



British Equestrian Federation Environmental Sustainability Report

EXECUTIVE SUMMARY

Produced by White Griffin Ltd

A study of the opportunities, challenges and risks presented by environmental sustainability and an industry baseline report with recommendations for action



WHITE GRIFFIN

FOREWORD

Environmental sustainability has long been a topic of concern in sport and in 2022, we decided at British Equestrian (BEF) it was imperative to gain a better understanding of the way in which changes in the environment could impact equestrianism, as part of our ongoing risk assessment. In addition, mindful that our own activities could contribute to some of the negative impacts we were seeing, we wanted to gain insight into how equestrianism impacts the environment in Britain.

This document is an executive summary of the extensive report provided to us by White Griffin, independent equine environmental sustainability specialists, following a six month research project which commenced in early 2023. It will be used as both a compass with which we navigate this complex topic and a launch pad upon which we drive our environmental ambitions and actions across the industry.

The BEF is acutely aware of our collective environmental and social responsibilities, and that equestrianism is more than just a sport – for many, it is a way of life. As such, and as a predominantly rural based industry, we need to better understand its environmental impact and the ways and means to address negative effects, in the short and long term. It is clear that there is no silver bullet to this challenge, but it is vital that the BEF and our members understand where we are now, and how to mitigate and change behaviours to be as environmentally conscious as possible. The overall ambition is for our industry to reduce our negative environmental impact and to inform and educate those involved about our responsibility to the planet.

We look forward to launching our industry response to this report and commencing the vital work, both internally at the BEF and across the industry as a whole, to ensure that equestrianism has a positive impact on the natural world which we so depend on.

A handwritten signature in black ink, appearing to read 'Jim Eyre', with a stylized, cursive script.

Jim Eyre
CEO, British Equestrian

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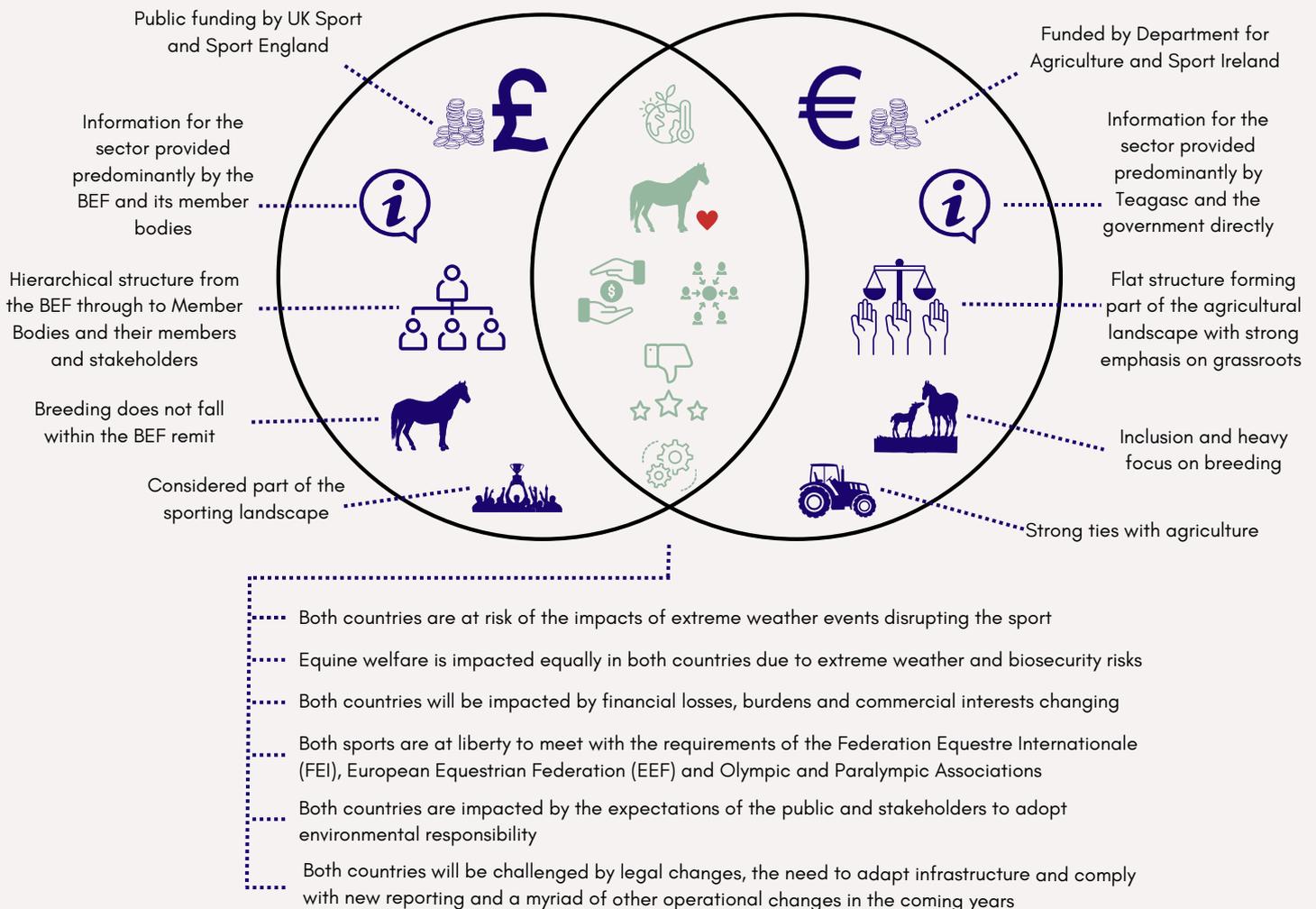
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JOINT FEDERATION APPROACH

The BEF and HSI decided to join together in the creation of this report, as it was felt by the federations that there were so many similarities in the content and approach pertaining to environmental sustainability in equestrianism in general, that it would make sense to combine resources and create an overarching report.

Whilst the research process has reinforced a large proportion of commonality, there are significant differences in terms of governance and funding as well as culture and mindset, which mean that ultimately two separate reports were required, in order to provide the most useful and accurate recommendations for each federation. However, these differences do not preclude the federations from working together in a number of ways now and in the future.



The above diagram illustrates these differences and commonalities and informs both the opportunities presented by a continued collaboration, as well as the recommendations for next steps.

The opportunities presented by continuing to adopt a shared approach to sustainability, begin with the ability to expedite progress by learning from one another and sharing best practice. In doing so, both federations can also seek to save money and time by only creating tools and resources once and working in a unified way with the supply chain to create a larger market force. Ultimately, by continuing to collaborate in certain areas, the federations will demonstrate unity and consistency within the equestrian world, offering a brighter vision for equestrianism's impact on the environment.



Recommendations

1. Devise an overarching vision statement pertaining to the way in which equestrianism seeks to protect and conserve the land and its resources.
2. Decide whether both federations wish to set the same goals and targets.
3. Establish the common shared goals within a joint statement that may be used 'upwards' governmentally, for the EEF and FEI and into the Olympic and Paralympic bodies.
4. Collaborate to learn best practice across the two countries. Devise ways of working to establish a learning programme including site visits, to experience the best examples in each country. Use examples from each country to support governmental lobbying through the appropriate mechanisms.
5. Consider the joint creation of tools and resources that may easily be used by stakeholders across both federations e.g. carbon calculator, how to guides, a centralised communications website or resources hub for sustainability. Jointly fund these tools in order to minimise costs to each federation and expedite the creation of useful resources.
6. Consider an annual environmental sustainability event for all organisations in order to stimulate change and support momentum across all aspects of equestrianism.
7. Create an opportunity for both federations to reflect annually on progress.
8. Consider standardising reporting and measurements for equestrianism, in order that useful comparisons can be made as part of the learning exercise, and to support conversations with the supply chain.
9. Consider a BEF/HSI certified training course and agreed upon standards across the industry. This will support a better understanding of what best practice is and will also help organisations in recognising a levelling of the playing field in terms of investment and expectations.
10. Have a joined up approach to communicating environmental sustainability to the media and public. Ensure that both federations are conveying the same vision and expectations to the public, to ensure clarity and consistency.

ENVIRONMENTAL SUSTAINABILITY CONTEXT

Taking a holistic approach

The topic of environmental sustainability can have a number of meanings and the parameters of what is included in the scope of environmental sustainability differs from organisation to organisation. The issues are broad ranging and interconnected and have been most robustly outlined by the United Nations in the Sustainable Development Goals (SDGs). The SDGs bring together a broad cross section of topics, including poverty, gender and education alongside climate, nature and water. In doing so, they demonstrate that environmental sustainability is part of a wider existential challenge, with seemingly disparate topics coming together to create one holistic approach to a sustainable world by 2030.



Whilst this research project has focused on the 'core' environmental challenges, these should be viewed within the broader social context of sustainability. Within the final chapters of this report, it is demonstrated that by taking a holistic approach to the topics of social licence, horse welfare, equality diversity and inclusion (EDI) and environmental concerns, equestrianism can find solutions to the most pressing existential topics of the industry, in a streamlined and resource efficient way. In this way, equestrianism will progress towards a strategic approach which mirrors the SDGs and the Environmental Social Governance (ESG) model adopted by the most forward thinking and successful businesses of the 21st Century.

The climate crisis

Concerns regarding environmental sustainability have been raised since the 1800s, but it is only in the last few years that a global consensus has been reached amongst scientists and the majority of world leaders. The agreed conclusion states that climate change and its many consequences are derived from human activity and that nature's ability to tolerate that activity is close to a tipping point. To avert the worst consequences of climate change, it is imperative that human activity around the world must change substantially.

The rise in greenhouse gas emissions as a result of the burning of fossil fuels and the removal of nature's ability to sequester carbon (through deforestation, ocean acidification and other destructions of the natural world), have created a rapid warming of the planet, which in turn has caused an increase in the frequency and ferocity of extreme weather events. Because of this, nations across the world have agreed to reducing emissions by half by 2030 and by more than 90% by 2050, in line with Science Based Targets. The Net Zero legal commitment globally, means substantial changes are required to every part of the way we live, work and play.

Secondly, water shortages around the globe impact 1.7 billion people and are forecast to become a serious problem in Britain within 25 years. Water authorities sum up this looming crisis as being a result of climate change factors reducing the supply and a growing population and lifestyle changes increasing demand. The National Framework for Water Resource has been charged with halving leakages, reducing water consumption and finding new water sources in order to deal with the crisis. All of which will impact on individuals and industry in the coming years.

Land use and biodiversity loss are now placed on an equal footing in importance as climate change. Despite ongoing efforts, biodiversity is in crisis, with the loss of 69% of our wildlife and an estimated 420 million hectares of forest, alongside substantial soil degradation which is impacting our food supply and nature's ability to recover. The UK is among the worst in the world for biodiversity loss and has missed nearly all of its targets to restore natural habitats and wildlife in recent years.

Finally, the extraction and use of the Earth's resources to fulfil our wants and needs has created a shortage, along with a waste crisis. Not only are we struggling to rid ourselves of plastic pollution, but we are contributing further greenhouse gases to the atmosphere through the production of 'stuff' and the use of landfill and incineration to dispose of it.



Against this backdrop, it is no longer possible for organisations to regard environmental sustainability as merely an option. For legal, financial, operational and reputational reasons, it is now an inevitability and a necessity.

The probable consequences of environmental issues within the next 10 - 50 years in the UK are a chronic demand for water, extreme weather events, food insecurity and a breakdown in the supply chain. Whilst we are striving collectively to reduce the worst impacts of climate change, it is important to understand that environmental sustainability is not just about reduction, it is also about resilience through mitigation and adaptation, against the known impacts that will occur due to the inaction to date globally in addressing the problem.

The impact on sport and agriculture

Sport and agriculture are both impacted substantially by climate change and environmental sustainability, and both industries have taken action in recent years.

The loss of playing surfaces, fixture cancellations, poor air quality for players and intolerable conditions have all impacted sport from elite to grass roots level. Not only does sport impact the environment through its operations, it is directly impacted by the changing climate and therefore clubs, federations, venues and even athletes have begun to mobilise action both to reduce impact and mitigate against it. In 2023, we have also seen a rise in activism at sporting fixtures, as well as pressure from event goers to adopt a more robust stance and think carefully about their choice of commercial partners.

The agriculture sector also faces significant changes to operations and funding, with the introduction of the 2020 Agriculture Act and ever-present threats to the viability of soil and climate conditions on the production of crops and the ability to rear animals. Tools, resources and funding are all in place to support the farming industry in making the transition to a sustainable future.

However despite these efforts, neither sport nor agriculture offer equine specific guidance in relation to environmental sustainability, action and impacts.

The imperative to act

The planet is in crisis and we are rapidly edging towards a tipping point. There is a moral and ethical imperative for all businesses and individuals to change both mindset and activities, in order to safeguard a liveable future for the next generation.

With funding, regulators, stakeholders and the public all accelerating in both their awareness of and expectations surrounding environmental sustainability, it is imperative that equestrianism hastens its understanding of its role in the wider environmental picture and puts in place a robust plan of action to address the risks, challenges and opportunities of this global crisis, that works in harmony with the other key drivers of social licence and horse welfare.





"We all need to do our share to minimise the impact of climate change, and as land owners or users of land, equestrians have a bigger part than most to play. Use of solar panels, organic fertilisers and rainwater capture should be top of all of our lists at the very least."

~Questionnaire respondent

THE IMPACT OF EQUESTRIANISM ON THE ENVIRONMENT

To understand the risks, challenges and opportunities of environmental sustainability and equestrianism, we must first understand the way in which equestrianism positively and negatively impacts all aspects of the environment.

Use of fossil fuels and production of emissions



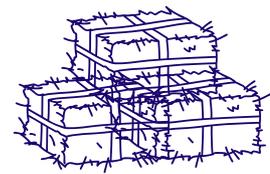
Energy for infrastructure and generator use



Petrol and diesel transport for people and horses



Diesel for equipment and machinery



Scope 3 (indirect) emissions

Equestrianism relies heavily on fossil fuels for its operations, whether that be at the high performance level or within leisure riding. Facilities need energy for power, events require generators for horse boxes and event supply and all vehicles, equipment and machinery utilise petrol or diesel. Additionally, as with all industries, emissions are produced through our scope three activities, in particular the production of feed and bedding. We know that as part of the Net Zero commitment, all industries must decarbonise their operations and this will be a challenge for equestrianism.

Use of water

Water is a fundamental part of our operations, particularly to maintain horse welfare through drinking water, washing and cooling down. Understanding that all businesses and individuals will be expected to reduce their water consumption in the coming years, it is imperative that we seek to find sustainable ways to be able to maintain a ready access to water for our horses, whilst also minimising our use in other areas. This will mean consideration for how we maintain our competition surfaces and the water we use within our buildings for sanitation.



“Not enough is done to manage wildlife areas alongside horse grazing fields. This is seen at livery yards and show jumping venues. There seems to be a presumption of importance for the horse to the detriment of other species.”

~ Questionnaire respondent

Use of the land and biodiversity impacts

Unlike most other sports, equestrianism requires substantial amounts of land in order to function. Many of the disciplines, including eventing, carriage driving, endurance and polocrosse require large acreage for competitions. Riding schools, livery yards, indeed any individual or business maintaining a horse requires acres of paddocks in which to allow horses to graze. And of course land is required in order to produce feed and bedding for equines. Even as a leisure pursuit, land is fundamental to the activity for trekking and hacking. But the use of the land for horses is not always considered a positive one, indeed horses are often considered to be ‘bad for the land,’ mainly because of the way in which most horses are kept in overstocked conditions. Horses can be both beneficial and have a negative impact on the land, depending on a variety of factors.



Soil degradation and mono cultures

In the wild, horses form a key part of the ecosystem, selectively grazing over 100 species of plant, shrub and tree, dispersing seeds over large distances, lightly poaching the land, to the benefit of small organisms. However our domesticated horses often live in smaller areas with less diversity of grass, which leads to a greater degree of poaching, the development of mono cultures and the degradation of the soil. Equally, the removal of nutrient rich manure from the soil as part of domestic mucking out routines, impedes the soil quality. As one equine academic expert stated “by overstocking and not considering fundamentals of land stewardship, the land becomes heavily poached, there is no proper grass growth. You need good levels of

sward to encourage biodiversity and habitat for nature. The real problem for the horse industry is how do you do that?”

The most common concern cited by horse owners and equine vets is the potential damage caused by manure and worming drugs. These are two distinct, but equally problematic issues. Manure is a useful source of fertiliser and an important part of the cycle within an ecosystem. However, because of the use of supplements for domestic equines, manure is rich in nitrates which, when dispersed on the land disrupts the ecosystem. Nitrophiles like nettles, dominate a spot or area with high levels of nitrates, which push other plants and therefore the broader ecosystem out. This is even more problematic in water courses, causing the creation of ‘blooms’ leading to eutrophication which leads to life within the waterway dying out. Secondly, the presence of worming drugs passing from the equine stomach, through the manure and into the land and waterways, is contributing to the decimation of important invertebrate, including the dung beetle.



Pollution, nitrates and biodiversity loss

Whilst horses can be beneficial to the land, forming part of a natural ecosystem, the way in which modern equine management has evolved is at odds with the needs of biodiversity. To be responsible land managers, horse owners and venues must adopt a different mindset and set of practices.



“Consideration needs to be given for the impact of packaging (feed, bedding, equipment) on the environment. I think there needs to be a move away from single use plastics and place more importance on discouraging excessive consumption of products within the equine industry.”
 ~Questionnaire respondent

Use of resources and waste management

As with every other business and industry, equestrianism requires resources to function and also produces a variety of waste. The industry has a large supply chain providing a range of resources, including feed, bedding, tack, transportation, equipment, supplements and clothing. All of these items require resources from the land to be produced and they in turn all become waste at some point in their lifecycle. In equestrianism, through our events in particular, we must be mindful of how we use and dispose of our resources and how this is perceived by the public.



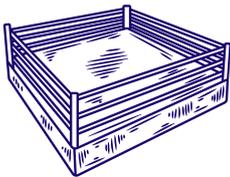
Solid waste produced from the day to day running of all organisations



Food waste produced from organisations with catering functions



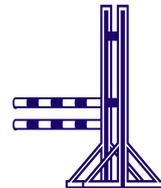
Plastic use and disposal



The creation of waste from our arena surfaces



Muck heaps



Large scale waste derived from equipment

Whether it be the plastic containers for supplements, plastic wrap on bales or plastic used in catering, the removal of single use plastics in favour of a circular option should be considered as a priority in 2024. Larger challenges are the arena surfaces and large scale equipment, which will require innovation from the supply chain.

“Building sustainability into the supply chain is critical in order for small changes - such as not wrapping shavings in plastic, or providing paper bags of supplement refills - to have a major impact.”
 ~Questionnaire respondent

83% of questionnaire respondents rated improving waste and recycling as the most important measure to take

RISKS

The risks posed by environmental sustainability are considerable and should be carefully understood. They provide us with both the motivation to act beyond the moral and ethical drivers, as well as a roadmap for activity to mitigate against these risks. The following table shows at a glance the risk register for environmental sustainability in equestrianism broken down by category, level of risk and proximity of the risk.

TYPE OF RISK	SPECIFIC RISK
The following issues present a <u>serious risk</u> to the industry <u>within the next two years</u>	
Environmental & climate related	Flooding and cancellations of events due to poor weather conditions
Environmental & climate related	Impact of heat and sudden temperature changes on horse welfare
Environmental & climate related	Unpredictable weather patterns impacting operational planning
Environmental & climate related	Storms and storm damage affecting properties
Horse welfare	Ground conditions at events impacting horse welfare
Horse welfare	Equine ability to cope with extreme conditions
Legal	Phasing out diesel and petrol for vehicles, machinery and equipment
Legal	Phasing out of plastics and reforms to resource use and waste
Legal	Manure storage and disposal
Financial	Cost of infrastructure, price rises and disruption to the supply chain
Reputational risk and social licence	Perception of lack of care for the environment and social standing
Reputational risk and social licence	Single use plastics and waste at events
Reputational risk and social licence	Water use during hose pipe bans
Commercial	Selecting challenging sponsors/not appealing to brands with purpose
Stakeholder led risks	UK Sport requirements for National Governing Bodies to have sustainability plans
Stakeholder led risks	Sport England requirements predicating future funding
Stakeholder led risks	British Olympic Association expecting sustainability as the norm





The following issues present a serious risk to the industry within the next three to ten years

Environmental and climate related	Land availability and supply chain insecurity due to climate change
Operational	Requirement to reduce/remove consumption of fossil fuels
Operational	Requirement to shift from diesel and petrol transportation
Horse welfare	Spread of disease due to climate change
Legal	Reporting requirements to become mandatory for some businesses
Legal	Water usage and availability impacting operations and prices
Reputational risk and social licence	Lack of biodiversity in large green spaces when land use at a premium
Reputational risk and social licence	Use of fossil fuels
Commercial	Risk to funding from stakeholders and sponsors
Commercial	Loss of ability to host events based on minimum standards required
Commercial	Supply chain expectations to meet with internal sustainability targets

The following issues present a moderate risk to the industry within the next two years

Operational	Access to land over concerns of damage caused by equine sport
Operational	Changes to operations due to the environment e.g. mowing schedules
Operational	Stretching an overstretched team with additional requirements
Legal	Land management and biodiversity mandates to support targets
Legal	Greenwashing and the trade descriptions act
Financial	Cost of inappropriate environmental management
Stakeholder led	The European Equestrian Federation mandating sustainability strategies

The following issues present a moderate risk to the industry within the next three to ten years

Stakeholder led	The Charities Commission mandating sustainability strategies
Stakeholder led	Federation Equestre International mandating minimum requirements
Stakeholder led	British Paralympic Association (BPA) mandating minimum requirements

The risks posed by environmental sustainability are considerable. On a fundamental level, extreme weather events create dangerous and unworkable conditions for horse welfare due to excessive heat and flood risk. Heavy rainfall and periods of drought are already impacting the event calendar with cancellations becoming more common place. Operational practices are having to change to accommodate the unpredictable weather, including how best to manage the event surfaces. Planning for the acceleration and worsening of extreme weather will need to form an important part of the industry's strategy and infrastructure funding moving forward.

Additionally, there are a number of risks to consider surrounding operational, financial and commercial challenges. From the requirement to invest in infrastructure to the loss of revenue through cancellations, rising supply chain costs and sponsors aligning with environmental brands, there are several areas to consider in order to safeguard the industry's future. These challenges don't just impact large events, but smaller entities too, as clubs and liveries already struggling to manage financially will be hit with additional burdens and rising costs.

The lack of viable transport options presents a significant risk to the industry as the UK moves towards a ban on new petrol and diesel vehicles in 2030. Other legal risks include the potential introduction of regulations to support the government's Net Zero target, which could seriously impact the ability of equestrianism to operate. This has already been seen in the introduction of the red diesel ban. Changes to land management payment schemes, mandatory reporting requirements and legislation surrounding water usage, all pose a risk to those operating in the equestrian sector.

There is a significant overlap between the environment and horse welfare, with equines impacted by extreme weather, as well as the threat of new diseases entering the UK via vectors now able to enjoy warmer temperatures on the island. These diseases, if not considered, would be fatal to horses and the response from the government and equine agencies would need to be robust in order to quarantine affected areas.

The lack of action or progress surrounding environmental sustainability risks further damage to social licence for equestrianism, as the public puts increasing pressure on organisations to do the right thing. This will become apparent not just at events, where we have already seen a sea change in the way event goers perceive the minimum standard expected at events, but also in the way that the industry utilises water during hose pipe bans and periods of drought and our management of the land, as comprehension of the biodiversity crisis increases.

Arguably the biggest risk to equestrianism is the need to align with key funding streams and federations in order to ensure the financial viability of the sport going forward. UK Sport's 2023 strategy has made clear the need for all federations to have a robust environmental strategy by 2025 and Sport England has indicated funding will be contingent on robust strategies being in place. The British Olympic Association has been clear that any sport wishing to remain an Olympic sport beyond the next cycle, must adopt a strong and coherent stance on the environment. If the BEF and indeed British Showjumping, British Dressage and British Eventing wish to continue to be Olympic and Paralympic sports, it is imperative that a suitable environmental strategy is established within the next 12 months.

CHALLENGES

Based on the impact equestrianism has on the environment and the risks associated with all forms of environmental sustainability, it is clear that action is required. However, there are a number of challenges to consider before any plans are drafted and strategies put in place. It is only by understanding these challenges that we can create a workable and achievable strategy for the whole industry.



**LACK OF
KNOWLEDGE &
UNDERSTANDING**



**FEAR OF
CRITICISM**

“Education, education, education – far too many people involved in equestrian sports and industries don’t think there’s a problem, and if there is, it doesn’t affect them. We have to make them understand that they are wrong – there is and it does.”

~ Questionnaire respondent

In all industries, the concept of environmental sustainability can be a challenging one that is met with nervousness and hesitation. It is important to recognise that whilst the majority of people are eager to support environmental improvements, there will be some who are less enthusiastic, who disagree that environmental sustainability is an issue for equestrianism, or even that climate change exists. Many interviewees and questionnaire respondents felt that there was a general lack of awareness of the topic, that it is not discussed anywhere in the industry except when people feel it presents a threat to traditional methods. Therefore, it is important to support everyone in the sector with understanding both the impact equestrianism has on the environment and the risks of environmental sustainability on equestrianism.

In general, there is a great deal of fear surrounding environmental sustainability, particularly in talking about the steps that have already been taken by an organisation, for fear of being accused of greenwashing, doing the wrong thing or not doing enough. Though a common attitude, this prevents the topic from being normalised in the sport and for other venues and events to gain confidence in what is possible. It also precludes the venues from gaining any competitive advantage from having undertaken these steps.

Whilst there are a myriad of tools and resources to support sport, agriculture and business, there is nothing available to support the equine sector, which means that anyone trying to make changes has to adapt data concerning cows or cricket pitches in order to create a tool that is useful to them.



**LACK OF EQUINE
SPECIFIC TOOLS
AND RESOURCES**

“After trying to work out our carbon footprint in a bid to offset it by supporting seahorse habitat around the British coast we found it impossible to work out. We could just about work out our own and visitors carbon footprint but we need more information and resources from suppliers eg. feed, bedding.”

~ Questionnaire respondent

Without accurate data gathering, it is very difficult to measure and monitor change, which is a fundamental part of reduction methods, but also influencing behaviour change.

It is important to get a clear and simple message out to support organisations in making changes, however due to the complexity of the industry, there is no one size fits all guidance on most topics for equestrians. Not every system that could be put in place on a piece of land is right for every animal. There is a big difference between advice that one might give to the owner of a sport horse versus a leisure horse for example. This is challenging as the key to successful leadership during a period of change, is to deliver a simple message consistently. In this instance, the detail of that message is vastly different for each stakeholder from top to bottom.



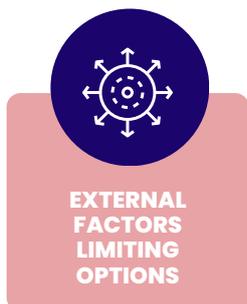
At present there is little pressure from consumers to make changes. This is especially true in the supply chain whereby transport companies stated that they are not being asked to produce electric, hydrogen or hybrid vehicles by their customers. Without legislation to force change, or consumers voting with their wallets, there is little drive for businesses to invest time, money or resources into environmental responsibility.

Whilst equestrianism in the UK is closely tied to sport, there are more commonalities and more useful collaborations to be had with agriculture. Because the two are not naturally positioned together at a government level, or even from a cultural perspective, equestrianism is missing out on agricultural funding opportunities, access to resources and general knowledge of land stewardship and requirements expected of land owners under the new environmental guidelines. Whilst this may mean that equestrianism is 'left alone' to carry on operating in a business as usual format, it is more concerning that lack of consideration for the sector means that regulations are brought in without an understanding of the impact on equestrian businesses, for example the change to the red diesel law which exempted golf and cricket, but not equine sports. This extends to the classification of equestrianism, leading to issues like riding schools not being eligible to access funding schemes because they are not considered 'farms'.

"I am a farmer. The equestrian industry is light years behind in environmental stewardship."
~Questionnaire respondent



In order to create change, an organisation must have control over operations. In many cases for the equestrian stakeholders, this is not straight forward, with many having a restricted scope of influence. Equally, it should be acknowledged that the BEF and its member bodies only have visibility of affiliated riders and are unable to directly influence change within the other 50% of the equine community.



"Many equestrian businesses run from rural locations and with older buildings which do not work well with such technologies. Schemes need to be more adaptable (...) For instance, we have a large south facing barn roof which is ideal for solar - however, current government schemes require us to fit an air source heat pump and thick insulation panels to a 100 year old listed building of non standard construction before they will consider this. Quite apart from the impact on a listed building all surveyors confirm that air source simply isn't suitable and the only insulation allowed will cause other issues! If you want small rural businesses (and most equestrian business falls into this description) to adopt renewable energy then you have to make it both appropriate and affordable."
~Questionnaire respondent



SUPPLY CHAIN CHALLENGES

Without the support of the supply chain, it is very difficult for other businesses to make environmental commitments. But changes for businesses within the supply chain are not always straight forward, for example certain materials may be required for equine welfare and biosecurity reasons and typically, any changes towards sustainability will require an element of investment for example in RnD to make changes to packaging. However, until the supply chain provides low carbon, sustainably packaged, ethical products, it will be a challenge for any business to reduce their scope 3 emissions and waste consumption.



COMPETING PRIORITIES



LACK OF TIME AND MONEY

“Feed, supplement and other companies (shampoos, ointments, etc) need to look at how much plastic is in their packaging - it’s impossible not to create plastic waste at the yard as so little of it is recyclable.”

~Questionnaire respondent

Environmental responsibility forms the foundations for a healthy industry, however there are a number of important competing priorities which mean that for many, prioritising action on climate and environmental protections simply is not possible. Operational stresses mean that those working in equestrianism often do not have the time to attempt projects outside of the day to day. Equally, the need to adopt more sustainable habits may compete with the need to travel long distances for events, or a charity taking in horses for welfare reasons resulting in overstocking the paddocks. There are no excess funds to spend on environmental initiatives and infrastructure, therefore any investments may take away from other financial priorities.

“I feel very aware things have to change but I don’t know how most competition centres or riding schools would afford to make the changes. Most measures (renewable energy, water recycling etc) are very expensive to install.”

~Questionnaire respondent

The pressure to act on key topics like horse welfare and social licence, equality diversity and inclusion and participation, all leaves less time and resource to work on the changes necessary to tackle the topic of the environment. Indeed some measures that are positive for the environment, may not be appropriate for disabled equestrians. Therefore, is it important that when considering our strategy for sustainability, that the broader needs and concerns of the industry are considered.

The BEF has a challenging task to devise a strategy that will meet with the different needs of a broad range of stakeholders. Within the industry, organisations and individuals have different requirements, different resource levels, different expertise, different organisational challenges, different funding mechanisms, different stakeholders - some of whom are associated with other member bodies too. There are those involved in high performance sport through to leisure riders, different home nations, urban and rural. Therefore, an industrywide approach needs to speak to all those differences, whilst unifying everyone within a common vision.

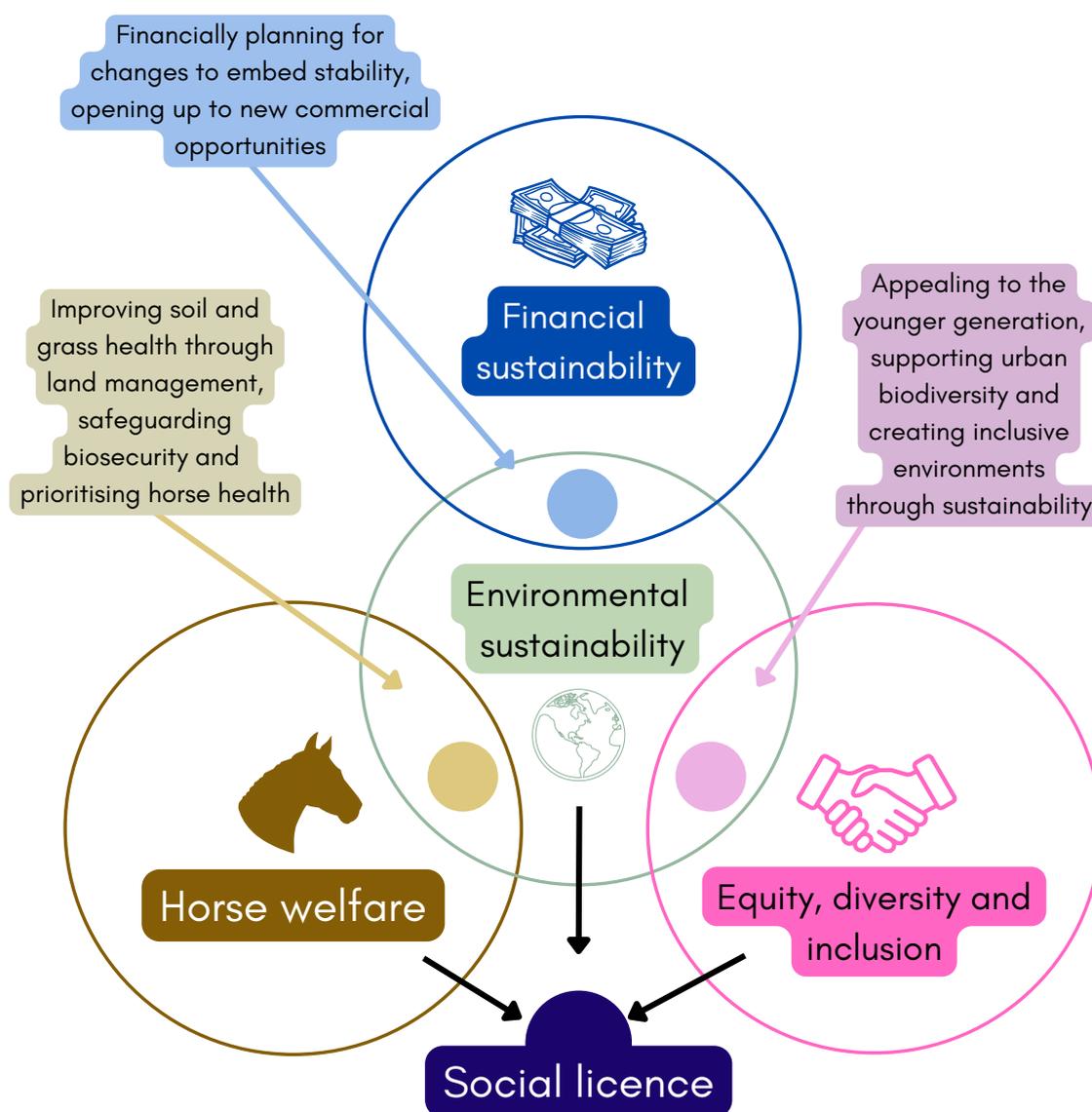


COMPLEX STAKEHOLDER MAP

OPPORTUNITIES

Adopting an environmental sustainability strategy is not just about mitigating against the risks to the industry or indeed 'doing the right thing' for the environment, it holds a number of opportunities that go beyond helping the environment. In particular, it is important to understand the deep links between environmental sustainability, horse welfare, equality diversity and inclusion and social licence.

Interconnected topics

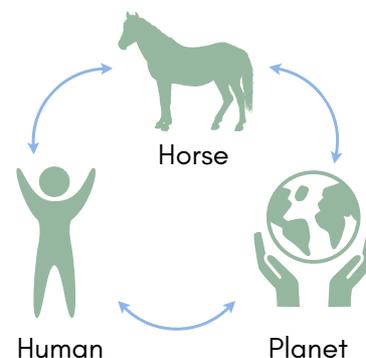


The equestrian industry has a number of topics that are existentially fundamental and require the focus and attention of the BEF and its member bodies. Environmental sustainability is central and complimentary to all of these going concerns and by weaving the topic like a golden thread through all of the strategies regarding horse welfare and equity, diversity and inclusion, the industry can further its progress regarding social licence, whilst also embedding financial resilience.

Each of these topics represent the future of equestrianism and by demonstrating that the industry contributes more than it takes away, it can hope to secure a healthy future.

Nature and nature

Horses are part of the natural world, and by encouraging people to enjoy leisure riding, not only may we hope to foster a love and respect for the natural world, supporting the need for behaviour change, we may also improve people's mental health through spending time outside in partnership with another animal. In this way, we bring together the horse, human, planet partnership.



Stability and resilience

The changes and uncertainty which lie ahead will require all individuals and businesses to be resilient both financially and operationally. By creating a roadmap which incorporates both reductions measures and adaptations to climate change, equestrianism can define the pace and direction of those changes, rather than be dictated to. This can include choosing operational efficiencies that make sense for each individual business.

Equally, by acting now, equestrianism can demonstrate leadership in this area, both internally and externally to the public, showcasing the ability to drive environmental improvements and support government and Non Government Organisation targets nationally.

Opening up new opportunities

By becoming a sport with purpose, equestrianism can expect to attract new commercial partnerships from those seeking to align with responsible brands, new riders, staff and customers from the next generation eager to support environmental causes, and new revenue opportunities through carbon sequestration and biodiversity enhancements.



INDUSTRY BASELINE AND BEST PRACTICE

The scope of this report includes all member bodies, the supply chain, venues and events, clubs, riding schools, livery yards, riders, charities and all the services and businesses which contribute to the industry. Based upon over 100 hours of interviews, more than 30 site visits and four months of desk based research and focus groups, the picture suggests that overall, very few equestrian companies have begun to approach environmental sustainability and in particular there are almost no strategies in place or public statements. However, it is possible to find many pockets of good or even exemplary activity within each aspect of the industry.

Best practice for the industry will be creating a robust vision and strategy which enables the clear and agile provision of education and tools to the widest possible group of individuals and organisations. These tools should form part of an overall narrative of what the industry stands for and what it expects from one another regarding the use of fossil fuels, water, resources and land management practices. The key is to embed sustainability into the DNA of the industry, so that business as usual is transformed quickly but organically, through a desire to do the right thing to protect both horse welfare and the industry as a whole.

The BEF and member bodies

At present, there are no environmental strategies in place across the BEF and member bodies, which provides a unique opportunity to create one unifying vision, and for each member body to utilise their own strengths and membership base to create change. Working together, the members bodies can share the actions that they are already undertaking, in order that those who are at the start of their journey may learn from experience. Equally, by taking a unified approach, those individuals who are members of multiple member bodies, will receive consistent messaging from the industry.

The supply chain

The supply chain reaches out beyond Britain and it is possible to see many example of excellent strategies and action happening, particularly in the feed sector. This is due for the most part to regulation and changes which have been coming into effect for many years internationally, and within the agri-food sector. However, the supply chain as a whole for equestrian is currently slow to adopt sustainable packaging and operations, with a large number of questionnaire respondents and interviewees citing that the lack of options renders making sustainable choices impossible in some sectors. In contrast to other industries, there are no awards for sustainable equestrian suppliers, online platforms do not promote sustainability and there is no apparent incentive from outlets to produce more sustainable options.

12 of 53

British and Irish feed suppliers have a sustainability statement

ONE

Member Body has a sustainability statement

Equi-Trek is the only manufacturer with an electric option available to purchase at present



Venues and events

Venues and events are the shop window of the industry and are also challenged by being compared with other sporting events and venues for different disciplines. Because environmental sustainability has been incorporated into venues and events in the broader sense for over a decade, most are either fairly or very advanced on the journey. This is a problem for equestrian events, which are more aligned to the baseline of equestrianism, than their other venue counterparts.

A small number of venues and events are early adopters, driven by the passion of their directors to keep pace with the broader event industry. Within 4* and 5* events and venues, 2023 has seen a greater willingness to promote sustainable practices and develop beyond the minimum expectation of 'zero waste to landfill.' It is encouraging to see that some venues have prioritised sustainability through the employment of inhouse or independent expertise. This will be advantageous to the industry as a whole, in order to expedite and share best practice across all other venues and events, particularly at grass roots level.

It is interesting to note that in the majority of cases, the historic estates on which major tournaments are run have a high standard in environmental practices and do an excellent job of communicating their work. This is an area that the industry may wish to capitalise on, learning from established practices and promoting a holistic approach to sustainability from venue through to event in one joined up vision. The following is a list of just some of the activities undertaken on one estate regularly used for equestrian competition.

At a grassroots level, there is a varied picture of activity, which is largely dependant on individuals choosing to adopt environmental practices. In the absence of guidelines and minimum standards, the use of resources like energy, water and infrastructure at events ranges from minor through to highly significant.

Part of the woodland is FSC certified

Nesting sites for birds are protected during their nesting season

Field margins are used as conservation strips where wildflowers can grow

A focus on sustainable farming including organic status

Leftover manure goes into the onsite biogas plant to generate electricity

Solar PV generating renewable energy at the dairy barn

Overall, there is significant work to be undertaken to raise equestrian events and venues above the current baseline of activity, some of which will be driven by legislation, for example the plastic legislation changes in October 2023, other areas will be necessitated by both the changing climate and public expectation. The significant use of water to maintain surfaces, diesel generators and the land itself, alongside participant and spectator travel, all mean that venues and events will need to work collaboratively to establish minimum standards for responsible, sustainable equestrian event management in order to keep pace with the wider event industry and sport in general.

Clubs, riding schools, livery yards and competition centres

Clubs, riding schools, livery yards and competition centres are a key part of the equestrian industry making horse sports more accessible and inclusive. Research suggests that these businesses are largely driven by cost reduction measures, which has led to some excellent examples of sustainable practices.

However, the success of these measures is dependant on the training and rigour of the staff working within these settings, and it is apparent that wastefulness still occurs with buckets of water left overflowing, no sorting of waste and lights left on 24/7. Sustainable land management is not typically considered, largely due to the lack of available land in which to support healthy soil and mixed grazing practices.

A combination of cost free operational changes to minimise waste, planned investment in infrastructure like rain water harvesting and resources to support better land management, would all benefit this part of the equestrian industry in continuing to make positive strides in this areas.

"More support of independent riding schools, that's the start of many riders' journeys - if they are struggling then environmental sustainability is low priority in their survival. Easing the pressure on them would allow for more areas of the business to thrive and more care taken of the environment."

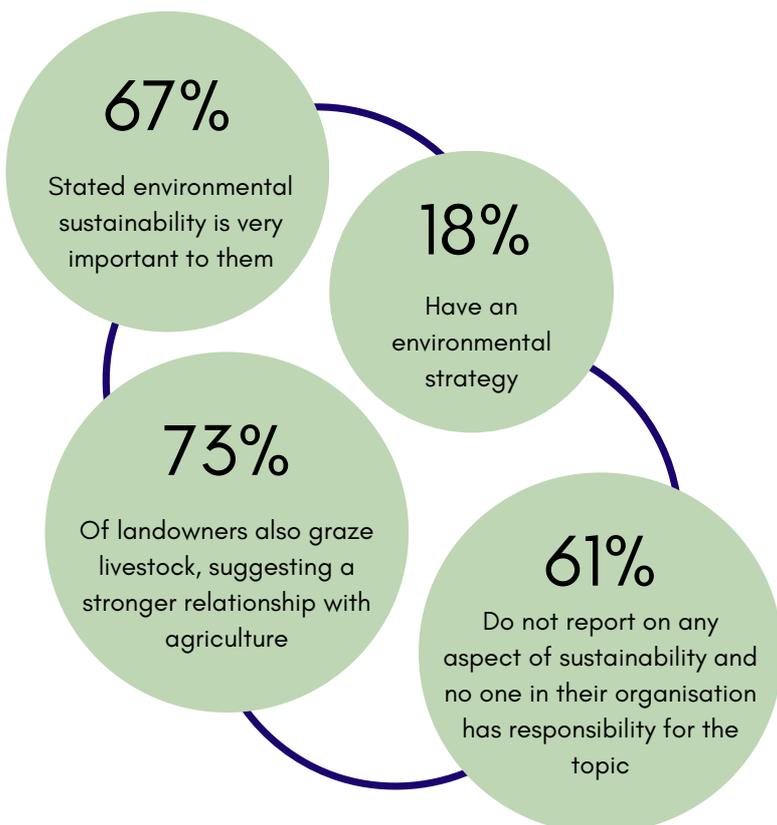
~Questionnaire respondent

Other businesses and stakeholders

Across the remainder of the industry there are many examples of advanced work and thinking in this area, particularly within the charity sector, equine veterinary practices and historic and academic institutions. It is likely that these parts of the industry have progressed further as a consequence of their relationship with sectors like education, culture and medicine, all of which have long established strategies and resources in place to support change. These businesses can support the rest of the industry in sharing their best practice and normalising the changes and benefits that derive from sustainable operations.

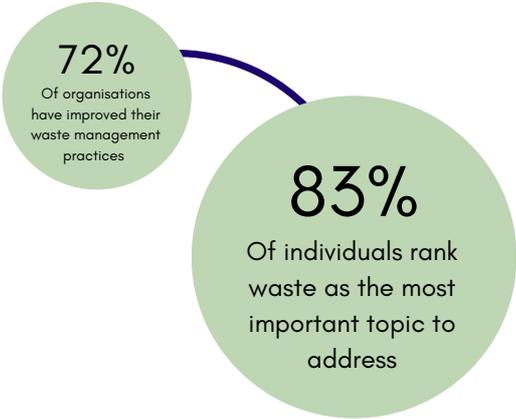
Questionnaire insights

The questionnaire was responded to by over 800 equestrians, 49% of whom own their own horse and 39% who work in stables, livery yards, riding centre and stud farms. The respondents were typically members of multiple member bodies, with 51% having more than one affiliation.



The questionnaire responses indicate that there is a great degree of potential in developing the relationship between equestrianism and agriculture, with 73% of landowners grazing livestock, 25% having woodland, yet only 29% carrying out any form of reporting on any aspect of their operations. This means that with appropriate tools, it will be possible to enhance the sustainability of a large proportion of equestrian properties, utilising adapted agricultural toolkits and with the potential to access agricultural funding for projects.

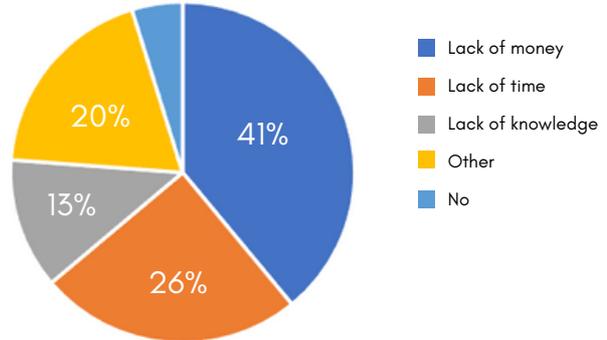
- 61% have protected areas for wildlife
- 12% have engaged in mass tree planting
- 20% have undertaken a biodiversity assessment



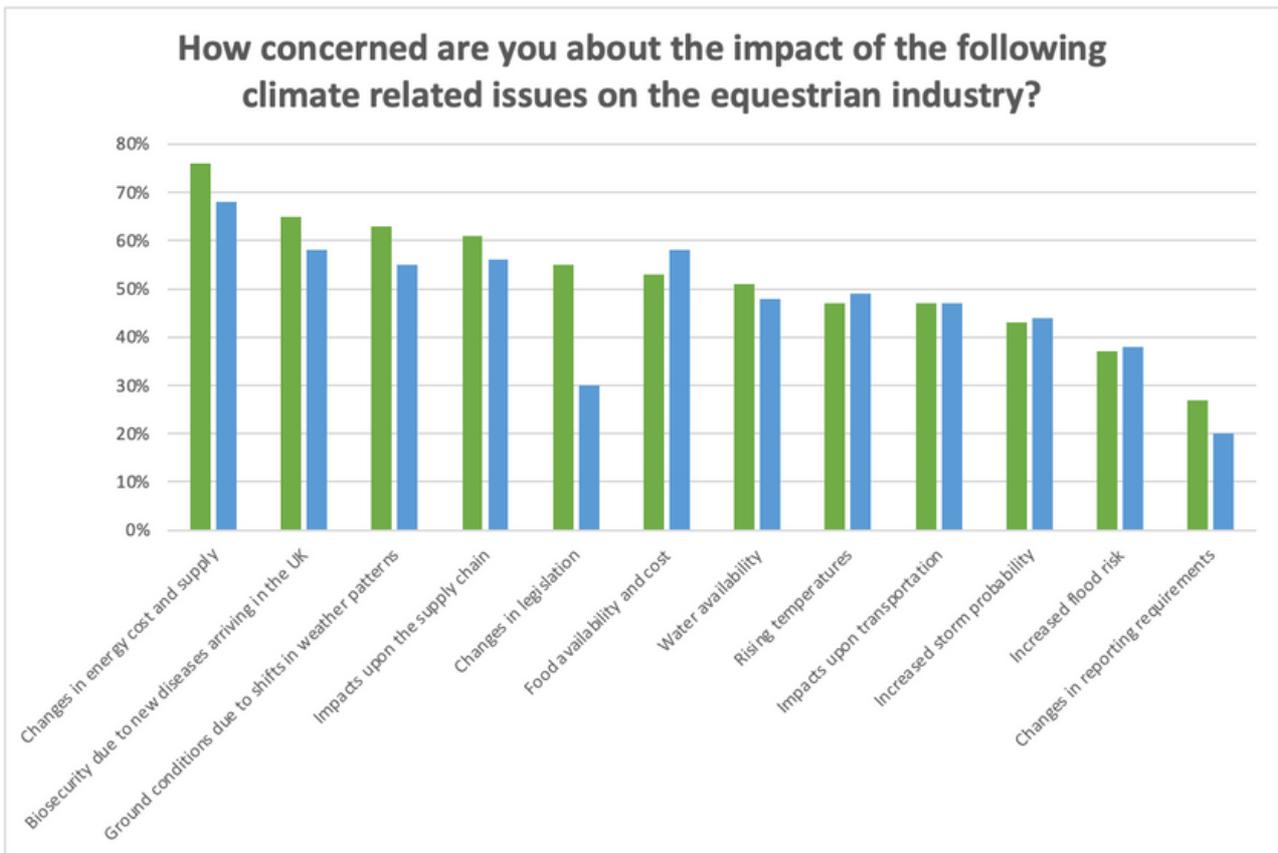
80% of individuals prioritised the removal of single use plastics as the second most important action to take

39% of organisations have removed single use plastics from their operations

Most organisations cited lack of money (41%) and time (26%) as their biggest barriers to change, with 80% seeking funding to pay for material changes. Despite this the most important support respondents requested was training or access to information, which accounted for 94% of responses.



Are there any barriers to introducing environmental sustainability initiatives in your organisation?



Overall, it would be reasonable to state that the industry is behind the curve in Britain as regards adopted environmental practices. However, there are lots of good examples of change happening, including a desire for change to occur. The absence of a strategy in most corners of the industry presents an opportunity for both the BEF and its member bodies to create an overarching strategy and series of interconnecting projects that can be adopted by all. This is an agile approach to the challenges ahead and will present a united, industrywide approach, which is crucial both in creating behaviour change and mobilising a strong message to enhance social licence.

RECOMMENDATIONS

The BEF's overarching strategic vision makes clear its role in safeguarding the industry for future generations. Environmental sustainability presents the biggest risk to the sport and therefore this report recommends a bold, carefully communicated and robustly delivered response. The following recommendations are intended both to ensure legislative compliance and as a means of future-proofing the sport through best practice.

Phase one

Phase one is about establishing a direction of travel, bringing stakeholders together under a common goal, communicating the vision to the industry and getting everyone's house in order.

- 1 Decide on the BEF's internal approach
- 2 Discuss the joint strategic approach with HSI
- 3 Support all member bodies with gaining an understanding of the risks, challenges, opportunities and baseline of the industry
- 4 Devise a vision that speaks to all corners of the equestrian community
- 5 Agree targets, frameworks and core activities that sit within the ambition of the vision statement and work across the whole sector
- 6 Work with key stakeholders to garner support for and direction of the specific pillars that support the vision
- 7 Discuss radical changes and solutions, be prepared to make systems changes where needed
- 8 Agree the right verbiage to be utilised across the industry pertaining to the pillars
- 9 Create a strategy that successfully articulates the vision for equestrianism
- 10 Consider the implementation of mandatory standards
- 11 Create an environmental 'Board' with representation from youth riders, in order to stimulate creative and forward thinking solutions that impact the future of the sport
- 12 Create a supporting programme of educational activity that promotes the best possible understanding of the problems, the vision and the solutions
- 13 Support member bodies in creating their strategies and a roadmap of specific projects over a long term period
- 14 Source and utilise expertise both inside and outside the industry
- 15 Create a communications plan

“

Together we will be the voice of and provide leadership for all those who are inspired by and engage with horses.' (Strategy 2020-2024). As such, the BEF is remitted to lead in strategic areas that impact the members and the external perception of industry and sport.

”

“EDUCATION AND AWARENESS!! Widespread communication within the general population of the equestrian industry as well as accountability for firms and member bodies as to their impacts and their actions towards sustainability in whatever they are doing.” ~

~ Questionnaire respondent

Phase two

In phase two, once the strategy is launched, the BEF and member bodies should begin to work outwards into the industry to support understanding and change.

"A good place to start would be resources being available for owners/businesses on simple yet impactful changes we can make towards sustainability"

~ Questionnaire respondent

16 Create specific tools that work in different areas of the industry to support change

The industry needs clear, equine specific tools and resources to quickly understand the right steps to take and how to take them. Examples of these tools are shown here and could be disseminated through webinars or a purpose built digital hub/App with downloadable resources.

1. A basic guide to a sustainable event for Event Managers and venues
2. Sustainable pasture management and the grazing environment
3. The seven habits of sustainable stable management
4. A landowner's guide to making space for nature
5. Water conservation for businesses
6. How to reduce your energy and emissions
7. Waste management that really makes a difference
8. How to reduce single use plastics
9. The circular economy and how to embed it into your products
10. Ten tips for making sustainable changes in our equestrian life

17 Create a communications platform to house resources and support information sharing

18 Create established standards and practices for equestrians to follow, with consideration for a form of 'kite mark'

19 Engage all riders in the topic from youth up to the World Class Programme, in order to find ambassadors to support the message

20 Host an annual event dedicated to equine sustainability with awards recognising best practice

"The biggest thing would be to support research into more environmentally sustainable and equine welfare supporting ways of keeping horses. The current traditional stabling and turnout systems are in need of updating."

~ Questionnaire respondent

"I would expect the BEF to lobby government on behalf of the industry by representing equestrians in matters pertaining to re-wilding and transport network and building developments, by providing information and guidance from a rural and common-sense perspective."

~ Questionnaire respondent

Phase three

In phase three the BEF should seek to reach beyond the internal industry, upwards and outwards to create a greater shift.

21 Fund research into specific areas where there are gaps in knowledge

22 Work upwards with the FEI and EEF to create a global understanding of equestrianism's role in the environment as part of the wider 'sustainability' narrative which includes horse welfare

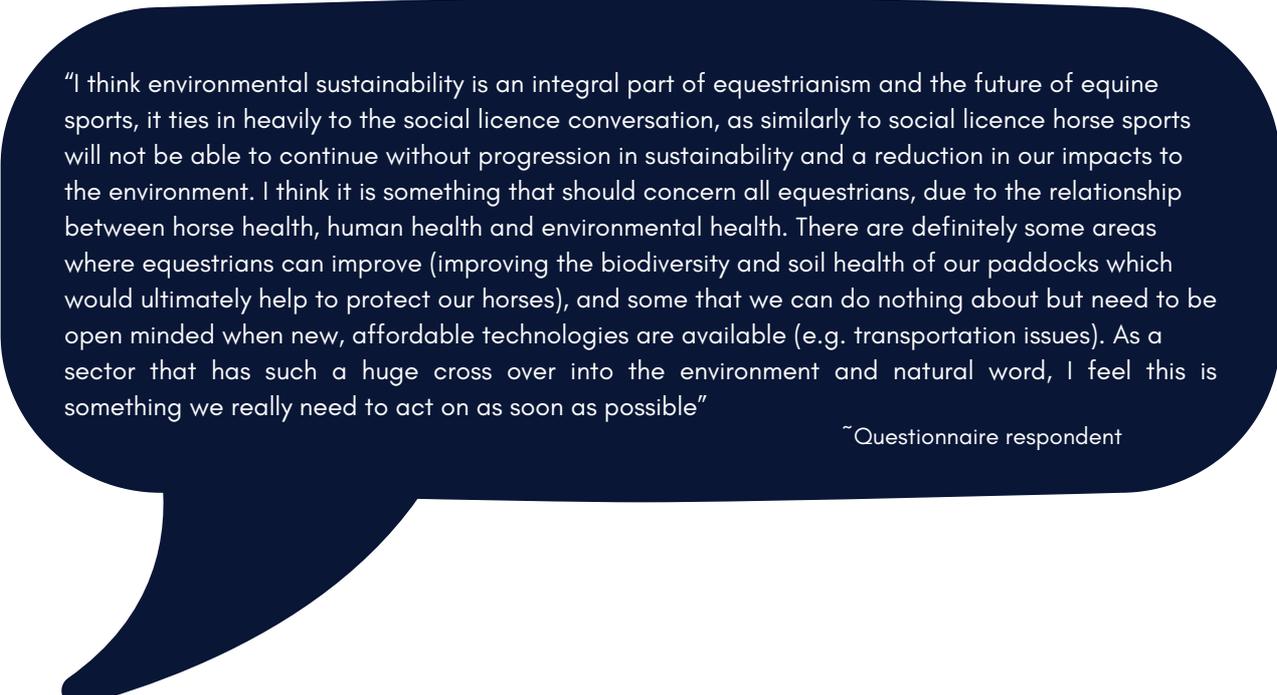
23 Ensure that environmental sustainability and the associated risks and requirements are on the agenda for the Horse Council

24 Work with charities and organisations to seek partnerships and opportunities to enhance protections in the natural world and innovations in the supply chain that support equestrianism

25 Conduct more work with the supply chain to support changes both to products but also the mindset of how we consume.

26 Forge a closer relationship with agriculture, to expedite learnings surrounding environmental land management practices and the potential for funding opportunities

CONCLUSION



"I think environmental sustainability is an integral part of equestrianism and the future of equine sports, it ties in heavily to the social licence conversation, as similarly to social licence horse sports will not be able to continue without progression in sustainability and a reduction in our impacts to the environment. I think it is something that should concern all equestrians, due to the relationship between horse health, human health and environmental health. There are definitely some areas where equestrians can improve (improving the biodiversity and soil health of our paddocks which would ultimately help to protect our horses), and some that we can do nothing about but need to be open minded when new, affordable technologies are available (e.g. transportation issues). As a sector that has such a huge cross over into the environment and natural world, I feel this is something we really need to act on as soon as possible"

~Questionnaire respondent

This quote from a questionnaire respondent expertly articulates the overall picture of the relationship between environmental sustainability and equestrianism, as well as the fundamental overlaps into horse welfare and even equality, diversity and inclusion. Adopting a holistic approach to these challenges, partly through the creation of an ESG strategy, will enable the industry to put forward a progressive, imaginative, robust and truly sustainable vision for the future of equestrianism.

Equestrianism is a sport of the land and its relationship with nature is a fundamental part of its DNA. Modern practices have created a negative impact on the environment, but it is possible to see a future in which equestrianism has a net positive impact on environmental sustainability, through passionate and deliberate support of biodiversity schemes and a careful progression away from the use of fossil fuels and excessive resource use.

The topics of horse welfare and the environment are inextricably linked and with further research and data, the veterinary world along with horse welfare charities, should seek to champion a joined up approach to conversations around and solutions for both challenges. In doing so, not only will it benefit the horse and the environment, it will also answer the industry's biggest existential risk of social licence.

Whilst social licence is indeed the most pressing concern for the equestrian world, there can be no conversation about social licence without the topic of sustainability. The moral and ethical imperative to take care of our planet is ever present in the worlds of sport, leisure, agriculture, consumption, indeed across all spheres. If the equestrian industry does not adopt a clear, passionate and meaningful stance on its impact on the environment, it will risk losing a licence to operate, even if it has managed to address concerns regarding horse welfare. These two topics must be considered as equally important and form part of the core pillars of the industry's strategy in the short, medium and long term.

The road to change is fraught with challenges for every business or industry addressing environmental sustainability, and equestrianism is no different. Traditional mindsets, denial, uncertainty, lack of time, lack of money are all common problems and in no way unique to the equine world, therefore these challenges should not be seen as insurmountable, simply a common part of the process of change. Equally lack of funding, lack of available infrastructure, a slowly moving supply chain are barriers which have to be addressed by any business. Equestrianism is in a good place to adopt and adapt and should not feel unduly constrained by a sense of being in any way different from the rest of industry.

The lack of strategy and activity in equestrianism for the most part is concerning, but also an opportunity that can be capitalised upon. The industry can benefit from having a largely blank canvas on which to start from and build a unified, bold and impactful vision, incorporating all of its stakeholders to create the best possible response to the risks, challenges and opportunities in front of it. By looking at successful strategies and communications programmes put in place outside of the industry, equestrianism can go from being behind the curve to leading the way in a short period of time, taking the best of what others have done and adapting it to the specific advantages of the equestrian world.

Despite the current lack of strategy throughout the industry, there are plenty of examples of good practice, even best practice, to reflect upon and celebrate. Businesses and individuals have in many places begun the process of activity, all be it in an ad hoc way. There are specialists, experts and enthusiastic amateurs in abundance and these voices should be amplified in order to mobilise the community at large into understanding the imperative and ability to change for the better.

Other sports do not have the advantage of having large swathes of land, they do not benefit from a close relationship with nature through the use of the horse, they cannot find different ways to access water through reservoirs and boreholes, nor use their land and infrastructure to house renewable energy. Other sports have to adapt with minimal resource and opportunity. The equestrian industry is different, it can support government biodiversity targets, generate energy for the local community and create green spaces in urban environments. The industry has more to celebrate than to fear and it is important to mobilise a strong education programme that focuses on this positive outlook and motivates people to want to change.

The future for everyone looks uncertain. Scientists are forecasting a very bleak world if we do not all act immediately and dynamically to change the way we operate. Whilst we can 'other' the problem and look to bigger countries, bigger industries or bigger sports to make the changes on our behalf we have to question what message we are sending out about the way in which we perceive our role in society in doing so. Changing the way in which we operate is a moral imperative for everyone, in order that we can provide a liveable future for the next generation, which will hopefully, in doing so, include the ability to enjoy equestrianism.



