

The Horse Industry

Richard Moore-Colyer



Further information relating to appendices, graphs, statistical data and questionnaires can be found on the website: www.craftsintheenglishcountryside.org.uk

The Horse Industry

Until very recently there has been a dearth of statistical data on the structure of the horse industry. Not recognised as an agricultural animal, the horse has not been included in the MAFF census material, and it was only with the publication of the 1999 National Equestrian Survey (British Equestrian Trade Association (BETA) Structural Report, 1999) that some light was cast on to the darkness. It is from this report that much of the data included in this chapter has been derived. The report itself was based on a large-scale telephone survey and personal interviews (3,500 households), together with a detailed postal questionnaire, and is therefore subject to the usual vicissitudes of sampling error. It is, however, widely regarded as authoritative.

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Beedon Farm, Berkshire (1937)

The Private Sector

From an historic peak of about 3.2 million around the turn of the twentieth century, the horse population of Great Britain had shrunk to just over a million by the outbreak of the Second World War. The fall was most marked in commercial and town horses, numbers of which declined from about 1.2 million to around 100,000 between 1900 and 1939. Agricultural horses held up better, and in 1939 still numbered around 650,000.

The collapse in numbers almost to the point of extinction after 1945 is one of the dramatic features of modern British agricultural history. In 1960 they numbered 54,000; in 1965, just 21,000. Numbers of 'private and pleasure' horses fell somewhat with the advent of the motorcar, but recovered from 1950, and are more numerous now than in 1900.

The horse and pony population of Britain (including Northern Ireland) has been worked out on the basis of 0.5 million private households (2% of the total) each owning some 1.8 horses/ponies. This amounts to 900,000 horses in the hands of private owners. When added to the animals owned by professionals (trainers, breeders, etc.) the total horse and pony population amounts to 1 million (although the margin of error gives a range of 800,000–1.1 million). Across the sector, 30% of these animals are ponies. The distribution of ownership is as shown in Table 1.



Table 1: Estimated horse numbers

Category	Number	% of total
Owned/kept by private households	0.83m	83
Owned by private households and kept by livery yards	0.07m	7
Owned by 'professionals'	0.07m	7
Others	0.03m	3



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While the number of horses in the UK has substantially increased over the past two decades, as the BETA report indicates, the future pattern is difficult to determine. Since the expansion in numbers has been almost entirely due to the growth of the leisure industry, it is reasonable to assume that any further advances will occur within this sector, whose own expansion will be determined by patterns of disposable income, overall economic conditions and demographic changes. On the basis of present evidence, including a considerable slowing down of the rate of proliferation of riding establishments and demand for equine educational courses, there would seem to be grounds for suggesting that 'saturation point' has probably been reached. Taken together with the public concern over fox hunting (which will have a major impact on eventing and other equestrian sports) and the spiralling cost of maintaining horses, it is probable that little significant change will occur over the next decade or so. Whereas until recently the growth of leisure riding was perceived as an important element in agricultural diversification, the capital requirements for developing horse enterprises on

The prediction, in the 1980s, that the horse might once again play a role in agriculture, has not come to pass. While there are in the region of 4,000 non-riding horses on UK farms, these are mainly the preserve of 'hobby' farmers and are of no significance to the agricultural industry. It was also believed that substantial numbers of horses might be required for forestry. However, the British Horse Loggers Association has only 30 full-time contractors as members (each with 1–2 horses, charging clients £20 per horse per hour) although in addition upwards of 150 'travellers', gipsies and 'hobby' farmers engaged from time to time in forestry work. In all cases, the conventional heavy breeds along with coloured cob types tend to be used.

The Army is also of minor significance to the horse industry. The Household Cavalry maintains a mere 300 animals, the King's Troop, Royal Horse Artillery has 150, and the various infantry regiments approximately 50. In all cases, replacements come from the Irish Republic.

Categories of horses

Leaving aside the ponies, cobs and cross-bred types of many descriptions, which comprise the great majority of leisure horses, the heavy horse and the Thoroughbred make up the most significant categories of horse in the UK. Statistical data, derived from the Breed Societies and the Thoroughbred Breeders Association (Newmarket) are set out below.

Heavy horses include the following:

- *The Shire* There are 700 breeding animals registered each year (including overseas registrations). In 2001, 306 foals were born in 2001 and there are approximately 3,500 purebreds currently in the UK.
- *The Suffolk* There are 80 registered breeders; 20 live foals were born in 2001 and currently there are 250 purebreds in the UK.
- *The Clydesdale* There are 200 breeding animals registered each year. In 2001 there were 200 foals born, and currently there are 1,700 purebreds in the UK (of which 600 are mares, 450–500 are fillies and 500 are geldings/stallions).
- *The Percheron* There are currently 350 purebreds in the UK.



Ploughing competition, Mendip Hills

farms are at present deterring farmers from moving into the equestrian arena, while specialist riding schools and livery yards established in the 1980s and 1990s satisfy demand in most areas of the country. Meanwhile, beyond the Thoroughbred world, the breeding of horses as an income-generating activity is only normally viable when overhead costs are minimised and the enterprise is complementary to some other activity.

The Thoroughbred industry essentially involves the breeding and training of Thoroughbred horses for racing purposes. At present, the industry has a turnover of £600 million per year, while betting turnover associated with racing amounts to some £5 billion annually. In 2003 there were 9,762 owners of Thoroughbred horses in training, keeping between them 880 flat racers and 840 National Hunt animals (including hunter-chasers). Meanwhile, owner-breeders maintain 26,204 brood mares and 950 stallions. In 2003, 16,203 Thoroughbred foals were born, 11,074 of them in the Republic of Ireland. While the owners of brood mares are widely distributed throughout the UK and Eire, animals in training are predominantly located at Newmarket (Suffolk) and Lambourne (Wiltshire). In 2002 the industry as a whole employed 586 trainers, 1,309 jockeys and about 6,000 stable staff (including 1,500 management/secretarial personnel).

Horses in training in the UK

Such is the nature of the racing industry that horses in training tend to vary on a monthly basis, since National Hunt jumpers are not run in the summer months and will return to training in the autumn. Conversely, summertime is the peak training period for flat racers. Table 2 presents 'peak', 'low' and mean figures for horses in training from 1995, that year being included for comparative purposes.

Table 2: Number of horses in training

	Peak Month	Low Month	Mean
1985	–	–	14,084
1995	13,365	10,558	11,960
1996	13,897	11,326	12,611
1997	13,757	10,528	12,142
1998	14,164	10,506	12,485
1999	14,491	10,600	12,545
2000	14,543	10,647	12,596
2001	15,473	12,181	13,827



Racehorses on the gallops, Oxfordshire

While there has been a steady increase in the number of horses in training since the mid-1990s, opinion in the industry suggests that in the current economic and socio-political climate numbers are unlikely to reach the high levels recorded a decade previously. Prize money, ambience, research back-up and general infrastructure remain more favourable in France and the USA. At present, some 90% of horses in training are located at Newmarket (Suffolk), Lambourne (Wiltshire) and Malton (Yorkshire), a situation that is unlikely to change in the future.

Statistics on ownership of racehorses are difficult to interpret because the owner may be the sole possessor or own a share. Whetherby's data for ownership since 1995 is set out in Table 3.

Table 3: Number of owners of racehorses

Year	Number
1995	18,438
1996	17,810
1997	17,385
1998	16,902
1999	17,107
2000	17,416
2003	17,712



Horse riders

Like most leisure activities, horse riding only attracts a small proportion (4.3% of those over the age of 5) of the population as participants. Nonetheless, this amounts to some 2.4 million riders, of whom 1.2 million between them spend £500 million annually on riding lessons. Riding, both for pleasure and for competition, is overwhelmingly a female activity: girls and women represent 77% of the riding (non-professional) population. Table 4 highlights the 'sectoral' situation.

Table 4: Gender of riders

	Female	Male
All riders (2.4m)	77	23
Riding lessons (1.2m)	79	21
Competitive riding	85	15
Trekking (0.3m)	90	10
Hunting (0.5m)	68	32

Of the total number of horses kept by private households, 88% are managed by members of the family, 8% are kept in livery yards and 4% maintained by paid help. Table 5 indicates the purposes for which private households keep horses. It should be noted that horses may also be used for other purposes.

Table 5: Horse usage

Activity	Main purpose (%)
Riding/hacking	53
Eventing	8
Hunting	7
Show jumping	5
Showing	5
Breeding	4
Dressage	3
Riding lessons	1
Driving	1
Others	13

Geographical distribution of horses and riders

The BETA report offers no indication of the regional distribution of horses. However, it gives the regional distribution of riders (see Table 6). To derive horse numbers from this table is a complex issue, since many people ride, but do not actually own, a horse, while others own but do not ride. It seems that those who own horses account for a third of all riders, but more than half the 'riding days' – i.e. the number of days during the year on which the horse is ridden. For this reason the BETA figure of 1.8 horses per owner has been ignored in the figures created in Table 7, for which one horse per rider has been used to calculate the regional distribution of horses. Whereas this is something of a 'guesstimate', there can be no question that the geographical distribution of horses will mirror the distribution of riders.

Table 6: Geographical distribution of riders

Region	% of riders
Scotland	8
North	21
Wales/West Midlands	14
East Midlands/East Anglia	11
South West	9
London/South-East	37



Tina Stallard

Riding school hacking in the Chilterns



Table 7: Horses per region of Britain

Region	No. of horses
Scotland	72,000
North	189,000
Wales/West Midlands	126,000
East Midlands/East Anglia	99,000
South West	81,000
London/South-East	333,000

Expenditure

Table 8 attempts to summarise available data on areas of expenditure on horses among private owners, who between them spend annually some £17 million.

Table 8: Annual expenditure on horses by private owners (£000)

Product/ Service	Expenditure	%
Feed	295	17
Healthcare	165	9
Accommodation	345	20
Farriery	200	11
Bedding	85	5
Horsecare (grooming aids, etc.)	20	1
Saddlery, tack, rugs (purchases/repairs)	160	8
Fees (competition, registration, etc.)	105	6
Paid help	65	4
Insurance	100	6
Transport	100	6
Capital expenditure (stable, repairs, fencing, etc.)	100	6
Total	17,400	100

Note: The total represents £1,905 per horse+pony



The Professional Sector

While the average equine business employs three people on a full-time basis (training establishments employing double that number), in total those establishments listed in the British Equestrian Directory between them employ some 25,000 people.

The professional sector includes three core constituents: riding schools and/or livery yards, breeders and trainers. The 1999 British Equestrian Directory, while not including all professionals engaged in these businesses, covers the vast majority of significant non-racing operations. Numerically these are:

- 1,790 riding schools and/or livery yards;
- 1,949 breeders of non-Thoroughbred horses;
- 762 trainers.

Between them these professionals own approximately 70,000 horses and keep (but do not own) a further 52,000. The proportion of horses owned to those kept amounts to 50:50 between the riding school/livery yard group and the breeders and trainers.

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Expenditure

Professionals spend some £200 million annually, or some £1,640 per horse (see Table 9). However, within the sector, trainers spend substantially more (£3,750 per horse) than riding schools/liveries (£1,510) or breeders (£920). Of the total, 41% is spent by riding schools/liveries, 38% by trainers and the remaining 21% by breeders. The data presented in Table 9 take no account of the highly specialised sectors, including valuable race horses and horses kept by the armed forces and the police. Accordingly, the figures should be regarded as erring on the conservative side.

If the figures for private and professional owners are combined, it becomes clear that some £2 billion is spent annually on the maintenance of horses, with a further £0.5 billion being paid for riding lessons.



Kingsdown Stables, Upper Lambourn

© Ann Seth

Table 9: Annual expenditure on horses by professionals (£000)

Product/ Service	Expenditure
Feed	36,600
Bedding	11,300
Healthcare	17,800
Farriery	14,200
Saddlery, tack, rugs	6,500
Registration/fees	12,500
Wages salaries	57,800
Repairs/removals (stables, yards, etc.)	12,400
Rental (stables, yards, etc.)	8,700
Insurance	6,300
Miscellaneous	13,200
Total	197,300

The Saddlery Trade

There are rather more than 1,000 individuals or organisations classified in Yellow Pages as saddlers and harness-makers. However, while a high proportion of these employ individuals who are engaged in stitching and reconditioning saddles and bridles, the majority function primarily as retailers, combining the sale of saddles, bridles and harness with the retailing of other equestrian impedimenta.

Indicative of the relative insignificance of the traditional rural saddle-maker is the fact that the 'trade' saddlers concentrated in the Birmingham/Walsall area produce some 85% of the total output of saddles and bridles. Of these, half are exported and the remainder are sold to retail or wholesale outlets. Whereas some Midlands-based concerns operate on a factory scale, employing 70–100 people, the trade is overwhelmingly organised around the small workshop, employing 3–4 workers and/or apprentices. It is often the case that larger organisations put out work to smaller workshops, while both groups also frequently employ outworkers, who undertake hand-stitching while working at home. These are mostly women who have previously been engaged in the trade. While many enterprises might be classified as family businesses, generational succession is now rare, since many young people are not keen to engage in what they see as 'sweatshop' work. Furthermore, few parents seem very enthusiastic about persuading their children to enter a trade that promises relatively little financial reward. Thus saddlery tends to be an 'ageing' trade.

Competition

Over recent years, the English saddlery trade has been subject to severe overseas competition, not only from Europe (Germany, France and Spain), but increasingly also from China, India and Pakistan, from whence the quality of product is steadily improving. Although trade statistics are not easy to interpret, with imports of saddlery often being subsumed under the generic classification of leather goods, representatives of saddlery organisations maintain that the trade has declined by some 10–15% since the 1990s. A number of factors combine to lead to the conclusion that the situation is hardly likely to improve. Leaving aside the capacity of low-wage economies in less developed parts of the world to undercut English prices, the fact that there is at present no legislation to ensure that leather imports are stamped with the country of origin creates a major problem. Moreover, it is currently legal for British

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Saddler at work on new saddle (c. 1930)



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Trainee Sue Edwards, The Saddlery Training Centre, Salisbury

leather exporters to sell abroad to foreign saddlers who can then (at undercutting prices) export finished saddles to this country where they can be sold as 'English' goods. It is therefore widely believed that the only realistic potential for the English trade is in the high-class, high-quality market. Even then, for the trade to compete effectively, costs and wages need to be kept low. If this does not happen, it is probable that competition will drive some saddlers in the direction of the last lorimer in Walsall, who went into liquidation in 2000.

Table 10 sets out details of saddlery/harness imports to the UK between 1992 and 1999, drawn from statistics published by HM Customs and Excise UK Tariff and Statistical Office. These figures refer specifically to weights and values of imported saddlery and harness. Category 612.2 of HM Customs and Excise Returns includes 'saddlery and harness for any animal, including saddlebags and cloths, traces, knee pads and muzzles of any material'. The figures for 1998 specify individual countries both within and beyond the European Community and are included in Table 11 to illustrate the range of countries from where exports arrive. Although the trend in the earlier years is sporadic and the data include composition leather, recent figures for 1998 and 1999 would seem to confirm the fears of the saddlery industry.

Table 10: Imports to the UK in terms of weight (100s of kg) and value (£000) of saddlery and harness

Year		Weight	Value
1992	Total	21,025	30,872
	EC	12,851	15,237
	Non EC	8,174	15,615
1993	Total	21,137	36,325
	EC	10,919	16,059
	Non EC	12,218	20,266
1994	Total	43,444	20,754
	EC	5,005	5,921
	Non EC	38,439	14,833
1996	Total	27,707	41,308
	EC	13,221	23,754
	Non EC	14,486	17,555
1997	Total	24,962	47,263
	EC	12,615	25,526
	Non EC	12,347	21,701
1998	Total	36,781	41,485
	EC	23,215	19,171
	Non EC	13,563	22,314
1999	Total	104,719	35,453
	EC	42,952	7,509
	Non EC	61,767	27,943



Table 11: Imports of saddlebags, cloths, traces, etc. for any animal in terms of weight (100s of kg) and value (£000)

		Weight	Value
1998	All countries	21,058	13,315
	EC Total	3,680	2,152
	(of which Germany)	3,153	
Others	USA	727	1,153
	India	4,759	2,402
	China	3,811	1,411
	Taiwan	3,219	1,546
	Hong Kong	2,511	1,577
	Others	2,351	3,403

Wages and employment

A significant majority of students pursuing relevant City & Guilds (C&G) qualifications (see below) do not proceed to apprenticeships, but instead seek employment in retail outlets and tack shops or set up their own businesses. Present training provision appears quite adequate for this purpose, since most rural saddlers/retailers require individuals with the more basic skills. While the various apprenticeship schemes do provide an excellent training in the trade, it is held by the 'trade' saddlers that more consideration needs to be devoted to inculcating aspects of the working routine among trainees.

At the time of writing, indentured apprentices are paid at about the national minimum wage rate, although some workshops pay up to and above £4 per hour. A fully trained saddle-maker out of apprenticeship may earn £300–£500 per week, while bridle-makers receive between £250 and £300. The need to keep costs low in the face of overseas competition precludes any realistic opportunity for wage increases within the trade sector. Where a saddle made, for example, in Walsall, is sold to a rural saddler/retailer – for £300, and is then sold on to a rider for £600–£700, opportunities for well-managed, well-located retail outlets

are substantial. If the returns to the primary craftsman/manufacturer are not especially high, and the wages of his employees modest, there exists within the saddle-making trade a strong sense of esprit de corps and a deeply felt pride in the work, which may explain why those entering this embattled trade with serious intent rarely leave it.

Numbers of saddlers and harness-makers

Since there is no central registry of the saddle and harness-making trade, the data presented in Table 12 has been derived from a careful trawl of Yellow Pages, 2000–1. When they are included, retailers engaged in the sale of riding clothes and general equestrian equipment are to be found under the entry 'Riding kit', but in practice they are often excluded from the lists because sampling suggests that they are rarely involved in saddlery and harness-making as such. Given the virtual impossibility of differentiating in the Yellow Pages between the businesses that make and those that retail saddles, bridles and harnesses, the list tends to be generic. On the other hand, a telephone survey of 50 enterprises listed under 'Saddle/harness-making' revealed that all were involved to a greater or lesser extent in the adjusting, repairing or fitting of equipment as well as retailing. Very few, however, were involved in the making of saddles and harness. It was also clear that the distribution of retailers by county mirrored that of membership of the Society of Master Saddlers (SMS). Inevitably, a degree of double-counting is involved in an exercise of this sort, where entries appeared in more than one volume of the Yellow Pages. However, random sampling indicated that this is unlikely to inflate the figures by more than 7–10%. Figures given in Table 13 indicate that Wales, the West Midlands and the South-West have a more generous rate of saddler and harness-makers/retailers to horses than elsewhere in the country.

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Table 12: Saddlers and harness-makers by county

County	Number
Bedfordshire	10
Berkshire	19
Buckinghamshire	25
Cambridgeshire	9
Cheshire	27
Cornwall	15
Cumbria	14
Derbyshire	18
Devon	37
Dorset	17
Durham	14
Essex	51
Gloucestershire	25
Hampshire	50
Herefordshire	6
Hertfordshire	6
Isle of Wight	3

Kent	41
Lancashire	41
Leicestershire	18
Lincolnshire	29
London	4
Manchester	4
Middlesex	5
Norfolk	30
Northamptonshire	20
Northumberland	14
Nottinghamshire	11
Oxfordshire	15
Shropshire	16
Somerset (inc. Bath and Bristol)	41
Staffordshire, Birmingham & Walsall	92
Suffolk	37
Surrey	32
Sussex	37
Warwickshire	17
Wiltshire	26
Worcestershire	15
Yorkshire	80
N Ireland	26
N Scotland	24
S Scotland	50
S Wales (a)	40
N Wales (b)	9
Total:	1,137

Notes: a) Glamorgan, Monmouth, Pembrokeshire, Carmarthen, Cardiganshire, Brecon;
b) Montgomery, Radnor, Merioneth, Caernarvon, Flint, Denbigh, Anglesey

The shifting categorisations of the Census bedevil any unequivocal statement of decennial trends. From 1961 onwards, saddlers and harness-makers were included among the generic classification of 'leather products makers', although the figure of 2,262 saddlers/harness makers in the 1951 Census indicates that numbers have virtually halved since that date.



Table 13: Number of saddlers and harness-makers per horse by UK region

	No. of saddlers/ harness-makers	No of horses*	Horses per saddler/ harness- maker
Scotland	74	72,000	973
West Midlands	196	126,000	514
Wales	49		
North	186	189,000	1,016
East Midlands/East Anglia	127	99,000	779
South-West	170	81,000	476
London/South-East	339	333,000	982

*As per BETA (1998)

Saddlery trade associations

There are two trade associations open to members of the saddlery trade. Many belong to neither, but a significant number now belong to both. The Society of Master Saddlers was originally formed for members of the retail trade, though it now has members who are manufacturers or in allied trades. The British Equestrian Trade Association (BETA) is a larger organisation, consisting of members with an interest in the wider equestrian markets. It aims, among other things, to influence the legal and statutory conditions affecting the well-being of the saddlery trade.

The Society of Master Saddlers

The Society is based at Stowmarket in Suffolk. Formed in 1966 as a trade association for country saddlers, it now has members from the larger manufacturing companies in Walsall and from allied trades such as leather producers and companies supplying saddlers' tools. The membership comprises both corporate (retail or trade businesses) and individual members, who have attained certain levels of skill, assessed under the National Saddlery Skills Assessment Scheme. The organisation retains lists of Master Saddlers prepared to take on apprentices, together with the names of indentured apprentices currently undertaking training. Entry to the Society is gained by anyone who has achieved the minimum qualification of C&G (Intermediate) Saddle-making and one other Intermediate qualification in bridle-

or harness-making, or by companies that have such an individual in their workshops. The present geographical distribution of membership is set out in Table 12.

Training and education in saddlery

Standards and qualifications for those producing saddles, bridles and harness have been developed jointly by the Rural Development Commission. The Worshipful Company of Saddlers, the Society of Master Saddlers and City and Guilds, with the help of other interested organisations and individuals, working together as the Saddlery Steering Group. Saddlery training is provided by apprenticeship, by FE Colleges, The Saddlery Training Centre as a Modern Apprenticeship with Learning and Skills Council funding, and by other private organisations, all of which now incorporate the standards and qualifications mentioned above into their curricula.

Since 1987, C&G Skills Tests/Assessments have been available to saddlers and by the end of April 2001, 1,177 qualifications at levels 1, 2 and 3 had been gained by 700 members of the saddlery trade. In February 2004, a Modern Apprenticeship in Saddlery was launched. Although NVQs were introduced in 1995, it was widely realised that the small-scale and varied nature of the saddlery trade did not readily lend itself to the NVQ system, and new qualifications in saddle-, bridle- and harness-making – awarded jointly by C&G and The Worshipful Company of Saddlers – were developed by the Saddlery Steering Group. Available at basic, intermediate and advanced levels, these tests are substantially equivalent to the C&G levels 1, 2 and 3 qualifications. Essentially, basic-level skills imply fundamental aspects of the craft common to all disciplines, while a choice of bridle, saddle or harness work is available at the intermediate and advanced levels. Recent statistics of passes by individuals at the various levels are shown in Table 14.



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Sue Edwards, The Saddlery Training Centre, Salisbury

Table 14: SMS/C&G assessments, 1998–2000

Year	Level 1			Level 2			Level 3		
	Bridle	Harness	Saddle	Bridle	Harness	Saddle	Bridle	Harness	Saddle
1998	16	14	7	2	15	4	1		
1999	31	19	10	5	10	5	10		
2000	21	18	11	12	13	2	3		

Apprenticeships

The two-and-a-half-year apprenticeship has recently been supplemented by the Saddlery Millennium Apprenticeship Scheme, based on the New Entrants' Training Scheme and still funded by the Countryside Agency. Developed jointly by The Worshipful Company of Saddlers and The Society of Master Saddlers with the Saddlery Steering Group, and advised by the Rural Development Commission, it offers a similarly structured and comprehensive training programme as that previously in existence. The scheme involves a carefully monitored apprenticeship for candidates of 16 years of age and upwards, during which time they are expected to demonstrate progress by achieving at least Intermediate and Advanced (Bridle), Intermediate (Harness) and Intermediate (Saddle) qualifications of the National Saddlery Skills Assessment and Qualification Scheme under the auspices of C&G. Skills assessment is an integral part of this form of training and standard of work is carefully recorded as candidates progress through their apprenticeship. In addition to Countryside Agency support for tuition materials, travel and accommodation, The Worshipful Company of Saddlers offers funding where no statutory assistance is available. By late in 2000, there were 18 apprentices on the scheme. It is also important to bear in mind that beyond the framework of formal apprenticeships a significant amount of informal training is undertaken by individuals in the smaller workshops. By its very nature, this aspect of training is not quantifiable.

College-based training/training with private organisations

The following offer City & Guilds Basic, Intermediate and Advanced certification in saddle-, bridle- and harness-making:

- Capel Manor College, Enfield, Middlesex;
- Walsall College of Arts and Technology;

- Cambridge and District Saddlery Courses (Int) Ltd, Bury St Edmunds;
- Cumbria School of Saddlery, Penrith.

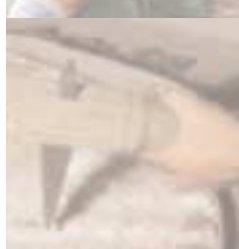
Capel Manor College offers a foundation course in saddlery and bridle-making, and as part of its 'Greenhearts' initiative, Walsall College of Arts and Technology offers an additional C&G award in the form of a two-year Diploma Course in Saddlery Studies, with the emphasis on general leather work. Entry requirements consist of a BTEC first Diploma or 4 GCSE passes (at Grade C or above), or relevant experience and Accredited Prior Learning. Students pursue courses in IT and business management alongside training in saddle, harness and bridle-making as well as basic key skills. Capel Manor also offers a full-time BTEC HND in Saddlery Technology, which covers horse studies, business management and IT, as well as saddlery studies, and which requires students to submit a dissertation. Entry requirements consist of a BTEC National Diploma, or one A-level pass with supporting GCSEs, or significant appropriate work experience. Whereas the HND is the ultimate qualification, students are also encouraged to take the Worshipful Company of Lorimers' Intermediate and Senior Certificates and the SMS and C&G Basic and Intermediate Assessment in Bridlework, Harness- and/or Saddle-Making.

Saddle-fitting

Recognition of the vital importance of the craft of saddle-fitting has led to the introduction of a two-day foundation course and four-day saddle-fitting course for fully qualified saddlers. The four-day course, mounted by the SMS in association with Warwickshire College, is open to members of the SMS only and leads to the Qualified Saddle-Fitter Assessment.

Recent developments

Saddlery courses at Capel Manor College and Walsall College of Arts and Technology continue to be funded by the Learning and Skills Council. Rural saddlers, however, are experiencing difficulties following the withdrawal of Countryside Agency funding and concerns as to the suitability of the Modern Apprenticeship framework for small saddlery firms and self-employed saddlers in rural areas.



Farriers and Farriery

Definition

It is important to avoid confusing a farrier with a blacksmith. The former works with horses but requires training in blacksmithing in order to make horse shoes effectively, while the latter works with iron and may have no contact with horses. A blacksmith may have been trained in farriery, in which case he can shoe horses legally provided he has also registered as a farrier.

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Farrier fitting hot shoe, Rural Development Commission

Under the terms of the Farriers (Registration) Acts of 1975 and 1977, anyone shoeing horses is required to register each year with the Farriers Registration Council (FRC). On payment of the registration fee (and annual renewal fee), all registered farriers receive a personal registration card. Application for enrolment with the FRC may only be made after an apprenticeship with an Approved Training Farrier (ATF), which also involves the successful completion of regular college courses.

Apprenticeship schemes

The training of farriery apprentices is currently overseen by the Farriery Training Service, a management agency established by the FRC, which comes under the remit of Lantra, the Sector Skill Council responsible for skills training in the land-based industries. The principal route is via the Modern Apprenticeship scheme, whereby candidates of at least 16 years of age serve a four-year apprenticeship with an ATF, during which period they undertake 23 weeks of centralised 'off-the-job' training either at the Centre for

Rural Crafts at Holme Lacey (Herefordshire College of Technology), Warwickshire College at Moreton Morrell or Oatridge College in Scotland.

Candidates for the Modern Apprenticeship must have gained 4 GCSE passes at Grade C or above (one of which must be in English) or have passed the Farriery Entrance Test. Moreover, a candidate cannot apply directly for a Modern Apprenticeship, but must be proposed by an ATF, who is then totally responsible for the suitability of the candidate.

During the course of training, and in order to be eligible for registration into the Register of Farriers via an Apprenticeship, the following items must be successfully completed by the apprentice:

- all mandatory college assessments;
- NVQ Level 3 in Farriery, which include Key Skills;
- Farriery Modern Apprenticeship requirements, which include IT, communication, personal skills and problem-solving;
- the Diploma of the Worshipful Company of Farriers;
- the four-year training period.

Apprenticeship fees currently stand at £5,750, in addition to which £70 weekly is required for accommodation while candidates attend block release courses at college. Grant aid from the European Social Fund is available for candidates under the age of 26, while Career Development Loans may be available to cover all or part of adults' (over 25) apprenticeship fees. The retention rate of apprentices is very high, with a 90% pass rate at the three colleges offering farriery NVQs. In 2002 there were approximately 20 females undertaking farriery training.



The Worshipful Company of Farriers

The Farriers Registration Council is the primary body involved in examining for farrier registration, although the Army, the Irish Horse Board and the American Farriers Association are also approved bodies for this purpose. Candidates for the Diploma of The Worshipful Company of Farriers are required to undertake a live horseshoeing test, together with written and oral examinations. The Worshipful Company of Farriers also conducts advanced examinations for registered farriers as proof of greater competence. These require an enhanced standard of specialist knowledge and skills and the qualifications include Associateship of the Worshipful Company of Farriers (indicative of competence in remedial and therapeutic farriery) and Fellowship of the Worshipful Company of Farriers (the qualification of the master craftsman in which candidates are required to submit a thesis, prepare and present a lecture and undertake a written test). Of the total population of farriers, only about 40 are Fellows of The Worshipful Company of Farriers.

College courses

A variety of block-release training courses are offered at Moreton Morrell, Oatridge and Holme Lacey (Herefordshire College of Technology). Herefordshire College of Technology offers a one-year foundation course leading to the Edexcel/BTEC First Diploma in Blacksmithing and Equine Studies for which entry requirements are 4 GCSEs (or above), or open access or via interview. The course provides basic skills in blacksmithing, shoemaking, welding and horse knowledge alongside general training in communication (written, oral and visual), business and IT skills. Whereas this course is designed as a lead-in to an apprenticeship, it by no means guarantees an apprenticeship, for which competition is brisk and the availability of which depends on the recruitment plans of training farriers. There is currently no shortage of potential recruits, the market being limited by the number of ATFs.

Farriery training is not affected by the withdrawal of Countryside Agency funding, as they have their own mainstream funding source through the Learning and Skills Council. Much discussion took place with the Learning and Skills Council over whether farriery should be funded under the agricultural or the manufacturing sector. Manufacturing won the day, thus greatly enhancing the level of funding available.

Statistical and geographical distribution of farriers

Since all farriers are required by law to be registered with the Farriers Registration Council, there exists a list of all practitioners except for those in the Highlands and Islands of Scotland. In other words, details of numbers and locations of registered farriers are precisely known. At the end of 2002, the total number was 2,392, with a natural decrease of 35 compared with an intake of 45. Numbers rose by 66 in 2003, to 2,458. With 120 new registrations coming through each year, any threat of a reduction is at the moment fairly remote. A significant statistic is the fall from 411 in December 1997 to 131 in December 2003 in the number of farriers listed under Part II – that is, those practising in 1975 prior to mandatory registration, most of whom are now nearing retirement and will, inside a few years, have disappeared from the Register. Information on the total horse



Student Robert Garlick at Herefordshire College of Technology

population, meanwhile, is less well documented, the most definitive indication being that based on the study undertaken by BETA. While the BETA data was obtained from a survey, updated in 1999, and is subject to the usual sampling errors, it is likely to remain the most authoritative source in advance of the completion of the county-by-county register currently being compiled by the British Horse Society's Access and Rights of Way Department. The data given in Table 15 are drawn from BETA and FRC sources. An estimated 250 blacksmith-farriers are currently practising, mainly in South-West England.



The Forge, Rodwell – family business since 1910

© Anne-Karin Purkis



© Terry Heathcote



Mobile farrier, New Forest

Table 15: Total number of farriers by county (as at 7/11/1997)

County	Part I	Part II	Part III	Part IV	Total (a)
Avon	16	9	–	3	28
Bedfordshire	17	5	–	2	24
Berkshire	37	8	4	2	47
Borders	7	2	1	4	13
Buckinghamshire	26	2	1	4	32
Cambridgeshire	18	6	2	6	30
Central	2	2	3	3	7
Cheshire	44	10	1	3	57
Cleveland	5	3	1	3	11
Clwyd	11	6	4	5	22
Cornwall	21	15	5	4	40
Cumbria	13	10	5	5	28
Dumfries & Galloway	6	3	2	2	11
Derbyshire	23	10	4	5	38
Devon	60	22	8	5	87
Dorset	32	7	–	2	41
Durham	8	5	2	4	17
Dyfed	23	9	6	1	33
East Sussex	33	7	1	1	41
Essex	48	18	9	9	75
Fife	5	3	1	–	8
Gloucestershire	35	8	3	8	51
Grampian	7	6	1	3	16
Gwent	12	4	2	2	18
Gwynedd	3	4	6	2	9
Hereford & Worcester	49	8	2	1	58
Hampshire	63	17	3	5	85
Hertfordshire	29	10	4	3	42
Highlands	3	4	1	1	8
Humberside	10	8	3	3	21
Isle of Wight	10	–	1	–	10
Kent	71	9	3	2	82
Lancashire	38	16	4	13	67
Lincolnshire	31	4	1	3	38
London	22	4	–	1	27
Lothian	10	4	–	–	14
Manchester	3	3	3	1	7



County	Part I	Part II	Part III	Part IV	Total (a)
Merseyside	8	–	–	3	11
Mid Glamorgan	12	2	4	2	16
North Yorkshire	33	13	6	3	49
Norfolk	21	4	3	3	28
Northumberland	10	5	3	4	29
Nottinghamshire	15	6	2	5	26
Northamptonshire	18	6	1	2	26
Orkney	1	–	–	–	1
Oxfordshire	32	10	–	2	44
Powys	15	2	1	1	18
South Glamorgan	6	–	–	1	7
South Yorkshire	24	4	4	8	36
Shropshire	25	2	–	3	30
Shetland	1	–	–	–	1
Somerset	38	8	5	3	49
Staffordshire	28	5	–	4	37
Strathclyde	23	8	4	5	36
Suffolk	55	–	3	7	62
Surrey	61	8	2	2	71
Tyne & Wear	6	3	–	3	12
Tayside	9	5	1	1	15
West Glamorgan	4	1	1	2	7
West Midlands	20	7	–	1	28
West Sussex	40	8	3	3	51
West Yorkshire	28	7	1	4	39
Warwickshire	23	5	1	2	30
Wiltshire	42	10	2	1	53
UK total	1,492	411	145	192	2,095
Overseas	19	1	–	–	20
Total	1,511	412	145	192	2,115

Note: Total (a) excludes Part III

Part I Farriers who have completed a 4-year, 2-month apprenticeship and who hold the Diploma of the Worshipful Company of Farriers, or who hold an equivalent qualification plus two years of regular and gainful employment in the shoeing of horses, or army farriers holding equivalent qualifications.

Part II Farriers practising in 1975 with two years of minimum experience.

Part III Persons who can shoe their own horses and/or horses belonging to other people without payment.

Part IV Persons with two years of regular and gainful employment in the shoeing of horses otherwise as an apprentice or while undergoing a course of training, or a person who has not passed an examination but has complied with the apprenticeship and training conditions.

NB: Parts II–IV are no longer open. All new registrations are enlisted under Part I.

The Horse Industry

If a farrier shoes six horses daily for five days each week and revisits each horse every eight weeks he will look after 240 horses per year. Many farriers, especially those with assistants/apprentices who operate in a 'horse-dense' area, will do considerably more than this, while it has to be remembered that farriers will also be involved in non-shoeing work (filing of young stock, etc). Nevertheless, on this basis it is clear that there is a shortfall of farriers in Scotland (assuming that proportions in the Highlands and Islands, not included in the Registration Council list, mirror Scotland as a whole) London and the South-East, while there is an apparent surplus in the South-West. However, two caveats have to be borne in mind. First, averages over large areas can obscure significant local variations. Second, the BETA survey suggests an increase in horse numbers from approximately 500,000 in 1995 to 900,000 in 1999 with the average number of horses per horse-owning household at 1.8, a rather dramatic increase which is explained as being due in part to sampling errors and in part to genuine increase. While there has undoubtedly been a substantial increase in private horse-ownership (leaving aside the 100,000 horses within the professional sector), this may be an overestimate. Even so, it is self-evidently clear that over the country as a whole there is likely to remain a buoyant demand for professional farriers of a high standard of training and competence.

Wages and incomes

In 2001–2, apprentices were paid at or near the national minimum wage, while a final-year apprentice working a 40-hour week was earning up to £170. However, earning potential for those working by the piece is considerably higher. Most apprentices will have assembled a full toolkit by the time their term is completed (at a cost of £3,000–£4,000) and will have bought a van, for which their master is normally expected to cover tax and insurance. In effect, an individual is set up for business once he or she is qualified.

Taking all costs into account, the income of a farrier dealing with four sets of shoes daily will amount to some £23,000 annually on the basis of a charge of £50 for a set of shoes. The breakdown of costs shown opposite (from *Forge*, December 2000) gives some indication of how this figure is derived. It should be remembered, however, that many farriers will achieve a higher work rate than in this example, which should therefore be viewed as a conservative estimate of income. If the costs were put against an average total cost of £50 per set of shoes, not including VAT, the average salary over 52 weeks per year would be approximately £26,448, or £508.62 per week before tax. For the farrier who buys a new vehicle with a 100% loan for six years, his salary would be approximately £22,608, or £434.77 per week before tax.





Breakdown of farriery costs (2001–2)

- 1 In a normal working day, taking in lunch breaks and dealing with the normal workings of a farriery business, the total maximum sets that can be achieved are four per day.
- 2 Mark-up is included, as a farrier has to have a certain stock of shoes, nails, rasps, etc. on the shelf for repeat business. This has to be termed as dead stock, as it has very low, if any, resale value, and does not form any part towards living expenses.
- 3 The maximum weeks a farrier can work are 48. This is calculated by assuming two weeks holiday, plus a week at Christmas; the other seven days are made up with business meetings, professional education seminars and sickness.
- 4 Professional fees are made up of accountants, legal farriery licence and trade membership.
- 5 Vehicle costs are based over six years with depreciation, and savings to renew the vehicle after six years of £2,668.80 per year. The running cost of the vehicle is based on 16,500 miles per year
- 6 If a 100% loan were taken out for a new vehicle with a bank over six years, this would add an extra £4 per set for the first six years.
- 7 All costings in this breakdown include VAT at 17.5%, where applicable.

Item	£
Four standard shoes to include mark-up for stock	9.00
Nails	1.47
Rasps	0.38
Gas	0.75
Miscellaneous: Wear + tear of working clothes, tools, equipment	0.50
Insurance of stock, storeroom, forge buildings, public liability	0.21
Personal insurance (pension minimum payment £100pm)	1.66
Professional fees	0.75
Telephone accounts	1.00
Stationery 0.10 vehicle replacement and depreciation	2.78
Diesel and oil based on 24mpg over 16,500 miles	2.73
Servicing	0.53
Tyres	0.17
Tax and insurance	0.42
Total costs	22.45

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A farrier's income will, to some extent at least, be determined by his personal expectations, his work rate and his level of overhead costs. Moreover, seasonal fluctuations will affect his pattern of work, as will the distances he is required to travel and the extent to which he is involved in remedial or therapeutic shoeing. A survey carried out by Zephyr Publications contacted all registered farriers, requesting information as to their level of charges. In all, 8% of farriers responded to the survey and the results (exclusive of VAT) are shown in Table 16, on a regional basis.

Table 16: Farriery charges (£)

Region	Average shoeing charge	Range
North-East	35	35–50
North-West	48	38–78
South-West	44	35–52
South-East	44	35–58
Midlands	48	30–36
Home Counties	50	40–70
East Anglia	43	35–53
Wales	37	32–45
Scotland	42	37–50
London		44–55
Bristol		30–58
Manchester		40–50

Farriery and racehorses

Generally speaking, both flat and National Hunt racers are re-shod with racing plates each time they run. Thus, demand for the services of farriers per horse per year will depend upon how frequently the animal races, and this, in turn, will depend upon its current form and the plans of the trainer for that particular horse. It is probably reasonable to assume that compared to the average event/dressage/pleasure horse which, when in use, will be re-shod every 6–8 weeks, the racehorse will be re-shod more frequently. It is, however, impossible to make an unequivocal statement, for the reasons given above.



© Terry Heathcote

Mobile farrier, New Forest

None of the principal authorities (the National Trainers Federation, the British Racing Board or the Jockey Club) is able to supply definitive observations on the issue of farriers specific to the racing industry. While remedial shoeing (for laminitis, for example) will be undertaken for especially valuable animals by the Lambourne-based 'Laminitis Clinic', very few training yards (and of these only the largest) employ their own farrier. The general procedure is for a trainer to build up a relationship with a particular farrier (or farriery group) in much the same way as he would with his veterinary surgeon, and for that individual (or group) to deal with the horses in that particular yard. Only rarely will a trainer seek farriery assistance outside this arrangement.



Appendix A

Analysis of responses to saddlers' questionnaire

There were 23 responses to this questionnaire, 6 of which were from urban-based saddlers, the remainder working in the village/countryside environment. Of the total, 60% (of mean age 49, range 27–81) operated in the area of their birth, working at their craft on average 41.5 hours weekly. Excluding part-timers and semi-retired respondents, mean weekly hours of work advance to 55.5. It emerged that 16 of the saddlers had been engaged with the trade for the whole of their working lives, 3 had entered the craft from the horse industry, and 1 each from carriage building, retail sales, the Fire Service and the Army. Only 4 had parents engaged in craft work, of whom just 1 emerged from a parental background in saddlery.

Education and qualifications

While all saddlers held Society of Master Saddlers (SMS)/City & Guilds (C&G) Level 3 certificates (or their equivalent) and a limited number held the Cordwainers Diploma (6) or the Lorimers Certificate (2), only 9 had pursued a four-year apprenticeship. On the other hand, 14 claimed to have learned their craft as apprentices, the rest as full- or part-time students. Only 7 had been, at various times, involved with the Countryside Agency's New Entrants' Training Scheme (NETS). A significant number (11) attended block-release courses at The Saddlery

Training Centre at Salisbury, while 2 had attended similar courses at Cordwainers College, Enfield. Few respondents (5) had no intention of attending courses in the future on the grounds that they believed their skills to be sufficient and they had little time to spare. While only 4 respondents regarded current training provision as poor, most offered qualitative judgements on levels and standards of training. These included the following concerns:

- access to various training courses should be less expensive, with guaranteed funding;
- group sizes should be smaller and training workshops in colleges should be better equipped;
- staff at the various training centres should themselves be better trained in practical skills and (if this were the case) more adequately rewarded for their efforts;
- with the retirement of older trainers, standards would decline.

In addition, 4 respondents held teaching qualifications from the British Horse Society, 2 (a 27-year old and a former army officer) held HNDs and 1 was a graduate (in geography/geology). Only 8 respondents felt the need for training in business methods and while more than half the sample had no computer skills, they claimed that such skills were of no relevance to them.

Business profile

Only 2 respondents believed their business to be declining, the remainder enjoying static (10) or growing (10) business activity. Where businesses were growing, respondents tended to find their workloads burdensome and were obliged to turn down offers of work. In each case, growing business correlated directly with increasing horse numbers in the area.

In all cases the home, workshop or shop were overwhelmingly the main sources of sales, with other outlets being of minor significance. Only 7 respondents claimed not to advertise their services, the remainder relying for the purpose on Yellow Pages and local magazines and papers.

© Tina Stallard



Racehorses on the gallops, Kingston Lisle



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© Andy Tyrner



Acorn Saddlery, South Molton, Devon

Trade magazines were of little importance, while only 2 respondents advertised via a website. As one might have anticipated on a small-scale, largely home-based craft, word-of-mouth advertisement was considered very significant by all correspondents.

Overview

While increasing bureaucracy and the efficacy of future training were evinced as matters of concern, the perception of declining craft standards and the difficulty of recruiting young people to the trade were unquestionably the principal issues. In like manner, competition with cheap (and to these respondents inferior) imports caused grave concern, with only 6 respondents claiming that foreign competition had little effect upon their businesses.

Whereas it is clear from anecdotal evidence and elsewhere that there exists a strong sense of belonging and esprit de corps within the saddlery/harness-making trade, the ageing trade population, the poor remuneration and the reliance on a declining supply of outworkers threaten its future viability. In addition, unfair competition (in the sense that exported English leather can be made into finished saddles/bridles in countries where labour is cheap and then sold in Britain as English products) is having a profound effect upon confidence. This is especially the case among younger craftsmen, who express the intention of leaving the trade. Despite the smallness of the present sample, it is significant that the 3 youngest

respondents (all 27 years of age) addressed these issues at some length and with some bitterness. Foreign imports and foot and mouth disease forced one young man to abandon his 'much-loved profession' for work in a bank after two years of supermarket labour to subsidise his business. Interestingly, however, he 'keeps his hand in' at the weekends and proposes to return to the trade at some future date 'if things improve'. In another case, a 27-year old Master Saddler with an HND from Cordwainers, a four-year apprenticeship and 'every qualification the SMS can offer, and more' was offered a starting salary of £8,000 p.a. He took employment in a livery yard and is shortly to emigrate to the United States, where 'I have been offered the world by a large saddlery there'. If these sort of views are widespread among the craft population as a whole, it is self-evident that action needs to be taken if young craftsmen are to be recruited and retained. Indeed, those now involved in the trade need to be considering ways by which a career structure with incremental advances in both remuneration and training can be evolved.

A final point of issue concerns the attitude of local planning authorities towards the change of use from agricultural to craft buildings. In several cases saddlers complained that while Defra was strongly encouraging farmers to diversify into rural trades and crafts, planning authorities were sometimes reluctant to countenance the appropriate change of use of buildings – in one case turning down an application for conversion to a saddlery without the matter even going to committee. Here, once again, is evidence of failure of the practical implementation of policy due to local intransigence. This sort of difficulty is only likely to be resolved when the various interested parties understand the imperative of rural regeneration in all its facets.





Henry Dorken shoeing horse. Chipping Hill, Essex, (1950)

Appendix B

Analysis of responses to farriers' questionnaire

In all, 29 farriers (of whom one was female) responded to the questionnaire, 4 of whom were from towns, the remainder working in a village/countryside environment. Of these, 21 (of mean age 41, range 23–65) worked in the locality of their birth, 6 having moved within the region. Only 2 had moved from beyond their region of birth: 1 from Accrington (Lancashire) to Cirencester (Gloucestershire) and another from Trelech (Carmarthenshire) to Marlborough (Wiltshire).

Leaving aside a single individual who combined farriery as a part-time occupation with farming, respondents worked for an average of 54 hours a week at their craft. Only 5 of the sample had not been farriers for the whole of their working lives. Of these, 3 had worked in the horse industry as National Hunt jockeys/showjumpers, 1 had been in the Army and the other had been a draftsman. Overall, 9 respondents came from a family tradition of blacksmithery or farriery, while 2 were from other craft traditions. The remainder entered the trade from non-craft backgrounds.

Educational profile

The formal apprenticeship route had been pursued by 25 of the respondents, 1 had learned farriery in the Army, 1 had studied the craft with his father and the remaining 2 (both late entrants) had attended short-term courses of various descriptions. The Diploma of the Worshipful Company of Farriers was held by 26 of the farriers, while 3 (on Part II of the FRC list) had obtained registration by virtue of experience. Of those who held diplomas, all had attended the Herefordshire College of Technology (Holme Lacey). No respondents held HND/HNC/BSc qualifications, although 2 held a teaching qualification by virtue of their status as Area Training Farriers.

Course attendance

During past year		During past 5 years		Over next 5 years	
Yes	No	Yes	No	Yes	No
13	14	18	9	18	9

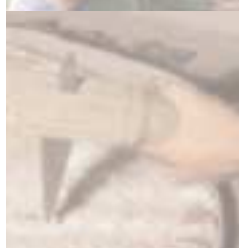
A variety of reasons were advanced by those who did not propose to attend courses in the future. Leaving aside the widely held view that individuals were either too busy or too old and were anyway already sufficiently skilled, the two significant reasons given were that distances between training centres were too great and that appropriate courses were not on offer. Although only 5 respondents considered current modes of training to be poor, a number of opinions were offered as to how training might be improved. These included:

- adhering to traditional methods and avoiding 'gimmicks' – an opinion exclusive to older farriers;
- the importance of establishing training courses at local venues;
- ensuring that college courses offered a comprehensive training in horse studies – as opposed to merely focusing on the foot;
- reducing paperwork and bureaucracy so that those teaching in colleges could concentrate on teaching.

Of the 10 respondents who believed that training in business methods would be helpful, interest was overwhelmingly concentrated on simple bookkeeping and correct filling of Inland Revenue forms. Apart from a single case, no interest was evinced on learning computer/web-based skills, with 70% of the sample claiming non-existent skills in this area.

Business profile

While numbers were fairly evenly spread between those respondents who believed their businesses to be growing (13, all of whom felt that horse numbers were increasing in their area) or static (16), only 3 farriers advertised their services, in each case via the Yellow Pages or local papers. On the other hand all respondents perceived



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word-of-mouth communication as a vital way of advertising their business.

With the exception of a single respondent, who spent 25% of his time in metalwork activity, all farriers were exclusively engaged with horse work. Significantly, perhaps, the exception was the only person to report that horse numbers in his area were declining, due to 'building on rural land'.

Overview and concerns over the future

With increasing horse numbers in recent decades, there remains a buoyant demand for the farrier's services and the trade is one that promotes job satisfaction and adequate remuneration. For this reason, perhaps, few farriers in this survey expressed concern as to the difficulty of recruiting young people to the craft or of securing capital for starting businesses. Virtually all, however, had grave concerns as to future prospects in the event of the total prohibition of hunting with hounds and were bothered (or even alarmed) by the growing burden of bureaucracy and paperwork. While the effectiveness of

standards to decline. Second, insufficient time is spent during training in colleges on shoeing horses, and too much on general training in use of metal (e.g. 'In the 23 weeks my last apprentice was in college he was engaged each day in practical skills, yet only applied five horse shoes in all that time'). Moreover, it is alleged, colleges rely too much on using machine-made, as opposed to farrier-made, horse shoes. This apart, there is apparently a tendency among teachers to use 'too many big words'.

Among the other issues raised by respondents was a widely held resentment against farriers coming to this country from overseas and undercutting indigenous craftsmen. These people, it was felt, had managed to avoid the rigorous British training system and were likely to contribute to a decline in the quality in the country as a whole.

The Farriers Registration Council was by no means immune from criticism, with approximately one third of the respondents commenting upon the somewhat high-handed attitude of that body, with terms like 'rudeness', 'condescension', 'secrecy' and 'lack of accountability' featuring in responses. This clearly suggests that for the future the FRC may need to develop a closer understanding with those whom it purports to serve.

© National Trust Picture Library



current training provision was generally regarded as adequate, there were general concerns over a perceived decline in craft skills, although it is difficult to determine the precise nature of this decline. However, two themes seem to emerge. First, as horse numbers grow at a greater pace than farrier numbers, so the demands on farriers' time increase and thus there may be a tendency for



Exemplars of the questionnaire, including responses, statistics and other information, can be found on the accompanying website: www.craftsintheenglishcountryside.org.uk