

THE
CANTER
CLUB

**Global Equestrian Industry
CEO Report 2026**

Executive Insights on AI, global growth & strategy

from 25+ Senior Industry leaders Across Europe, the Middle East,
Asia and Latin America

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The Canter Club - Social

Executive Summary

In early 2026, The Canter Club conducted confidential executive interviews with more than 25 senior leaders across the global equestrian industry. Participants included CEOs, founders and directors from companies spanning equestrian retail, fashion, feed and supplements, digital platforms, logistics, trade fairs, infrastructure and media, representing markets across Germany, Sweden, Hungary, Italy, Switzerland, Singapore, Argentina, the UAE and beyond.

The goal: to understand how market leaders are seeing the current state of the industry, where they see growth, how artificial intelligence is reshaping operations, what marketing strategies are delivering results and what they believe will define the future of equestrian business.

Key findings at a glance



- 65% of CEOs expect moderate growth for the equestrian industry over the next 3-5 years; only 6% forecast a decline.
- The strongest growth categories identified globally are horse care & grooming, feed & supplements and riding equipment & tack.
- Social media, paid advertising and trade shows & events remain the top three marketing channels across all company types.
- AI is already actively used by the majority of participants - primarily in marketing & content creation, customer analytics and operational processes.
- The biggest industry challenges are economic uncertainty, rising production costs and changing consumer behaviour.
- Emerging markets - particularly the Middle East, Asia and America - are consistently named as the greatest growth opportunity.

This report presents aggregated findings from all participants. Individual insights have been anonymised and consolidated unless otherwise agreed. Selected direct quotes appear throughout the report to illustrate key themes.

About this study

Methodology

The Canter Club Global Equestrian Industry CEO Report 2026 is based on structured executive interviews conducted between Q1 and Q2 2026. Each interview followed a standardised framework combining quantitative ratings and multiple-choice questions with open-ended qualitative insights.

All interviews were conducted virtually, under confidentiality. Data has been aggregated and anonymised for publication. Participants were selected based on their seniority, market relevance and geographic diversity.

Participant profile

Category	Details
Total participants	27 senior executives & industry leaders
Regions represented	Europe, Middle East, Asia, Latin America
Company types	Retail, Fashion, Feed, Digital Platforms, Logistics, Trade Fairs, Media, Infrastructure, Agencies
Interview format	Structured virtual interviews, 30-45 minutes
Confidentiality	All insights anonymised and aggregated
Period	Q1-Q2 2026

01 - Industry outlook

CEOs were asked to rate the current state of the global equestrian industry on a scale of 1 to 10 and to indicate their expectations for the next 3-5 years.

Current industry health

6.9 / 10

Average CEO rating - Current state of the global equestrian industry

Scale: 1 = Very weak / declining - 10 = Very strong / growing rapidly

The majority of participants rated the global industry between 6 and 8, reflecting a nuanced picture: while established markets such as Germany and parts of Western Europe are experiencing stagnation or slight decline, newer markets in the Middle East, Asia, and Latin America are showing strong momentum.

Several CEOs drew a clear distinction between segments within the industry - noting that the luxury and competitive sport sector continues to grow, while the recreational riding segment faces increasing pressure from economic headwinds and rising costs.

Selected CEO voices

"Regional differences are significant. The competition sport and luxury segment are growing strongly - recreational riding, on the other hand, is declining. At the same time, many new countries are entering the equestrian sport."

"Germany is stable to declining - but Asia, the Middle East, and the Americas are genuinely growing. The industry is not one market. It is many."

"Strong momentum in markets like the Middle East and Asia. Saturation in Europe, stable in the US, and growth across Central Asia."

Expected development over the next 3-5 years

#	Expected industry development	Mentions
1	Moderate Growth	65%
2	Stable	29%
3	Moderate Decline	6%

A clear majority of participants expect the global equestrian industry to grow moderately over the next 3-5 years. No participants forecast a strong decline. The consensus view is one of

cautious optimism with growth concentrated in emerging markets and specific high-value segments, while traditional core markets stabilise or contract slightly.

" Smart companies will grow but it won't happen quickly."

"The sport gets more attention in mainstream media. That will slowly translate into market growth but it won't be overnight."

02 - Key growth areas

Participants were asked to identify the product categories or services currently experiencing the strongest growth, both within their own companies and across the broader industry. Up to three categories could be selected.

Top growth categories identified

#	Strongest Growth Categories	Mentions
1	Horse Care & Grooming Products	9
2	Feed & Supplements	8
3	Riding Equipment & Tack	7
4	Experiences / Events / Tourism	6
5	Digital Platforms / Equestrian Tech	6
6	Apparel / Rider Fashion	5
7	Training / Education Services	5
8	Stable Equipment & Infrastructure	4
9	Logistics & Horse Transport	2

Horse-focused categories dominate the growth landscape. Multiple CEOs observed a notable shift in consumer spending patterns: riders are increasingly prioritising investment in their horses over personal equipment or fashion. This 'horse-first' mentality is reflected in the strong performance of care, health and feed products.

Experiences and digital platforms represent the two fastest-growing non-product categories. Equestrian tourism, competition experiences and high-quality content formats are attracting both new audiences and premium spend. Meanwhile, digital training platforms and equestrian tech are gaining traction, particularly among younger riders and markets where access to qualified instruction is limited.

CEO perspectives

"Horse-related categories are growing - rider apparel, on the other hand, is declining. When purchasing power drops, the horse comes first."

"Health products and supplements, things that directly benefit the horse, are growing strongly everywhere. The rider comes second now."

"Feed and supplements already represent a strong market because of recurring buyers. That loyalty is extremely valuable."

03 - Consumer behaviour

CEOs were asked to rate the extent of change in customer behaviour over the past five years and to identify the most visible shifts they have observed.

6.3 / 10

Average CEO rating — Extent of change in consumer behaviour

Scale: 1 = No change — 10 = Major transformation

Consumer behaviour in the equestrian industry has changed meaningfully, but not uniformly. The COVID-19 pandemic created a significant spike in demand across most categories, which has since normalised. CEOs broadly note a more economically cautious consumer who is, at the same time, more informed, more quality-conscious and more influenced by social media than ever before.

Most visible consumer shifts

#	Most Visible Consumer Behaviour Changes	Mentions
1	Increased Price Sensitivity	17
2	Growing Influence of Social Media & Creators	11
3	Greater Focus on Horse Welfare	10
4	Increased Online Purchasing	10
5	Higher Expectations for Product Quality	9
6	More Interest in Sustainability	8
7	Demand for Personalised Products	8
8	Greater Demand for Premium Products	4

Price sensitivity is the most commonly cited shift - a direct consequence of economic uncertainty and the post-COVID normalisation of spending. However, CEOs emphasise that this does not signal a downmarket shift. Rather, it reflects a more deliberate consumer who, when they do spend, expects clear quality and value in return.

Horse welfare has emerged as a central theme, particularly in European markets. Consumers are increasingly informed about animal wellbeing, and brands that communicate transparently on this topic are gaining relevance. Several CEOs noted this as both a challenge and a significant opportunity.

CEO perspectives

" People buy less often, but more deliberately. When they do decide to spend, they choose quality."

"The middle segment is disappearing. You either go premium or you compete on price. There is very little space in between."

"Horse welfare is the defining consumer topic in Germany right now. Brands that get it right will win."

"In Asia, the average rider has a nine-to-five job, takes two or three lessons per week, and isn't thinking deeply about horse welfare. They just want matching outfits. But that is changing as the sport matures."

04 - Artificial intelligence

Artificial intelligence emerged as one of the most discussed topics across all interviews. CEOs were asked to rate the current relevance of AI to their business and to identify the areas where they are actively using or exploring AI applications.

7.2 / 10

Average CEO rating - current AI relevance

Scale: 1 = Not relevant - 10 = Core strategic priority

AI relevance scores ranged widely (from 3 to 10) reflecting a significant gap between early adopters and those still exploring the technology. However, the average of 7.2 out of 10 indicates that AI is firmly on the strategic agenda of the majority of equestrian industry leaders. Several CEOs noted that this number will only increase.

Where AI Is being used

#	Current AI Application Areas	Mentions
1	Marketing & Content Creation	18
2	Customer Analytics & Data Analysis	15
3	Operational Processes & Efficiency	11
4	Supply Chain & Logistics Optimisation	9
5	Customer Service & Chatbots	5
6	Product Development	5
7	Training or Performance Analytics	2
8	Not currently using AI	2

Marketing and content creation is by far the most common AI application, used across virtually every company type and size. CEOs describe using AI for everything from copywriting and image editing to campaign planning and social media content. Customer analytics and operational process optimisation follow closely.

Notably, several CEOs described AI not as a separate tool but as an integrated part of daily workflows, used across departments for research, document creation, customer communication, and strategic planning. One CEO described it as something used in 'virtually every area of the business.'

CEO perspectives on AI

There is virtually no area where we don't use AI: Controlling, reports, concepts, customer configuration. This is no longer a future topic. It is the present.

"AI is embedded across our platform, both internally for our team and externally within the product itself. Processes are being automated that used to take days."

"We use AI for emails, customer service, dealer communication, drafting contracts. The efficiency gains are real and significant."

"For us, AI is still primarily a content tool, but I see that changing quickly. The potential in data and analytics for equestrian businesses has barely been tapped."

"Before, we talked to grooms, riders, and caretakers, then brainstormed on paper. Today we also brainstorm with AI. It is another tool, but a very powerful one."

CEO quick rating: Future impact of AI on the industry

3.7 / 5

Average rating - future importance of AI for the equestrian industry

Scale: 1 = Not relevant - 5 = Very important

While enthusiasm for AI is high, CEOs are also realistic about the pace of change. The equestrian industry remains deeply rooted in human expertise, physical product and personal relationships. Several leaders noted that AI will augment, but not replace, the human dimension of the business.

05 - Digital transformation

Beyond AI, participants were asked to identify the digital developments they believe will most influence the equestrian industry in the coming years. Up to three areas could be selected.

#	Most Influential Digital Developments	Mentions
1	E-Commerce & Direct-to-Consumer Platforms	22
2	Horse Health Monitoring Technologies	19
3	Wearables & Smart Equipment for Horses	19
4	Social Media & Creator-Driven Marketing	15
5	Digital Training Platforms	11
6	Data-Driven Product Development	10
7	Streaming & Digital Event Formats	5
8	Online Marketplaces for Horses & Equipment	4
9	Supply Chain Digitalisation	3

E-commerce and direct-to-consumer platforms top the list, reflecting both the ongoing shift away from physical retail and the growing importance of brand-owned customer relationships. Several CEOs noted that the decline of specialist brick-and-mortar retail is creating significant opportunities for brands willing to invest in digital commerce infrastructure.

Horse health monitoring and wearables represent the most cited technology-specific opportunity. CEOs across multiple company types anticipate that tracking, data, and smart equipment will become standard parts of equestrian care and that brands positioned here early will benefit significantly.

Digital training platforms are gaining ground, particularly in markets where access to qualified coaches is limited. WeHorse, a digital training platform already operating in this space, emphasised the structural demand gap: 'There is enormous demand from beginners for riding lessons, but the supply of quality instruction is completely insufficient.'

CEO perspectives

"Wearables, AI, better digital shopping experiences - the ability to measure and compare horse welfare through smart equipment will become a real topic."

"Horse health monitoring will change the industry. Owners want data. Insurers want data. Vets want data. The technology is almost there."

"The equestrian audience is actually more offline than people think, they are deeply connected with their horses physically. But that does not mean digital doesn't matter. It means digital needs to serve that physical reality."

06 - Marketing strategies

Participants were asked to identify the marketing channels currently delivering the strongest results for their businesses. Up to three channels could be selected.

#	Most Effective Marketing Channels	Mentions
1	Social Media (Instagram, TikTok, LinkedIn)	26
2	Paid Advertising (Meta, Google)	21
3	Trade Shows & Events	11
4	Email Marketing & CRM	10
5	Influencer / Creator Collaborations	8
6	Direct-to-Consumer Online Sales	6
7	PR & Trade Media	4
8	Community Building & Brand Ambassadors	3
9	Retail Partnerships	2

Social media remains the dominant channel across all company types and geographies, but with important nuance. Several CEOs noted declining ROI from influencer marketing, with a particular shift away from 'lifestyle' influencers toward riders and athletes who carry genuine credibility within the community.

Trade shows and events retain strong relevance, especially in Europe, where industry gatherings like Equitana and Spoga Horse serve as critical touchpoints for B2B relationships, brand visibility, and community engagement. However, multiple CEOs questioned the ROI of events relative to digital alternatives.

Email marketing and CRM are consistently cited as high-performing owned channels, particularly for brands with established customer bases. Several leaders noted the growing importance of WhatsApp and direct messaging as complements to traditional email.

The Influencer question

The role of influencer marketing in equestrian is actively being reassessed. CEOs expressed mixed views - recognising the reach that creators provide while questioning conversion and long-term brand value.

"Influencer collaborations - we prefer riders and athletes over classic influencers. The ROI of traditional influencers is declining."

"We have internally debated influencer ROI for a long time. The reach is there. The conversion is much less clear."

"Podcasts are becoming increasingly relevant. They build deeper trust than a single social post and the equestrian audience is more engaged there than people expect."

"Influencers who are strong in their niche deliver a very good ROI - it's the generic lifestyle influencers where the returns have sometimes disappeared, also because the budgets increased massively."

CEO quick rating: Future importance of digital marketing

4.6 / 5

Average rating - Future importance of digital marketing for the Industry

Scale: 1 = Not relevant - 5 = Very important

Digital marketing received the highest future importance score of all three CEO rating categories, significantly above both AI and market growth potential. This reflects a broad consensus that digital channels are not just important today, but will become even more central to equestrian business over the coming years.

07 - Industry challenges

Participants were asked to identify the biggest challenges currently facing equestrian companies globally. Up to three challenges could be selected.

#	Biggest Industry Challenges	Mentions
1	Economic Uncertainty	23
2	Rising Production & Operational Costs	19
3	Changing Consumer Behaviour	17
4	Animal Welfare Discussions	11
5	Market Fragmentation	8
6	Increasing Competition	8
7	Supply Chain Disruptions	4
8	Talent Shortage / Workforce Challenges	3
9	Regulation & Compliance	3

Economic uncertainty and rising costs dominate the challenge landscape. CEOs across all market segments describe an environment in which consumers are more cautious, margins are under pressure, and cost structures have shifted significantly since 2019. The post-COVID normalisation has been harder than many anticipated.

Animal welfare discussions represent a growing reputational challenge for the industry, particularly in Germany, where the topic has entered mainstream public debate. Several CEOs see this as both a risk and an opportunity: brands and companies that get ahead of the welfare agenda, rather than reacting to it, are likely to benefit.

Market fragmentation (the coexistence of many small, regional players with limited scale) was cited as a structural challenge that makes consistent quality, pricing, and reach difficult to achieve across the industry.

CEO perspectives

"We are so consumed by the day-to-day challenges that we barely have time to think about the bigger picture. That is the real problem."

"The animal welfare discussion is not going away. The industry needs to get ahead of it - transparently and proactively. The brands that do will win."

"Regulation is a real burden. The textile regulation alone has created enormous complexity for apparel companies operating across Europe."

"Youth development is almost entirely absent. Fewer people are starting to ride, that is a structural problem for the entire industry."

08 - Innovation priorities

Participants were asked to identify where their companies are currently investing most strongly, in terms of innovation and development.

#	Current Innovation Investment Priorities	Mentions
1	Brand & Marketing	22
2	Digital Transformation	18
3	International Expansion	11
4	Product Innovation	10
5	Customer Experience	7
6	Operational Efficiency	5
7	Technology Development	4
8	Sustainability	3

Brand and marketing investment leads all innovation priorities, a signal that equestrian companies across the board are prioritising visibility and positioning in a more competitive, digital-first environment. Digital transformation follows closely, reinforcing the earlier finding that e-commerce, CRM and marketing technology are front-of-mind across the industry.

International expansion is a top-three priority for a significant share of participants, particularly those based in Germany and Europe who are looking to grow in the Middle East, Asia and North America. Several CEOs noted that their domestic markets are saturated or contracting, making international diversification a strategic necessity.

CEO perspectives

"We are investing in our German base, but with more niche assortments and a clearer profile, not large collections."

"Our biggest investment right now is in digital infrastructure. Without a strong e-commerce and CRM foundation, everything else is harder."

"International expansion is non-negotiable for us. The German market is not growing. The Middle East and Asia are."

09 - Industry opportunities

Participants were asked to identify the greatest growth opportunities in the equestrian industry today. Up to three areas could be selected.

#	Greatest Growth Opportunities	Mentions
1	Emerging Markets (Middle East, Asia, Latin America)	20
2	Technology & Smart Equipment	14
3	Experiences & Equestrian Tourism	10
4	Digital Platforms & Services	8
5	Horse Welfare & Health Innovations	7
6	Premiumisation of Products	6
7	Youth / Next Generation Riders	5
8	New Competition Formats	4

Emerging markets represent the single most cited opportunity across all 27 interviews. The Middle East, particularly the UAE, Qatar and Saudi Arabia, is mentioned as a market with strong infrastructure investment, growing consumer demand, and government-backed equestrian development. Asia, especially China and India, is identified as a longer-term but structurally significant growth market. Latin America, led by polo-oriented markets, also features prominently.

Technology and smart equipment rank second - a direct extension of the earlier findings on digital transformation and horse health monitoring. CEOs anticipate that wearables, tracking devices, and health-data platforms will not only create new product categories but will reshape how riders, vets, and trainers interact with horses.

Experiences and equestrian tourism emerged strongly, reflecting a broader consumer shift from products toward memorable, high-value experiences. Several CEOs noted that polo tourism, riding clinics, and curated equestrian experiences in aspirational destinations are attracting premium clientele willing to spend significantly.

CEO perspectives

"Strong momentum in markets like the Middle East and Asia. These markets are not just growing, they are being built from scratch, with infrastructure investment and institutional support."

"Five years ago people wanted things. Now they want experiences - playing polo in AIUla, riding across landscapes they've never seen. The experiential market in equestrian sport is real and growing fast."

"The next generation is the industry's blind spot. If we don't invest in young riders now, we will have a serious problem in ten years."

10 - Outlook 2026 & beyond

As a final quantitative measure, CEOs were asked to rate their overall optimism about the equestrian industry's development in 2026 on a scale of 1 to 10.

7.2 / 10

Average CEO optimism score - Equestrian Industry 2026

Scale: 1 = Very pessimistic - 10 = Very optimistic

The average optimism score of 7.2 reflects measured confidence, not euphoria, but genuine belief in the industry's direction. Individual scores ranged from 3 to 10, illustrating the contrast between companies facing significant headwinds in domestic markets and those positioned for growth in emerging markets or high-growth segments.

The most optimistic participants are those with significant exposure to emerging markets, digital businesses, or the premium experience sector. The most cautious are those primarily dependent on the German or broader Western European retail market, where economic pressure and structural shifts are most acutely felt.

CEO Quick ratings summary

3.7 / 5

AI Industry Impact
Future importance for equestrian

3.9 / 5

Market Growth Potential
Global equestrian market

4.6 / 5

Digital Marketing
Future importance rating

CEO Voices on the future

"The industry will always exist. Horses are emotional, riding is a passion. That doesn't disappear. The only question is who positions themselves well."

"Technology, sustainability, and access will define the next chapter. The brands that combine all three will be the ones people remember in 2030."

"The equestrian industry is still very traditional and that is both its greatest strength and its biggest risk."

"Whoever wins the younger generation now and takes animal welfare seriously will shape the industry of the next decade."

"The future of the equestrian industry is global, digital, and experience-driven. The companies that embrace all three will lead."

About The Canter Club

The Canter Club is a strategic marketing consultancy focused exclusively on the global equestrian industry. Based in Dubai and active across Europe, the Middle East and key international markets, The Canter Club works with equestrian brands, events and organisations to build meaningful brand presence, develop marketing strategies and connect with the right audiences.

The Global Equestrian Industry CEO Report 2026 is The Canter Club's first annual executive insight study - designed to provide industry leaders with cross-border perspectives, data-driven insights, and a benchmark for strategic decision-making.

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