



European Federation of Thoroughbred Breeders' Associations
Fédération Européenne des Associations d'Éleveurs de Pur Sang Anglais

Annual Report 2008 and Statistical Overview

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Chairman's Introduction

I am delighted to introduce this 2008 Report and data update for our Federation.

The EFTBA is now in its fourteenth year, and I have the honour of being its Chairman for the next three years. I have a number of priorities for my Chairmanship, and this report and data update is one of the most important. We need to promote European thoroughbred breeding more widely, not just amongst our own racing and breeding audiences, but also amongst the wider media and, of course, in the European institutions.

European laws impact more and more upon our businesses. EFTBA's workload in the area of political lobbying in Brussels is increasing year on year. Over the past twelve months we have been in meetings with European policy makers up to the highest levels, including two European Commissioners. We have been working for breeders throughout Europe on crucial issues ranging from VAT, to farm payment subsidies, sports betting legislation, transport, veterinary issues and more.

We also continue to serve as an important focal point for breeders' associations to come together to discuss issues and to formulate common policies.

I would like to thank the previous Chairman Dr Franco Castelfranchi, who has led the organisation for the past three years, and who is staying on as Vice Chairman, together with Bo Helander as our new Second Vice Chairman. I would also like to thank Alec Head, our outgoing Honorary President, who has been with us since EFTBA's inception, and welcome Her Highness Princess Zahra Aga Khan as our new Honorary President. Thanks should also be given to Rolf Leisten, Bernard Ferrand and Charles Henri de Moussac for their work as Vice Chairmen of the EFTBA over the past years.



A handwritten signature in blue ink, which appears to read "Joe Hernon". The signature is written in a cursive style and is positioned above the printed name.

Joe Hernon
Chairman

EFTBA's Aims and Activities

EFTBA, the European Federation of Thoroughbred Breeders Associations, was set up in 1994 to enable European breeders' associations to be represented at a European level with a strong single voice. EFTBA represents the majority of European Thoroughbred breeding countries.

Our aims are

- to provide a single focus for breeders associations to come together to discuss and formulate common policies
- to lobby at a European level on issues which affect European breeders
- to promote the Thoroughbred breeding industry at a European level including better access to EC funding schemes

Some of EFTBA's main areas of activity include

- Education of Thoroughbred breeders
- Exchange of new information regarding legislation, veterinary research, international and domestic regulations, publication of new research data, etc
- Equine health. Veterinary routines and checks. EU veterinary border inspection procedures
- Codes of Practice – the agreed veterinary procedures when presenting a Thoroughbred mare for breeding
- To work towards the standardisation of veterinary laboratories (for equine tests) throughout Europe
- Expansion of the international market for European Thoroughbred horses



EFTBA study visit to GB in 2007

2007 Report



Stud farm in Ireland

Report from the EFTBA Annual General Meeting, May 2008

The fourteenth Annual General Meeting of the European Federation of Thoroughbred Breeders' Associations was held at Longchamp Racecourse, Paris. Twenty five delegates from thirteen countries attended, including new member Russia.

Outgoing Chairman's address

The outgoing Chairman, Dr Franco Castelfranchi, in his final Chairman's address underlined the importance of the horse sector as part of the agricultural sector. He stressed the important role EFTBA has to play as the only European Federation in the thoroughbred racing and breeding sector, and as such, the responsibility it has in explaining and promoting not just breeding but the sport of racing to European institutions.

Dr Castelfranchi also underlined the importance of the EFTBA support which was given to the efforts made by French horse organisations in relation to their PMU and the inquiry by the European Commission into the PMU's monopoly status. Thoroughbred breeding and racing depends on betting revenues, and Dr Castelfranchi stressed that it cannot be accepted that third parties make money out of horseracing without contributing to the future existence of that sport.

Incoming Chairman's address

Mr Joe Heron underlined the importance of the EFTBA in supporting thoroughbred breeders throughout Europe. His main priorities for his Chairmanship would be in strengthening the Veterinary Committee and its work, stepping up lobbying at a European level, and ensuring EFTBA promotes this work to a wider audience.

He stressed his determination to work for the good of all European breeding countries, regardless of their size, and his overall aim of growing and strengthening the Federation itself.

Elections and appointments

EFTBA members unanimously approved the following appointments for a three year term

- Princess ZAHRA AGA KHAN,
EFTBA Honorary President
- Joe HERNON,
EFTBA Chairman
- Dr Franco CASTELFRANCHI,
EFTBA Vice Chairman
- Bo HELANDER,
EFTBA Vice Chairman, representing B&C countries
- Rhydian MORGAN-JONES,
EFTBA Treasurer



EFTBA Chairman Joe Heron, presentation of a statuette to Alec Head to thank him for his valued contribution as Honorary President

Political Report 2007-8

The agricultural activity of horse breeding

In November 2007 EFTBA representatives met with Mrs Mariann Fischer Boel, the Agriculture Commissioner. Horse breeding is strongly linked to the land, and is considered by the Agriculture DG to be an agricultural activity. The meeting talked about raising the profile of thoroughbred breeding in Europe both as an important farm diversification activity, and an ideal sector in which to safeguard Europe's permanent pastures and rural employment.

EFTBA representatives were pleased to receive such a positive reaction from the Commissioner and her officials who recognised the huge advantages of horse breeding as a rural activity, from its labour intensive, year round employment needs, to its international market. In addition it uses extensive grazing methods using little or no chemicals, and supports a biodiverse environment.

EFTBA representatives have also subsequently met with senior Agriculture DG officials to talk about the importance of taking into account the hundreds of thousands of hectares throughout Europe used by horse breeding when looking at future changes to the Common Agricultural Policy in the move away from direct payments for production towards a more land-management oriented approach.

European Commission VAT investigation

In 2007 the European Commission announced an inquiry into EU countries which applied a reduced VAT rate to horse sales and any associated products (from riding school and livery fees to prizes). Their principal reasoning is that horses are not normally intended for the generation or production of foodstuffs (only a limited list of supplies can apply reduced VAT). Of the countries concerned (Netherlands, Austria, Czech Republic, France, Germany, Italy, Luxembourg and Ireland) Italy has already amended its legislation from 1 January 2008 to apply full VAT, and the Netherlands government have announced their decision to do so.

EFTBA is strongly against this decision. Horse breeding and the selling of horses is a labour intensive activity, and while many breeders are registered farmers, the fact remains that they cannot sell horses under the flat rate VAT scheme for farmers, as our sector does not operate in the same way as the farm livestock sector, and horses are sold to owners or agents who are obviously not registered as farmers.

EFTBA remains convinced that the French government's decision a few years ago to lower the VAT rate on equestrian activities in order to stimulate the rural economy is a positive and proactive policy change which we believe should be welcomed by European policymakers who should be encouraging countries who apply full VAT to horses to consider similar changes to their legislation.

As soon as the enquiries were announced the EFTBA sent a delegation to the European Commission to see the officials who were heading the investigation, to underline the importance of horse breeding for the European rural economy and rural land use, and to point out how damaging full VAT rates would be for horse breeders in these countries.

Funding of horseracing, and EU policy on sports betting

The political arena in 2007 was dominated by increased political activity in relation to horserace betting. The catalyst for this was the announcement by the Commission on the free movement of sports betting services in several countries including France.

This is of huge significance for thoroughbred breeders, who depend on a healthy racing industry in order for them to continue to sell their youngstock.

The response by horseracing authorities was significant as it is the first time they have mobilised at a European political level. EFTBA was instrumental in providing support in terms of European media links, participation and knowledge of the EU institutions.

Animal welfare in Transport Regulation review

A Common Declaration of European Horseracing Organisations was presented at the European Parliament in March 2008, and was strongly welcomed by many Members of the European Parliament:

'We call on the European Parliament, the Council and the Commission, to recognize urgently the need for a clear and coherent legal and regulatory framework, guaranteeing:

- 1. A fair return from betting to the racing on which it is promoted or offered;*
- 2. The protection of the future integrity of the sport.*

We call on the European Commission to develop a policy to achieve this, in consultation with the European horseracing organizations. It is necessary that, in conformity with the principle of subsidiarity, Member States have a European legal framework on betting, which will allow them to exercise their own competence in conformity with EU law'

Discussions have begun between the European Commission and the governments of the EU member states for the 2009 review of this Regulation. The EFTBA has sent an initial response, and will be seeking to have coordination with other equine bodies such as the FEI, and EU horse racing authorities.

EFTBA will be underlining the importance of retaining the important derogations which were obtained in the 2005 Regulation in relation to the travelling of registered horses, while at the same time supporting horse welfare organisations in their aim of improving the standards for horses destined for slaughter.

Left, former EFTBA Chairman Dr Franco Castelfranchi, and Mr Nick Elsass, Chairman of the Danish Jockey Club and Danish Thoroughbred Breeders' Association with Agriculture Commissioner Mrs Fischer Boel, November 2007



Veterinary Report

EFTBA are grateful for the active support it receives from its veterinary advisors:

Dr Roland Devolz (France)

Dr Richard Greenwood (GB)

Dr Hanspeter Meier (Switzerland)

Dr Kenneth Strickland (Ireland)

Stud Books

In a report to the 2008 AGM in May, Dr Devolz informed members that the Serbian stud book has been approved. Bosnia and Herzegovina will be incorporated into the Serbian book in future. The Lithuanian book may also be approved and this book will have its first two foals in 2008.

Ukraine and Kirgistan are also keen to establish a thoroughbred studbook. Outside Europe, Syria is to have a book, and Oman shortly. The Pakistan book is moving forward and the American Bahamas also.

Country initiatives

Turkey is to be congratulated on its positive action of a huge testing programme for Equine infectious anaemia to clean the country. It will test on Elisa and confirm on Coggins. The horses testing positive on the Coggins test will be destroyed and compensated.

The Thoroughbred Breeders' Association of Great Britain held a seminar on exotic diseases in Newmarket in June 2008 in order to raise awareness by European breeders and veterinarians of these diseases and to discuss action which can be taken.

In October 2007 the French TBA organised an informal meeting in Deauville, France, on the Equine European sanitary situation and ideas to harmonise rulings between countries.

Veterinary representatives from almost a dozen countries attended this excellent initiative. The two main conclusions were as follows:

- that there should be a common aim to improve communications regarding health problems between countries
- a continuing priority should be the drive towards the harmonisation of testing methods across Europe.

CEM

Dr Hanspeter Meier, the EFTBA B&C country veterinary representative also raised at the AGM the problem of CEM throughout Europe and the extra costs this imposes on thoroughbred breeders, as well as being a continued export problem.

It was agreed that education is needed on how to take swabs and how they are transported to the lab, and not necessarily in thoroughbred areas, as thoroughbreds are tested much more than the non-thoroughbred population despite the fact that nowadays there are also a huge number of sports horses moving between countries for breeding purposes

Further EFTBA Action for 2008-09

At a European level the EFTBA remain convinced that there is need for urgent action in two main areas:

- A risk analysis for exotic diseases in order to have a contingency plan in case of an outbreak. The main problem will be the lack of movement for thoroughbreds particularly during the breeding season.
- Industry waste: evacuation of manure, and disposal of carcasses remains a problem in some European countries.

EFTBA also regard it of prime importance to continue to support and develop initiatives to spread best practice amongst breeders themselves and their veterinarians in relation to health status and disease control, particularly regarding the smaller and developing countries and their access to the latest veterinary advice and research.

European successes

European bred horses continued to dominate the international thoroughbred horseracing scene in 2007.

Over half of all the horses in the International Federation of Horseracing Authorities World Thoroughbred Racehorse Rankings Northern Hemisphere were bred in Europe, including the top two horses.



The number one racehorse was Manduro, German bred and trained by André Fabre in France by top German sire Monsun. Authorised took the runner up spot – Irish bred and trained in Britain by Peter Chapple Hyam.



Statistics 2007





Number of thoroughbred breeders (by number of mares)

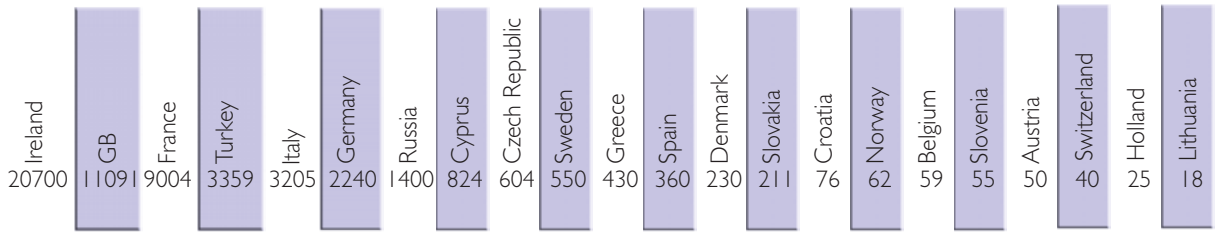
	Ireland	GB	France	Turkey*	Germany	Italy	Czech	Sweden	Hungary	Russia	Spain	Croatia	Denmark	Austria	Norway	Belgium	Switzerland
1 to 4	8513	3830	3830	1791	833	582	212	246	120	80	94	.	50	44	38	27	20
5 to 10	546	298	241	147	66	195	19	10	30	25	12	.	7	2	0	1	0
11 to 25	124	79	200	21	15	108	4	3	15	10	4	.	3	1	0	0	1
25 plus	20	21	15	3	11	27	1	1	5	10	3	.	0	0	0	0	0
total	9203	4228	4284	1962	925	912	649	260	170	125	113	87	60	47	38	28	21

Overall Total: 23 | 12

breeders own on average
less than two mares each



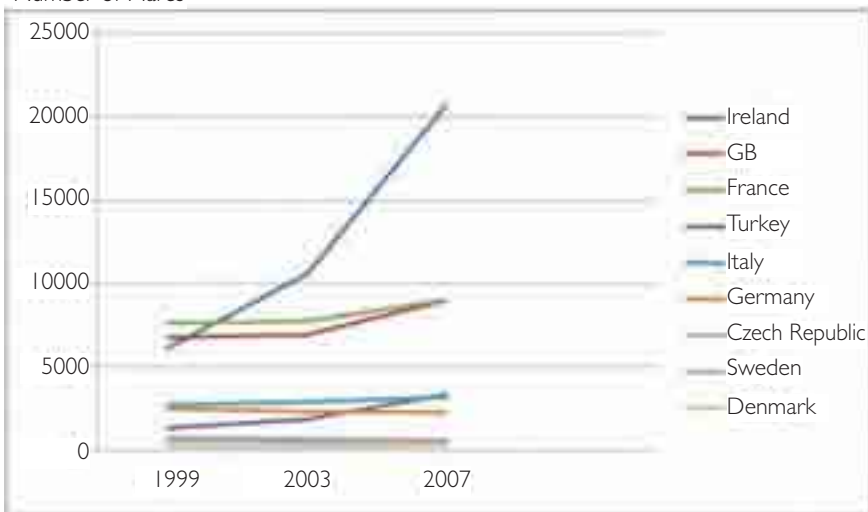
Number of mares used for breeding 2007



Overall Total: 33 893

Comparison of mare numbers 1999, 2003 and 2007

Number of Mares

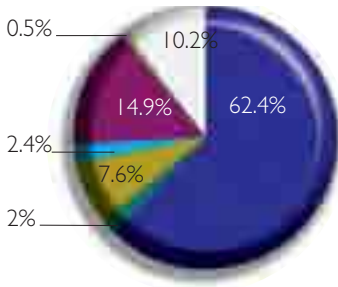


Irish mare numbers have more than tripled since 1999, Turkish mare numbers have almost tripled, and British mares have almost doubled. Italy and France have also increased their mare numbers.

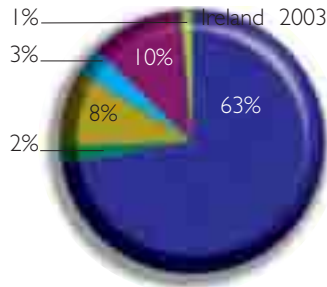


Percentage of Thoroughbred mare population according to type in Ireland GB and Germany

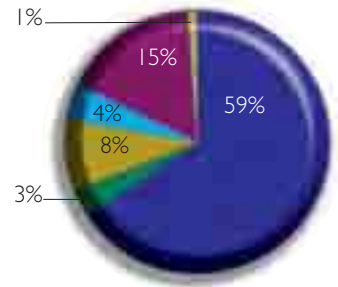
Ireland 2007



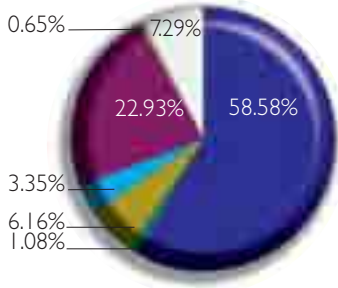
Ireland 2003



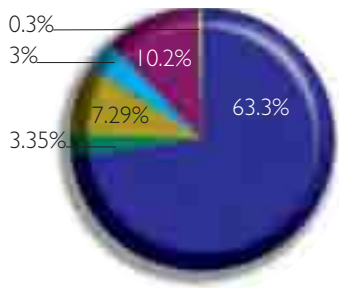
Ireland 1999



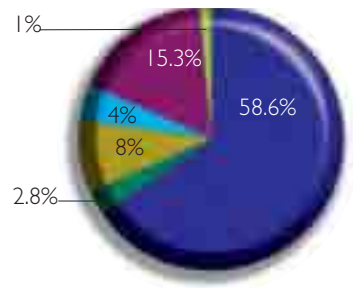
Great Britain 2007



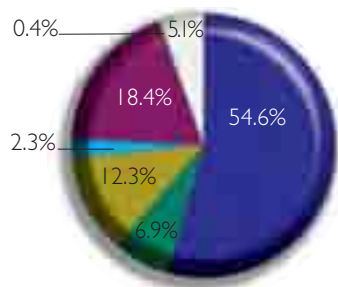
Great Britain 2003



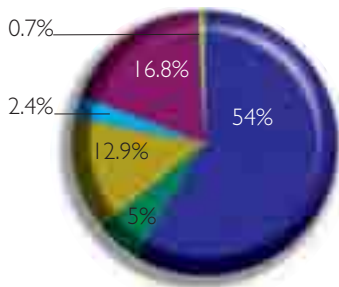
Great Britain 1999



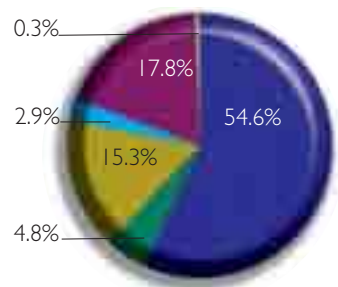
Germany 2007



Germany 2003



Germany 1999



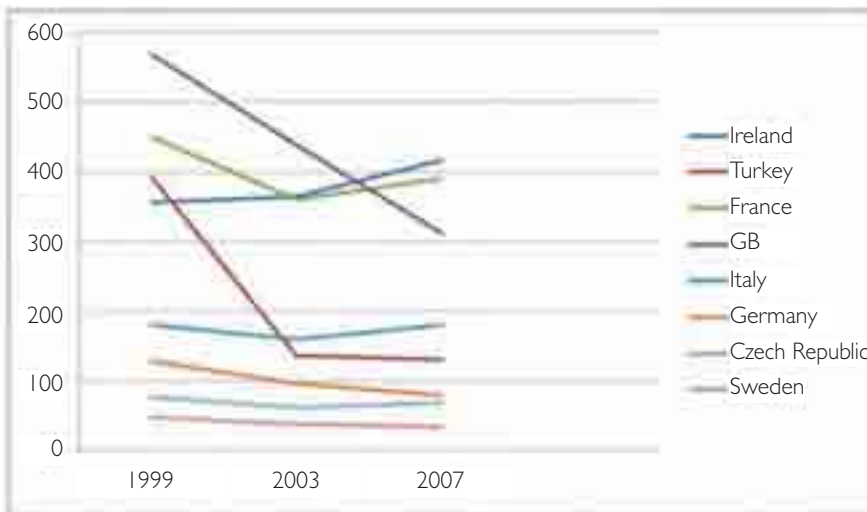
live foals
 dead foals
 barren
 slipped
 not covered
 covered by non-TB stallions
 no return

Number of thoroughbred stallions used for breeding

2007	Ireland	Turkey	France	GB	Italy	Russia	Germany	Czech Republic	Greece	Cyprus	Spain	Sweden	Denmark	Croatia	Slovakia	Belgium	Slovenia	Austria	Lithuania	Switzerland	Norway	Holland
	416	392	390	311	180	160	79	69	68	64	37	33	25	23	16	14	13	10	6	4	17	4

Overall Total: 2331

Number of stallions in some European Countries: 1999, 2003 and 2007 comparisons



The number of stallions standing in Turkey have tripled since 1999, and stallions standing in Ireland have risen by almost a fifth. In all other countries stallion numbers have fallen: In Great Britain by almost 45% and in Germany by 40%

Stallions used by level of breeding fees

by fee euro	Ireland	GB	Germany	Italy	France	Croatia	Spain	Denmark	Czech Republic	Austria	Switzerland	Sweden	Russia	Norway	Holland	total
Up to 1000	224	181	42	74	240	23	31	10	40	10	4	20	0	0	0	899
1001 to 2500	75	36	13	68	72	0	3	9	5	0	0	13	144	17	17	472
2501 to 5000	66	37	15	23	50	0	0	0	0	0	0	0	0	0	0	191
5001 to 10 000	21	23	7	15	16	0	0	0	0	0	0	0	16	0	0	98
10 001 to 20 000	19	21	1	0	8	0	0	0	0	0	0	0	0	0	0	49
20 001 plus	9	13	1	0	4	0	0	0	0	0	0	0	0	0	0	27

Number of stallions by number of mares covered

Mares	Ireland	GB	France	Italy	Germany	Croatia	Spain	Denmark	Czech Republic	Austria	Switzerland	Sweden	Belgium	Russia	total
1 to 15	130	77	184	130	51	23	32	12	32	10	2	24	18	114	869
16 to 40	103	132	110	37	14	0	3	5	11	0	2	9	0	16	442
40 to 65	54	32	51	10	7	0	1	2	1	0	0	0	0	0	158
66 to 110	50	25	37	3	7	0	1	0	1	0	0	0	0	0	124
111 plus	79	45	8	0	0	0	0	0	0	0	0	0	0	0	132

Less than 8% of stallions cover over 110 mares a season

50% of stallions cover less than 15 mares a season

Over 50% of stallions stand for a fee of 1000 euros or under, compared to 66% in 2003

Nearly 80% of stallions stand for a fee of 2500 or under

Only 1.5% of stallions have a fee of over 20,000 euros

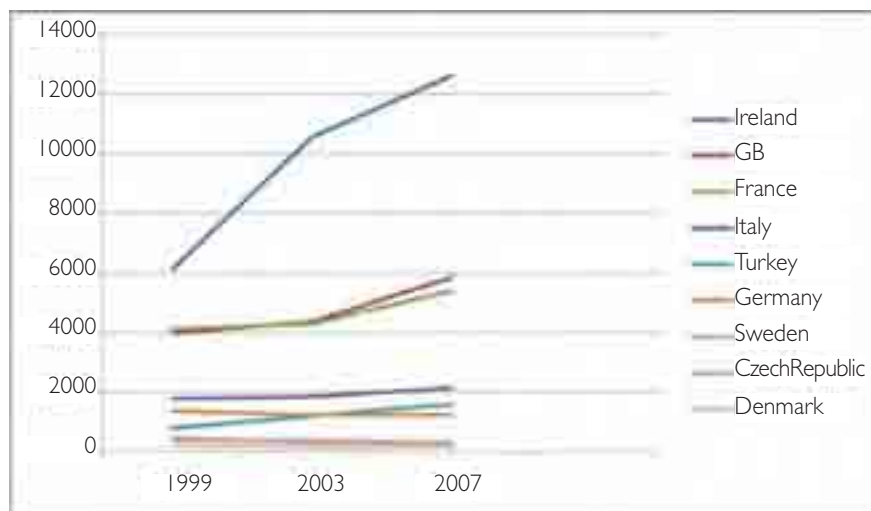


Foal numbers

Ireland	GB	France	Italy	turkey	Germany	Russia	Cyprus	Sweden	Czech	Greece	Spain	Denmark	slovakia	Norway	Austria	belgium	Switzerland	Croatia	holland	slovenia
12633	5839	5394	2153	1590	1224	638	328	312	307	274	200	162	64	49	39	35	28	18	16	12

Overall Total: 31315

Comparison of foal numbers 1999, 2003 and 2007



Comparison of foal numbers 1999, 2003 and 2007

	Ireland	GB	France	Italy	Turkey	Germany	Sweden	Czech	Denmark
2007	12633	5839	5394	2153	1590	1224	312	307	162
2003	10574	4377	4300	1840	1215	1242	322	375	134
1999	6138	3985	4100	1774	794	1371	457	399	215

Both the Irish and Turkish foal population has doubled since 1999

Other countries such as Germany, Sweden, the Czech Republic and Denmark have seen a drop in the number of foals



Horse sales 2007

GB	€
average euros	86301
foals	30 970 327
no of foals	1063
yearlings	156 230 741
no of yearlings	2584
HIT	57 412 293
no of HIT	2867
mares	979 946
no of mares	1030
total value horse sales	382 785 471

Ireland	€
total value of foals	€35,607,685
no of foals sold	1725
total value of yearlings	€76,830,150
no of yearlings sold	2236
horses in training total value	€13,203,250
no of Horses in training sold	809
total value of mares	€23,667,500
no of mares sold	961
no of mixed individuals sold*	€9,896,350
total value of mixed individuals sold	741
no of Store (NH) individuals sold**	€21,667,200
total value of Stores individuals sold	812
total value of all horses sold	€180,872,135

* Mixed Stock Wealings, Yearlings, 2yr, Foals, Mares

** Stores (Mixed Stock) N/H stock sold at mostly 3/4yr olds

Germany	€	France	€	Italy	€
total value of foals	193 300	total value of foals	3 200 000	total value of foals	1 3500
no of foals sold	19	no of foals sold	143	no of foals sold	4
total value of yearlings	10 067 085	total value of yearlings	40 400 000	total value of yearlings	10 601 000
no of yearlings sold	385	no of yearlings sold	927	no of yearlings sold	391
horses in training total value	2 122 500	horses in training total value	12 500 000	horses in training total value	1 615 800
no of Horses in training sold	182	no of Horses in training sold	360	no of Horses in training sold	129
total value of mares	246 100	total value of mares	15 000 000	total value of mares	212000
no of mares sold	246 100	no of mares sold	377	no of mares sold	14
total value of all horses sold	12.5 million	total value of all horses sold	71 million	total value of all horses sold	12.4 million

Denmark	€
overall average price in euros	9356
total value of yearlings	477162
no of yearlings sold	51

Spain	€
overall average price in euros	8470
total value of foals	7000
total value of yearlings	1643500
total value of mares	52100

Overall Total: 885 794 738 euros

Sales companies and sales days 2007

	Ireland	GB	Germany	Italy	France	Spain	Denmark	Switzerland	Sweden	Norway
Number of sales companies	3	3	2	2	1	2	1	0	2	0
sales days total	34	57	4	14	15	4	1	1	0	1
sales days for yearlings	9	18	3	6	8	3	1	1	2	0
sales days foals and mares	16	13	0	1	3	1	0	1	0	0
Horses in training	7	18	0	5	2	0	0	1	0	0
2yos	2	5	1	2	2	0	0	1	0	0

It is estimated that, in the countries which do hold public sales, private sales account for around half of the overall total money spent on thoroughbreds in these countries.

In other countries, such as the Czech Republic, all sales are private.

Therefore, while it is difficult to be exact, it could be estimated that thoroughbred horse sales in Europe in 2007 accounted for around 1.8 billion euros



Number of races 2007

	Ireland	GB	Germany	Italy	France	Croatia	Spain	Denmark	Czech Republic
races flat	958	5659	1670	4583	4102	52	509	300	348
races jump	1439	3218	66	606	2179	0	0	0	168
total races	2397	8877	1736	5189	6281	52	509	300	516

Total: 31,670 races

Prize Money 2007

	Ireland	GB	Germany	Italy	France	Croatia	Spain	Denmark	Czech Republic
prize money flat	31 094	86 079	13 968	59 960	99 945	148	5 108	1800	941
prize money jump	28 513	48 425	461	6785	60 203	0	0	0	589
total prize money	59 607	134 504	14 429	66 745	160 148	148	5 108	1800	1530

Breeders premiums

	Ireland	GB	Germany	Italy	France	Denmark	Sweden	Belgium
breeders premiums money flat	125000	1894620	2886269	10654432	13100000	100000	616769.8	13775
breeders premiums money jump	125000	1065840	0	903410	8200000	0	0	0
total breeders premiums	250000	2970460	2886269	11557842	21300000	100000	616769.8	13775

Sweden	Belgium	Norway	Turkey	Netherlands	Lithuania	Greece	Cyprus	Slovenia	Slovakia	Russia
627	182	260	1720	101	27	1000	1069	140	21	600
	4	9	0	0	0	0	0	23	0	30
627	186	269	1720	101	27	1000	1069	163	21	630

Switzerland	Sweden	Belgium	Turkey	Slovakia	Greece	Cyprus	Slovenia	Lithuania	Norway	Netherlands
1265	5555	521	79604	501	12 527	5 088	10	13	2 890	295
384	147	190	0	40	0	0	0	0	108	0
1649	5702	711	79604	541	12 527	5088	10	13	2998	295

Prize money provided by (%)

	Ireland	GB	Germany	Italy	France	Croatia	Spain	Denmark	Sweden	Belgium	Russia
central racing authority	54.01	56.8	nearly 0	97	95	0	0	50	83	0	0
racetracks		14.9	0-70	0	0	0	80	0		93	30
sponsorship	16.2	15.2	20-100	1	3	100	5	5	1	1	40
owners entries	29.7*	13.3	10	2	2	0	10	45	16	6	30

* includes sales races

Employment

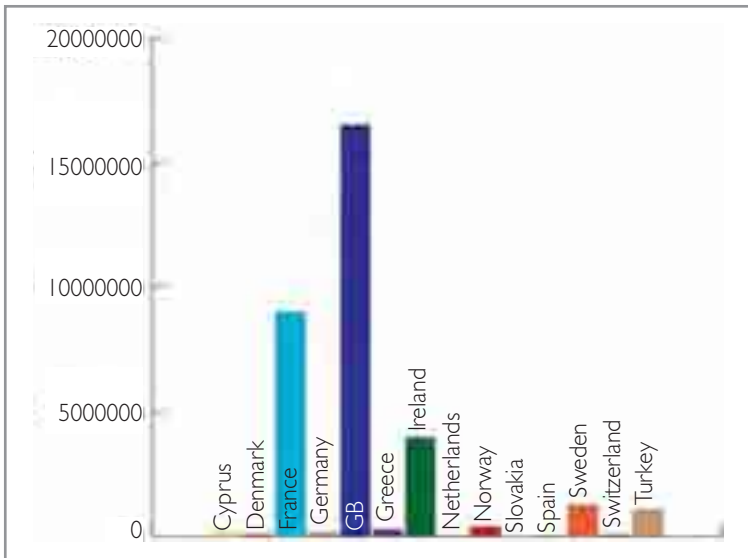
	Ireland	GB	Germany	Italy	France
Employment breeding	7600	6000	1000	500	3000
Employment racing		6040	400	1000	4000
Racing and breeding including betting and associated industries	16500	88300	3145	7000	25000

Total employment in the five EFTBA 'A' Countries in breeding, racing and related industries = 139,945

Estimated total employment across the EU in the thoroughbred breeding industry = 20,000



Betting turnover (x 1000euros) 2007



Total: 32.98 billion

Cyprus	101378
Denmark	87500
France	9035972
Germany	133776
GB	16 520 963
Greece	283150
Ireland	3992351
Netherlands	34328
Norway	395338
Slovakia	119
Spain	26509
Sweden	1246224
Switzerland	69133
Turkey	1063182



The world famous Pardubice - Czech Republic

International Comparisons 2007

Americas

11604093
72947
138028
5045
82008
50975

Europe

32089610
31670
67539
2331
33893
31315

Asia

44942072
54801
100147
1669
56737
36400

Betting (× 1000 euros)

Number of Races

Breeding (mares, stallions, foals total)

Breeding - stallions

Breeding - mares

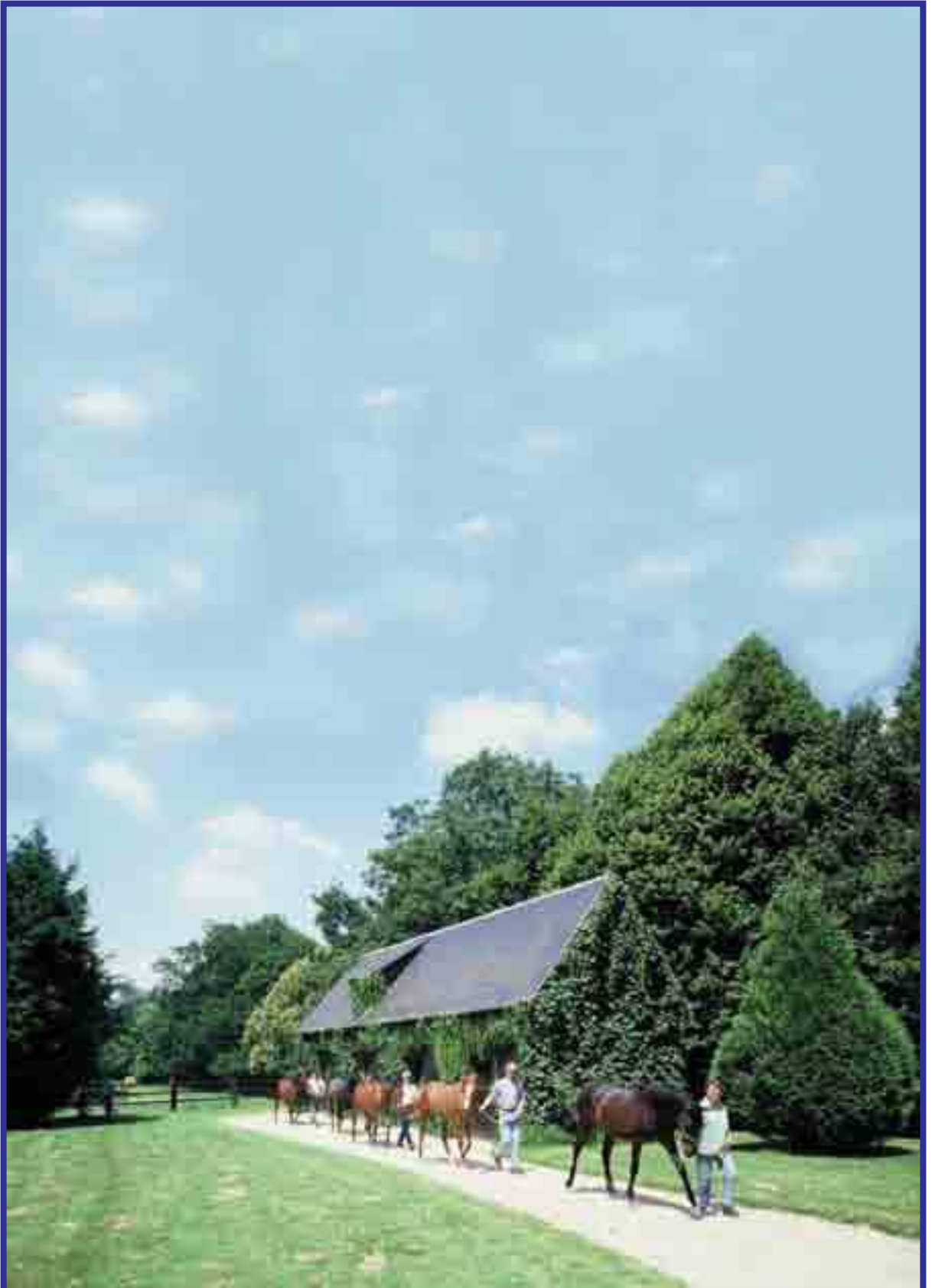
Breeding - foals



*non european figures provided by the International Federation of Horseracing Authorities.

**betting figures for some countries include trotting races;

Members





Natagora - Cartier Awards 2yo filly of 2007

NATAGORA trained by PASCAL BARY in CHANTILLY. She is the only filly to have won both the CHEVELEY PARK and the 1 000 GUINEAS for 16 years. She is the only filly to finish in the first three of the French Derby for 50 years. NATAGORA was born in 2005 and bred at HARAS DE LONRAY, in Normandy. She is French bred and has now won 7 races, also twice second and twice third for a total of over £1,000,000. She was the winner of the CARTIER AWARD for the 2YO FILLY OF 2007.

French bred horses continue to enjoy success throughout the world -notable wins include

Doctor Dino (FR) winner of the 2007 Hong Kong Vase, and Darjina (FR) winning the Dubai Duty Free in 2007. Literato (FR), Lawman (FR), Mandesha (FR) Geordieland (FR) Irish Wells (FR) and Passager (FR) were all outstanding GR1 winners throughout 2007. In 2008 Muralakana (FR) and Spirit One (FR) both won at GR1 level in the USA, and French bred Group 1 success continued elsewhere with Vision d'Etat (FR) winner of the Jockey Club and Goldikova Prix Rothschild and Prix du Moulin de Longchamp, Manchand d'Or (FR) with the July Cup and Monmartre Grand Prix de Paris, and Belle et Celebre (FR) the Prix Saint Alary.

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GERMANY



Manduro – World's Leading Racehorse In 2007

photo by www.marcruehl.com

The German-bred and owned Manduro marked a new dimension for German breeding when ending the year 2007 as the world's leading racehorse. He proved to have reached his utmost height of maturity at five that year.

The classically bred and arguably best son of the German sire sensation Monsun opened up with a easy victory in the Group III Earl of Sefton Stakes before notching up his much deserved first Group I victory in the Prix d'Isphahan.

He subsequently landed the Prince of Wales's Stakes and the Prix Jacques le Marois at this level and the Group II Prix Foy for his final outing. During his entire career, Manduro raced 18 times from two to five winning ten races including eight Pattern events with a winning distance of a mile to twelve furlongs as well as

placing in all his other starts. His other Group victories came in the Preis des Winterfavoriten as a juvenile, the Preis der Deutschen Einheit at three as well as the Prix d'Harcourt at four.

Manduro was bred from the Listed placed Be My Guest mare Mandellicht and is a close relative to the German 2000 Guineas victor Mandelbaum who shares the German Triple Crown winner Konigsstuhl as a sire with Monsun with this being the family of the Epsom Oaks heroine Ginevra.

Other international successful German bred horses in 2007 and 2008: Quijano, Frozen Fire, Mi Emma, Goose Bay, Le Miracle, Bussoni, Lady Marian, Baila Me, Shiaparelli, Getaway.

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GREAT BRITAIN



photo by Trevor Jones, Thoroughbredphoto.com

Look Here (GB)

LOOK HERE has been only lightly raced but in her four performances to date has proved herself to be a filly of utmost class and ability.

Her three-and-three-quarter length victory in the Oaks at Epsom in June was the first taste of Classic success for her young trainer Ralph Beckett and for owner/breeder Julian Richmond-Watson, who owns Lawn Stud in Northamptonshire.

Her victory was also the first British Classic win for her sire Hernando, who stands at Lanwades Stud in Newmarket and is also the sire of Prix du Jockey-Club winners Sulamani and Holding Court.

Look Here lined up for her second Classic of the season, the St Leger at Doncaster, running with

great credit to finish third to Conduit, and will remain in training as a four-year-old.

She is British-bred out of the unraced Rainbow Quest mare Last Look, whose half-sister Kristina provided Richmond-Watson with a runner in Oaks in 2007, the Listed winner Kayah.

Look Here is not the only British bred horse to enjoy Group 1 success. GB had no less than 24 successful Group 1 winners in 07/08 including African Rose, Bordelescott, Champs Elysees, Grand Couturier, Lush Lashes, Saddex.....and not only in the Northern Hemisphere; British bred horses enjoy success throughout the globe - just one example is Viva Pataca (GB) who claimed success in the Hong Kong Cup, Hong Kong Gold Cup and Dubai Sheema Classic in 2007/8

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IRELAND



New Approach (IRE) - four Group 1 successes, prize money won totalling over € 2 million

Irish breeding success in 2008 alone:

Group one

Again,
Bushranger
Duke of Marmalade
Halfway to Heaven
Kingsgate Native
Mastercraftsman
New Approach
Sageburg
Soldier of Fortune
Yeats
Youmzain
Zarkava

Grade one

Al Eile
Celestial Bay
Comply or Die
Cousin Vinny
Denman
Fiveforthree
Joe Lively
Katchit
Muirhead
The Listener
Tidal Bay
Won in the Dark

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Chairman: Joe Foley
Vice Chairman: Dr Dean Harron
Manager: Shane O'Dwyer

ITALY



Altieri



Pressing



Falbrav



Ramonti



Endless Hall



Rakti



Electrocutonist

In the last 10 years success for the Italian Thoroughbred industry has flown regularly. Italian bred horses winning list is highly impressive especially if you measure it with the size of our industry.

Maybe not everybody is aware that horses like Falbrav (total prize money € 5.793.064), Electrocutonist (total prize €4.415.122),

Ramonti (total prize € 2.641.429), Rakti (total prize € 2.594.366), Endless Hall (total prize € 1.506.868), Altieri (total prize €1.233.108), Pressing (total prize €1.137.930), these magnificent 7 are ALL Italian bred despite the suffix after their name: You can be sure that an Italian bred horse will have international appeal and unlimited potential.

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CZECH REPUBLIC



The seat of The Czech TBA is The Napajedla Stud Farm, established in the year 1886. Napajedla Stud has long been the most successful thoroughbred breeding establishment in the Central European Region, at present with 6 proven breeding stallions. The broodmare band, supplemented with new progressive French and British bloodlines, is creating a solid reputable establishment of high standard on a European scale. The Stud offers full service boarding and breeding, impressive stallion roster, foal and yearling care, top class facilities located on more than 300 hectares of lush pasture.

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EFTBA delegate

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DENMARK



photo by Burt Seeger

MASTER KID (DEN), winner of the Danish Derby 2008, bay colt by Academy Award (IRE) - Stolga (FR) by Baillamont (USA).

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NORWAY



Norwegian bred foal

Norsk Forening for Fullblodsavl

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RUSSIA



photo by Natalia Kostikova

Russian champion stayer Satellit (Aport - Summer School by Sure Blade) winning the Minister of Agriculture Stakes (3200 m) for the 4th consecutive time in 2007.

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SPAIN



Sanlúcar horse races

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www.criadorespsi.es

Contact:

Mr Fernando Melchor Oruna (Chairman)
Jesus de Miguel (Secretario)

SWEDEN



Photo: Kimberley Curran

Nisse o Jennie

Leading amateur rider Jennie Österberg, who represented Sweden in the European Amateur Ladies' Championships in Hungary and Slovenia in August this year, in prepost parade at Stockholm race course Täby Galopp, with the horse Lucky Look, son of stallion Funambule (USA), Champion Sire in Sweden and Scandinavia 2004 and 2007 and seemingly on his way to a third title in 2008.

The Swedish Thoroughbred Breeders' Association

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Chairman: Bo Helander
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SWITZERLAND



Feliciano

Feliciano (SWI) 1994, dark bay by Pennine Walk IRE out of Finger Lake IRE (by Kings Lake)
He ran 47 times from 2 to 10 years with 18 victories and 23 places (CHF 246'480.-)
He is registered with the EBF
Feliciano stands at the Gestüt Birkenhof in Dietwil, Switzerland, and is looked after by Mrs. Rita Arnet (leading him up). She also owns Sinyar (IRE), 1992, dark bay by Machiavellian USA out of Place of Honour IRE (by Be My Guest).

TBA of Switzerland

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EFTBA Delegate and Veterinary Advisor:
Dr Hanspeter Meier

TURKEY



Inspector (Tur)

Inspector (Tur) 2004, b. c., by Bin Ajwaad (Ire) ex Pandora (Ger) by Platini (Ger) winning the 2008 International Bosphorus Cup (2400m. Turf) with his Jockey Halis Karatas.

The winner of the Turkish Derby 2008 was Pan River(TUR) c.by Red Bishop 1st dam by Unfuwain.

2000 guineas Maracaibo(TUR) by Manila 1st dam by Castle Rising ,1000 guineas Berraksu(TUR) by Sri Pekan 1st dam by Palace Pageant, Oaks Sparkling(TUR) by Strike The Gold 1st dam by Quest for Fame,St Leger (Ankara Stakes) Nash Bishop(TUR) c.by Red Bishop 1st dam by Acatenango.

International Topkapi Trophy is the richest mile race in Europe. Bogazici Trophy is among the richest 1,5 mile races. Number of European G1 horses contested in both Topkapi and Bogazici Trophies since first Running, 1991

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Czech Brood mare LETNI NOC (Monseigneur, USA), with 2008 filly foal by House Rules (USA)



Sayyara Princess (BEL)



Photo: scoopyga.com

Photo: copyright Stefano Grasso



Turkish stud farm near Istanbul



Le Vie dei Colori (GB)



Ramonti (FR) by Italian sire Martino Alonso (IRE)

