

THE BIGGEST EQUESTRIAN TRADE FAIR- SPOGA HORSE, COLOGNE 03-05.09.2017 – A REPORT by P. Dhanasekaran, AEPO, CLE and Smt. Suneeta Das, AEPO, CLE

The International Trade Fair for the Equestrian Sports

With a foreign share of 80%, the event is undisputedly number one industry marketplace in international level. Spoga Horse with its two editions Spring & Autumn meets the needs of the international retail as well as wholesale market with the right mix of products and services! A successful concept, impressively proven by the growing numbers of visitors and exhibitors to the event. It is the perfect industry meeting point: Innovative ideas, important information and a modern infrastructure quickly get the equestrian experts talking!

Spoga Autumn 2017- Passion & Profession

With a title of "Passion & Profession" the Spoga Horse Fair Autumn opened its gates from September 3-5, 2017 at Koelnmesse GmbH, Koln the Cathedral City at the Rhine River. As per figures calculated in accordance with the guidelines of the Association for the Voluntary Control of Trade Fair and Exhibition Statistics (FKM), the Autumn edition witnessed :

Trade Visitors : Spoga horse autumn and spoga+gafa 2017 registered around 39000 trade visitors on the final day of the fair who came from 113 countries, 60 percent of whom came from abroad and as such this fair has once again become more international. This clearly underpins the leading international position of the trade fair.

Trade Exhibitors : In terms of the number of exhibitors, this year's event achieved a three percent increase. 425 exhibitors from 32 countries participated in the fair, 81 percent of which were from abroad, participated at spoga horse autumn. These included

82 exhibitors from Germany and 343 exhibitors from abroad who had presented their new products in the fair cutting edge innovations & latest developments of the equestrian industry to the international trade visitors. The companies rely on the trade fair as an industry platform and appreciate the first- class quality of the trade visitors. Once again, spoga horse autumn impressed with an expanded range of offers in Hall 11. As a result of the adapted layout over the two floors of the hall, the trade visitors' quality of stay was further optimized. Whereby all key players of the equestrian sport industry were represented in Hall 11 and offered the trade visitors a condensed market overview. Furthermore, the young, innovative companies that presented themselves to the international trade visitors in the pavilion of the Federal Ministry of Economic Affairs and Energy (BMWi) also brought a breeze of fresh air and new ideas.

Display of Products : Each product range is presented : trendy fashion, boots, saddles, bridles, care products and feed supplements. In addition to riding fashion, helmets, shoes, saddles and bridles, care and feed supplements, through to accessories and services, spoga horse also offered an extended range of items for dogs this year. Many equestrians had a dog walking with them at the barn & outdoors.

The fact that the diversified offer once again attracted more international trade visitors to the exhibition hall was also confirmed by the members of the Germany Sports Equipment Industry Association e.V. (BSI). In her capacity as a member of the BSI Committee,

Monique van Dooren-Westerdaal summed up that "spoga horse went very well from our point of view. The distribution over the two floors of the hall was solved extremely well with a successful mixture of all product sections.

Outcome : There was a high number of international customers. The members were able to hold very good discussions, also with many new international customers. The outcome was constantly busy stands and aisles as well as intensive discussions everywhere, indulging in serious business negotiations. The mood was very positive and not just among the exhibitors but also the trade visitors also confirmed that spoga horse is the number one marketplace of the industry: 84 percent of the visitors were satisfied or very satisfied regarding having achieved their fair objectives. 92 percent would recommend a good business acquaintance to visit spoga horse. In addition to the positive mood, the high quality of the visitors also underlined the significance of the trade fair: 73 percent of the respondents are involved in procurement decisions, 53 percent are even decisive in the decision- making process...as informed by the fair authority.

The Winners of the Spoga Horse Award... This is what the future looks like.

Spoga Horse Award was organized on 5th September, 2017. This award has been conferred by Koelnmesse and its media partner Equitrend since 2015. This year the highlights were Innovations, Sales Concept & Sustainability.

INTERNATIONAL

Name of the Awardees	Category
Komperdell Sportartikel	First place in the category Innovations with the safety vest, Equestrian Cross Body Protection.
Horseware Products Ltd	Sustainability with the waistcoat Isola Gilet.
HKM Sports Equipment	Gold medal in the category Sales Concepts with a product collection for the cinema film Wendy.
Cabasus	Claimed Special jury prize with an app & movement tracker.

Stands in CLE Pavilion



(From right Mr. Ashwani pande, Managing Director, Koelnmesse YA Tradefair Pvt. Ltd, Mr. P.Dhanasekaran, AEPO, CLE, Ms.Suneeta Das, AEPO, Kanpur & Mr. Bijoy Varghese, Project Manager, Koelnmesse YA Tradefair Pvt Ltd)

One Indian company M/s. Kava Exports, Kanpur was awarded on successful completion of fair participation for 25 years continuously.

German Market for Indian Equestrian Products – Present Status

Germany is the second-largest global importer of Harness and Saddlery items, with its imports increasing

sharply from US \$ 126.41 million in 2012-13 to US \$ 147.13million in 2016-17. India's export of Harness & Saddlery items to Germany has also been growing from US\$ 18.45 million in 2010-11 to US\$ 28.69 million in 2016-17.

Therefore, Germany is the leading importer of Saddlery & Harness products from India, and further, eight of the top ten leading importing countries of Indian Saddlery & Harness items i.e. UK, Belgium, Netherlands, France, Sweden, Italy, Denmark, are from the European Union, with this region having a share of 74% in Indian Saddlery & Harness exports.

India's export of Harness & Saddlery Products :

As per Shri Taj Alam, Convenor, by virtue of Kanpur's specialization in tanning of buffalo hide from which harness leather is made, which is the main raw material for the harness & saddlery goods and due to the trained manpower available here and Unnao, it has become the only region in India to manufacture saddlery & harness goods, for which Geographical Indication has also been granted.

Harness & saddlery comprises of a wide range of products running into more than 1,000 different items. In addition to the traditional leather equipment, it also includes metal hardware, nylon & textile items, such as horse rugs, blankets, saddle pads etc and also the riding apparel and the specialised riding boots.

Predominantly the manufacturing units in Kanpur & adjoining Unnao are 100% export oriented. It's the most labour-intensive product segment in the leather sector generating maximum employment to the economically & socially weaker section of the society.

In quantity terms, India is still the largest manufacturer of these products in the world, having an estimated capacity of 20 million pieces per annum.

In dollar terms India is positioned as the 3rd largest exporter in the world during 2016.

Global Scenario

Statement showing global import of Saddlery & Harness, India's export and share 2012-2016

(Value in Million US\$)

Details	2012	2013	2014	2015	2016
World Import	1255.41	1300.82	1414.97	1404.78	1451.66
India's Export	110.41	145.54	162.70	146.38	143.08
% Share of India	8.79%	11.19%	11.50%	10.42%	9.86%

Source: ITC, Geneva/India's export DGCI&S

The global import of Saddlery & Harness increased from US\$ 1255.41 million in 2012 to US\$ 1451.66 million in 2016.

India's export of Saddlery & Harness has increased from US\$ 110.41 mn in 2012-13 to US\$ 143.08 mn in 2016-17

India accounts for 9.86% share in the world's total import of US\$ 1451.66 mn in 2016.

Global Import of Saddlery & Harness – Top 10 importing countries

(Value in Million US\$)

Importers	2012	2013	2014	2015	2016
World	1255.41	1300.82	1414.97	1404.77	1451.66
USA	408.95	411.07	436.17	485.73	510.47
Germany	126.41	134.82	163.31	145.75	147.13
United Kingdom	71.68	86.02	99.92	96.17	92.96
France	74.76	79.32	85.99	83.32	81.82
Canada	58.58	60.15	60.79	62.37	57.58
Netherlands	45.89	43.36	53.67	49.95	51.06
Australia	42.08	41.68	46.21	43.72	46.88
Japan	53.06	50.40	50.73	44.54	46.79
Belgium	35.28	35.87	35.42	35.40	40.29
Italy	33.70	35.78	38.53	36.35	37.19
Spain	23.57	24.94	32.01	28.56	36.51
Sweden	30.73	34.91	36.84	32.97	31.22
Switzerland	26.77	26.78	29.93	26.86	27.14

Source: ITC, Geneva

These 13 countries together accounts for a share of 83.15% in global saddlery & harness import.

Export of Saddlery & Harness from Central Region for last five years

(Value in Million USD)

Commodity	2012-13	2013-14	2014-15	2015-16	2016-17	% variation
Saddlery & Harness	137.97	145.28	162.72	154.20	146.5	-4.99

Kanpur's participation in terms of number of exhibitors from any country is the highest, followed by hosts Germany. Nearly 90 exporters (25 through CLE) from the city exhibited their harness and saddlery goods at the equestrian fair.

India's Export of Saddlery & Harness – Top 10 Countries

(Value in Million US\$)

Country	2016-17
GERMANY	28.69
U.S.A.	26.96
U.K.	14.93
NETHERLANDS	12.6
FRANCE	10.99
AUSTRALIA	10.06
SWEDEN	6.49
BELGIUM	5.4
ITALY	4.5
SPAIN	4.01

Source: India's Export DGCI&S

These 10 countries account for about 87% of India's total export share

CLE's participation in the Spoga Fair

With the aim of enhancing our market share in Germany and in order to facilitate member-exporters of Harness & Saddlery who are predominantly from the MSME sector to take part in this specialized fair for Equestrian Products in Europe, the Council had taken necessary initiative with the Govt. of India & organized the "Group Participation" of 25 member exporters in a total area of 320 Sq.mt in Hall no. 11.1 & 11.2 in the September 2017 edition with support from the Market Access Initiative Scheme (MAIS) of the Govt. of India. The participant-exhibitors had displayed entire spectrum of equestrian products like saddles & bridles, shoes, boots, accessories etc. made up of leather & non leather.

The following member exporters participated and displayed their various range of products in the Spoga Horse Fair, September 2017.

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S No	Company Name	Place	Booth No.
1	ACE Exports Ltd	Kanpur	K-071
2	ACME Export India	Kanpur	N-081
3	Al-Rahman Tacks	Kanpur	T-129
4	Essel International	Kanpur	L-099
5	FHS International	Kanpur	N-101
6	G B Exports	Kanpur	S-088
7	H & G Saddlery	Kanpur	L-100
8	Lederwares (India)	Kanpur	R-068
9	Madina Overseas	Kanpur	T-121
10	Malik Traders	Mumbai	N-104
11	Max Breeches	Kanpur	N-121
12	Mehboob Exports	Kanpur	L-100a
13	Minimax Engineers	Kanpur	S-100
14	Orion Exports	Kanpur	M-110
15	Panache Exports	Kanpur	O-101
16	Ruksh Garments Pvt Ltd	Kanpur	S-123
17	S R Global	Kanpur	K-080
18	Star Tanning Industries	Kanpur	S-124
19	BNG Exports	Kanpur	S-71
20	Vanya Enterprises	Kanpur	N-91
21	Meer International	Kanpur	N-71
22	Faris exports	Kanpur	O 108
23	Adam Export	Kanpur	S 98
24	Legacy Export	Kanpur	O 99
25	Golden Exports	Kanpur	R 89
26	Council for Leather Exports	INDIA	P 104

Apart from the above, about 63 companies had exhibited in the fair directly.

CLE Information Booth :

The CLE's Information Booth was in Hall no.11.2 stand P104. The CLE representatives Shri P. Dhanasekhar, Asst. Export Promotion Officer & Ms. Suneeta Das, Asst. Export Promotion Officer had coordinated with the participants & the visitors very well and tried their best to facilitate them at their utmost satisfaction. All the promotional publications were displayed in the booth for the information & distributed to the trade visitors/exhibitors accordingly. Two local Interpreters Ms. Alexandra & Ms. Jana were also engaged and rendered their services to the member-participants as & when required all the three days.

Promotional Activities at CLE's information booth:

i) Meeting held with Fair Organizer of Equist Fair

A meeting was conducted on 4th September, 2017 with the officials of Equist, International Horse & Equestrian Fair, with Shri Taj Alam, Convenor, Saddlery & Harness Panel. Mr. Osman Bayazit Genc ,Project Manager & Ms. Irmak Canpolat, Marketing and Sales Specialists informed that 5th International Horse & Equestrian Fair EQUIST , Istanbul Horse Show will be organized on 11-13 May, 2018 at Veliefendi Hippodrome in cooperation with Jockey Club of Turkey and interested to visit Kanpur for mobilization purpose. Shri Taj Alam advised the Fair Organiser to send the detailed fair proposal to CLE by 15th of September as CLE is in a process of preparation of fair proposal to DOC,

Ministry of Commerce & Industry, Govt. of India for funding under MAI scheme as informed by the CLE representative.

ii). Visit of Investment Advisor, Normandie, France :

Ms. Arpita Sen, Inward Investment Advisor from Normandie, France visited the CLE Information booth. She was interested to invite the Indian Equestrian Product Manufacturers to Normandie for joint venture. She informed that there is very good opportunity in Normandie as the demand is quite high and no manufacturing companies are there for the equestrian products. The officials given her the contact details for further communication with CLE into the matter.

Footfall of Visitors in Indian Pavilion & Business Generated :

The footfall of visitors was good in all the three days of the fair. All the exhibitors were quite busy in their business negotiations and most of them have received very good future business. As per feedback form received from the 25 member-exporters, total 241 no. of business enquiries generated and booked spot order for Euro 72500 & estimated business of Euro 12,41,800.

Conclusion :

As per feedback form received from the exhibitors Germany is still holding strong market for the equestrian products in comparison to other European countries and having ample potential for future business. Kanpur's participation in terms of number of exhibitors from any country is the highest, followed by hosts Germany. Nearly 90 exporters (25 through CLE) from the city had exhibited their harness and saddlery goods at the equestrian fair. It is also felt that the Indian companies need to be focused on the innovation of the products in the way of design, quality, presentation etc. to attract the buyers. Few members of the view that preference should be given to them for best location in the hall.

Overall all exhibitors have given their consent to participate in the SPOGA HORSE, September 2018 through Council for Leather Exports.