



Average Earnings Per Horse Per Country in 2012

| | Country | Gross Purse \$ | Runners | Average per horse |
|----|---------------------|-------------------|--------------|-------------------|
| 1 | Hong Kong | 121 151 769 | 1 283 | 94 429 |
| 2 | Japan | 1 127 251 500 | 23 205 | 48 578 |
| 3 | Korea | 161 631 900 | 3 419 | 47 275 |
| 4 | Singapore | 60 252 713 | 1 395 | 43 192 |
| 5 | UAE | 47 196 306 | 1 194 | 39 528 |
| 6 | Macau | 19 383 669 | 614 | 31 569 |
| 7 | France | 264 662 816 | 9 207 | 28 746 |
| 8 | Ireland | 63 717 750 | 2 273 | 28 032 |
| 9 | Turkey | 76 632 865 | 2 810 | 27 271 |
| 10 | Canada | 122 067 551 | 6 547 | 18 645 |
| 11 | USA | 1 034 301 321 | 56 916 | 18 172 |
| 12 | Great Britain | 166 221 355 | 9 614 | 17 290 |
| 13 | Australia | 488 709 074 | 30 371 | 16 091 |
| 14 | Mauritius | 5 042 217 | 426 | 11 836 |
| 15 | Italy | 49 545 946 | 4 811 | 10 298 |
| 16 | Argentina | 91 456 200 | 11 653 | 7 848 |
| 17 | Chile | 30 678 661 | 3 961 | 7 745 |
| 18 | New Zealand | 40 135 990 | 5 319 | 7 546 |
| 19 | South Africa | 40 274 740 | 7 043 | 5 718 |
| 20 | Brazil | 36 184 080 | 6 332 | 5 714 |







South Africa - A Story of Value!

It's a story of **VALUE...**

South African racehorses continue to perform at the highest level and when it comes to value for money, pound for pound nothing compares to South African bloodstock!

2013 INTERNATIONAL YEARLING PRICES IN EACH COUNTRY

| SOUTH AFRICA | US\$ | GB£ | ZAR |
|---|----------------------|----------------------|-------------------------|
|  National Yearling Sale Highest price: Average price: | 365 170 29 950 | 226 930 18 610 | 3 600 000 295 260 |
| Cape Premier Yearling Sale Highest price: Average price: | 329 710 49 140 | 204 860 30 540 | 3 250 000 484 410 |
|  NEW ZEALAND Karaka Premier Sale Highest price: Average price: | 1 632 860 130 690 | 1 014 670 81 200 | 16 097 970 1 288 280 |
|  UNITED STATES Keeneland September Sale Highest price: Average price: | 2 500 000 102 220 | 1 554 660 63 580 | 24 706 420 1 010 200 |
|  AUSTRALIA Sydney Easter Sale Highest price: Average price: | 4 755 980 276 300 | 2 954 710 171 660 | 46 868 610 2 722 890 |
|  UNITED KINGDOM Tattersalls October Sale Highest price: Average price: | 8 040 440 333 690 | 5 000 000 207 500 | 79 448 000 3 297 150 |
|  Combined sales average of all unraced horses is: US\$ 27 800 | | | |



South Africa – Source of Champions!





Potential of SA Horse Export Industry

Current
US\$25million
/annum

Potential
US\$100million
/annum

**Reliable and Regular
delivery system of horses**



South African Horse Export Strategy Workshop

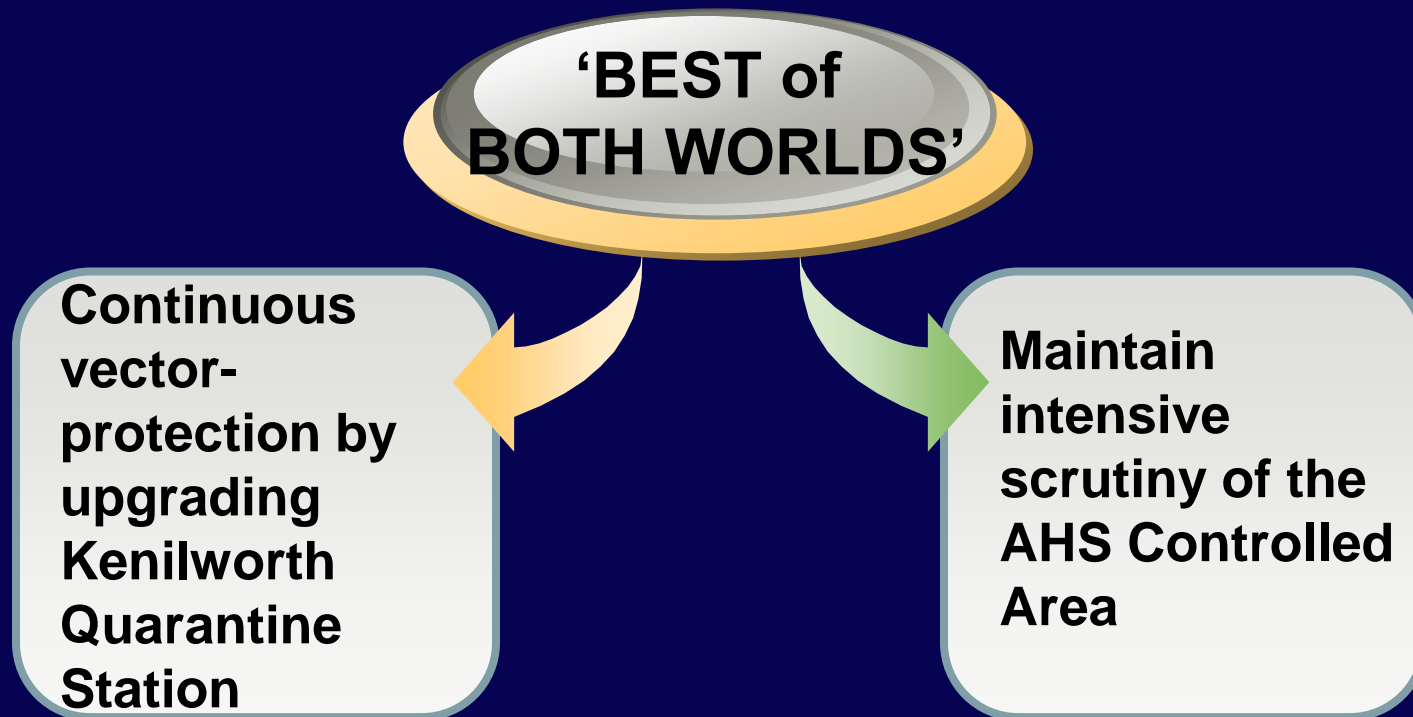
EXPORT SOLUTIONS!



- Upgrade of existing Kenilworth Quarantine Station to allow **CONTINUOUS** vector-protection for duration of quarantine
- Enhanced **SURVEILLANCE** of AHS Controlled Area
- Significant advances in **DIAGNOSTIC TESTING** for AHS
- Other options:
 - **Alternative AHS Free Zone**
 - **USA**
 - **Mauritius**



Spear-heading the New Strategy



THE AIM: importing countries encouraged to revise their import conditions and negotiate new terms with SA veterinary authority



The importance of an EXPORT solution for SA

UPSIDES:

- Growth in EXPORTS, increased share of market worth \$4bn/annum
- Access to SHUTTLE STALLIONS
- Ability to COMPETE in international equestrian competitions
- Ability to HOST international equestrian competitions



Thank You !

