



South Africa | Cape Town | 2020

# China Horse Sports Landscape

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The Hong Kong Jockey Club  
RIDING HIGH TOGETHER

## AGENDA



- 1) Current developments
  - China horse sports industry stakeholders
  - Government framework for supporting horse sports
  - Racecourses, equestrian competitions and trade fairs
  - Horse imports and racing competitions
  - Industry Training
  - Equestrian development under CEA
  - Hainan development
- 2) Development needs
- 3) Prospect of development through Conghua Racecourse
  - The Conghua Racecourse
  - Potential ARF Conference in Conghua



# 1. CURRENT DEVELOPMENTS





# China's horse sports industry stakeholders



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Government Associations

Private Entities

## "The Big Two"

### Chinese Equestrian Association (CEA)

- Rules of Racing Establishment
- Development of improved technical standards
- Licensing and development of professionals including officials, riders/jockeys, trainers, stable staff...
- Results and Ratings
- Preparing Team China for Olympic Equestrian

### China Horse Industry Association (CHIA)

- Imports / Exports
- Breeding
- Stud book
- Sales
- Approval feed / medication
- Veterinary services
- Disease free zone related matters
- Regulatory veterinary control
- Practicum placements for vets, farriers and lab

Horse ID/ registration  
Prohibited Substances  
Technical support for Racing Events  
Race Organization  
.....

Some overlap in activities

## Major Industry Players

**Close to 30 Provincial Equestrian Associations** under directive of CEA responsible for local organisation of competitions and talent development

**~10 Major Race Courses** with Active Races (several are openly backed by Local Governments)

**A number of major industry players** with end-to-end capabilities actively importing/breeding horses and organising races (usually with close relationship to the Government) – e.g. Rider, Yulong, Oriental Group, etc.

## Other Participants

**~2000 Private riding Clubs** around the country with a heavy concentration in the North and East

**~10 Speed Racing / Equestrian Training Programs** offered by Universities, Industry Associations and Local/Foreign Companies

**Major Non-Equine Conglomerates** diversifying into horse sports business (e.g. Fosun, Evergrande)

A number of other **non-Government backed industry associations**

**Up / Downstream suppliers** for essentials such as feed, drugs, equipment, etc.

# Government Framework for supporting horse sports

“Sports for the masses” continues to be development focus of the Government, and there is a trend (based on policy documents) to group equestrian into the list of sports that benefit the masses (as opposed to an elitist sport)

▪ **2016 State Council Document #37** (“State Council Notice on Developing Programs for Fitness of the Community”): “**Actively develop** recreational sports including yachting, fencing, auto racing, **equestrian\***, extreme sports, aviation, etc.”

▪ **State Council Suggestions on Deepening Reform and Opening Up of Hainan Province**: “**develop horse racing** as part of tourism offering; also mentioned possibility to explore “guessing type game” on major international sports events”

10/2014

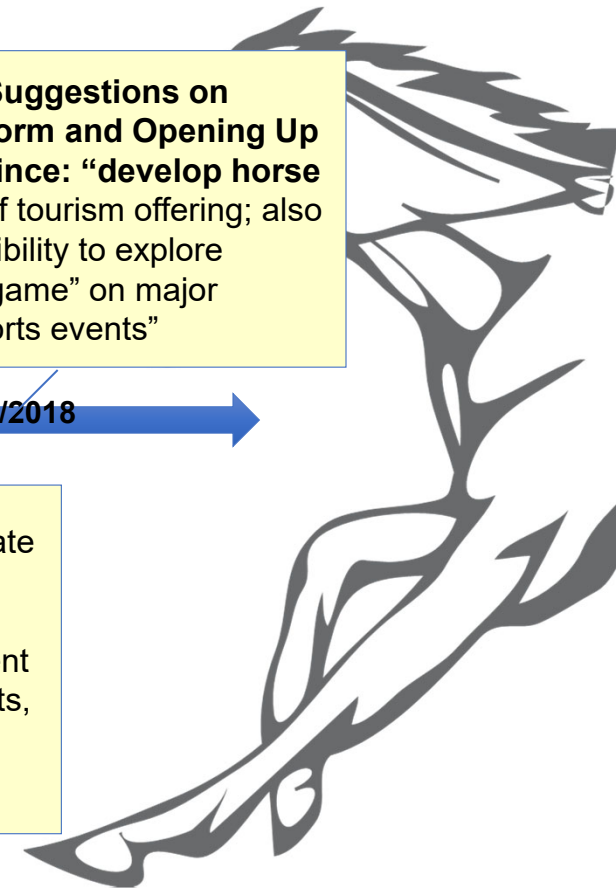
6/2016

10/2016

04/2018

▪ **2014 State Council Document #46** (“Several suggestions to accelerate the development of sports industry”): “**Develop** recreational sports disciplines. Actively push forward the development of jogging, cycling, water sports, rock climbing, shooting/archery, **equestrian**, aviation, extreme sports, etc.”

▪ **2016 State Council Document #77** (“State Council Notice on Accelerating Development of Sports for Leisure and Fitness”): “**Push forward** the development of specialty sports such as extreme sports, fencing, **equestrian**, golf etc. which are fashionable and beneficial to fitness”



\* “Equestrian” in Government Documents encompasses both flat racing and equestrian (in the narrow sense)

# Racecourses, equestrian competitions and trade fairs

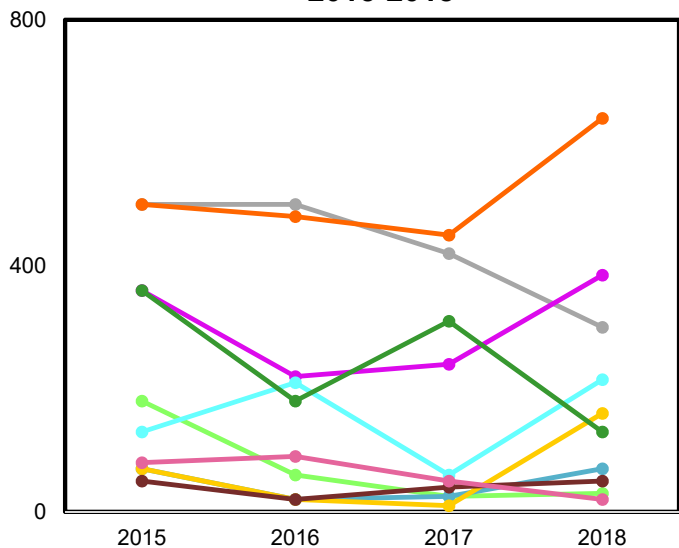


\* Held between 2014 and 2018

Active Flat Races (major ones only)		
1	Conghua	HKJC Exhibition Racing and Training Center
2	Inner Mongolia	Rider races Monsing Rider races
4	Shanxi	China Flat Racing Tournament; China Wuhan Open Horse Racing; Yulong International Racing Tournament
5	Wuhan	Wuhan Orient Lucky City International racecourse
6	Chengdu	Chengdu Dubai International Cup*
7	Yunnan	Evergrande Rider Horse China National Invitational Flat Racing
8	Xinjiang	Belt and Road China Open Horse Racing ; China Silk Road Cup
Equestrian Competition (FEI CSI3 or above)		
9	Beijing	Equuleus Jumping Competition Longines BJ Master Longines FEI World Cup Jumping - China League – BJ Final
10	Tianjin	Longines FEI World Cup Jumping China League
11	Shanghai	Longines Global Champions Tour – Shanghai
12	Chengdu	Longines FEI World Cup Jumping China League
Trade Fairs / Carnival (Larger scale/Recurring)		
13	Beijing	China Horse Fair
14	Chengdu	Chengdu International Equestrian Carnival
15	Hainan	Wenchang horse-themed carnival

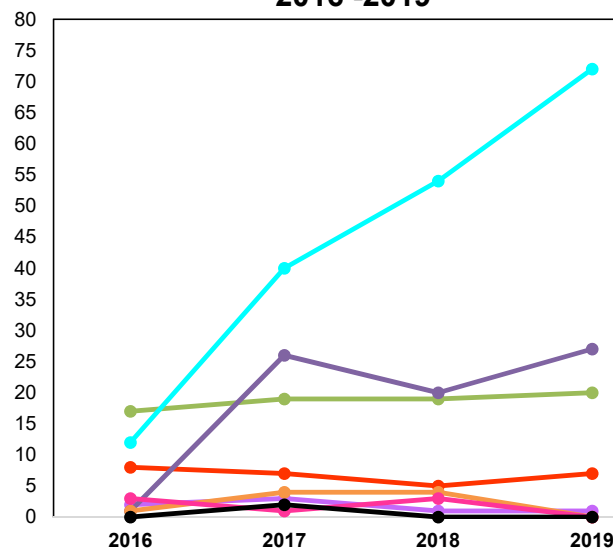
# Horse imports and racing competitions

Imported Horses No. & Species  
2015-2018



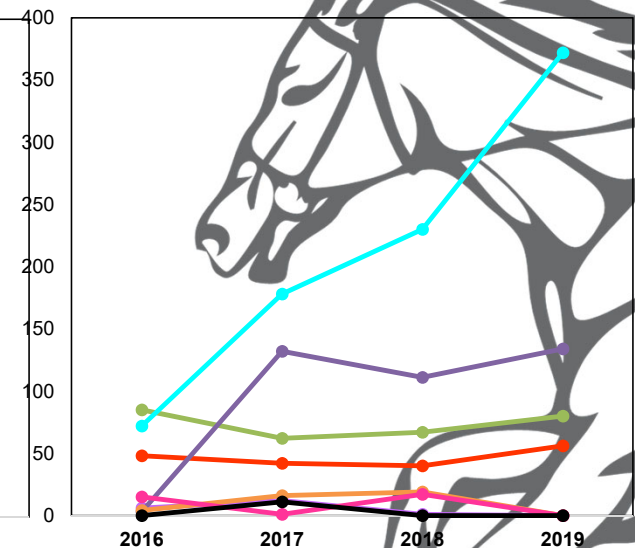
- Warmblood
- Thoroughbred
- Pony
- Akhal-Teke / Turkemene
- Mongolian
- Arabian
- Orlov trotter
- Friesian
- Retired horses from HK/Macau
- Others

Numbers of Race Meetings\*  
2016 -2019



- CEA
- Yu Long
- CHIA\*
- Beijing Turf and Equestrian Association
- Rider\*\*

Total Numbers of Races\*  
2016-2019



- Wuhan Oriental Horse Group
- China Horse Club

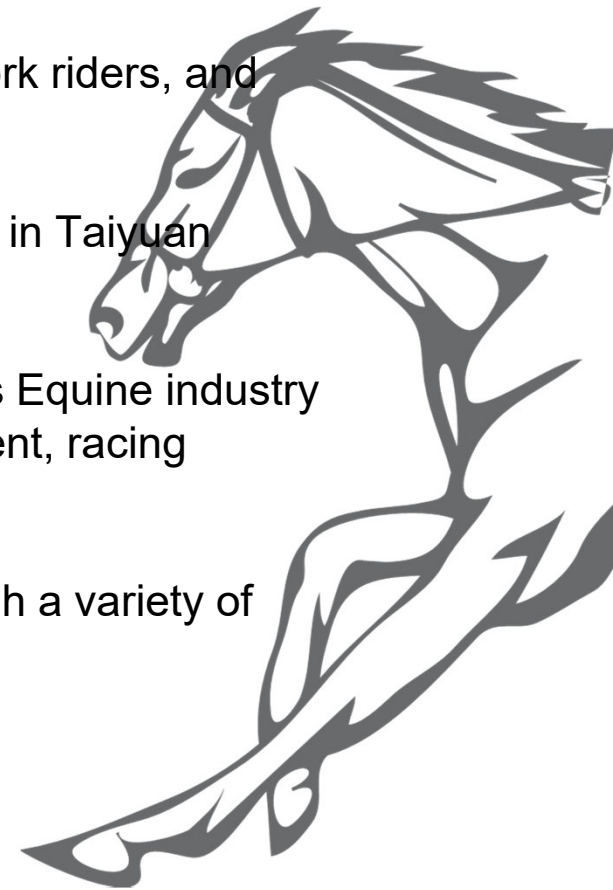
\* Race meetings indicated include not just thoroughbred races but all races

## Industry Training



- HKJC delivers HKCAAVQ\*-approved curriculum for stable workers, work riders, and farriers to develop workforce for the Guangzhou/Conghua area
- The first cohort of Yulong International Racing College started in 2019 in Taiyuan University of Technology
- International School of Equestrian at Wuhan Business University offers Equine industry management programmes, including equestrian sports and management, racing industry management, as well as riding theory and practice
- Several other speed racing vocational training programs offered through a variety of local programs and local/foreign collaborations

\* Hong Kong Council for Accreditation of Academic and Vocational Qualifications





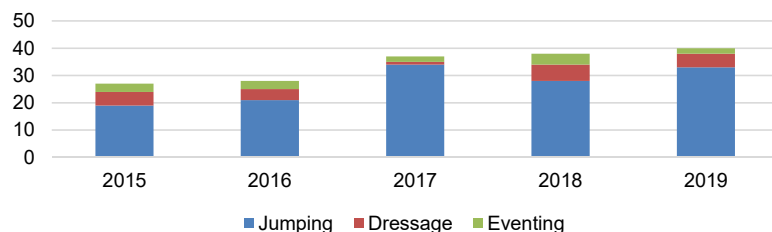
# Equestrian development under the CEA

## CEA's Three Missions and Five Supporting Systems

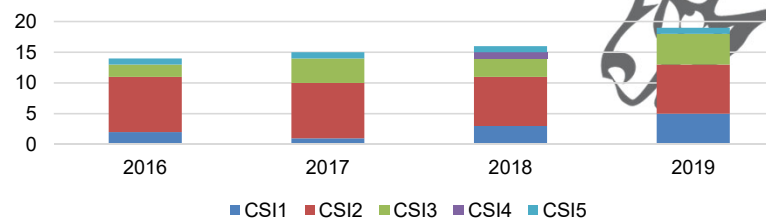
1. Win medals in Olympic Equestrian events (starting with Tokyo 2020\*)
2. Organize international and high quality equestrian competitions
3. Make China a leading equestrian nation

1. Intensive Training Systems
2. High standard Competition Systems
3. Membership Service and Management Systems
4. Certification and Talent Training Systems
5. Equestrian & Services Industries Integration Systems

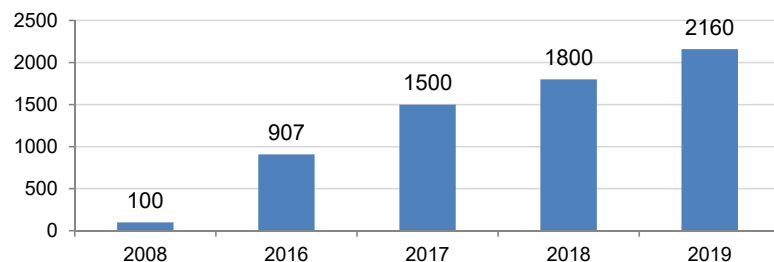
### CEA Sponsored Equestrian Competitions



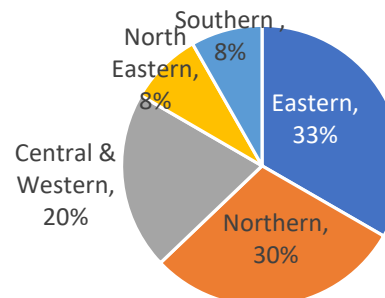
### FEI CSI Equestrian Competitions



### # of Equestrian Clubs in China



### Regional Distribution of Equestrian Clubs\*\*



\* China achieved team qualification in both Eventing and Jumping for the first time in history for the 2020 Tokyo Olympics

\*\* Based on 2018 data

## Hainan Development

11 Apr. 2018

In the State Council Suggestions on Deepening Reform and Opening Up of Hainan Province, **horse racing** was **mentioned in the tourism section**; the possibility to **explore “guessing type game” on major international sports events** was also mentioned

28 Dec. 2018

Implementation plan for building an international tourism consumption center in Hainan: **encourage horse racing development is once again mentioned**; along with (separate) mention on exploring lottery development

Dec. 2019

A Mainland news reported\* that **a detailed draft guidance on horse racing development in Hainan Province had been formulated and submitted to the Provincial Government for approval**. (“Guiding Opinion on the Development of Horse Racing in Hainan Province” 《海南省關於發展賽馬運動的指導意見》); subject to Provincial and State Approval, some announcement may come in preparation for more material industry development

**Overall, Central Government’s intention is to development Hainan into a Free Trade Zone including a leading International Tourism Pilot Zone hosting horse racing and international sports events**



Confirmed Gov't policy



Policy in Shaping

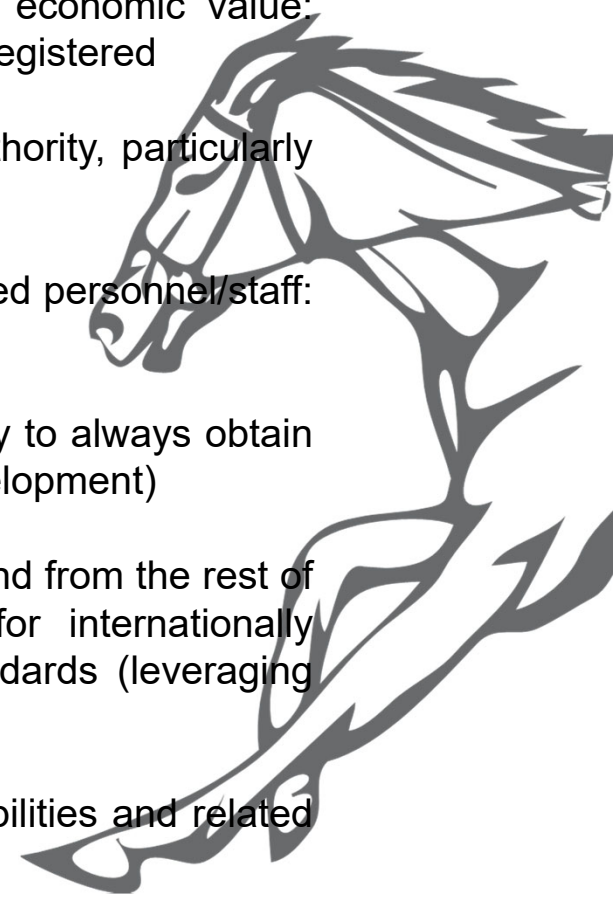
\* Report was published in online portal of stock.com.cn

## 2. DEVELOPMENT NEEDS



## Development Needs

- 1) Need to develop upstream breeding/registration components to unleash economic value: despite existence of stud book many thoroughbreds who are racing are not registered
- 2) Need to establish world class rules of racing and capabilities in racing authority, particularly those in regulatory functions: Stipendiary Stewards, Regulatory Vets, etc.
- 3) Need for top class vocational training to develop key racing operations related personnel/staff: vets, farriers, stable workers, trainers, jockeys, etc.
- 4) Significant issues concerning veterinary science and mediation (e.g. inability to always obtain drugs and other materials needed for world class racing and equestrian development)
- 5) Current health status of horses from China may restrict their movement to and from the rest of the World, hence there is pressing need to establish infrastructure for internationally recognized system of movement, quarantine, and competition/racing standards (leveraging CRC/Greater Bay Area as a starting point)
- 6) Racing as a key tourist magnetic, race course entertainment/catering capabilities and related tourism event organisation capabilities stand to be further developed



### 3. PROSPECT OF DEVELOPMENT THROUGH CONGHUA RACECOURSE

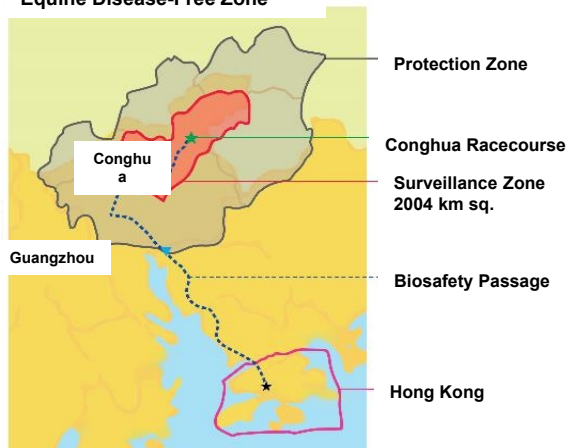




# The Conghua Racecourse



Equine Disease-Free Zone



## First World-Class Thoroughbred Racehorse Training Facility in Mainland

- State-of-the-art stable facilities; 4 tracks including an uphill gallop track
- Mainland's only comprehensive equine hospital – with professional vets, technicians, dedicated pharmacy, and clinical lab
- World class training programs for jockeys, Mafoos and other staff

## World Class Exhibition Racing

- Inaugural exhibition raceday in March 2019 – first time for Hong Kong world-class horses to race in Mainland attended by a variety of top officials

## Equine Disease-Free Zone (EDFZ)

- Mainland China's only permanent EDFZ for race horses, enabling seamless movement between HK and Conghua
- Strict biosecurity to facilitate regular movement of horses between HK and Mainland, and then overseas; strict adherence to HK's international animal import and export control system

## Future International Equine Quarantine Station

- Significant development which will make horses eligible to acquire internationally recognized health status, thereby enabling the seamless movement of horses between China and overseas, and further activating world class equine center of excellence

## Potential ARF Conference in Conghua

- ARF can consider holding special China edition conference in Conghua:
  - Bring together racing experts, Officials and related industry participants from around the World
  - Anchored to the Conghua Racecourse and World Class Exhibition Racing (tentatively October 2020) as a live demonstration of the Equine Center of Excellence
  - Conference and break-out sessions can include:
    - Racing landscape from around the world and particularly in China
    - Discussion on operating models of Racing
    - Breeding/Registration and upstream development
    - Orchestration and Sharing of World Class Rules of Racing Establishment
    - Vocational Training
    - Horse Movement and EDFZ
    - And other topics...



A scenic landscape photograph featuring a city nestled in a valley, surrounded by mountains and lush greenery. The text "THANK YOU" is overlaid in the center. The image has a halftone or dithered texture. The scene is captured during the "golden hour" of late afternoon or early morning, with warm, low-angle sunlight illuminating the mountains and the city below. In the foreground, there are several tall, slender pine trees on the left and dense, rounded green bushes on the right. The city in the valley is densely packed with buildings, their roofs catching the light. In the background, a range of rugged mountains stretches across the horizon, with a prominent, sharp mountain peak on the right side. The sky is a pale, hazy blue with soft, wispy clouds. The overall mood is peaceful and majestic, suggesting a place of natural beauty and tranquility.

THANK YOU