



WBFSH

WORLD BREEDING FEDERATION
FOR SPORT HORSES

2025 ANNUAL REPORT to the General Assembly Nottingham Road (RSA)

WBFSH Department of Development

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1. Introduction

The WBFSH Department of Development, led by Vice President Renai Hart (New Zealand) and Executive Director Katy Holder-Vale (United Kingdom), has dedicated 2024 to strengthening collaboration across the global sport horse breeding industry.

Our work continues to focus on projects that are relevant, forward-looking, and designed to provide lasting benefits to breeders, studbooks, federations, and the wider equestrian community.

2. Objectives

The **State of the Industry Report** remains our central initiative, with the following aims:

- **Engagement** – foster constructive cooperation between WBFSH, member studbooks, breeders, the FEI, National Federations, and riders.
- **Accuracy** – ensure consistent and reliable horse identification and data recording.
- **Insight** – build datasets that enable meaningful analysis and long-term planning.
- **Foresight** – identify emerging challenges and opportunities to prepare members for the future.

By recognising the interdependence of all stakeholders, we aim to build a more sustainable and resilient industry.



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3. Key Themes & Findings

1. Global and Economic Context

The sport horse industry has felt the effects of rising living costs, the aftershocks of COVID-19, and ongoing global conflicts. Surveys indicate that these pressures have impacted breeders, riders, and owners. Questions remain around how far reduced economic confidence has affected participation and demand.

2. Foal Statistics and Auctions

Our 2024 statistical review centred on foals:

- Foal numbers reported by member studbooks.
- Foal auctions, comparing studbook-run with independent events.

Studbook auctions consistently achieved the highest prices and strongest averages, reinforcing their reputation as trusted and reliable platforms.

3. FEI Competition Data

Analysis of FEI competition statistics revealed:

- *Competition numbers* dipped only slightly during COVID, with most countries now returning to 2017 levels.
- *Horse participation* dropped sharply in 2021 and has only partially recovered, remaining below 2017–2019 levels.

This trend suggests that economic conditions continue to influence demand for new horses.

4. Traceability and Breeding Techniques

- Following the adoption of the DNA motion at last year's General Assembly, WBFSH hosted a well-attended webinar to support studbooks transitioning to DNA use.
- In July, WBFSH presented to the European Commission on the traceability of modern breeding techniques. Nadine Brantner delivered a comprehensive presentation covering natural covering, artificial insemination, embryo transfer, cloning, OPU, and ICSI.

Recommendation: All PIOs should record reproductive techniques in foal passports. While some large European studbooks already do so, consistent implementation is essential.

5. Welfare and Best Breeding Practice

- Welfare and transparency remain fundamental to public trust in breeding.
- The WBFSH–Hartpury University Best Breeding Practice project, presented last year, produced 10 welfare principles backed by a two-year scientific study. These principles have since been referenced widely, including at international conferences such as Bucharest.
- WBFSH delivered a webinar presenting the 10 principles to members and is considering extending the project for another two years.



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- The WBFSH Breeding Department has drafted a Charter on Horse Breeding Welfare, inviting members to commit to these principles.

This initiative highlights the shared duty of care across the industry and reinforces WBFSH's leadership role in advancing welfare standards.

4. Looking Ahead

In the years ahead, the Department of Development will:

- Strengthen **data quality and transparency** across breeding and competition systems.
- Monitor **long-term trends** through consistent and comparable data collection.
- Stay **proactive** in addressing welfare, economic, and environmental challenges.
- Promote **pride, accountability, and transparency**, ensuring these values become a source of strength for the industry.

5. Conclusion

The 2024 Annual Report highlights the value of cooperation, transparency, and responsibility across the sport horse breeding sector. By combining rigorous data, forward-looking welfare commitments, and open collaboration, WBFSH and its members are well positioned to shape a sustainable and respected future for the global sports horse industry.