Size and Scope of the

Australian Equine Sector (Non Racing)

Prepared for the Australian Horse Industry Council by IER / March 2025

AHIC
Australian Horse Industry Council
ier

Key Findings

The Australian equine sector is responsible for **generating more than $15.7 billion in value added contribution** to the national economy – **50.7% of which directly benefits regional economies**

Direct Spending Impacts

	Greater Metropolitan	Regional	Total
Total Direct Expenditure[1]	$4,972.7m	$6,311.9m	$11,284.7m

Economic Impacts

	Greater Metropolitan	Regional	Total
Total Value Added[2]	$7,768.6m	$7,985.5m	$15,754.1m
% of Industry Value Added	49.3%	50.7%	
Total Household Income[3]	$3,730.2m	$4,841.1m	$8,571.2m
Total FTE Employment	48,441	53,021	101,462

The Australian equine sector generated total direct spending of $11.3 billion. This expenditure is responsible for creating a direct value added impact (in terms of wages, salaries and profits) of $5.45 billion. However, the flow-on effects linked to this expenditure increase the size of the sector's value added contribution to in excess of $15.7 billion to the Australian equine economy.

Half of the total value added impact occurs in regional areas of Australia, with regional Queensland ($2.98b) representing the largest area of regional economic activity nationally.

The economic output generated by the sector is directly responsible for sustaining 54,154 full time equivalent (FTE) jobs across the country. When flow-on employment impacts are considered, the total FTE impact generated by the sector increases to 101,462 jobs.

This total represents the employment sustained within the sector, as well as the employment that is sustained in supply industries who meet the demand created by horse related activity.

1. Direct expenditure is defined as expenditure associated with breeding and maintenance of horses, improving property for the care of horses as well as travelling and attending equine events. Direct expenditure is counted at the point at which it leaves the sector and reaches the broader economy.

2. Value added contribution is defined as the value of sales less the value of inputs used in production, i.e. it is equal to the income (wages, salaries and profits) generated in production.

3. Household Income is defined as being wages and salaries (before tax) earned from employment generated by the sector.

NOTE: This report does not include racing Thoroughbreds or Standardbreds, nor the cost of breeding or maintaining horses in training for racing.

Of the **101,462 FTE jobs sustained** by the Australian equine sector over **53% are the direct result of horse related activity,** whilst the remainder support down-the-line industries that **produce and supply goods and services** for the equine sector.

In 2024, there are estimated to be more than 1 million horses in Australia[4]. This includes a vast array of breeds including Thoroughbreds and Standardbreds (outside of the national racing jurisdictions), Ponies, Hotbloods, Warmbloods, Stock Horses, American Western and Heavy/Cold Bloods among others. Excluded from these numbers are brumbies and other wild horses.

New South Wales (30.2%), Queensland (29.4%) and Victoria (24.4%) are home to the highest number of horses. Overall, approximately 56% of all horses domiciled in Australia are located in regional parts of Australia.

Horse carers are the lifeblood of the equine sector. They provide the investment, time, skills and passion that underpins the sector in Australia. In total, there are more than 710,000 participants engaged in the caring directly for equines. This includes people who either own or care for horses for the purpose of breeding or other equine pursuits and those who are employed or volunteer in various roles.

Of these roles it's estimated that 100,000 are heavily active in the sector and travel to events and competitions with their horses each year.

At a Glance

Key Numbers

372,800 Horse Carers

Metropolitan	195,400
Regional	177,300

339,700 Support Staff & Volunteers

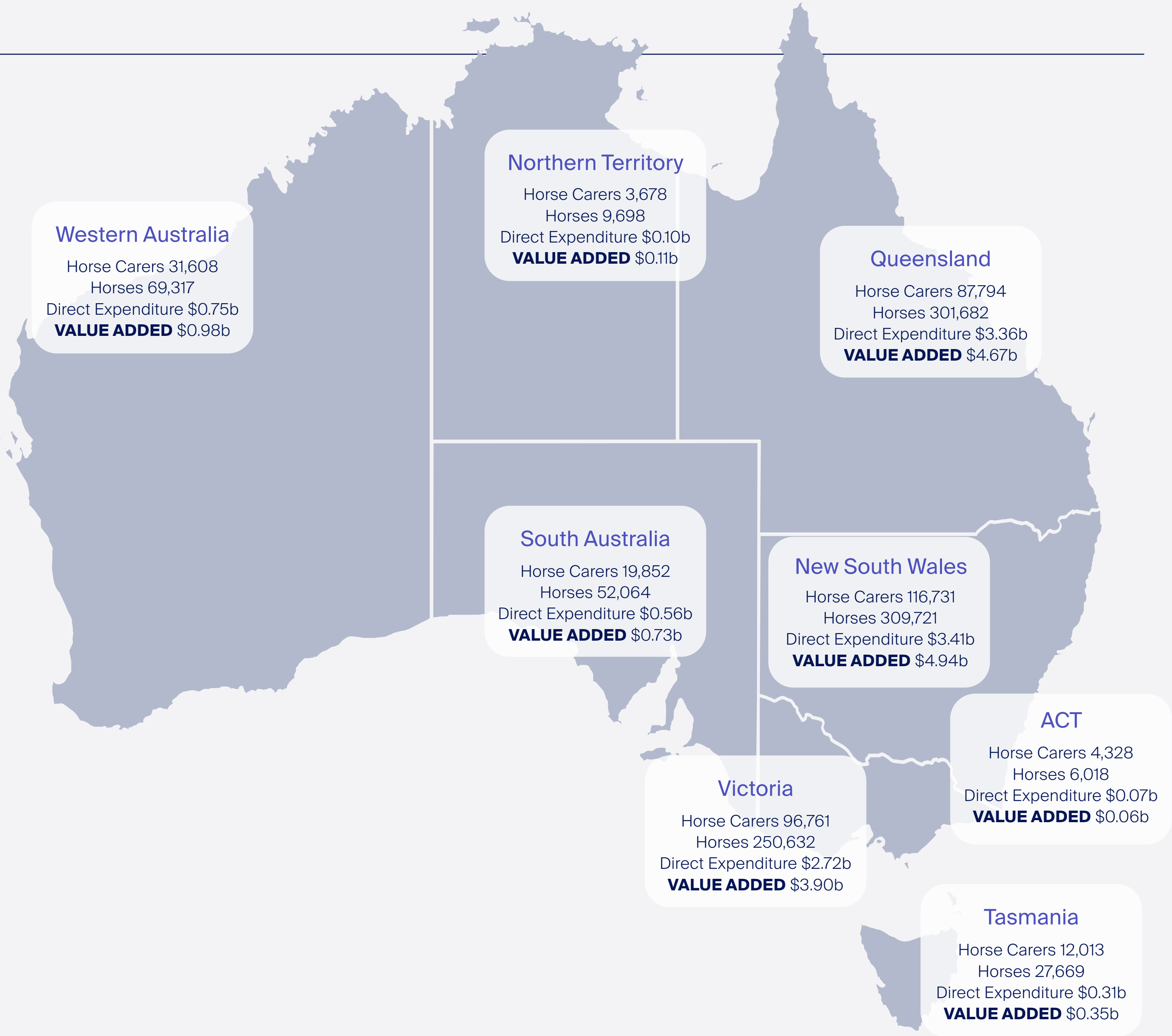
Metropolitan	185,000
Regional	154,700

1,026,800 Horses

Metropolitan	451,500
Regional	575,300

There are more than **1 million horses living in Australia[4]** supported by **more than 712,000 owners and carers**

4. This figure does not include wild horses or breeding and training Thoroughbreds/Standardbreds for training


Western Australia
Horse Carers 31,608
Horses 69,317
Direct Expenditure $0.75b
VALUE ADDED $0.98b
Northern Territory
Horse Carers 3,678
Horses 9,698
Direct Expenditure $0.10b
VALUE ADDED $0.11b
Queensland
Horse Carers 87,794
Horses 301,682
Direct Expenditure $3.36b
VALUE ADDED $4.67b
South Australia
Horse Carers 19,852
Horses 52,064
Direct Expenditure $0.56b
VALUE ADDED $0.73b
New South Wales
Horse Carers 116,731
Horses 309,721
Direct Expenditure $3.41b
VALUE ADDED $4.94b
ACT
Horse Carers 4,328
Horses 6,018
Direct Expenditure $0.07b
VALUE ADDED $0.06b
Victoria
Horse Carers 96,761
Horses 250,632
Direct Expenditure $2.72b
VALUE ADDED $3.90b
Tasmania
Horse Carers 12,013
Horses 27,669
Direct Expenditure $0.31b
VALUE ADDED $0.35b

Introduction

In March 2024, the Australian Horse Industry Council (AHIC) commissioned a study into the size and scope of the Australian Equine Sector. This is the first time a size and scope study has been undertaken to understand the magnitude of the economic and social contribution in Australia.

Purpose of the Study

This study aims to quantify the economic, employment and social contribution that the non racing segment of the equine sector generates in Australia. The report focuses on the national impacts as well as assessing the contribution the equine sector makes for each of the states and territories. The key focus of the study is to investigate the following outcomes attributable to the Australian equine sector:

+ To estimate the equine population in Australia for better disease and bio-security preparedness
+ The number of people involved (i.e. horse owners, carers and support staff) in the sector
+ The full-time equivalent employment generated by horse sector activities
+ The total direct expenditure contribution that the sector makes, in its current form, to the national economy
+ The value added contribution that the sector generates within the Australian economy
+ The social and community importance of participation and involvement within the equine sector – particularly in regional parts of Australia

Study Methodology

In assessing the size and scope of the equine sector in Australia, the study focuses on breeds, competition and leisure horses and excluded any horses related to the racing industry.

The data that underpins this study has been gathered from a number of sources. These are outlined below:

+ A national population study conducted with panel provider Dynata
+ A national participant study to those who own horses
+ IER also interviewed a number of sector specialists from the Australian Horse Industry Council, various equine associations and suppliers to help build an understanding of the equine sector.

Throughout the report, data has been presented at the national, state and regional level. The regional level analysis is based on the Greater Capital City Statistical Area (GCCSA) level framework.

This study also provides an estimate of the number of people involved in the sector, either as an owner or as a support person in the care for horses.

The sample for the nationally representative population study conducted through Dynata was 533 Horse Carer (owners or carers) which was derived from a national sample of 25,430 respondents.

The participant survey was promoted via the AHIC website and social media presence, alongside specific invitations sent to member organisations and breed societies. Additionally, the survey was promoted through Horse Deals and mastheads such as The Land, Farm Weekly and Stock Journal. There were 2,349 responses nationally for the participant survey.

Economic Methodology

The development of an economic model of the equine sector requires an in-depth understanding of the expenses incurred by horse owners on an annual basis.

This study measures the economic contribution made by the sector in Australia. Particular focus was made on identifying the breeds of horses that are active nationally and where the horse is domiciled, for example are they at home with the owner, or are they in another location. Additionally understanding types of activity each horse undertakes is important as expenditure can differ depending on if the horse is used for breeding, competition, working or leisure pursuits.

The final expenditure profile of the sector is based on the following key inputs:

+ the expenditure by owners on products and services such as feed, agistment, farriers, veterinary, transport etc.
+ the average annual expenditure made by owners on improvements to property in order to care for or support their equine activities
+ the expenditure made by participants on travelling to equine events and competitions each year (excluding horse racing) either with or without their horse.

The economic model used within this study follows four key steps:

1 Calculating the non racing equine population In order to estimate the number of non racing horses in Australia, IER has utilised the Australian Bureau of Statistics and panel provider Dynata to first calculate the incidence of horse carers (those that own or care for horses on their property) in each Australian state.

The number of horse carers is then overlayed with the estimated number of horses per horse carer by using the grouped median of respondents for both the Dynata population study and the national participant study.

2 Gathering Sector Expenditure Through both the population and the participant surveys, horse carers were asked to estimate their annual expenditure per horse across key spending categories defined by IER and sector experts to accurately generate the expenditure profile of the sector.

IER is aware that different breeds of horses require different levels of investment (from a breeding and maintenance perspective), and similarly some horses are retired to a paddock and others compete in national level competitions which means it was vital to overlay and understand the type of breed, and the likely activity that each horse is undertaking to derive an accurate expenditure profile.

3 Categorisation of sector expenditure into ANZSIC classifications The equine sector itself does not exist within the Australian and New Zealand Standard Industry Classification (ANZSIC) structure.

For modelling purposes, it is necessary to allocate direct expenditures to the appropriate industry sectors. The majority of expenditures are classified within their relevant ANZSIC codes.

4 Economic modelling IER has utilised an input output methodology for the calculation of economic impacts associated with the equine sector in Australia. The input output model provides direct and indirect impacts in relation to value added, income and employment.

Value added and employment are units of measurement that are based on economic multipliers derived from the national accounts. It is based on the level of value added and employment that is created within specific industry sectors in order to meet final demand expenditure.

Please note: some tables in this report may not add up due to rounding.