

THE MARYLAND HORSE INDUSTRY

Why Does It Matter?

>30% of Maryland households contain at least one horse enthusiast

Maryland has 7.6 horses per square mile, more than any other state



1. Economic Impact

\$2.9 billion annual economic impact

\$80 million spent on hay, feed, and straw

\$78 million in tax revenue

2. Open Space

Over 25% of agricultural land in horse use

88,000 acres in permanent preservation

Land conserved with private dollars



3. Tourism

4 international competitions

8 competition venues

14 race courses

4. Health and Wellness

58 therapeutic riding programs

10,000 children served by educational programs

\$8.4 million economic impact



5. Jobs

>28,000 industry jobs

200 equine organizations

16,000 horse farms and stables

THE ANNE ARUNDEL COUNTY HORSE INDUSTRY

4,500

Number of Horses

More than any other category of livestock in the county

950

Stables

14,000

Equine Acres

Over half of all farmland in the county

\$344M

Non-Equine Assets

\$54M

Total Capital Expenditures

\$6.6M

Economic Impact (Laurel Park)



The Baltimore County HORSE INDUSTRY



Number of Horses
8,950

Number of Stables
1,540

Equine-Related Acres
30,000

Capital Expenditures
\$17.5 million

Non-Horse Assets
\$1.1 billion

Tourism
(Steeplechasing)
\$1.87 million



THE CARROLL COUNTY HORSE INDUSTRY



6,050
Number of Horses
Second behind cattle



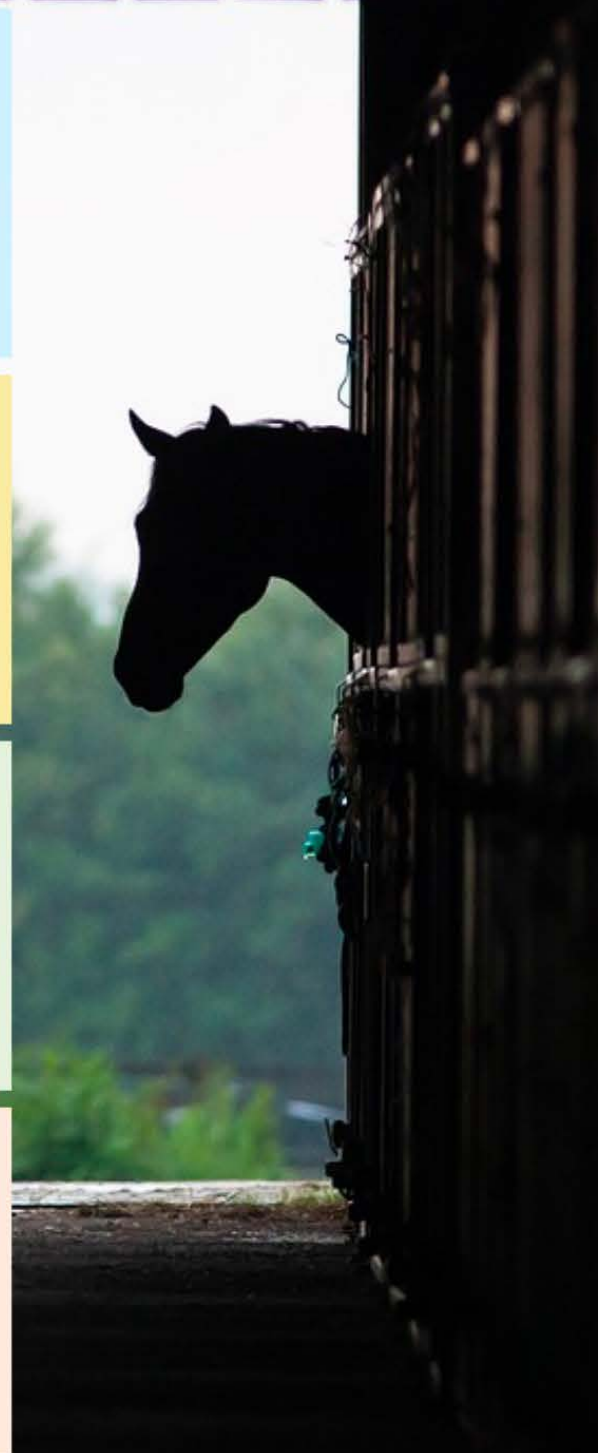
1,700
Number of Stables



41,500
Acres in equine use
30% of all farmland



\$13.3 million
Total Capital Expenditures



THE CECIL COUNTY HORSE INDUSTRY

A 5-STAR COUNTY



6,200
NUMBER OF HORSES
*More than any other
category of livestock*

740
STABLES



14,700
EQUINE ACRES
20% of all farmland

>\$25 million
CAPITAL EXPENDITURES



>\$40 million
ECONOMIC IMPACT



THE FREDERICK COUNTY HORSE INDUSTRY



Horses
7,850

3rd behind layers and cattle



Stables
1,600



Equine Acres
51,400

Over 40% of all farmland



Total Assets
\$653 million



Economic Impact
>\$15 million



Tourism



1. 46 days of equestrian competition
2. 5 international competitions
3. Regional competitions with competitors from Virginia, Pennsylvania, and Delaware



THE HARFORD COUNTY HORSE INDUSTRY



HORSES
6,200

STABLES
1,020

EQUINE ACRES
24,300

VALUE OF HORSES
\$57 million

TOTAL ASSETS
\$72 million

CAPITAL EXPENDITURES
\$9.5 million



HORSES IN HOWARD COUNTY

a \$414 million industry

Data sources: Maryland Horse Census; HCEDA

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of Horses

20.5 horses per square mile,
the **highest density of any
county in the country.**



of Stables

Includes lesson barns,
boarding barns, therapeutic
riding programs, etc.

Equine-Related Acres

Includes horse farms, stables, and
5,900 acres in hay; **64% of all HoCo
land in farmland preservation**



Jobs Supported

Includes trainers, instructors,
farriers, veterinarians, barn
builders, lumber companies,
landscapers, etc.

Total Assets

Value of horses alone = >\$36
million; capital expenditures
= >\$5.8 million

4,350

1,020

14,800

>2,000

\$414M



THE MONTGOMERY COUNTY HORSE INDUSTRY



Data sources: Maryland Equine Census; Montgomery County
Census of Agriculture

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of Horses

More horses than any other category of livestock

10,000

\$85M

Economic Impact

Assets other than equines

Value of Horses

N.B. Recently, horse values have increased faster than inflation.

\$2.6M

15,100

Equine-Related Acres

Includes farms, riding schools, competition venues, etc.

Direct Equine Jobs

Farriers, veterinarians, trainers, instructors, etc.

3,300

30

of Disciplines

Includes dressage, eventing, hunter/jumpers, polo, polocrosse, Western, etc.

of Hay Farms

The price of hay is affected by the global economy and does not track with inflation or CPI.

163

\$23M

Capital Expenditures

Construction, repair, renovations, equipment, etc.

of Equine Places

Includes barns, farms, and stables.

1,500



of Horses

4th after Baltimore,
Montgomery, and Frederick

7,100

of Equine Acres

Includes farms, riding schools,
barns, and competition venues

5,700

of Stables

770

THE PRINCE GEORGES COUNTY HORSE INDUSTRY



Values of Horses

Adjusted 2010 \$\$

\$2.73M

Non-Equine Assets

Excludes value of horses

\$215M

Total Capital Expenditures

Includes real estate, equipment, and
equine purchases; adjusted 2010 \$\$

\$13.6M

THE WASHINGTON COUNTY HORSE INDUSTRY



Stables

66% of all farms in the county (877)

580



Horses

More than pigs, goats, and chickens; equal to sheep; second behind cattle.

3,750



Equine Acres

30% of all agricultural acres in the County

33,000



Total Assets

Includes barns, fencing, trucks, trailers, barn equipment, etc.

\$125M



Capital Expenditures

\$2.3M



THE SOUTHERN MARYLAND HORSE INDUSTRY

Calvert, Charles, and St. Mary's

HORSES

5,400



STABLES

1,490

EQUINE ACRES

25,276



TOTAL ASSETS

\$450M

CAPITAL
EXPENDITURES

\$10.2M



THE LOWER SHORE HORSE INDUSTRY

Wicomico, Somerset, and Worcester



2,870
Number of Horses



900
Stables



13,843
Number of equine acres



\$129 million
Total Assets



\$2.8 million
Capital Expenditures



\$147 million
Economic Impact
Ocean Downs and Assateague



THE MID-SHORE HORSE INDUSTRY

Talbot, Caroline, and Dorchester

Number of Horses

3,150

Number of Stables

830

Equine Acres

9,300

Capital Expenditures

\$15.5 million

Non-Horse Assets

\$138 million



THE UPPER SHORE HORSE INDUSTRY

Cecil, Kent, and Queen Anne



9,100

of Horses

1,350

of Stables

35,263

Equine Acres

\$614M

Total
Assets

\$45M

Capital
Expenditures



THE WESTERN MARYLAND HORSE INDUSTRY

Garrett, Allegany, and Washington

Horses
6,600

Stables
1,250

Equine Acres
73,050
30% of all ag acres

Total Assets
\$146 million

Capital
Expenditures
\$2.5 million