

Breeding Farms and Land in the State

Sector Advisory Committee – Public Meeting Summary

February 24, 2026

Overview

Members of the Breeding Farms and Land in the State Advisory Committee met virtually to discuss the role of breeding farms and land use within Maryland’s broader horse ecosystem and to provide input for the Maryland Horse Industry Strategic Plan. The conversation focused on shared messages about Maryland’s horse industry, why the breeding industry matters to the state, workforce and financial challenges, and opportunities for better coordination, marketing, and statewide leadership.

1) Maryland’s Horse Ecosystem and Shared Messages

Participants agreed that Maryland’s horse industry should present itself as one interconnected ecosystem that includes racing, breeding, sport and recreational horses, youth and educational programs, aftercare, veterinary services, and associated agricultural businesses. Members emphasized that breeding farms, in particular, are often “hidden” but underpin the entire system by providing horses for both racing and non-racing disciplines and by maintaining open space and historic landscapes.

A recurring theme was the need to correct the misconception that people involved with horses are wealthy and profit easily from the industry. Members stressed that most breeders, farm owners, and horse professionals are “hoping to break even,” and that their primary motivation is a long-term commitment to horses and land stewardship rather than financial gain. Committee members suggested that common messaging should highlight:

- The industry’s breadth (all breeds and disciplines, not just Thoroughbreds or Standardbreds).
- The central role of land-based operations and preserved farms.
- The value-driven nature of the work: love of horses, rural heritage, and care for the land.

Several members noted that when horse people from different sectors meet, they “instantly” connect, and that this natural affinity can be a foundation for more unified public storytelling and shared branding.

Relationship Between Racing and the Broader Horse Community

Committee members described racing as one important component of a much larger horse community that also includes lesson barns, sport and show barns, pony breeders, youth and therapeutic programs, and aftercare organizations. They observed that:

- Racing depends on a strong breeding base and on an ample pipeline of horses and workers developed in non-racing settings (lesson barns, youth programs, and educational farms).
- Non-racing sectors can benefit from racing’s visibility, facilities, and marketing infrastructure if connections are deliberately built.

Members saw opportunities to:

- Expand farm tours and open-farm events (including those held during major racing festivals) to show how breeding and racing connect to recreation, youth, and tourism.
- Use existing racing-oriented public-relations efforts (such as the Maryland Thoroughbred Partnership and equine media) to tell stories from across the whole horse community, not only Thoroughbred racing.
- Explore use of racetrack facilities on non-race days for rodeos, sport horse events, and low-cost entry-level shows as a way to link sectors and share infrastructure.

Key Topics & Examples

- Maryland’s horse ecosystem is broader than racing and includes breeding across multiple disciplines (thoroughbred, standardbred, sport horse, pony, Welsh, etc.) and land preservation.
- Participants emphasized that breeding farms are foundational green infrastructure—often invisible to the public but critical to the entire horse lifecycle.
- A recurring shared message: horse people are not wealthy hobbyists; most operations are struggling to break even and operate out of passion, not profit.
- Strong agreement that marketing and storytelling must highlight people, land, and horses—not just competition results.

Issues Identified

- Public misperception that horse farms are elite or financially privileged.
- Breeding farms are largely “behind the fence” and not understood by non-horse audiences.
- Lack of a unified narrative that connects breeding, land use, workforce, and economic impact.

Action Items / Opportunities

- Develop consistent, people-centered messaging explaining who horse breeders are and what breeding contributed not just to the horse industry, but to Maryland’s ecosystem, especially open space
- Use vignettes and personal stories to humanize the industry for the general public.

- Position breeding farms as environmental, historical, and community assets, not luxury uses.

2) Why the Horse Industry Matters to Maryland

Economic and Workforce Contributions

Participants underscored the horse industry's broad economic footprint, extending from farms and racetracks to feed suppliers, hay and straw producers, farriers, veterinarians, transportation providers, and tourism businesses. They emphasized that:

- The breeding industry & all horse farms support a wide range of skilled and semi-skilled jobs, many of which are tied directly to land-based operations.
- Incentive and bonus programs (for both Thoroughbred and Standardbred breeding) influence where mares are kept and where horses are raced, with regional programs in states such as New York and Virginia currently attracting Maryland-connected breeding stock.

Members noted that uncertainty around racing dates, facilities, and purse levels directly affects breeding decisions, with ripple effects across the broader equine economy.

Land Use, Open Space, and Rural Communities

The committee highlighted the role of horse farms in preserving open space, scenic landscapes, and historic uses of the land that are highly valued by residents—even those with no direct connection to horses. Participants observed that:

- Many larger horse operations participate in state and county land preservation programs, but existing easement programs do not systematically track how much preserved acreage is used for horses.
- Legislators may have limited understanding of the horse industry, but they do understand open space preservation and constituent demand for rural character and green viewsheds.

Members suggested exploring ways to better quantify and publicize how many preserved acres support horse farms, potentially in collaboration with the Maryland Agricultural Land Preservation Foundation (MALPF), Rural Legacy, and county programs. Ideas included:

- Working with preservation program staff to survey easement holders about equine use.
- Encouraging preserved farms to post signage indicating that the property is permanently protected, so the public can link attractive horse landscapes to public investments in preservation.

Cultural and Historical Identity

Participants noted that horses are deeply embedded in Maryland's history and identity, from racing and foxhunting to local show and pony circuits. They cited examples such as:

- The visible impact of horse imagery on public infrastructure (e.g., the horse-themed water tower near downtown) as a point of local pride.
- The potential to create horse-focused displays at BWI Thurgood Marshall Airport, citing existing displays in Lexington and Albany as models that immediately convey a region's equine identity to visitors.

Members felt that elevating horses as a core part of Maryland's story—through tourism marketing, welcome displays, and museum-style exhibits—would reinforce the industry's relevance and help justify continued support.

Key Topics & Examples

- The industry supports a wide employment chain: veterinarians, farriers, feed suppliers, hay and straw producers, transporters, and agricultural services.
- Horse farms preserve open space and are often preferred by communities over more intensive agricultural uses.
- Maryland's breeding industry competes directly with New York, Virginia, Kentucky, and others with stronger incentive structures.

Issues Identified

- Legislators and even agricultural peers often **underestimate the economic and land-use value** of horse farms.
- Maryland risks losing breeding stock and talent to neighboring states with better support systems, resulting in farms sold and fewer events filled with horses. Such as undercards on racedays in Maryland and Marylandbred Horse Shows

Action Items / Opportunities

- Frame the horse industry as both economic development and land preservation.
- Align messaging with open space, rural character, and workforce impact, which resonate strongly with legislators.
- Highlight regional competitiveness risks if Maryland does not remain attractive for breeding operations.

3) Connection and Fragmentation Within the Industry

Committee members agreed that Maryland’s horse industry often feels disconnected, despite a strong underlying sense of shared identity among horse people. Key reasons cited for fragmentation included:

- Time constraints and geography: Horse and farm work is intensive and seven-days-a-week, leaving little time to attend meetings or travel to statewide events. Farms and facilities are dispersed across the state rather than concentrated in one region.
- Discipline-specific organizations: Racing, sport horses, Western disciplines, and pony breeders each have their own associations, events, and communication channels, which can limit cross-sector awareness.
- Historical patterns of intra-industry conflict, especially within racing, which have contributed to a reputation in Annapolis for “fighting among ourselves.”

Members offered several ideas for strengthening connection:

- Reviving and updating cross-discipline gatherings such as the Maryland Horse Expo, with seminars, demonstrations, and educational sessions that intentionally mix different breeds and disciplines.
- Hosting more multi-sector farm tours and open houses that feature breeding farms, training centers, and show or racing facilities in one coordinated program.
- Using shared physical spaces such as the Maryland Horse Library and Education Center as neutral convening sites for in-person meetings, leadership training, and cross-sector planning.
- Developing simple, shared messaging “toolkits” that any horse organization can use when speaking to media, policymakers, or the public, to ensure alignment on key facts and themes.

Key Topics & Examples

- Fragmentation is driven more by time, geography, and workload than by philosophical division.
- Horse people feel culturally connected but lack regular, practical opportunities to interact across disciplines.
- Loss of statewide convening events (e.g., Maryland Horse Expo) reduced cross-sector exchange.

Issues Identified

- Limited venues for multi-discipline collaboration and information sharing.
- Different sectors often advocate separately, weakening overall influence.

Action Items / Opportunities

- Use the Maryland Horse Industry Board as a neutral convener for cross-sector dialogue.

- Re-establish industry-wide gatherings (educational, historical, or planning-focused).
- Encourage shared advocacy narratives even when sector-specific issues differ.

4) Coordination and Statewide Leadership

There was broad agreement that Maryland benefits from having the Maryland Horse Industry Board (MHIB) as a one for the statewide forum and voice, and that the current administration is more engaged with MHIB and the industry than in the past. Members noted that:

- The Governor's Horse Industry Strategic Plan Steering Committee includes multiple state agencies (such as Agriculture, Labor, and Commerce) that have not historically communicated regularly about the horse industry.
- This multi-agency engagement has already uncovered existing apprenticeship, workforce, and business-development programs that the horse industry did not previously know it could access.

While recognizing that MHIB, as a state entity, cannot engage in lobbying, participants saw a need for a clearly defined coordinating role that could realistically include:

- Convening stakeholders across breeds, disciplines, and regions on a regular basis.
- Collecting and maintaining data on economic impact, land use, workforce needs, and program participation.
- Supporting unified marketing and public education efforts (in partnership with Commerce and Tourism), including tourism materials, airport and gateway displays, and digital storytelling.
- Facilitating workforce pipelines by linking farms, racetracks, educational institutions, and labor programs (apprenticeships, internships, and high-school career and technical education).
- Serving as a hub for information on existing state grants, workforce subsidies, and agricultural support programs relevant to horse operations.

Several members also referenced the Kentucky Equine Education Project and similar foundation-style entities as potential models for a non-governmental organization that could complement MHIB's work with more flexibility in advocacy and fundraising.

Key Topics & Examples

- This Strategic Plan process is the first time many state agencies have learned about the horse industry in depth.
- Participants noted improved visibility with Commerce, Labor, Agriculture, and the Governor's Office.
- Virginia's success was repeatedly cited as an example of long-term coordination following a strategic plan.

Issues Identified

- Historically, Maryland’s horse industry has been perceived as divided and reactive.
- Lack of a single, coordinated educational voice for state decision-makers.

Action Items / Opportunities

- Position the Strategic Plan as a checklist and roadmap for state agencies.
- Maintain cross-agency collaboration after the plan is delivered, not just during its creation.
- Use the Horse Industry Board as an educational—not lobbying—hub for state leadership.

5) Information Needs for Decision-Makers

Participants stressed that state and local decision-makers need concise, credible, and visually clear information to understand the horse industry’s value and make informed policy choices. They identified the following priorities:

Key Metrics and Data

- Total economic impact of the horse industry, including direct and indirect jobs, wages, and tax revenues.
- Understanding how numbers of horses bred in Maryland results in success of Pimlico
- Number of acres of land in active horse use, especially within state, county, and private preservation programs.
- Counts of farms, horses, and facilities by region and discipline.
- Measurements of tourism activity tied to horse events, farm tours, and racing (attendances, visitor spending, lodging, etc.).
- Participation in youth, educational, and workforce programs (internships, high-school agricultural programs, university breeding programs, and aftercare organizations).

Members emphasized that decision-makers respond strongly to well-designed infographics, one-page summaries, and “checklist-style” reports, rather than long narrative documents.

Stories and Communication Products

Participants also felt that data should be paired with compelling human stories that convey why people stay in the horse business despite tight margins. Suggestions included:

- Short vignettes featuring individual breeders, farm workers, veterinarians, and trainers explaining what they do and why they do it, aimed at both the general public and policymakers.

- Broader distribution of existing narrative content (such as feature stories from Mid-Atlantic Thoroughbred) to non-industry audiences and to government officials.
- Video or multimedia content highlighting the lifecycle of a Maryland-bred horse, from breeding farm to racecourse or sport career to retirement, illustrating the many touchpoints and jobs involved.

Key Topics & Examples

- Legislators respond strongly to data, visuals, and infographics, especially related to land preservation and jobs.
- There is currently no easy way to quantify how much preserved land is actively used for horses, due to easement program limitations.
- Examples from other states (airport displays, tourism branding) show how visibility shapes perception.

Issues Identified

- Data gaps around acreage, land use, and breeding activity.
- Horse-related benefits are often indirect and therefore undercounted.

Action Items / Opportunities

- Work with MALPF, Rural Legacy, and counties to estimate horse-related preserved acreage, even if imperfect.
- Create clear, simple metrics that can be reused by legislators and agencies.
- Explore high-visibility branding opportunities (airports, tourism materials) to reinforce statewide identity.

6) Financial Sustainability of Operations

Committee members discussed the pressures facing breeding farms, lesson barns, show venues, and other operations connected to racing and the academic ecosystem. Key challenges include:

- Thin or negative margins: Breeding Thoroughbreds, Standardbreds, or sport horses rarely produces reliable profit; many participants described breeding as a labor-intensive activity that at best “loses less money” in jurisdictions with strong incentive programs.
- Incentive disparities: Robust breeders and state-bred incentive programs in other jurisdictions (for example, New York and regional programs in Virginia) make it financially attractive to base broodmares or foal out horses outside Maryland.
- Uncertain racing environment: Questions about the number of tracks, race dates, and purse levels create year-to-year uncertainty that discourages long-term breeding and capital investment in Maryland.

- High show and facility costs: For sport and pony breeders, the cost of competing (entries, stabling, judges, and awards) is a significant burden, and show organizers often rely on stabling fees to avoid operating at a loss.
- Competition for multi-use venues: Facilities such as Prince George’s Equestrian Center can earn more revenue from non-horse events, making it harder to keep equestrian use affordable and frequent.

Participants also highlighted structural constraints, such as:

- Limited or no financial incentives for non-racing breeders, especially in sport and pony sectors, beyond small futurity purses and recognition programs.
- The need to balance purses and bonuses: With finite racing funds, raising breeder or resident bonuses may require lowering base purse levels, which can affect field quality and wagering.

Despite these pressures, members pointed to positive developments such as recent moves to allow breeders’ bonuses to be paid even when Maryland-breds race outside the state, and efforts to strengthen regional collaboration.

Key Topics & Examples

- Across all breeds, breeding is described as a “labor of love”, not a profitable enterprise.
- Racing-related breeding benefits from incentives, but non-racing breeders have virtually none.
- Regional breeding incentives (MD-VA-DE collaboration) were cited as a successful survival strategy.

Issues Identified

- Maryland breeders are disadvantaged compared to NY, KY, and VA.
- Sport horse and pony breeders lack any meaningful financial support mechanisms.
- Facility economics (show venues, stabling costs) directly affect breeding demand.

Action Items / Opportunities

- Explore regional incentive models rather than state-only approaches.
- Support venues and infrastructure that make showing and racing viable, indirectly supporting breeding.
- Frame sustainability as risk reduction and retention, not profit generation.

7)Entry Points and Pathways Into the Industry

The committee devoted significant time to discussing how people first encounter horses and how early experiences can translate into careers or lifelong participation. Members identified several key entry points:

- Lesson barns and youth riding programs, which introduce children to basic handling, care, and safety.
- Inner-city and access-focused programs such as City Ranch, which expose young people from non-traditional backgrounds to horses and basic horsemanship skills.
- School-based agricultural education programs, including county high schools with agriculture tracks and programs supported by the Maryland Agricultural Education Foundation (MAEF).
- University-based programs, including the University of Maryland's hands-on foaling and broodmare care program, which provides immersive experience to students and supports local breeders.

Participants stressed that effective pipelines require:

- Early exposure: Starting in elementary and middle school, so that young people have time to build intuition, confidence, and horse-handling skills long before they enter the workforce.
- Access and transportation: Many interested youth lack transport to farms or show venues, and arranging buses and chaperones can be expensive and logistically complex for schools and community groups.
- Local, structured programs: Partnerships between high schools, agriculture programs, and nearby farms that can provide supervised, skill-building experiences for students who may not be college-bound.

Members suggested that:

- More formal alignment between MAEF, local school systems, and horse farms could create high-school-to-work pipelines into grooms' roles and other entry-level positions.
- State labor and apprenticeship programs could be better leveraged to support internships, on-farm training, and paid progression into horse careers.
- Educational and outreach efforts from other jurisdictions (such as Kentucky's foundation-based equine education and workforce initiatives) might offer useful models, even if specific funding mechanisms (such as license plates) are not directly transferable to Maryland.

Key Topics & Examples

- College-age internships alone are insufficient; early exposure is critical. Camps are vital
- Programs like City Ranch were cited as effective models for introducing non-traditional audiences to horses.

- Riding schools and low-cost local facilities are essential gateways.

Issues Identified

- Children from non-horse backgrounds lack access, transportation, and early exposure.
- By college age, many potential workers are already “too far behind” in horsemanship skills.

Action Items / Opportunities

- Partner with K–12 agricultural education programs and vocational tracks.
- Expand collaborations with MAEF and county ag programs to define horse-specific certificates.
- Support local, affordable facilities that reduce barriers to entry.

Workforce and Careers in the Horse Industry

Participants described attracting and retaining workers as a central challenge across all sectors, including racing backstretch workers, farm staff, veterinary support teams, and show and lesson barn employees. They identified multiple barriers:

- **Demanding work conditions:** Long hours, seven-day-a-week schedules, and physically demanding tasks make it difficult to recruit and retain staff, especially when compared with other industries.
- **Low pay and limited benefits:** Many workers lack health insurance and other basic benefits, which is particularly problematic in a physically risky occupation.
- **Limited awareness:** Young people and their families often do not understand that horse-related careers exist, what they entail, or how to enter them.
- **Skills gap:** Modern workers may have little or no prior experience with horses, and farms must invest significant time in teaching basic safety and horsemanship.

Committee members discussed what could make these careers easier to understand and sustain:

- Clear career pathways that distinguish roles available directly out of high school from those requiring college or advanced degrees, and that outline potential progression and earnings over time.
- Structured training and certification programs, developed in partnership with state education and labor agencies, to provide recognized credentials and basic horse-handling competencies.
- Supportive infrastructure, such as improved access to transportation and, where feasible, housing options near farms and racetracks to address commute barriers.

- Continued exploration of immigration and workforce policies that recognize the current reliance on workers from communities with strong horse cultures and support their long-term participation in the industry.

Members highlighted that successful programs like the University of Maryland’s foaling course often shift students toward equine careers once they see what is possible, suggesting that targeted exposure can be a powerful recruitment tool.

Key Topics & Examples

- Workforce shortages are driven by low pay, long hours, and lack of benefits, especially health insurance.
- Horsemanship is a high-skill, experiential profession that cannot be learned quickly or solely in classrooms.
- University-based and farm-based immersive programs were highlighted as effective but resource-intensive.

Issues Identified

- Lack of structured career ladders from youth to entry-level to professional roles.
- Safety and liability concerns when training inexperienced workers.
- Transportation and access barriers for young people.

Action Items / Opportunities

- Define clear job categories by education level (high school, certificate, college, graduate).
- Expand apprenticeships and paid internships with state labor support.
- Invest in hands-on, supervised training models that reduce risk for employers.

Major Takeaways and Suggested Next Steps

Across the conversation, several themes surfaced repeatedly:

1. One interconnected ecosystem: Racing, breeding, sport, recreation, youth, and aftercare are interdependent; the Strategic Plan should treat them as one system and encourage shared messaging.
2. Perception and storytelling: Changing perceptions—from “wealthy hobby” to hard-working, land-based, and community-rooted industry—requires sustained marketing, accessible stories, and visible public symbols (such as airport displays and gateway signage).

3. Land and open space as a core asset: Preserved horse farms are one of Maryland's strongest arguments for the industry's value and should be better quantified and highlighted for policymakers and the public.
4. Data plus narrative for decision-makers: Legislators and agencies need both credible metrics (jobs, acres, revenue, participation) and human stories, packaged in concise, visual formats.
5. Workforce pipelines and equity: Sustainable workforce solutions must start early, be accessible to diverse communities, and bridge K-12, higher education, and on-farm training, with attention to wages, benefits, and transportation.
6. Financial pressures and regional competition: The Strategic Plan should acknowledge the financial fragility of many operations and the competitive pull of neighboring states' incentive programs, while focusing on tools other than direct new funding requests in the near term.
7. Need for ongoing coordination: MHIB and the multi-agency Steering Committee are valuable platforms, but continued cross-sector convening, data development, and shared marketing will be needed beyond the current planning process.

Suggested next steps arising from the discussion included:

- Exploring mechanisms to quantify horse acreage in preservation programs and developing public signage to highlight preserved horse farms.
- Developing a coordinated proposal for horse-focused tourism and identity projects (such as airport displays and expanded farm tours) in partnership with Commerce and Tourism.
- Working with MAEF, county school systems, and state labor programs to pilot structured high-school and post-secondary pathways into horse careers, including farm-based practicums and internships.
- Using the Strategic Plan to define a realistic statewide coordination role (or roles) for convening, data collection, marketing, and workforce development across all breeds and disciplines.

Participants expressed optimism that, by speaking with a more unified voice and presenting clear evidence of their economic, cultural, and land-use value, Maryland's horse industry can secure stronger recognition and support from state leaders in the years ahead.