

## CHAPTER 25

# The Equine Industry in County Kildare

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### **The Irish Equine Industry**

Horses have long held a special place in the hearts and minds of Irish people. As a result, the equine industry plays a role in Irish society disproportionate to its direct economic impact. This is not to say that the industry is of little economic significance. Direct employment in the different segments of the industry amounts to over 15,000 (in terms of full-time job equivalents), with perhaps a similar number involved in spin-off industries such as accommodation, transport, services and supplies. This employment is divided fairly evenly between the three main industry components: the breeding of thoroughbreds; training and racing; and sport horses (show jumping, eventing and leisure riding).<sup>1</sup>

The bloodstock sector (breeding of thoroughbreds) is undoubtedly the glamour end of the industry, because of the image of high-profile stallions such as the unfortunate Shergar and the enormous sums which are sometimes paid for the offspring of the sector at the yearling sales. In 2003 the fee for a single nomination resulting in a foal by Sadler's Wells, Ireland's top stallion, was almost €300,000. In 2002, 16,500 brood mares were kept on over 900 stud farms in the Republic of Ireland, although most of these were small one- and two-mare operations. This figure was up significantly from 14,700 just two years previously. In fact, there has been very substantial growth in thoroughbred horse breeding in Ireland over the last 35 years, stimulated mainly by the 1969 exemption from tax of the profits made from stallion nomination fees, which led to a major surge of overseas investment in the industry, especially in the 1970s. In 1970, just 2,400 thoroughbred foals were produced in Ireland; by 2002 this figure had reached 10,200. Ireland is now the European Union's foremost producer of thoroughbred foals and the third largest in the world after the USA and Australia, with eight per cent of the global total.

While horse breeding may be the glamour component of the Irish equine industry, horse training and racing is the most popular. The aggregate attendance at race meetings in Ireland in 2002 was 1,287,000, while betting on horse racing, on- and off-course, came to a total of €1,787 million. Horse training and racing have been experiencing a boom period in recent years. While the aggregate attendance at race meetings grew by 11 per cent between 1997-2003, betting (mainly off-course) jumped by 150 per cent in the same period, a clear indication of Ireland's rapidly growing affluence. This growth is reflected in the number of licensed trainers, up 13 per cent to 380 between 1997-2003; the number of registered racehorse owners, up one third to 817 and the number of racehorses in training in Ireland, up 30 per cent to 5,500. In addition, Irish-bred and trained racehorses have been making a big impact internationally for many years. In 2000 Irish-bred horses won 30 group/grade 1 races around the world.

Partly because of its diversity, the sport horse sector has the lowest public profile of the three main components of the Irish equine industry, but in total employment terms, it is comparable to the two other main sectors. Among the activities which come under the banner of this sector are show-jumping, gymkhanas, three-day eventing, point-to-point races, horse shows, polo, hunting, trail riding and trekking and riding schools and clubs. Corbally estimated that in 1993 there were between 58,000 and 68,000 sport horses in Ireland, of which 48,000 were registered.<sup>2</sup> Equestrian holidays have become an important part of the tourist industry with up to 100,000 tourists participating in equestrian pursuits annually. There is also a substantial export market in sport horses.

### **The Equine Industry in County Kildare**

County Kildare has long been by far the leading centre of the equine industry in Ireland. With less than three per cent of the country's agricultural land, Kildare accounts for a quarter of all broodmares and racehorses in training. There are over 160 stud farms and training establishments in the county. However, these proportions do not accurately reflect Kildare's dominant position in the equine industry, as the country's top stallions and trainers are disproportionately concentrated in the county. Ireland's top flat racing and National Hunt race courses, the Curragh and Punchestown, are located in the county. Kildare's position in the sport horse sector is not so prominent, as this sector is much more dispersed around the country, being strongly linked with the tourism industry. Finally, most organisations involved in administering and providing specialist support services to the equine industry are located in Kildare.

The remainder of this chapter examines in some detail the structure of the equine industry in County Kildare. The next section examines the historical,

geographical and environmental factors which help explain the county's leading position in the industry. Subsequent sections review the breeding, training, racing, and sport horse sub sectors of the industry, its various spin-off economic activities and the range of equine organisations based in the county. The chapter concludes with some observations on future prospects for the industry.

### **Origins and Distribution**

The open and well-drained expanse of the Curragh appears to have attracted horse racing activity at least from the middle ages.<sup>3</sup> With the advent of the Anglo-Normans in the late- twelfth century its commonage was protected by law from enclosure and overgrazing. Over the centuries the Curragh became the principal sporting venue for the English administration based in Dublin, and by the eighteenth century horse racing was being carried on there on a highly organised basis. In 1784 the Turf Club was established to control and develop horse racing and it subsequently became the central regulatory body. By the beginning of the nineteenth century the Curragh had become fringed by lodges and their stables belonging to Ireland's leading breeders, who were invariably the landed gentry. The lodges served as residences for trainers working for their aristocratic patrons who put up in the lodges during race weeks. It was only in the twentieth century that specialised training establishments, with professional jockeys catering for a range of clients as distinct from an individual patron, evolved. Kildare's equestrian importance was further enhanced through the establishment of military barracks on the Curragh and in nearby Newbridge and Kildare. Thus thousands of cavalry horses joined their racing counterparts in using the Curragh as an exercise and training ground. The inauguration of the Irish Derby, at what had become the Curragh Racecourse, in 1866 further cemented the Curragh's status as Ireland's premier horse racing venue. The construction of railways linking the racecourse directly to Dublin, Cork, Galway, Limerick and Waterford also played a key role in boosting the area's accessibility to a nationwide clientele.

Other spatial and environmental circumstances were also influential in creating a major concentration of specifically breeding activities in the region around the Curragh. The limestone soils, which underlie much of this part of central County Kildare, are of critical importance for the bloodstock industry.<sup>4</sup> An adequate supply of calcium and phosphorus is necessary for proper bone development in horses. Food concentrates which are fed in large quantities to horses tend to contain a disproportionately high level of phosphorus, which inhibits calcium intake. Pasture and hay with a high calcium content play an important role in balancing out this high phosphorus content.<sup>5</sup> Not surprisingly, therefore, stud farms in Ireland are generally found in the regions with the best limestone-based mineral soils, including not only Kildare but also

Meath, east Limerick, south Tipperary and north and east Cork. The long grazing season made possible by Ireland's cool, damp and temperate climate is also advantageous in this respect (while also making it possible to exercise horses on a year-round basis).

What has allowed Kildare to rise to pre-eminence above these other horse breeding regions is not only the historical legacy of the Curragh, but the further development of the advantages of Dublin's proximity, as the bloodstock industry has become more commercialised and internationalised. Stud farm owners and managers surveyed by Smyth in 1989<sup>6</sup> pointed to the importance of access to Dublin's air- and seaport, the accommodation facilities the capital city provides for visitors (investors, buyers, owners of mares), and the social, cultural and business services it provides for both visitors and stud farm personnel alike. Smyth also found that Kildare's big fields, large farms, and pastoral tradition and the county's well-managed and organised landlord landscape were also attractive for stud farms.

### **The Bloodstock Industry in County Kildare**

The bloodstock industry is primarily involved in the breeding and rearing of race horses. Indeed, while breeding and training are two separate activities which for the most part are carried on by different people in different establishments (stud farms and training stables), they tend to be very strongly interlinked, both economically and spatially. According to the *Irish Field*<sup>7</sup> there were 153 stud farms in County Kildare in 2003 – almost 14 per cent of the 1,103 stud farms listed for the whole country. However, this understates the position of Kildare in the industry, as it has a disproportionate share of large stud farms and leading stallions. Thus, in 1976, Kildare accounted for 32.4 per cent of all stud fees with just 16 per cent of thoroughbred stallions.<sup>8</sup> There clearly has been rapid recent growth in stud farm numbers in Kildare, as the county development plan for 1999 listed 120 stud farms in the county, covering a combined area of 8,842 hectares (21,832 acres) or 6.2 per cent of the total area of arable land.<sup>9</sup>

Figure 25.1, adapted from a map originally published by Kildare County Council, shows the concentration of stud farms and training establishments around the Curragh, but also displays how the stud farm region now stretches north-eastwards from there through Naas and Clane to Celbridge, Maynooth and Kilcock. The absence of stud farms from the bog land of west and north west County Kildare is apparent. There is a sparse distribution of stud farms in the tillage region of south Kildare which suggests that proximity to racecourses and army head quarters were important in shaping their locational geography.

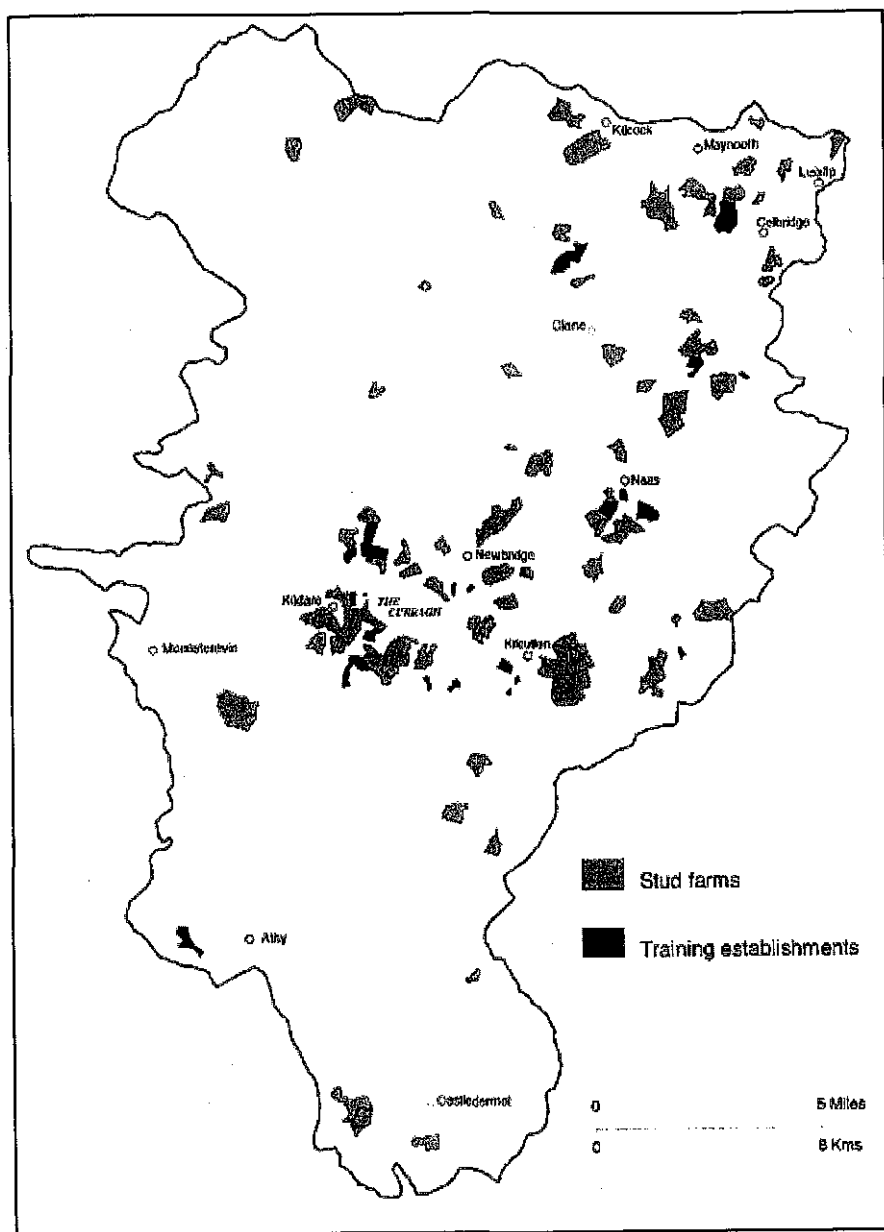


Figure 25.1 – Distribution of stud farms and training establishments in County Kildare (Smyth, 1989, Figure 3.1)

The area around Maynooth emerged as an important secondary concentration of the bloodstock industry in County Kildare during the 1970s and 1980s, with 33 stud farms located within an eight kilometre radius of the town.<sup>10</sup> Some of these are among the largest in the country, including Derrinstown, at over 400 hectares Ireland's second largest stud farm after the 600-hectare Kildangan Stud, located south of Monasterevin in the mid-west of the county. At peak periods Derrinstown houses up to 400 horses. Both Derrinstown and Kildangan are owned by members of the Al-Maktoum family of Dubai which invested over €75 million in the Irish bloodstock industry in the 1980s, and which by 1994 owned eight stud farms, totalling 2,000 hectares, in counties Kildare and Meath.<sup>11</sup>

While some stud farms are purely private enterprises in which the stallions and mares belong to the stud farm owners, most are public studs which charge boarding fees for both stallions and broodmares which are owned by customers or patrons. The stallions are usually owned by shareholders who can either choose to have their own mares covered by the stallion or to sell this right, for which they receive what is known as a nomination fee. During the service period, approximately 15 February - 15 July, the mare-owners will place their horse in a public stud to be covered by a stallion. After this, the mare is kept for the gestation period or returned to another stud. The resultant offspring is sold as a foal, a yearling, or as a three-year-old (jumping horses).

### **The Training and Racing Industry**

Usually the foals and yearlings sold from the stud farms are bought by private investors who then place them in training stables. Horses suitable for flat racing, (which places a premium on speed over short distances, begin racing at the age of two. National Hunt racing, which requires horses to jump over hurdles, fences and ditches and places more emphasis on stamina and good jumping ability, begins at the age of four and may include horses who have graduated from flat racing. The income of the training stable is made up of boarding fees, training fees and a racing fee, including a percentage of the prize money. When the trainer is also a horse owner, income can be supplemented with income from trading .

While much of the offspring from the bloodstock sector is exported abroad, the bulk is retained for training in Ireland, where they are supplemented by horses from abroad which are brought to Ireland for training. As with breeding, County Kildare is the location for a major proportion of horse training establishments. According to the *Irish Field* directory<sup>12</sup>, one fifth of the 391 licensed racehorse trainers in Ireland in 2003 were found in Kildare, along with 11 per cent of permit holders with restricted training licences. In 2000, one quarter of all race horses in training in Ireland were based in Kildare, up from one sixth just two years previously. As with the breeding sector, there is a

disproportionate concentration of top trainers in the county. Thus, in 1998, 57 per cent of all prize money won by the top 40 flat race trainers in Ireland was won by Kildare-based trainers. Figure 26.1 shows that there is a close relationship between the spatial distribution of stud farms and training establishments in the county; in many instances the same establishment serves both functions.

Regular race meetings are held at 27 different venues in Ireland (including Northern Ireland) while many Irish-trained horses also race overseas. The Irish Derby, Ireland's most prestigious flat race, was first run at the Curragh in 1866 but only became a race of international stature when the now-defunct Irish Hospitals Trust contributed £30,000 to its prize fund in 1962.<sup>13</sup> Punchestown, outside Naas, was established as Ireland's first permanent race course in 1842. Its popularity was greatly enhanced by the attendance of Prince Edward at a meeting there during the royal visit in 1868; an estimated 150,000 spectators were present to celebrate the occasion. The Punchestown meet held each year in late April subsequently became Ireland's premier National Hunt festival, a status which it retains to this day. Naas race course, established in 1924, is also part of the Irish racing calendar.

In 2002, race meetings at the three County Kildare racecourses accounted for almost one quarter of all betting on Irish horse races. Over a quarter of a million people attended races at these venues in that year, amounting to one fifth of the total attendance at all meetings in Ireland. No recent data are available on the numbers employed in horse racing in Ireland. However, in 1981, according to the Central Statistics Office,<sup>14</sup> horse racing supported 1,075 full time job equivalents in Ireland, of which 43 per cent were located in County Kildare. This very high proportion may be explained by the location in Kildare of the main centres of racing administration and a number of other support activities.

When they complete their racing careers, many fillies and stallions are channelled back into the breeding segment of the thoroughbred industry, thereby completing the equine production circle. The male horse used for national hunt racing is often castrated so the last link in the circle is not always there. Horse monetary value (and that of its potential offspring) and the nomination fees of a stallion depend on their performances on the race track. The principal income of a horse owner is made up of profits from trading horses and prize money but a proven stallion constitutes the cream of the business.

### **The Sport Horse Industry**

The sport horse industry is involved in the breeding, production and commercial exploitation of sport horses, both for competition and leisure purposes. A sport horse is defined as 'a riding horse of a single breed or a

combination of breeds used for (or intended to be used for) recreational and competitive activities other than racing'.<sup>15</sup> The three main activities in the sport horse industry are breeding, competition and leisure. These activities are usually carried out by, breeding studs, training stables and equestrian centres, respectively. The breeding stud is the equivalent of the public stud farm in the thoroughbred industry. Breeding activities are organised in a fashion similar to the thoroughbred industry. However, because of the lower value of the sport horse *vis-a-vis* the thoroughbred horse, syndication is less common. The sport horse starts competition at an older age than the thoroughbred horse and, for this reason, tends to spend a longer time at the breeding farm. Although some of the horses are sold as foals, most are sold as three-year-olds.

Some foals and three-year-olds are bought by private investors and placed in the stables of professional competitors. These take in customers' sport horses and break and school them to perform in the competition sector (show jumping, eventing, dressage). As is the case with the thoroughbred sector, the competitive performance of the sport horse will determine its value when it is channelled back into the breeding segment of the industry. However, a large number of sport horses leave the breeding sector for the leisure sector. These horses are either directly bought by the equestrian centres as part of their animal inventory or are placed there by private owners. The principal income of equestrian centres is made up of livery fees paid by private owners for maintaining, exercising and schooling of their horses, and income from riding lessons. Some equestrian centres derive additional income from educational activities such as post-Leaving Certificate courses in horse management and the British Horse Society examinations.

There is substantial overlap between the three business segments of the sport horse industry. Thus equestrian centres can be involved in professional competition and/or horse trading. Some breeders also compete. In many cases, horse-related activities form only a part of the larger farming business of breeders and trainers. However, most of the sectors in the industry are specialised.

In contrast to the bloodstock and racing sectors, data relating to the sport horse sector are not readily available. It is clear, however, that the role of Kildare in the sport horse sector is not as prominent as in the other equine sectors.<sup>16</sup> As regards the breeding of sport horses, County Kildare accounted for just three per cent of the total number of foals registered in Ireland in 1995, compared with 11 and 10 per cent, respectively, in Galway and Clare, the leading breeding counties. Just over six per cent of the equestrian centres registered with the Association of Irish Riding Establishments are located in Kildare. While leisure use of sport horses is strongly oriented towards the tourist market and is mainly concentrated in Munster and the West of Ireland, competitive sporting activities are strongly concentrated in the Dublin region.



Approximately nine per cent of those engaged in dressage and 13 per cent of those engaged in horse trials were based in Kildare and 17 per cent of the total number of members of The Showjumping Association of Ireland were resident either in Kildare or Meath.

### **Economic spin-offs of the Equine Industry**

A key and long-recognised feature of economic geography is the way in which localised clusters of activities in particular sectors generate, between them, sufficient demand to make it worthwhile for specialised suppliers to set up in the same areas to cater for the needs of the initial cluster activities. Where these suppliers achieve a high level of sophistication, they may in time develop significant markets in other regions, thus adding to the export markets already being served by the original, so-called 'basic' industries. Furthermore, to the extent that the growing expertise and sophistication of the supply industries enhances the performance of their client industries, these latter may further expand their export markets. Ultimately, therefore, the aggregate employment and income created in the region becomes substantially greater than was the case before this expansion process began. This phenomenon is known as the multiplier effect.

In County Kildare, a wide range of activities has grown up over the years to provide various supports and supplies to the county's basic equine industries (i.e. the bloodstock, training, racing and sport horse sectors). While the precise dividing line between them may not be clear-cut, these spin-off activities can be divided into two categories. First, there is a category of firms and individuals which provide direct service and material inputs to individual operating units within the basic sectors (stud farms, race courses, equestrian centres). These are the focus of the following subsection. Secondly, there is a category of organisations and agencies which provide indirect, general, services and supports to these sectors at large. Many of these agencies have a national remit, but have chosen to locate in Kildare due primarily to its leading position within the Irish equine industry. Thus Kildare has been able to build on its existing strengths to attract activities which further strengthen the regional economy, a process known as cumulative causation. Both of these categories are examined now.

### **Direct input suppliers**

Table 25.1 identifies four separate categories of direct input suppliers to the equine industry. Some of these provide very general and basic materials (wood chips) and services (laundry) while others are highly specialised (saddles, horse boxes) and technologically sophisticated (equine health services).

**TABLE 25.1 – Direct input suppliers to the equine industry**

Consumables	Services	Equipment	Structures
Feed & Supplements	Equine health services	Saddles & tack	Stables
Healthcare/Grooming products	Facility services	Rugs	Sheds
Bedding	Business services	Horse boxes	Arenas
Surface materials (e.g. wood chips)	Agricultural contracting	Horse exercisers	Fencing
Agricultural supplies	Laundry services	Stable equipment & hardware	Gallops
		Riding ware	Flooring
		Office & electronic equipment	Courses

*Source: van Egeraat et al., 1999.*

As regards consumables, feed, including concentrate (oats, nuts, foal pellets, beet pulp, coarse mix), additives/supplements (e.g. minerals and vitamins) and hay, represent one of the biggest costs for all segments of the equine industry. Concentrate is mainly sourced from Carlow and Wexford, as there is no local concentrate manufacturer in Kildare. Of the two main Irish producers of additives/supplements, one is based in Newbridge. Surprisingly, hay of the required quality for the thoroughbred industry is not that readily available in Ireland, and there are substantial imports from Canada, France and the USA. Most veterinary and healthcare products are produced abroad by major transnational firms and are imported into Ireland, although some grooming and leg/h hoof care products are sourced locally. Stable bedding materials like straw, sawdust, shavings and paper bedding and wood chips for use as surface material in gallops, rings and arenas are essentially the by-products of other industries and are sourced from all over Ireland. The main agricultural supply input is fertiliser which is principally supplied by three large Kildare-based firms.

On the services side, clearly good healthcare services are of crucial importance for all sectors of the equine industry. There are four specialised equine veterinary practices, based in and around the Curragh, which cater for most of the industry's needs, although considerable use is also made of general veterinarians. Laboratory testing is mainly carried out by the Irish Equine Centre in Johnstown, near Naas. However, specialised dental and chiropractic services are largely imported. There are some ten farriers located around the county which look after this aspect of the industry's needs.

Bloodstock purchases and sales, bloodstock transport, bloodstock insurance and stallion syndication and nomination are all key specialised elements of the equine industry which are mainly looked after by bloodstock agencies, of which there are four located in County Kildare. A Newbridge-based company specialises in equine computer systems and software. For establishments which do not have their own gallops, public facilities are available in the Curragh and

in Maynooth and Ardclough in the north east of the county. Similarly, for sport horse producers and trainers who do not have their own training arenas, public facilities are available in Kill, Rathcoole and Moone. The long-felt need for a major arena in the county has recently been solved through the establishment in 2002 of the international arena at Punchestown.

As regards equipment, most saddles and tack used in County Kildare are produced by one of three specialist operations based in the vicinity of the Curragh. Trailer horse boxes are mainly imported from England by an agency in Naas which also makes customised boxes for local clients (as well as some stable equipment, such as bins and racks, although most of this is also imported). Motorised horse boxes are principally sourced in England and Northern Ireland. Most permanent structures such as stables, sheds, arenas and gallops are constructed and maintained by general contractors located all over Ireland. However, the erection of fencing for equine establishments is a specialised function which is provided by a number of Kildare-based firms.

#### **General Equine Industry support, regulatory and promotional agencies**

A wide range of agencies and organisations for the support, regulation and promotion of the Irish equine industry are based in Kildare, reflecting the county's premier position within the industry. The most important of these are listed in Table 25.2 and will be discussed in turn in the following paragraphs.

**TABLE 25.2 – *Principal support, regulatory and promotional agencies for the equine industry in Kildare***

The Turf Club
Goffs Ireland
The National Stud
The Irish Equine Centre
The Kildare Horse Development Company
Horse Racing Ireland

#### **The Turf Club**

In 1866 the Turf Club's regulatory authority over all jockeys in Ireland was recognised; in 1890 it was made compulsory for all racecourses to be licensed and all race meetings to be sanctioned by the Club; and in 1904 a requirement that all race horse trainers in Ireland be licensed by the Club was introduced. Meanwhile in 1870 the Turf Club set up the Irish National Hunt Steeplechase Committee as the governing body for National Hunt racing; the Turf Club continued as the corresponding body for flat racing. When the Tote was

established in 1929 it was placed under the control of the Turf Club and the National Hunt Steeplechase Committee. In 1891 the Turf Club moved its headquarters to Dublin, but returned to the Curragh in 1976. Some of the Turf Club's functions, including control of the Tote, passed to Horse Racing Ireland upon its establishment in 2001. However, it retains responsibility for making and enforcing the rules of racing, and sends a team of officials to every race meeting held in Ireland to ensure the integrity of all procedures and activities associated with the event.

### **Goffs Ireland**

Goffs Ireland is by far the main agency for thoroughbred horse sales in Ireland. Goffs traces its origins back to the appointment of Robert J Goff as official auctioneer to the Irish Turf Club in 1866. From this grew the Robert J. Goff auctioneering firm which originally was based in Dublin and specialised in National Hunt horses (which included the iconic pair Arkle and Red Rum), although after World War II there was an increasing flow of eventual flat racing champions through Goff's sales. In 1974, following the sale by the Royal Dublin Society of the premises traditionally used by Goffs for their main sales at Ballsbridge, the firm moved to a purpose-built sales complex at Kill, near Naas. To finance this move, the firm was transformed into a new public company most of whose shareholders were bloodstock breeders, many of them based abroad. With its new facilities, Goffs launched a major marketing drive which saw its share of all Irish horses sold at public auction in Britain and Ireland pass the 50 per cent mark in 1981 (in 1974 over 80 per cent of all Irish horses were sold abroad). In addition to sales, Goffs now provides equine insurance and transport services.

### **The National Stud**

The National Stud at Tully, near Kildare Town, originated as a very successful private stud established in 1900 by Colonel William Hall-Walker (later Lord Wavertree). Tully's celebrated Japanese Garden was created by Hall-Walker. In 1916 Colonel Hall-Walker presented the stud to the British government for the purposes of founding a national stud. In 1943 the operation was taken over by the Irish government which established its own national stud in 1946, with the aim of assisting Irish breeders by providing the services of top-class stallions at reasonable fees. The Racing Apprentice Centre for Education (R.A.C.E.) was established at Tully in 1973 and provides training for jockeys and other persons seeking employment in the bloodstock and horse racing industries, including training programmes in conjunction with the Army Equitation School at the Curragh. The national stud also provides an advisory service for breeders, and engages in equine health research. It is the home of the Irish Horse Museum, part of a range of attractions which make the stud one of Ireland's leading tourist attractions.

### **The Irish Equine Centre**

In 1979, the Irish Equine Foundation Ltd established the Irish Equine Centre (IEC) at Johnstown, near Kildare. The function of this centre is to provide veterinary services for the bloodstock industry and also to undertake research into diseases associated with the industry. It now provides training programmes validated by the University of Limerick. The IEC is an independent organisation with the status of a charity, which is funded from a variety of sources including fees for its services, research grants, Horse Racing Ireland and subventions from the Turf Club and Weatherbys. The IEC has a clientele of over 600 veterinary practices for which it provides diagnostic services in the areas of pathology, microbiology and virology.

### **The Kildare Horse Development Company**

The Kildare Horse Development Company was established in 1997 as an umbrella group for the main actors in the county's equine industry including Goffs, Weatherbys Ireland (an equine services firm which is the recognised authority on pedigree records and blood lines in the bloodstock industry), the Irish Turf Club, the Curragh, Naas and Punchestown racecourses, the Irish National Stud (including RACE), Irish Thoroughbred Marketing, as well as the Kildare Community Network. Its principal functions are to act as a representative group for the county's equine sector, to market and promote the sector and to further develop Kildare's role as a centre of excellence. As part of its promotional function, the company has persuaded Kildare County Council to adopt the image of the thoroughbred as the official county logo and to designate the county as 'The Thoroughbred County', including the erection of road signs to this effect at all the main entrances to the county. The company's website includes a page where the various equine supply firms can advertise themselves, thereby providing a useful directory of locally-available services for the industry.

### **Horse Racing Ireland**

Horse Racing Ireland (HRI) was established in 2001 to take over the functions previously carried out by the Irish Horseracing Authority along with some of the functions of the Turf Club. Headquartered at Kill, County Kildare, HRI is responsible for the overall administration and development of Irish horseracing, the operation of the Registry Office and the Tote, regulation of bookmakers, representation of Irish horseracing internationally and the negotiation of income from the media and broadcasting rights. It is also responsible for the general promotion of the Irish thoroughbred horse through its Irish Thoroughbred Marketing division and owns and operates a number of racecourses. Horse Racing Ireland is responsible for publishing the racing calendar and guaranteeing prize money at race meetings; it also provides finance towards the cost of developing race courses.

The previous sections have drawn a picture of a well-developed equine supply

industry in County Kildare. The concentration of breeders, trainers and producers has attracted a large number of suppliers of inputs and services along with a number of principal supporting institutions and organisations related to the equine industry. This local cluster of supporting enterprises is centred around The Curragh. Although not all the required inputs are actually produced in Kildare, the local network of retailers and distributors is very well developed and some of the inputs that are not locally available can be bought from suppliers located in adjacent counties.

## **Conclusion**

Whether this local supply and support structure would be sufficient to retain the major international investors in the bloodstock industry in the absence of the current tax incentives is not known. Another potential threat to the future development of the equine industry in Kildare relates to the difficulties being experienced in keeping workers in the industry, in view of the low pay rates and long working hours which obtain in some segments of the industry. However, the increasing employment of immigrant workers is going some way towards solving this particular difficulty. At the same time, growing general affluence has provided a substantial boost to the equestrian end of the equine industry. The sport horse sector of the industry received a major boost with the establishment in 2002 of the National Centre for Equestrian & Field Sports at Punchestown, which combines a world-class equestrian training and eventing facility with major exhibition facilities. This centre is likely to create further potential clustering dynamics creating opportunities for new equine-related enterprises and the further development of County Kildare's equine industry complex.

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