



Maryland's
Thoroughbred Breeding Industry:
Steps to
Survive and Thrive

WHAT IS THE HORSE BREEDING INDUSTRY?

The Horse Breeding Industry is all aspects of agriculture involved in maintaining horses of breeding age and raising their offspring.

It encompasses the horses, their owners and caretakers, as well as the associated farms and many ancillary service providers.

MARYLAND EQUINE INDUSTRY SIGNIFICANCE

- 28,000-plus people involved
- \$1 billion spent annually by industry participants
- 705,000 total acres
- Economic impact: \$2.1billion
- Economic impact of racing and breeding sector: \$572 million
- Tax revenue: \$80 million



MARYLAND HORSE BREEDERS ASSOCIATION: A NATIONAL LEADER



- First state Thoroughbred breeders association (1929)
- First state Thoroughbred breeders incentive program (Maryland Fund, 1962)
- First one-day state-sired event day (Maryland Million, 1986)

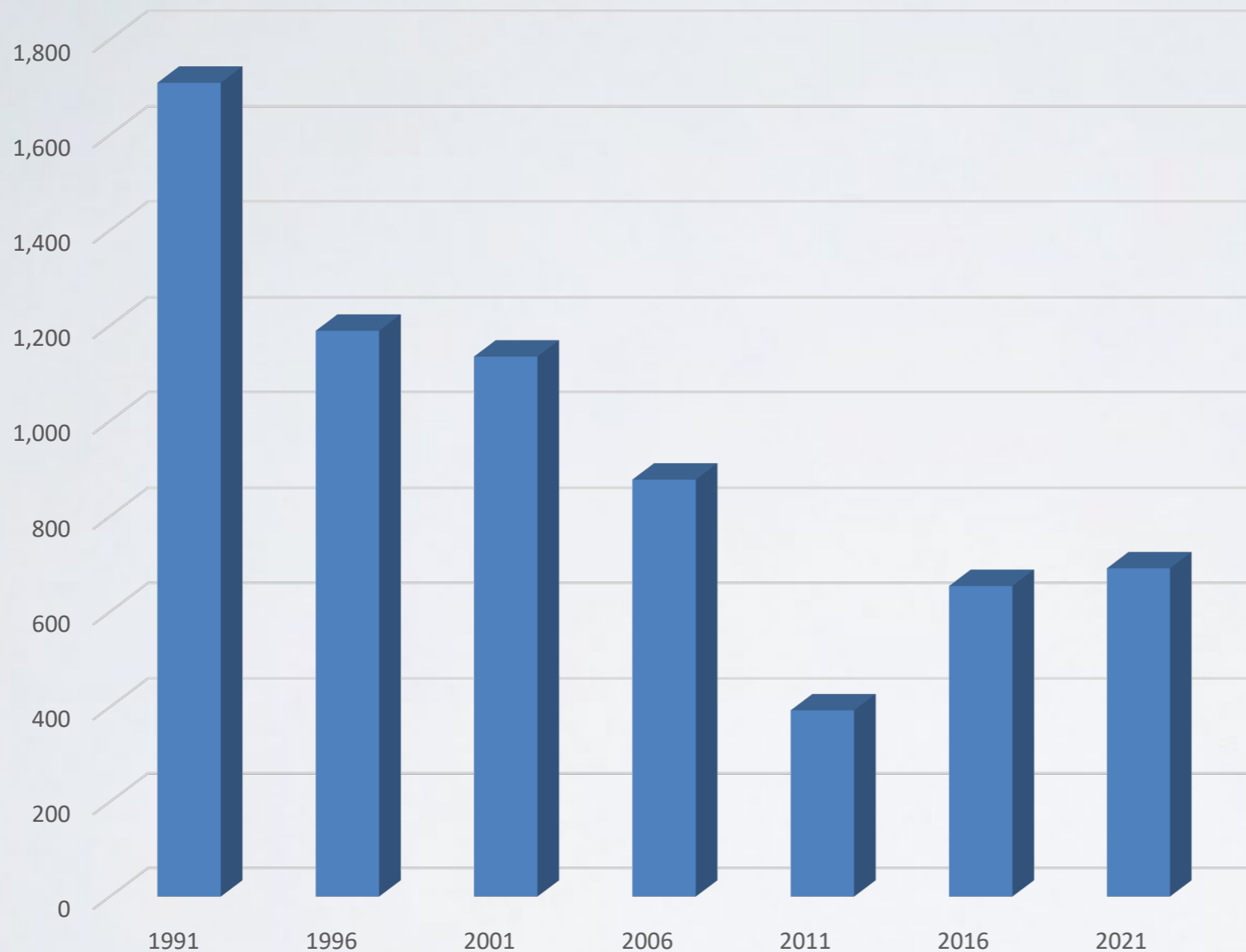
THOROUGHBRED BREEDING INDUSTRY

- Declining number of mares and stallions nationwide, resulting in a dramatic fall in foal production
- Shrinking on-track attendance
- Loss of breeders and owners



Maryland's Foal Crop

1991 - 2021



- Nationwide, the numbers have continued to drop
- Maryland has held its own compared to the nationwide average, in part due to support from the legislature and the breeding incentive program

Graph in 5-year increments

Source: 2023 Jockey Club Fact Book;
Jockey Club Distribution of US Foal Crop by state: 1991, 1996, 2001

THOROUGHBRED BREEDING INDUSTRY

- The Maryland horse breeding industry, while holding steady in recent years, is witnessing serious competitive challenges in the region — other states in the area are dedicating significantly more funds to reward the production of horses.
- Legislature support has been key to maintaining the horse breeding industry.
- Maryland-Bred horses make up a third of all horses racing in the state and are critically important to Maryland's racing product now and in the future — a strong breeding program ensures a strong racing industry.
- A strong breeding program also plays a critical role in Maryland's agricultural and open space network.

THOROUGHBRED FARMS (1 of 2)

A day in the life of a Thoroughbred farm:

- Every horse stall is cleaned every day with fresh hay and straw added.
- Every horse is fed grain twice a day. This includes every holiday—there are no days off.
- Every broodmare is examined by a veterinarian an average of twice before each breeding and twice after each breeding. Veterinarians are called for every injury, unusual swelling, or any other anomaly.
- Every broodmare is bred an average of once or twice to conceive by a three-person team. One to hold the stallion, one to hold the broodmare, and one to wash both before and after each breeding.
- Every horse is worked on by a blacksmith an average of eight times a year.

THOROUGHBRED FARMS (2 of 2)

- A horse is a grazing animal and does best if it has an average of 1.5 acres to graze. This promotes large areas of open space.
- The hay, straw, and grain are needed to support large open space on Maryland farms. Buying locally is generally more economical.
- Maryland veterinarians and farriers need to be local since there is no time if there is an emergency.
- Farm workers need to be local since many can't afford their own housing and horse care is often around the clock.
- **All these jobs support the Maryland economy and open spaces.**

What measures can be taken
to stimulate the breeding
industry in Maryland?

BRING BACK STABILITY TO THE THOROUGHBRED INDUSTRY

- The industry needs a long-term agreement between the racetrack owners, the Maryland Horse Breeders Association, and the Maryland Thoroughbred Horsemen's Association to bring **stability** to the industry.
- This will give all investors **confidence** the industry will be around for many years.
- It will **benefit** horse sales, horse breeders, horse owners, and the betting public.

DEVELOP ADDITIONAL REVENUE SOURCES (1 of 2)

- Add Historical Horse Racing (HHR) machines at the racetracks. These machines use actual horse races from the past but change the names of the horses.
- HHR machines are available in seven states, and are currently supplementing purses and state-bred funds in AR, KY, LA, and VA.

DEVELOP ADDITIONAL REVENUE SOURCES (2 of 2)

- iGaming (any kind of **online** betting)
- RaceTrax (uses horse racing for a keno-style game)
- These ideas can then be converted into increased Breeder and Stallion Bonuses to Registered Maryland-Bred and/or Maryland-Sired horses to make the program competitive with those of surrounding states.

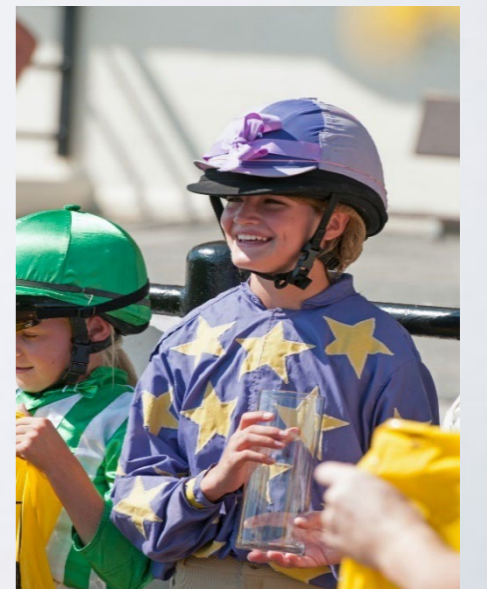
DEVELOP A MARYLAND-BRED RESTRICTED RACE PROGRAM

- Restricted races are exclusive to horses meeting certain conditions—in this case, sired and/or foaled in Maryland.
- All our neighboring states offer significant opportunities for their state-bred and state-sired horses.
- Pennsylvania's restricted race program is expansive—in 2022 the program was \$8.2 million.

SUGGESTED INITIATIVES THAT WOULD RESULT IN POSITIVE EFFECTS

- CREATE **breeder and owner incentives** that are competitive with surrounding states, including bonuses paid when there is no live racing in Maryland.
- CREATE **increased opportunities** and significant **financial incentives** for Maryland-Bred and Maryland-Sired horses to breed and race in Maryland.
- CREATE an **economic environment conducive to maintaining farms for breeding and raising horses**, thereby serving the state of Maryland by preserving open spaces and the integrity of the **Chesapeake Bay**.
- CREATE **jobs within the industry**, as well as in related fields.

THE MANY FACES OF THE MARYLAND HORSE INDUSTRY



LINKS TO INFORMATIONAL RESOURCES

Maryland Horse Breeders Association & Affiliated Organizations

Marylandthoroughbred.com

Marylandmillion.com

Marylandhorse.com

Midatlantictb.com

Pennsylvania & Virginia Breed Associations

Pabred.com

Vabred.org

Virginiahorseracing.com

The Jockey Club – National Stud Book & Registry

Jockeyclub.com

Ownerview.com

Maryland Racing Commission

Dllr.state.md.us/racing

Possible Revenue Sources

Mdlottery.com/games/racetrax

Bettingusa.com/historical-horse-racing-machines

Sportsbettingdime.com/guides/legal/igaming



From foaling in Maryland...



To training in Maryland...



To racing in Maryland!

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Maryland
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