Maryland Horse Industry

Strategic Planning Initiative

Report of the

Maryland Horse Industry Strategic Planning Committee

Pursuant to Executive Order 01.01.2025.23

August 2026

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First Lady

The Maryland General Assembly

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Table of Contents

Executive Order 01.01.2025.23 5
Executive Summary 7
Advocacy, Public Awareness, and Promotion 14
Education and Workforce Development 18
Economic Development 21
Collaboration and Communication 29
Sustainability and Land Use 33
Equine Health and Welfare 38
Recommendations 43
Appendix 56
About the Facilitation Process
Horse Industry At-Large Survey
Glossary of Terms

Executive Order 01.01.2025.23

Maryland Horse Industry Strategic Planning Initiative

Maryland Horse Industry Strategic Planning Initiative

WHEREAS, The Maryland horse industry, also known as the equine sector, is a vital component of Maryland's cultural heritage, economic vitality, agricultural landscape, and recreational life;

WHEREAS, The Maryland horse industry includes, but is not limited to, the following sectors: Thoroughbred racing, harness racing, jousting, horse shows, eventing, recreational riding, therapeutic stables, and trail riding;

WHEREAS, Maryland's horse industry also includes farriers, small business owners, farmers, feed dealers, tack shops, veterinarians, owners, trainers, exercise riders, fox chasing clubs, steeplechase participants, therapeutic riding centers, breeders, horse riding clubs and teams, 4-H & Pony Club youth programs, rodeo participants, and racing participants;

WHEREAS, The Maryland horse industry contributes significantly to Maryland's economy through jobs, tourism, education, and land stewardship with more horses per square mile than any other state in the United States, generating an annual economic impact of $2.9 billion and maintaining vitally important open space;

WHEREAS, Over the years, the sectors within Maryland's horse industry have worked well individually, but not collectively; and

WHEREAS, A unified, coordinated approach is vital for the continued growth, sustainability, and impact of the horse industry statewide.

NOW, THEREFORE, I WES MOORE, GOVERNOR OF THE STATE OF MARYLAND, BY VIRTUE OF THE AUTHORITY VESTED IN ME BY THE CONSTITUTION AND LAWS OF MARYLAND HEREBY PROCLAIM THE FOLLOWING EXECUTIVE ORDER EFFECTIVE IMMEDIATELY:

A. Establishment

1. There is hereby established a Horse Industry Strategic Plan Initiative ("Initiative") to promote growth, financial sustainability, and a thriving ecosystem within Maryland's horse industry.
2. The Initiative shall be administered by the Maryland Department of Agriculture, in consultation with:
    a. The Secretary of State;
    b. The Maryland Racing Commission;
    c. The Department of Labor;
    d. The Department of Natural Resources; and
    e. The Department of Commerce.
3. If requested, all Executive Department agencies shall cooperate with and assist the Department of Agriculture in carrying out its responsibilities under this Executive Order.
4. The Department of Agriculture shall staff the Initiative.

B. Strategic Plan.

1. The Initiative, led by the Department of Agriculture, shall develop a strategic plan to ensure a coordinated and sustainable future for Maryland's horse industry.

2. The strategic plan shall:

a. Provide a coordinated framework to strengthen, support, and promote the State's horse ecosystem;

b. Advance policies, programs, and partnerships that ensure the long-term viability, growth, and sustainability of equine enterprises across all sections including racing, breeding, sport, recreation, and education; and

c. Develop a recommended strategy to advance the Maryland horse industry and address the following objectives:

i. Strategic Planning and Policy Guidance;

ii. Economic Development;

iii. Advocacy, Public Awareness and Promotion;

iv. Education and Workforce Development;

v. Sustainability and Land Use;

vi. Health and Welfare; and

vii. Collaboration and Communication.

C. Reporting.

On or before September 1, 2026, the Department of Agriculture shall submit a report to the Governor and General Assembly outlining its progress, recommendations, and strategic priorities for the Maryland horse industry's ecosystem.

D. General Provisions.

1. This Executive Order shall be implemented in a manner that is consistent with all applicable statutes and regulations. Nothing in this Executive Order shall operate to contravene any State or federal law or to affect the State's receipt of federal funding.

2. If any provision of this Executive Order or its application to any person, entity, or circumstance is held invalid by any court of competent jurisdiction, all other provisions or applications of the Executive Order shall remain in effect to the extent possible without the invalid provision or application. To achieve this purpose, the provisions of this Executive Order are severable.

GIVEN Under My Hand and the Great Seal of the State of Maryland, in the City of Annapolis, this 6th Day of November 2025.

Wes Moore
Governor

ATTEST:

Susan C. Lee
Secretary of State

EXECUTIVE SUMMARY

On November 6, 2025, Governor Wes Moore issued Executive Order 01.01.2025.23, establishing the Maryland Horse Industry Strategic Planning Initiative to promote growth, financial sustainability, and a thriving ecosystem within Maryland's horse industry. The Executive Order recognizes the industry's cultural, economic, agricultural, and recreational importance; notes that Maryland has more horses per square mile than any other state, generates an annual economic impact of $2.9 billion, and maintains vitally important open space; and calls for a unified, coordinated approach to strengthen the horse ecosystem.

This report begins from the premise that Maryland's horse industry is a broad ecosystem of interdependent sectors. Maryland's horse ecosystem is a network of interconnected and interdependent sectors that collectively create and support the health, sustainability, and economic vitality of the industry, including lesson and training programs, breeding, sport horse competition, racing, equine-assisted services, recreation and trail riding, youth development, veterinary medicine, equine professional services, agricultural, tourism, education, land conservation, and the related businesses. The Strategic Planning Committee's central conclusion is that Maryland's future competitiveness depends on cross-sector coordination, better public and legislative understanding, stronger workforce pipelines, thoughtful economic development planning, sustained land preservation, visible commitment to equine health and welfare, and sufficient implementation capacity.

McGuireWoods Consulting LLC facilitated the stakeholder process with the Strategic Planning Committee. The process addressed the six Topic areas identified below and produced recommendations that are summarized here in abbreviated form, with fuller discussion in the body of this report.

Strategic Planning Topic Areas and Recommendations

Advocacy, Public Awareness, and Promotion

- ***Establish and commit to a new industry "unified voice" ethos.*** The Committee treats a unified public message as foundational to stronger public awareness, credibility, and cross-sector coordination across Maryland's horse ecosystem.
- ***Express clear, strong industry support for the Pimlico redevelopment project.*** The Committee recommends that the industry speak with one voice in support of Pimlico redevelopment and the State's acquisition of the Preakness intellectual property, emphasizing the project's statewide benefits to racing and the broader horse ecosystem.
- ***More prominently highlight the horse industry's economic impact.*** The Committee recommends more visible use of the $2.9 billion economic impact figure in public, legislative, and industry advocacy materials.

- ***Recognize Maryland's urban and suburban youth as important to the industry's future.*** The Committee recommends outreach that deepens interest in horses and equine careers among young people in suburban and urban communities, which are increasingly important audiences for the industry.
- ***Engage private racetracks and other industry stakeholders on horse industry marketing.*** The Committee recommends coordinated ecosystem-wide messaging with private-sector equine stakeholders, the Maryland Horse Industry Board, the Maryland Office of Tourism, and the Department of Natural Resources Office of Outdoor Recreation.
- ***Use a unified, one-voice approach in General Assembly engagement.*** The Committee recommends a cross-industry advocacy posture that presents shared priorities to legislators and reinforces the Executive Order's call for coordinated action.
- ***Develop and execute a year-round government relations plan.*** The Committee recommends that the Maryland Horse Council and other advocacy groups coordinate a month-by-month plan, including in-session and interim engagement, factual advocacy materials, and website content communicating the industry's breadth and economic impact.
- ***Promote Maryland branding in signature industry events.*** The Committee recommends using major equine events to increase Maryland equine branding and public awareness.
- ***Support resource-sharing for industry collaboration.*** The Committee identifies Pimlico's year-round entertainment opportunities and the Maryland Horse Industry Board's coordinating role as potential platforms for cross-sector collaboration and unity.
- ***Explore options to address private-sector liability insurance concerns.*** The Committee recommends exploring approaches to reduce liability insurance pressures on small and medium-size businesses and nonprofit organizations, including the possibility of a collective insurance program convened through the Maryland Horse Council.

Education and Workforce Development

- ***Include baseline labor data in the economic impact study.*** The Committee recommends that a Maryland-specific horse industry economic impact study include sector-by-sector labor data, with particular attention to labor demand.
- ***Include the horse industry in Commerce's state programs accessibility tool.*** The Committee recommends that the Department of Commerce include the horse industry among the first participants in its online tool to make beneficial state programs more accessible to the private sector.
- ***Compile state job-recruitment and training programs that may benefit the industry.*** The Committee recommends that the Maryland Horse Industry Board work with the Department of Commerce and the Department of Labor to identify relevant programs and determine how best to share that information with industry participants.

- ***Collaborate on industry-specific credentials, certificates, and continuing education.*** The Committee recommends working with the Department of Education and the Maryland Higher Education Commission on programs that improve entry-level training, including basic horsemanship.
- ***Consider an industry-led micro-credentialing pilot program.*** The Committee recommends that industry leaders explore a micro-credentialing curriculum and that state agencies engage the Maryland Horse Foundation on a possible state-sanctioned career program partnership.
- ***Develop a youth pipeline and long-term outreach strategy for suburban and urban youth.*** The Committee recommends combining near-term workforce training with longer-term outreach to young people who may have little exposure to horses or equine careers, building on programs such as 4-H, FFA, Pony Club, and other youth equine organizations.

Economic Development

- ***Form a Department of Agriculture / Department of Labor workgroup to evaluate selected Maryland Horse Industry Board and Maryland Racing Commission responsibilities.*** The Committee recommends that the Department of Agriculture and the Department of Labor explore potential efficiencies, including transferring MHIB's stable licensing responsibilities to the Maryland Racing Commission while maintaining MHIB as an entity with its executive director and added staff capacity.
- ***Increase Maryland Horse Industry Board funding so it can more effectively fulfill statutory and recommended responsibilities.*** The Committee recommends considering revenue enhancements, including the Maryland Feed Fund, public-auction sales tax treatment, and the commercial stable licensing fee, to support MHIB operations.
- ***Develop a horse tourism program.*** The Committee recommends collaboration among private-sector tour operators, MHIB, industry associations, and the Maryland Office of Tourism to promote horse farms, venues, wineries, breweries, farm markets, and related attractions.
- ***Conduct a public-private partnership feasibility study for a Mid-Atlantic animal import facility.*** The Committee recommends reassessing development of an animal import facility at or near BWI, with a focus on a public-private partnership model for development and operation.
- ***Promote the Pimlico redevelopment project's local and ecosystem benefits.*** The Committee recommends central messaging on Pimlico's benefits to the horse ecosystem and Park Heights, as well as the Laurel Park Training Center's benefits to surrounding counties.
- ***Prepare a Maryland horse industry economic development plan.*** The Committee recommends a professional plan, developed with an economic impact study

and labor market baseline analysis, to provide defensible information for strategic implementation.

- ***Work with counties that award Local Impact Grants for eligible venue capital improvements.*** The Committee recommends that the state and industry engage Local Development Councils in casino jurisdictions to pursue grants for capital improvements at qualifying horse racing and competition venues.
- ***Provide dedicated leadership and support for the Maryland Horse Park System.*** The Committee recommends that MHIB's proposed marketing and communications position also coordinate MHPS event recruitment, statewide tourism, business development, and clearer public access across its venues.
- ***Integrate the horse industry into the Governor's economic development strategy.*** The Committee recommends elevating the industry's contributions and including a horse industry representative in the Department of Commerce's economic development strategy process, including the Biannual Integrated Economic Development Plan.
- ***Conduct a capital infrastructure needs assessment of horse industry venues.*** The Committee recommends assessing capital needs at venues such as Fair Hill Special Event Zone, Prince George's Equestrian Center, and Rosecroft Raceway, among others, as statewide economic development considerations.
- ***Encourage the University of Maryland to expand equine education, research, and workforce capacity.*** The Committee recommends that the University of Maryland expand equine education, research, Extension, and workforce development capacity through a feasibility study for a modernized campus farm facility, including an indoor teaching and riding arena, while pursuing strategic public and private partnerships to strengthen teaching, applied research, experiential learning, and industry engagement.

Collaboration and Communication

- ***Coordinate on strategic messaging.*** The Committee recommends that industry associations, organizations, and advocates identify cross-sector interests, formulate unified positions, and agree on shared messaging and communications avenues.
- ***Consider creating an umbrella organization to develop unified positions.*** The Committee recommends exploring a formal convening forum, modeled in part on the Virginia Equine Alliance, through which principal associations and advocacy groups can coalesce around positions benefiting all industry sectors.
- ***Make Maryland Horse Industry Board more centrally responsible for cross-sector collaboration and communication.*** The Committee recommends giving MHIB sufficient staff and financial resources to coordinate industry collaboration, communications, and a broader unifying narrative for the Executive Branch, General Assembly, and public.
- ***Coordinate Maryland Horse Industry Board marketing with industry sectors and state agencies.*** The Committee recommends that MHIB increasingly

align its statutory marketing responsibilities with industry sectors and state agencies whose marketing budgets and responsibilities intersect with horse industry promotion.

- ***Review Maryland Horse Industry Board composition to support its mission and any revised scope.*** The Committee recommends that the Department of Agriculture review whether MHIB's board composition supports its reformed purpose, including potential representation for community youth organizations and equine-assisted services.

Sustainability and Land Use

- ***Collaborate with state land conservation agencies and organizations.*** The Committee recommends coordinated outreach with MALPF, MET, and other land conservation organizations to reach landowners whose properties may benefit the horse ecosystem through permanent conservation easements.
- ***Align common land preservation initiatives and goals.*** The Committee recommends aligning the Governor, General Assembly, horse industry, and land conservation partners around shared goals, including the 40 percent by 2040 initiative, the Chesapeake Bay Watershed Agreement, and preservation of agricultural lands needed for breeding and other equine operations.
- ***Stabilize state land conservation funding.*** The Committee recommends stable state appropriations for land conservation agencies and programs, particularly MALPF, to support staffing, operations, and landowner outreach.
- ***Consider transferable land conservation tax credits.*** The Committee recommends legislation allowing unused land conservation tax credits to be transferred or gifted, making conservation easements more financially attractive to potential donors.
- ***Consider allowing unused land preservation tax credits to be sold.*** The Committee recommends considering legislation that would allow Maryland residents with unused state income tax credits to sell them to other Maryland taxpayers, increasing the incentive value of conservation easements.
- ***Ask MALPF to better define "horse farm" and "horse farm operation" criteria.*** The Committee recommends clearer criteria and examples of commercial equine activity that MALPF would consider consistent with conservation easements, so horse farm owners can better understand program requirements.
- ***Ask MALPF to revise minimum-acreage criteria for horse farms.*** The Committee recommends that MALPF consider reducing the current 50-acre easement minimum to 25 acres for horse farms, better reflecting the size of many equine operations.
- ***Ask MALPF to consider preferential ranking for horse farm owners.*** The Committee recommends that MALPF work with counties to give appropriate priority to horse farm owners interested in land conservation and its benefits.

Equine Health and Welfare

- ***Acknowledge social license to operate as important to public confidence.*** The Committee recommends that the industry and regulators continue treating social license, equine health, safety, welfare, and aftercare as central to public trust in racing, competition, and recreation.
- ***Expand public education and communication on equine health and welfare.*** The Committee recommends more concerted public education about initiatives to improve horse health, safety, welfare, facility conditions, and equipment, supported by better communication of health and welfare reports.
- ***Review and update the Maryland Horse Council's "Minimum Standards of Care for Equines."*** The Committee recommends that MHIB's Maryland Equine Health Advisory Committee review, update as needed, and publicize the standards for food, water, shelter, veterinary care, air quality, and space for movement.
- ***Strengthen equine lifecycle and aftercare collaboration.*** The Committee recommends stronger collaboration with nonprofit organizations and other stakeholders to develop a public statewide strategy for responsible horse ownership and lifecycle planning.
- ***Provide incentives to veterinary students to practice in Maryland.*** The Committee recommends incentives for Virginia-Maryland College of Veterinary Medicine and University of Maryland Eastern Shore School of Veterinary Medicine students who will practice large-animal and equine veterinary medicine in Maryland after graduation.
- ***Collaborate with UMES School of Veterinary Medicine on externships, mentorships, and partnerships.*** The Committee recommends working with UMES to develop externships, mentorships, scholarships, loan-repayment concepts, and practice opportunities that encourage graduates to remain in Maryland and serve the equine sector.
- ***Advocate for sufficient state funding and staffing for equine health and welfare oversight and reporting.*** The Committee recommends identifying funding and staffing for expanded equine health and welfare regulatory oversight and reporting, beginning with a pilot program and allowing for eventual broader coverage.

Across these strategic planning topic areas, several themes recur: a unified public message; stronger year-round government relations; more reliable labor, economic, and participation data; greater engagement with state workforce, higher education, tourism, economic development, and conservation programs; a more robust MHIB; and sustained attention to equine health and welfare.

The Topic areas remain deeply interconnected. Public awareness affects economic development and legislative support; workforce development supports safety, welfare, and business growth; land preservation underpins farms, venues, trails, recreation, and breeding; and collaboration provides the structure needed to carry recommendations forward.

The stakeholder discussions also show that Maryland's challenge is not principally a lack of assets. Maryland has globally recognized racing heritage, the Preakness, major racing and competition venues, respected breeding farms, university and youth programs, therapeutic riding operations, equine professionals, the Maryland Horse Park System, and substantial land conservation infrastructure. The strategic question is whether those assets can be connected into a coherent statewide story and actionable framework.

Accordingly, this report is both a strategic narrative and an implementation framework. It explains the stakeholder process, summarizes the Committee's discussions, and presents recommendations intended to help Maryland's horse industry speak with greater unity while respecting legitimate sector-specific needs.

Advisory Committees

The Maryland Horse Industry Board's executive director and the Maryland Racing Commission's executive director also established ten sector-based Advisory Committees composed of members of the broader horse ecosystem. The Advisory Committees convened between January and March 2026 to provide additional perspectives in response to the Executive Order's charge.

The Advisory Committees engaged representatives from economic development, Thoroughbred racing, Standardbred racing, sport, competition and recreation, equine health and welfare, equine-assisted services, aftercare, and equine-assisted services, natural resources, breeding farms and land use, and At-Large interests. Their discussions reinforced the Strategic Planning Committee's view that Maryland's horse industry is an interconnected ecosystem requiring stronger coordination, communication, workforce development, public awareness, lifecycle stewardship, and data collection.

Advisory Committees' Horse Industry At-Large Survey

To broaden participation, the Advisory Committees, with assistance from Maryland Horse Industry Board and Maryland Racing Commission staff, created, advertised, and distributed an online "Horse Ecosystem Strategic Plan Form." Nearly 400 horse owners, businesses, nonprofit organizations, professionals, volunteers, and interested citizens responded, providing public input that helped inform the Advisory Committees and the Strategic Planning Committee.

The Advisory Committees and public engagement process helped ensure the Strategic Plan reflects sector-specific expertise and broader stakeholder experience from across Maryland, while identifying practical implementation considerations, emerging opportunities, and potential collaborative solutions. (See the Appendix for the "Horse Ecosystem Strategic Plan Form.")

ADVOCACY, PUBLIC AWARENESS, AND PROMOTION

The Strategic Planning Committee determined that advocacy and public awareness efforts must address at least two principal audiences: the general public and the Maryland General Assembly. The Committee recognized that the industry must understand how Marylanders view the horse industry in order to broaden public appeal and enhance economic viability. The Committee also recognized that understanding how the General Assembly views the horse industry is essential to improving the industry's standing with legislators and advocating successfully for policy and, as may be necessary, appropriations support.

The General Public

With respect to general public awareness, stakeholders observed that many Marylanders may first associate the horse industry with the Preakness and Pimlico Race Course, while knowing less about harness racing, steeplechase, horse shows, eventing, jousting, equine-assisted services, youth riding programs, recreational riding, trail riding, breeding, training, farming, feed, veterinary services, and other industry vocations and small businesses. Stakeholders also surmised that some members of the public may perceive the horse industry as privileged without appreciating the broad and complex communities that comprise the Maryland horse ecosystem. These observations pointed to the need for broader, more accurate, and more inclusive public messaging about Maryland's horse ecosystem.

The public awareness discussion revealed that Maryland's challenge is partly one of visibility and partly one of narrative. The public may know individual symbols of the industry, particularly the Preakness, but not understand how those symbols connect to farms, jobs, land preservation, animal care, youth development, tourism, education, and small businesses. A person may know Pimlico or the Preakness without appreciating the breeding operations, feed suppliers, transportation services, veterinarians, farriers, grooms, trainers, exercise riders, stable operators, and hospitality businesses that make racing and other equine activity possible. Similarly, a person may attend an event at Fair Hill Special Event Zone or Prince George's Equestrian Center without seeing the broader statewide network of venues, farms, educational institutions, and associations that support the event.

The Committee's discussion therefore suggests that public awareness should not be treated as a single marketing campaign. It should be approached as a long-term effort to explain the Maryland horse industry as an ecosystem. That explanation must be accessible to people who have no prior connection to horses, persuasive to policymakers who must weigh competing public priorities, and authentic to industry participants who know the complexity of the work. It should also be inclusive, emphasizing that the horse industry is not limited to owners, breeders, and racing participants, but includes workers, students, volunteers, small business owners, rural and suburban communities, urban visitors, veterans and individuals served by therapeutic programs, youth organizations, and families who encounter horses through recreation or education.

This broader public narrative also matters because public support cannot be assumed. As Maryland becomes more urban and suburban, fewer residents may have direct daily exposure to

farms, stables, riding programs, or the working landscape that supports equine activity. Without intentional outreach, the industry risks becoming visible only during isolated events, controversies, or legislative disputes. A stronger public awareness effort would give the industry the ability to tell positive, accurate, and defensible stories before moments of crisis, and to show the public why the horse industry matters to Maryland's economy, land, history, and quality of life.

The Committee identified important strengths in the industry's public messaging story. Maryland has a long and storied horse history, with racing roots tracing to the early eighteenth century, and the broader equine industry now has a $2.9 billion economic impact. The Committee identified the Pimlico redevelopment project as an extraordinary opportunity to generate new interest in horse racing and create growth opportunities that extend beyond racing.

Pimlico's redevelopment is especially important because it is one of the few horse industry issues already visible to a broader statewide audience. Stakeholders agreed that the project is essential not only for Thoroughbred racing, but for the horse ecosystem as a whole. If communicated effectively, the project is a gateway for explaining the broader horse ecosystem: breeding farms that support racing, workers and small businesses that support racetracks and stables, agricultural lands that support the industry's physical footprint, tourism and hospitality activity generated by major events, and the statewide pride associated with Maryland's historic role in American racing. A narrow message about one facility would understate the project's significance; a broader message can connect Pimlico to the full strategy for Maryland's horse industry.

The Committee also recognized that public messaging should draw on Maryland's agricultural identity. Farms, barns, open space, conservation, and rural working landscapes provide an accessible way to explain why the horse industry matters beyond entertainment and sport. These themes can appeal to Marylanders who may never attend a race or show but who value open space, agricultural heritage, environmental stewardship, and local economies. They also connect the horse industry to broader state policy goals, including land preservation, tourism, workforce development, and economic growth.

The Committee also identified significant public awareness challenges. Stakeholders observed that Maryland's horse history is largely unknown to many Marylanders and that the public may not fully recognize the industry's economic impact, infrastructure, entertainment value, and social benefits. The Committee further recognized that sector-specific leadership and parochial interests can impede cross-sector collaboration and the need for the industry to speak with a unified voice. Stakeholders therefore emphasized the need for a new ethos and culture among sector leaders, together with new resources for those responsible for promoting the industry as a whole.

The General Assembly

With respect to the General Assembly, the Committee recognized that the legislature plays an essential role in the industry's success through laws, regulations, appropriations, and oversight of state programs. The Maryland Horse Council is as a private, nonprofit, all-volunteer association that promotes and protects horse industry interests before the General Assembly

and Executive Branch. Indeed, it has for many years been the principal, industry-wide organization to advocate for the state horse industry. The Committee noted, however, that the Maryland Horse Council has limited staff and resources. The Committee observed that the industry needs a visible and consistent face and voice before legislators on laws, regulations, and appropriations affecting the horse industry. The Maryland Horse Council can be that consistent face and voice, but it will need to better collaborate with other horse industry associations, develop a fuller, more executable government relations plan, and be more consistently before General Assembly members, both in-session and out-of-session.

The Committee identified both strengths and weaknesses in the industry's legislative advocacy. State officials understand that the horse industry is historic and economically important, and the industry has an economic impact report that can support advocacy about its contributions to Maryland's economy. The Maryland Horse Council, racetrack owners and operators, the Maryland Horse Breeders Association, the Maryland Thoroughbred Horsemen's Association, and the Maryland Farm Bureau all provide different forms of legislative or advocacy engagement. Additionally, the Maryland Horse Industry Board and the Maryland Racing Commission provide, on occasion, technical assistance to state agencies and industry nonprofit organizations. At the same time, stakeholders recognized that legislators likely have limited appreciation of the industry's full ecosystem and that the industry's many sectors often speak and act more parochially than from a unified industry position.

Advocacy and public awareness recommendations emerged from this discussion. For the general public, the Committee identified the need for a cohesive ecosystem leading to a unified voice. For the General Assembly, the Committee identified the need for a cross-industry stakeholder approach to unified advocacy, a detailed and executable month-by-month government relations plan, coordination among complementary advocacy organizations, education of legislators, and factual advocacy materials communicating the industry's breadth and economic impact.

Horse Industry Government Relations and Engagement; Coordinating and Planning

The government relations and engagement discussion was particularly important because stakeholders recognized that legislative advocacy cannot be limited to activity during the General Assembly session. A month-by-month plan would allow the industry to identify relevant legislators, educate new members, cultivate champions, prepare factual materials, coordinate with allied organizations, anticipate bills and budget issues, and maintain engagement during the interim. Such a plan would also help avoid the reactive pattern in which sectors mobilize only when a specific bill, appropriation, or regulatory issue arises.

A more disciplined government relations and engagement structure would not eliminate sector-specific advocacy, and it should not attempt to do so. Racing, breeding, sport horse, recreation, equine-assisted services, agricultural, and professional sectors will continue to have distinct needs. The goal is instead to identify when a matter affects the horse ecosystem as a whole and to ensure that industry organizations have a forum for developing consensus, or at least identifying areas of disagreement before approaching policymakers. The Committee's discussion reflects the view that the General Assembly would be more receptive to an industry that can

explain where sectors agree, why a proposal benefits more than one sector, and how a requested action fits into the Governor's broader strategic planning initiative.

Advocacy Materials

The recommendations also reflect the need for research- and data-supported advocacy materials. These materials should be clear and concise enough for legislators and staff who are not immersed in the industry, but detailed enough to be credible. They should explain the industry's economic impact, employment footprint, land stewardship role, venues, events, youth programs, educational assets, welfare commitments, and needs. They should also distinguish between the horse industry's broad statewide ecosystem and any single component of the industry, so that policymakers recognize that support for one strategic element can generate benefits across multiple sectors.

The Committee's discussion of advocacy and public awareness led directly into the second focus area – Education and Workforce Development. A stronger public narrative can increase awareness and support, and the industry also needs people with the skills, experience, and commitment to operate farms, stables, tracks, venues, programs, and events. Education and workforce development therefore complements the public-facing discussion by asking whether Maryland has the labor pipeline, training structure, and career pathways necessary to sustain the industry that stakeholders seek to promote.

EDUCATION AND WORKFORCE DEVELOPMENT

The Committee spent a great deal of time focused on Education and Workforce Development, with the stated goal of expanding the talent pipeline. The Committee considered existing youth development programs, current education and workforce development programs, apprenticeship opportunities, industry-recognized credentials, community college programs, University of Maryland Extension programs, and four-year college and university resources. The meeting also raised questions about whether Maryland has conducted a horse industry skills gap analysis, a labor market analysis, or an inventory of existing education and workforce assets.

Baseline Labor Data Needed

The Committee recognized that the Maryland horse industry has historically faced serious labor challenges across its sectors. This is a challenge faced by many states' horse industries. Although industry participants experience those labor challenges daily, the Committee noted that there is currently a lack of industry-specific baseline data defining labor supply and demand challenges. The Committee therefore observed that anecdotal information, while useful, is not enough to support defensible policymaking, program development, or appropriations requests.

The Committee discussed state government and higher education programs that may help address workforce needs. The Maryland Department of Commerce and Maryland Department of Labor have job recruitment and training programs that could benefit the horse industry, and the Department of Labor has apprenticeship programs with capacity to assist the industry. The Committee also discussed opportunities to coordinate with the Maryland Higher Education Commission (MHEC) as it develops a new strategic plan, including potential integration of horse industry certificate, training, credentialing, or continuing education programs.

The workforce discussion made clear that the first challenge is informational. Many industry participants know from experience that labor markets are tight, that skilled workers are difficult to recruit, and that retention is a persistent concern. However, policymakers and state agencies often need more than anecdotal evidence before developing programs, allocating resources, or adapting existing workforce tools to a specific industry. Baseline labor market data would allow the horse industry to describe its workforce needs by sector, occupation, geography, wage range, skill level, and training pathway. It would also help distinguish between immediate shortages, long-term pipeline issues, and occupations where better credentialing or training could improve retention.

A baseline assessment could also help the industry identify where existing state programs already align with industry needs. The discussion identified relevance in job recruitment, training, apprenticeships, EARN Maryland-style programs, K-12 and career and technical education, community college offerings, University of Maryland, and other higher education resources. The problem may not always be the absence of programs; it may be that the horse industry has not organized itself to identify, pursue, and adapt those programs to equine occupations. A coordinated inventory of programs, paired with a clear statement of industry demand, would put the industry in a stronger position to work with Commerce, Labor, MHEC, community colleges, universities, and private employers.

Industry-led Credentialing Program; Pilot Project

The Committee also identified the need for industry-led training or credentialing programs. Stakeholders observed that industry sectors and subsectors, including Thoroughbred, Standardbred, breeding, racing, eventing, and horse-care sectors, know where their most acute vocational pressure points lie. Those sectors could collaborate internally, with national associations, the Maryland Department of Labor, the Maryland Department of Education, the community college system, and other state workforce and educational agencies to develop structured, credible, industry-driven vocational training and micro-credentialing programs. Such programs could support recruitment and retention by creating better trained and more valuable employees and by establishing credentials recognized within the industry.

The discussion of credentials was deliberately practical. The Committee did not treat workforce development as an abstract education issue. Instead, it focused on occupations and competencies that are necessary for the industry's day-to-day operations, including equine safety and handling, groom technician work, foaling and breeding assistance, exercise riding, barn management, equine facility biosecurity, and equine aftercare or transitioning. Some of these competencies may be best addressed through formal education, while others may be better suited to apprenticeship, short-course training, employer consortia, micro-credentials, or industry-recognized certificates.

An industry-recognized credentialing structure could serve several purposes at once. It could give new entrants a clearer pathway into horse industry careers. It could give employers greater confidence that workers have baseline skills. It could help workers see equine employment as a career path rather than a temporary job. It could also give state agencies a concrete framework around which to align training dollars, apprenticeship programs, and employer partnerships. The Committee's discussion suggests that any such program should be developed with significant private-sector input because employers best understand the skills needed in barns, farms, racetracks, training centers, events, veterinary settings, and therapeutic riding operations.

Focusing on Suburban and Urban Youth Programs, Pipeline

The youth pipeline remains equally important. Programs such as 4-H, FFA, Pony Club, and other youth equine organizations already create early interest in horses, but stakeholders recognized that many K-12 and college-age students, particularly in suburban and urban communities, may have little exposure to horses or equine careers. A broader workforce strategy should therefore include both near-term training for current labor shortages and long-term outreach to young people who might become future riders, workers, veterinarians, equine professional services, trainers, instructors, researchers, entrepreneurs, volunteers, or industry advocates.

The Maryland Horse Foundation's Maryland Horse Career Program was also discussed as an existing asset. The program, administered by the Maryland Horse Breeders Association's chartered Maryland Horse Foundation, focuses principally on the Thoroughbred sector and is designed to increase awareness of horse industry career opportunities, provide participants access to industry leaders, and support employee recruitment and retention. The Committee identified the program as a potential blueprint for a public-private partnership involving the

Maryland Horse Foundation, MHEC, higher education institutions, K-12 education, state agencies, and industry employers to expand career awareness, experiential learning, recruitment, and long-term workforce retention across Maryland's horse ecosystem.

Education and workforce development recommendations include collaborating with the MHEC to ensure the horse ecosystem is represented in statewide workforce planning, encourage the development of horse industry-specific certificates, credentials, and experiential learning opportunities, and strengthen partnerships among higher education institutions, industry, and employers. Additional recommendations include exploring an industry-led micro-credentialing pilot projects developing baseline horse industry labor market data by sector and vocation, creating a comprehensive inventory of existing state workforce recruitment and training programs that may benefits the horse ecosystem, and engaging the Maryland Horse Foundation to explore a state-sanctioned public-private career program that expands awareness of careers across Maryland's horse ecosystem.

The Committee's work on education and workforce development framed two essential questions: how can Maryland's horse industry become better understood and more effectively supported by the public and policymakers, and how can the industry build the human capacity needed to deliver on that broader promise? Building on those questions, the Committee next turned to Economic Development, examining the economic structure of the horse ecosystem – its measurable economic impact, its venues and revenue streams, its capital needs, and its relationship to statewide economic development planning.

ECONOMIC DEVELOPMENT

The Committee's economic development discussion began with the American Horse Council Foundation's 2023 Economic Impact Study for the Maryland horse industry. The study used credible IMPLAN economic impact modeling and showed that the Maryland horse industry contributes $1.05 billion to the State's GDP, directly and indirectly employs 28,434 people, and has a total economic impact of $2.9 billion. The Committee agreed to rely on the American Horse Council Foundation study for certain data and for the industry's economic impact.

The Committee broadly agreed that Maryland's horse industry is an important economic driver, especially in the agricultural sector. The Committee continued emphasizing that the industry should be viewed as an interconnected ecosystem that includes breeding, sport horses, racing, competition, recreational riding, equine-assisted services, licensed stables, horse welfare, and related activities. The Committee identified opportunities to boost the horse industry's economic contributions to local and state communities while recognizing the varied strengths and needs of individual sectors.

The Committee identified several strengths and sources of momentum. Governor Moore's Executive Order itself was viewed as evidence of extraordinary state interest in the industry's historical, economic, agricultural, and cultural importance. Maryland's diverse economic footprint includes farm workers, trainers, veterinarians, instructors, farriers, feed and bedding suppliers, equipment dealers, transportation providers, hospitality workers, and professional services. Maryland's horse population was identified as foundational to the industry's reputation and strategic growth because Maryland has more horses per square mile than any other state.

The Committee also discussed breeding, the Maryland Horse Park System (MHPS), venues and events, equine welfare, youth programs, academic programs, and the Mid-Atlantic horse quarantine facility as important assets.

Additionally, and importantly, the Committee recognized that the state may be limited in funding and other resources to boost horse industry programs or necessary infrastructure improvements. The Committee thus underscored the importance of the state pursuing public-private partnerships in programmatic and infrastructure investments where prudent and feasible.

Maryland Horse Industry Board

A central economic development issue is the capacity and role of the Maryland Horse Industry Board (MHIB). The Committee described the MHIB as the only state agency with a universal, cross-sector view of the $2.9 billion horse industry. The Board functions as an advisory, regulatory, and promotional board within the Maryland Department of Agriculture, licenses stables, conducts inspections, supports promotion and outreach, administers grants and industry support programs, and coordinates initiatives such as the Maryland Horse Park System and Horse Discovery Centers. Yet the Committee noted that the MHIB has only one full-time employee, shares two stable inspectors with the Maryland State Board of Veterinary Examiners, and receives no state general fund tax dollars, leaving it stretched exceedingly thin. The

Committee therefore concluded that if the Board is to take on additional industry ecosystem responsibilities, it needs additional staffing and resources and likely revised statutory authority.

As such, the Committee recognizes there may be opportunities to restructure and share resources between the MHIB and the MRC. The Committee recommends the Maryland Department of Agriculture and the Maryland Department of Labor explore MHIB's and MRC's synergies and opportunities, and the Committee offers particular recommendations to guide considerations.

Maryland Department of Agriculture and Maryland Department of Labor to form a workgroup to explore integrating certain Maryland Horse Industry Board responsibilities with Maryland Racing Commission; workgroup to consider additional MHIB staff and funding

The Committee recommends that the Maryland Department of Agriculture, whose secretariat includes the MHIB, and the Maryland Department of Labor, whose secretariat includes the MRC, form a workgroup to consider transferring certain MHB responsibilities – most notably its stable licensing responsibilities – to MRC. are efficiencies to be achieved in transferring this responsibility to MRC, which provides greater flexibility for MHIB staff to focus on other statutorily required responsibilities as well as to better focus on marketing, communications, and regulatory matters. Additionally, the Committee recommends additional MHIB staffing and funding to enable the agency to more effectively fulfill its statutory mission.

The Committee wishes to make clear that in its recommendations, MHIB will remain an entity, with a full-time executive director and, as recommendation note, other staff. In no circumstance does the Committee recommend the workgroup MHIB be eliminated as a board; on the contrary, on the contrary, the Committee proposes a more robust MHIB to serve the Maryland horse ecosystem.

The Committee offers the following to guide the Agriculture-Labor workgroup considerations.

MHIB to be given additional staff

The Committee recognizes MHIB as vital to the Maryland horse ecosystem. It is the only state commodity board with a universal view and understanding of all horse industry sectors. However, the Committee also recognizes that for MHIB's considerable statutory mission and responsibilities, the agency has only one full-time staff person and receives no state general funds for operations.

It is recommended that MHIB be better staffed. Specifically, the Committee recommends – after considerable discussion over several meetings – that MHIB retain its executive director position and increase staffing by two additional positions.

One additional staff position would be responsible for marketing and communications across industry sectors. Industry marketing and communications is one of MHIB's statutory responsibilities – and it is an important one – yet under MHIB's current constrained operations and funding, marketing and communications does not get the attention they deserve. Providing MHIB an additional staff position to focus on marketing and communications also centrally addresses much of what at the heart of Governor Moore's Executive Order establishing the horse industry's strategic planning initiatives – that is, more effective industry cross-sector

communication and collaboration. Additionally, and importantly, this marketing and communications position would provide coordination to the Maryland Horse Park System, which also is served by MHIB and warrants greater support.

The second additional staff position would provide greater support for MHIB's programmatic and regulatory responsibilities, including administering grants and industry support programs, supporting promotions and outreach, stable licensing administration (coordinating with the Maryland State Board of Veterinary Examiners), and more.

MHIB stable licensing responsibilities to be transferred to Maryland Racing Commission

In conjunction with providing two additional staff to MHIB – one for marketing communications, the other for programmatic and regulatory matters – the Committee recommends transferring MHIB's stable licensing administrative responsibilities to MRC. The Committee found that at particular times of the year, MHIB's one full-time staff person's time is almost entirely spent on licensing work for more than 800 commercial stables – virtually to the exclusion of MHIB's many other tasks.

The Committee recommends MHIB's stable licensing responsibility be transferred to MRC, whose jurisdiction and work includes racing licensing. MRC thus has licensing expertise, protocols, and infrastructure in place as well as staff capacity to absorb MHIB's stable licensing responsibility. This, the Committee believes, makes task-reorganization sense.

MHIB operations to benefit from revenue enhancements

The Committee understands that if MHIB is to be awarded additional staff to better and more effectively fulfill its statutory mission – and to more robustly support the horse ecosystem in keeping with numerous strategic plan recommendations – then it must offer recommendations for additional, prudent funding to support the agency's operations.

Because MHIB is central to executing many of the Committee's recommendations, the Committee spent a great deal of time examining the agency's funding per the Committee's staffing and operational recommendations (also taking into account the recommendation to transfer MHIB's stable licensing responsibility to MRC). As noted, the MHIB receives no state general fund tax dollars and relies on industry-generated fees and occasional grants, so the Committee identified three revenue-enhancement opportunities to better support its operations and fund additional staff.

First, the Committee discussed the Maryland Feed Fund, a statutory fee currently set at $6 on every ton of horse feed sold within the state. This industry-generated revenue provides the primary funding for the MHIB and translates to approximately $0.15 per bag of feed paid by feed manufacturers, ultimately costing the horse owner about $3 per horse annually. The $6/ton fee has not been increased since 2009, with inflationary effects since then having significantly reduced its purchasing power. The Committee recommends increasing the fee to better support the MHIB, while remaining mindful not to raise fees any more than may be prudent and necessary.

Second, the Committee discussed the state sales tax on horses purchased at public auctions. Currently, buyers who purchase a horse at public auctions and intend to keep it in Maryland

pays the 6% state sales tax, while buyers who purchase a horse and intend to immediately ship it out of state do not. The Committee views this as a parity issue and recommends that all buyers who purchase Maryland horses at public auction sales pay the 6% state sales tax – without exception, regardless of whether the horse is kept in state or shipped out of state. The Committee further recommends that no less than 1% of the 6% sales tax on purchased horses at public auction sales go to MHIB to support its operations.

Third, the Committee discussed the horse stable licensing fee. Commercial horse stables that solicit the general public for boarding, riding lessons, rentals, or horse rescues are required to pay an annual $125 fee that supports MHIB operations, which has not been raised in more than a decade. The Committee recommends increasing the licensing fee for commercial horse stables, with the fees continuing to support the MHIB. The Committee is not recommending changes to existing licensing exemptions.

Maryland Horse Park System

The MHPS has been described as the "front door" to Maryland's horse ecosystem. It is anchored by the Fair Hill Special Event Zone, the Maryland Horse Library and Education Center, Pimlico Race Course, and Prince George's Equestrian Center. It serves as a statewide marketing, education, and navigation platform to connect people to horses while driving tourism, industry visibility, and long-term growth. The Committee sees the MHPS as a unifying and forward-looking statewide network.

The MHIB leads the MHPS and provides centralized branding and a website platform to showcase Maryland as a national equestrian destination. The Committee also recognized that the MHPS currently operates without dedicated funding or staff beyond what the MHIB provides, creating an opportunity for expanded leadership, event recruitment, business development, and statewide partnerships.

The MHPS is significant because it provides a possible organizing structure for assets that might otherwise be understood separately. Fair Hill Special Event Zone, the Maryland Horse Library and Education Center, Pimlico, and Prince George's Equestrian Center each serve different functions and audiences. Taken together, however, they can help present Maryland as a comprehensive equine destination with racing, sport, education, history, events, and public engagement. The Committee's discussion suggests that this kind of statewide network is essential if Maryland is to compete with other states that market their equine industries in a more coordinated way.

MHPS needs more active management

The Committee also recognized that a network requires active management. A website and brand are important, but they do not by themselves recruit events, develop partnerships, coordinate programming, attract investment, communicate with tourism and economic development officials, or integrate workforce and education opportunities. The Committee therefore recommends, as noted, that the additional MHIB staff position for marketing and communication also provide MHPS coordination. The MHP coordination would include, in part, pursuing event recruitment, promoting tourism, supporting business development, and giving

the public a clearer entry into the Maryland horse ecosystem. (The Committee recommends this be part of the Department of Agriculture / Department of Labor workgroup's discussions.)

Horse Industry Economic Development Strategy

The Committee recognized that a true economic development plan would require more detailed work than the Strategic Planning Committee was qualified to undertake within the facilitated meeting process. Such a strategy would typically require data-driven surveys, an inventory of capital infrastructure assets, analysis of revenues and expenses, labor and employment analysis, job creation and retention strategy, capital needs assessment, review of supply chains and ancillary services, identification of partners, marketing and branding analysis, and risk assessment. Nevertheless, the Committee generated discussion sufficient to support certain recommendations on economic development matters that may advance the industry.

The Committee's caution on this point is important. A strategy can identify priorities and recommend next steps, but a complete economic development plan would require additional technical and professional analysis. For example, the state and industry would need to evaluate direct, indirect, and induced spending across sectors; assess revenue streams for racing, competition, breeding, recreation, hospitality, and supply-chain businesses; identify capital improvement costs and funding sources; analyze workforce needs and wages; consider tourism and marketing opportunities; and evaluate risks such as facility obsolescence, labor shortages, land loss, public perception, and competition from other states.

At the same time, the Committee's discussion produced enough information to identify the shape of a future economic development plan. Such a plan should treat the industry as an ecosystem rather than as isolated sectors. Racing revenues, competition entry fees, ticketing, food and beverage sales, merchandise, sponsorships, stud fees, boarding, retail sales, professional services, hospitality spending, fuel purchases, and tourism activity are different revenue streams, but they are connected through events, venues, farms, workers, suppliers, and visitors. The economic development plan should therefore ask not only how to strengthen individual sectors, but also how to increase cross-sector benefits.

The Committee's discussion also suggests that economic development must be integrated with public messaging. A defensible $2.9 billion economic impact figure is valuable, but it must be translated into a story about jobs, businesses, farms, tourism, tax revenue, education, land stewardship, and community benefits. Economic development materials should help policymakers and the public understand that investments in facilities, workforce programs, marketing, land preservation, and coordination are not isolated subsidies; they are investments in an industry that produces measurable economic and social value.

Horse Industry to be included in the Governor's Economic Development Plan

The Committee further discussed how to integrate the horse industry into the Governor's broader economic development strategy. The Department of Commerce is developing and refining its Biannual Integrated Economic Development Plan, due in December 2026. Stakeholders questioned whether the horse industry is sufficiently recognized and integrated into the State's broader economic strategy, especially in light of the Executive Order and the State's support for the Pimlico redevelopment project and the state's purchase of the intellectual

property rights to the Preakness Stakes and Black-Eyed Susan. The Committee supported elevating the horse industry's contributions and growth potential within state economic development planning and including a horse industry representative in the Department of Commerce's economic development strategy process.

This integration is important because the horse industry touches several economic development priorities at once. It supports agriculture, tourism, small business, rural economies, sporting events, hospitality, education, workforce training, land stewardship, and professional services. A state economic development strategy that does not account for the horse industry risks overlooking an existing sector with global renown and substantial statewide impact. Conversely, intentionally incorporating the horse industry into the state's broader strategy could help align agency programs, grant opportunities, tourism promotion, capital planning, workforce initiatives, and private-sector partnerships.

A horse industry representative in the Department of Commerce's planning process would help ensure that the industry's needs are understood early, rather than after a plan has already been drafted. Such representation could also help identify where the industry aligns with existing state priorities. For example, major events may align with tourism and hospitality goals, facility improvements may align with capital investment and local economic development goals, workforce credentials may align with labor and education strategies, and land preservation may align with agriculture and environmental stewardship. The Committee's discussion suggests that the industry should not wait for state economic development officials to discover these connections; it should organize itself to present them clearly and constructively.

Mid-Atlantic Animal Import Facility

The only USDA-approved horse quarantine facility in Maryland is Rigbie Farm in Harford County. It stables horses being imported and exported. Its mid-Atlantic location is most beneficial.

The MHIB commissioned a 2007 feasibility study to assess the need and viability of a Mid-Atlantic animal import facility in the vicinity of the Baltimore/Washing International Thurgood Marshall Airport (BWI). The study found strong industry support and outlined an operational model for establishing such a Mid-Atlantic facility on or in the vicinity of BWI. The Committee notes that there is current industry interest in developing a Mid-Atlantic animal import facility and that such likely would have to be undertaken as a public-private partnership. As such, and given industry and economic changes since the 2007 feasibility study, the Committee recommends a new public-private partnership feasibility study be conducted.

Breeding Farms

Breeding was another important asset discussed in economic development terms. Maryland breeding farms are respected, and the breeding industry remains an important agricultural sector with farm-level effects. The Maryland Horse Breeders Association and the Maryland Thoroughbred Horsemen's Association were highlighted as significant organizations, and the relationship between the Maryland Racing Commission, the Maryland-Bred Race Fund, and the Maryland Standardbred Race Fund illustrates how state-administered programs can influence farm-level economics. The broader strategic point is that breeding should not be discussed only as a racing input; it is also a land-based agricultural activity, a source of jobs and investment,

and a central part of Maryland's equine identity. Additionally, breeding farms are a vital attraction in a more developed horse tourism industry.

Stakeholders also discussed the increasing competition among states for breeding, training, and other equine businesses. Several neighboring states have adopted incentive programs, tax policies, infrastructure investments, and business recruitment strategies intended to attract equine enterprises. While the Committee did not evaluate the merits of any specific program, it recognized the importance of periodically comparing Maryland's policies with those of competing states to ensure that Maryland remains competitive in attracting and retaining equine businesses and investment.

Venues' Capital Infrastructure Needs Assessment

Capital infrastructure needs were a significant part of the Committee's economic development discussion. The Committee noted that every Maryland horse industry venue, whether public or private, has capital infrastructure improvement needs, while setting aside Pimlico because it is already undergoing redevelopment. Fair Hill Special Event Zone has capital needs that include improved infield access, infield water and electricity availability, infrastructure for broadcasting, replacement of grandstands, and possible expansion or improvement of stalls. Prince George's Equestrian Center was described as a worn, approximately thirty-year-old facility that needs major improvements, if not replacement, and new barns and rings. The Maryland Horse Library and Education Center was recently built, but continuing care and maintenance must be well managed. Rosecroft Raceway was identified as a privately owned venue eligible for certain Racetrack Facilities Renewal Account matching funds and local impact grant opportunities.

The facility discussion underscored that economic development depends on the quality, capacity, and marketability of physical assets. Major equine events require safe access, adequate stabling, modern spectator amenities, dependable maintenance, and facilities capable of meeting the expectations of competitors, organizers, visitors, sponsors, and broadcast or media partners. If facilities are not competitive, Maryland risks losing events, visitors, and associated spending to other states. Conversely, well-maintained and strategically improved facilities can support tourism, local spending, business recruitment, youth engagement, and industry pride.

The Prince George's Equestrian Center discussion illustrates the stakes. The facility hosts breed shows, dressage, hunter-jumper, carriage driving, and other competitions, and it includes show rings and permanent barns. Yet stakeholders described the complex as worn and in need of major improvement or replacement. A facility in that condition can still be an asset, but only if its long-term capital needs are acknowledged and addressed. Similarly, Fair Hill Special Event Zone's status as a nationally and internationally significant equestrian venue creates both opportunity and responsibility. Its capital needs should be evaluated not only as local facility issues, but as statewide economic development considerations.

Rosecroft Raceway illustrates a different infrastructure question. As a privately-owned venue with potential access to certain matching funds and local impact grant opportunities, Rosecroft may require a strategy that combines private-sector investment, public funding tools, and local government coordination. The Committee's discussion of Video Lottery Terminal revenues and local impact aid shows that some funding mechanisms already exist, but the industry may need a more coordinated approach to identifying which venues qualify, what capital projects are most

important, and how public funding can be aligned with broader strategic objectives, including achieving greater local economic development benefits.

Horse racing and competition venues should better understand and engage with Local Development Councils on potential eligibility for VLT-generated Local Impact Grants support

There are six Maryland jurisdictions that host state-licensed casinos and thus receive Video Lottery Terminal (VLT) revenues for Local Impact Grants to support the community surrounding the gaming facilities. The six jurisdictions and gaming facilities are these: Anne Arundel County (Live! Casino & Hotel Maryland), Baltimore City (Horseshoe Casino Baltimore), Prince George's County (MGM National Harbor), Cecil County (Hollywood Casino Perryville), Worcester County (Ocean Downs Casino), and Allegany County (Rocky Gap Casino Resort). The Committee noted that the horse industry should make a concerted effort to better understand jurisdictional Local Development Councils that determine how VLT-generated Local Impact Grants are considered and awarded to support their local community. It may be possible that Local Impact Grants could be awarded to further support venue-related infrastructure that would mutually benefit both the community, horse racing and competition venues, and the broader horse industry. Such possibilities should be explored.

UMD equestrian education, research, and workforce program should be expanded; UMD should undertake a study to improve equestrian facilities

The Committee also discussed the University of Maryland's Animal Science Department as an important education and workforce asset. The University's campus farm infrastructure is approximately seventy-five years old, and the Animal Science Department is a major feeder to veterinary schools through the University's pre-veterinary program. The Committee discussed whether the University should undertake a feasibility study for a new campus farm facility, potentially including an indoor arena, to better serve the Animal Science Department and the pre-veterinary program.

The Committee encourages the University of Maryland to consider expanding its equine education, research, and workforce development capacity. Such expansion would help recruit and retain University students in equine and agricultural careers. Additionally, the Committee recommends the University undertake a feasibility study for a new campus farm facility, potentially including an indoor arena, to establish a University-affiliated center supporting equestrian, research, and industry engagement, and to identify and pursue funding mechanisms and partnerships to support implementation.

Having considered the industry's economic assets and needs, the Committee then turned to the question of how those assets can be coordinated. The economic development discussion made clear that Maryland has important venues, farms, organizations, programs, and data points. The collaboration and communication discussion asked why those assets have not always added up to a unified public presence or a shared strategic agenda, and what type of structure might be needed to change that.

COLLABORATION AND COMMUNICATION

The Committee's Collaboration and Communication discussion returned to the central premise of the Executive Order. Maryland's horse industry is diverse, and that diversity is both a strength and a challenge. The Committee stated that much of what gave rise to the Executive Order was the fragmented industry's failure to unify, speak with one voice, and capitalize on its strengths in order to advance the industry, reclaim its historical renown, and better compete with other states.

The Committee reached broad consensus that industry-wide collaboration and communication are foundational to economic growth, equine health and wellbeing, and public trust. Stakeholders acknowledged that each sector necessarily has its own interests and responsibilities, but they emphasized that sector-specific advocacy can coexist with improved, coordinated, consensus-based, cross-sector collaboration and communication. This discussion built directly on the Committee's belief that the industry needs a new culture of unified public and legislative messaging.

Benefits of Effective Collaboration and Communication

The Committee discussed what the industry loses when it fails to collaborate and communicate effectively. The most obvious lost opportunity is the ability to form a strong collective industry voice, and the failure to speak with that voice diminishes the industry's effectiveness with the public and policymakers. Ineffective collaboration also undermines communication with stakeholders, unified promotion, resource sharing, awareness of state and local programs with cross-sector benefits, and the effectiveness of the Maryland Horse Industry Board.

The consequences of weak collaboration are practical, not merely rhetorical. When sectors do not communicate regularly, they may miss opportunities to share operational information, coordinate event promotion, identify funding programs, address common regulatory concerns, or support one another on legislative matters. A breeding organization may understand one set of problems; a racing venue may understand another; an academic program may see workforce and veterinary pipeline issues; a land preservation program may understand easement tools; and a an equestrian-assisted services provider may understand public engagement and social benefit narratives. Without a structure that brings these perspectives together, the industry loses the opportunity to develop more complete solutions.

The Committee also recognized that weak collaboration can make the industry appear divided to policymakers. If organizations approach the General Assembly separately, with messages that seem inconsistent or narrowly parochial, legislators may struggle to understand the industry's overall priorities. Even when each sector has a legitimate concern, the absence of a shared framework can make the industry seem less strategic and less prepared. A more collaborative structure would allow the industry to distinguish between issues on which it has consensus, issues on which sectors have different interests but can support a shared compromise, and issues on which disagreement remains and should be acknowledged honestly.

MHIB to be more responsible for industry cross-sector collaboration

Better communication would also benefit the MHIB. The Board has the broadest cross-sector view of the industry, but it cannot maximize its role if sectors do not provide information, coordinate priorities, and support common messaging.

As a major recommendation, the Committee concluded that the MHIB – as the single entity with the most comprehensive understanding of the state horse ecosystem – should take a more central and robust responsibility for coordinating industry cross-sector collaboration and communication, and that it should be given sufficient staffing and financial resources to carry out this critical function. Empowering the one agency with the greatest universal industry understanding is, in the Committee's view, vitally important to fulfilling the Executive Order's charge that the industry become more collaborative and unified. The Committee's discussion therefore supports a two-way model: the MHIB would serve as the central coordinating entity, but industry sectors must also commit to participating, sharing information, and respecting the value of cross-sector consensus.

Stakeholders also assessed current industry collaborations. The Committee observed that Maryland horse industry sectors are generally siloed, with breeders communicating with breeders, racing venue operators communicating with racing venue operators, and academics communicating with academics. Although cross-sector communication does exist, the Committee concluded that it is not organized, strategic, or directed toward mutually shared ends. The Committee therefore encouraged long-standing industry organizations, including the Maryland Horse Breeders Association, the Maryland Thoroughbred Horsemen's Association, the Maryland Horse Council, the Cloverleaf Standardbred Owners' Association, and the Maryland Standardbred Breeders Association, to commit to better collaboration with each other, the MHIB, and state and local leaders.

Maryland horse industry should consider an umbrella organization to convene cross-sector collaborations, forming unified positions

The Committee suggested that various horse industry organizations and advocates consider establishing a multi-sector umbrella organization to serve as a forum for strategic collaborations. Industry sectors themselves would organize an umbrella organization, perhaps with some advisory assistance from the MHIB.

In considering such an umbrella organization, the Committee looked to the Virginia Equine Alliance (VEA) as an example of a cross-sector convening body. The VEA is a nonprofit, 501(c)(6) organization comprised of the Virginia Thoroughbred Association, Virginia Gold Cup Races, Virginia Horsemen's Benevolent & Protective Association, and Virginia Harness Horse Association, and its purpose is to bring together its member organizations to sustain, promote, and expand the horse breeding and racing industries. The VEA has achieved considerable success with the Virginia Governor's office, the Virginia General Assembly, and the Virginia Racing Commission in promoting a unified horse industry that speaks with one voice on legislative, appropriations, and regulatory matters. A comparable Maryland umbrella organization could convene the state's sector associations in a forum to identify, discuss, and develop unified positions that advance the industry's broader interests before the Executive Branch, General Assembly, and public.

The Committee identified multiple beneficiaries of better collaboration and communication. The public benefits because it can better understand the horse industry as an ecosystem that includes breeding farms, suppliers, retailers, racing and eventing venues, academic programs, and veterinary resources. The horse industry itself benefits because venue owners and operators, competitors, event organizers, suppliers, equine health professionals, and others can share information and promote the industry more effectively. Policymakers benefit because the Governor and General Assembly see a more unified industry that has collaborated to reach consensus on legislative, policy, and appropriations matters.

Industry communications themes; coordinated strategic messaging

The Committee discussed key messages that could support a unified communications strategy. Top-line themes include the "power of the horse," the horse industry as a major economic driver, the idea that when one sector thrives all sectors thrive, the industry's centuries of history, association with the renowned Preakness, and the industry's potential as a major tourism driver. Additional themes include the industry's commitment to animal care and welfare, its importance to open-space preservation, its positive local community impacts, and the social, health, and wellbeing benefits that horses and the horse industry provide.

The Committee concluded that organized implementation of unified communications and messaging is essential and will require funding. The Committee again identified the MHIB as a critical coordinator for industry-wide promotion and communications. If the Board is to coordinate industry-wide promotion and messaging, the Committee suggested that its mission and scope should be reviewed, additional staff should be added for industry-wide communications and promotion, and state leaders should consider funding options beyond existing funding sources such as the feed fund and stable licensure. (See MHIB funding recommendations in Economic Development section.)

The Committee's communications discussion should be understood as a governance issue as much as a marketing issue. A message cannot remain unified if no one is responsible for maintaining it, refreshing it, distributing it, and ensuring that it is used consistently by industry partners. A communications strategy would likely need a core narrative, audience-specific materials, a calendar of outreach opportunities, a government relations component, coordination with tourism and economic development officials, and an organized process for responding to public concerns about equine health, welfare, land use, or facility investment.

MHIB Communications Resources

The Committee also recognized that implementation will require resources. A communications plan cannot be sustained only by volunteer effort or by adding responsibilities to an already resource-constrained agency without additional capacity. If the MHIB is to serve as the coordinating entity – and the Committee believes that it should be – then there should be recognition that its statutory mission, staffing, and funding are insufficient.

The Committee therefore sharpened the central implementation challenge for the Strategic Plan. The economic opportunities and unified communication the Committee had identified both

depend on a deeper structural condition: the land base that supports horse farms, facilities, trails, stables, and venues. The Committee turned next to Sustainability and Land Use, recognizing that land is not incidental to the horse industry but one of its core inputs.

SUSTAINABILITY AND LAND USE

The Sustainability and Land Use discussion began with the recognition that Maryland is a rural, suburban, and urban state experiencing significant residential and commercial development pressure. The Committee recognized that Maryland land-use matters are complex and involve the interplay of local zoning and state land-use laws, environmental stewardship, housing demand, comprehensive planning, annexation, infrastructure, and staffing constraints. The Committee also recognized that it, as comprised, was not qualified to conduct a county-by-county land-use assessment or make broad recommendations on state and local land-use law. Accordingly, the discussion focused principally on Maryland's land conservation programs and how they might be enhanced to support the horse industry.

This focus was appropriate because land is central and vital to the horse industry. It is a core industry input. Breeding farms, training facilities, boarding operations, equine-assisted services, trails, competition venues, and recreational riding all require land that is compatible with equine use. As residential and commercial development pressures increase, the availability and affordability of land suitable for horse operations can decline. This can affect not only individual farm owners, but also the broader ecosystem of breeding, training, riding, events, veterinary services, feed and bedding suppliers, and rural community businesses.

The Committee's discussion also recognized that land-use policy is not a simple state-level issue. Local governments have primary zoning and planning responsibilities, while state laws and environmental programs create additional frameworks. County land-use staff must balance housing demand, growth, infrastructure, environmental stewardship, comprehensive plan consistency, and local economic development. In that setting, the Committee did not attempt to prescribe statewide zoning changes. Instead, it focused on where the horse industry can most credibly make progress: connecting horse farm preservation to existing state and county land conservation tools, improving outreach to landowners, and exploring whether preservation criteria can better account for the realities of working horse farms.

Maryland's land conservation record was central to the discussion. Maryland operates several major land preservation programs, including the Maryland Environmental Trust (MET), Program Open Space, the Maryland Agricultural Land Preservation Foundation (MALPF), and the Rural Legacy Program. As of mid-2024, Maryland had preserved approximately 1,908,893 acres out of approximately 6,189,629 total acres, or approximately 30.84 percent of its total lands. The State has also set a goal of preserving 40 percent of Maryland's total lands by 2040, which requires preserving an additional 600,000 acres.

Industry Collaborations with State Land Conservation Agencies and Organizations

The Committee discussed Maryland's land conservation record as a strength that should be leveraged for the horse industry. Maryland Environmental Trust, Program Open Space, MALPF, and the Rural Legacy Program each contribute to a larger preservation landscape. MALPF is especially relevant because it focuses on agricultural lands and works closely with county programs to preserve working farmland. Maryland also has land conservation tax credit tools,

and many counties have their own incentives or preservation efforts. These programs provide a foundation that many states would find difficult to replicate.

At the same time, the Committee's discussion suggests that the horse industry has not fully connected itself to that preservation infrastructure. A horse farm owner may not know which program applies, whether an easement would allow the kinds of activities necessary for a working equine operation, how county ranking systems work, whether the farm meets required easement acreage or soil criteria, or what financial incentives might be available. The strategic planning process therefore identified a practical opportunity: improve the relationship between horse industry organizations and land conservation entities so that horse farm owners receive clearer information and so that preservation programs better understand the operational realities of horse farms.

Industry to align with Governor's "40 X 40" and Chesapeake Bay Agreement Land Conservation Goals

The Committee connected Maryland's renewed land conservation commitment to the horse industry's sustainability needs. Governor Moore's "40 percent by 2040" initiative and the 2025 Chesapeake Bay Watershed Agreement both create opportunities to align land conservation with the horse industry's need for agricultural land, horse farms, and working equine operations.

The Governor's "40 X 40" initiative is ambitious. It will require both the Governor's continued leadership, frequently underscoring the goal before important audiences, and the General Assembly's critical appropriations support, providing necessary general fund or authorized fee appropriations to MALPF and other state land conservation programs as well as potentially enhancing the state's land conservation tax credit program to make it increasingly attractive to induce more easement donations. Capitalizing on this synergy is important.

Equally, the 2025 Chesapeake Bay Watershed Agreement's focus on healthy landscapes and protected lands not only is consistent with and honors Maryland's renown as a leading "Bay state," but is especially coincidental, and timely, to the Governor's horse industry strategic plan initiative and its focus on sustainability and land use. Capitalizing on this synergy also is important.

The Committee discussed the decline in Maryland breeding stock as a land-use and sustainability concern. Stakeholders noted that Maryland stallions and mares have continued to drop, creating challenges in meeting current market demands. Although there are signs of stabilization, in part due to state subsidies, the breeding industry remains appreciably down from earlier historical highs. The Committee therefore emphasized that the public, the horse industry, and the General Assembly should recognize the long-term decline in the breeding industry and consider whether development pressures, land-use policies, and preservation programs can be improved to support horse farms and operations. The Governor's "40 X 40" initiative and meeting the Chesapeake Bay Watershed Agreement's healthy landscape and land protection challenges will be instrumental in sustaining the state's breeding farms.

Maryland Agriculture Land Preservation Foundation and Maryland Environmental Trust are important industry partners

The Committee identified MALPF and MET as especially important to working farmlands and horse operations. According to MALPF, approximately 10 percent of MALPF-protected acres identified some type of horse operations on the easement lands at the time the easements were established, including breeding, training, recreational riding, equestrian-assisted services, and other equine activities. The Committee observed that if Maryland is to strengthen its standing as a horse breeding state and reverse breeding stock declines, it likely must increase breeding farms and operations and protect them from development pressure.

General Assembly must stabilize and prioritize land conservation funding

MALPF funding volatility also was identified as a major concern. In 2024, MALPF saw record-high funding of $95 million, including $73 million in state appropriations and $12 million in county appropriations. In 2026, MALPF funding hit a record low of $18.6 million, including $6.6 million from the State and $12 million from counties. The Committee noted that such volatility undermines MALPF's effectiveness, reduces applicant confidence, destabilizes staffing, and diminishes landowner outreach. The Committee also noted that a planned reduction of $100 million from MALPF, Rural Legacy, and Program Open Space Stateside over four years is estimated to result in approximately 20,000 fewer acres preserved.

The land conservation funding volatility discussion is central to the horse industry's long-term planning because preservation decisions often require landowners to make permanent choices. A landowner considering an easement must have confidence that the program is stable, adequately staffed, and capable of moving applications through the process. Dramatic fluctuations in funding can discourage participation, reduce outreach, and make it harder for preservation programs to plan strategically. If Maryland's goal is to preserve significant additional land by 2040 – that is, another 600,000 acres – and to support more horse farms, the Committee's discussion suggests that preservation funding should be stable enough to give landowners and counties confidence. Indeed, the General Assembly must not only stabilize MALPF's and other land conservation programs' funding, but increase it.

General Assembly should consider transferable land conservation tax credits

The Committee also discussed the role of tax credits and the question of transferability. Maryland has a land conservation tax-credit program, but the discussion noted that it is not transferable. In states with transferable conservation tax credits, landowners who cannot use the full value of a credit may transfer – as a gift – unused credits to someone else to claim on their state income tax return. Such gift transfers are often to family members, business partners, or other entities without selling them. A tax-credit transferability feature can increase the financial attractiveness and usefulness of the incentive. The Committee noted, generally, that such a tax-credit feature could be helpful if Maryland wants to increase conservation interest among horse farm owners and other agricultural landowners.

General Assembly should consider allowing unused land conservation tax credits to be sold on the open market

Additionally, the Committee discussed other states' land conservation tax credit programs that include a provision allowing state residents holding unused state income tax credits to be sold to other in-state taxpayers on the open market to offset their state income tax liability. Usually, tax-credit brokers match tax-credit sellers and buyers (or the tax credits can be sold independently). Virginia, for example, passed legislation in 2002 allowing its land preservation tax credits for qualified donations to be sold to other state taxpayers. Land preservation advocates and practitioners in Virginia have for many years noted that allowing unused tax credits to be transferred or sold on the open market quickly enhanced that state's land conservation program's attractiveness.

MALPF requested to consider changes to minimum-acreage criteria for horse farms

The Committee discussed whether MALPF criteria could be refined to better accommodate horse farms. MALPF's criteria include a fifty-acre minimum or contiguity with permanently protected lands, healthy soil conditions, location outside county growth plans, and limited development rights. The Committee noted that while some Maryland horse farms are hundreds of acres, many horse farms are considerably smaller, and some operational horse farms may be as small as ten acres. The Committee therefore discussed whether the fifty-acre minimum could make smaller horse farms ineligible for preservation and suggested exploring a horse farm exception, while also recognizing concerns about setting a precedent that deviates from MALPF's acreage criteria.

This discussion should not be read as a rejection of MALPF's conservation standards. On the contrary, the Committee recognizes that MALPF's criteria protect the integrity of agricultural easements and help ensure that preserved lands have defensible conservation value. The question is whether the criteria, as applied, adequately capture the agricultural and equine value of legitimate horse farm operations that may require less acreage than some other agricultural uses. A smaller horse farm may still support breeding, training, boarding, riding, or other equine activity and may still contribute to open space, rural character, and the broader horse ecosystem.

The Committee's discussion of a possible exception was cautious. It is recognized that a special horse farm carve-out could create precedent concerns and would need to be designed carefully. The discussion included the idea of lowering the acreage threshold for horse farms, though not below a level sufficient to support legitimate agricultural and equine use. Any final recommendation in this area should therefore be framed as a request for MALPF's board to give strong consideration, with technical analysis, to defensibly decrease its minimum-acreage criteria to help preserve farms that otherwise fall outside the program despite contributing to the state's agricultural and equine goals.

MALPF requested to consider preferential ranking for horse farms

The Committee also discussed possible horse farm operations criteria and county ranking systems. Because horse farm operations may include limited commercial activity, the Committee suggested that MALPF consider defining commercially allowable activity in a way

that could encourage horse farm owners to consider perpetual agricultural easements. The Committee also suggested that MALPF could encourage – or even require – county ranking systems to give some priority to horse operations, noting that some county systems have provided additional points to dairy operations to support that industry.

Horse industry must collaborate with land conservation organizations on targeted outreach to horse farm owners

Finally, the Committee emphasized the need for greater collaboration among the horse industry, MALPF, and state and county land conservation programs. The Committee suggested that MALPF, the MHIB, and others prepare joint outreach efforts targeted to horse farm owners to educate them about conservation programs and encourage consideration of perpetual land protection. This recommendation reflects the Committee's broader view that land preservation is not only an environmental or agricultural objective, but also a central element of the horse industry's long-term viability.

Joint outreach could take several forms. It could include informational materials for horse farm owners, regional meetings with county preservation staff, webinars explaining easement options, case studies of protected horse farms, guidance on permissible equine-related activities on easement lands, and coordination among MALPF, MET, county programs, the MHIB, the Maryland Horse Breeders Association, the Maryland Horse Council, and other stakeholders. The purpose would be to make preservation options understandable and actionable for landowners before development pressure makes preservation less likely.

The land-use discussion also reinforces the importance of messaging. Land preservation can be an abstract policy issue unless it is connected to visible public benefits. The horse industry can help explain those benefits in concrete terms: preserved farms keep working lands working, support rural economies, maintain open space, protect the land base needed for breeding and equine activity, and reinforce Maryland's identity as a horse state. In this way, sustainability and land use connect directly back to advocacy, public awareness, economic development, and collaboration.

The land-use discussion also provided a natural transition to equine health and welfare. Both topics require industry to demonstrate stewardship. In one case, the stewardship obligation concerns land, farms, and open space. In the other, it concerns horses themselves. The Committee's movement from land preservation to health and welfare therefore reflected a broader recognition that the industry's future depends on responsible care for both the physical landscape and the animals at the center of the ecosystem.

EQUINE HEALTH AND WELFARE

The Equine Health and Welfare discussion recognized that the U.S. horse industry is heavily regulated and has become increasingly regulated in recent years. This increased attention has come in response to public concern over horse injuries and deaths in racing, Olympic competition, and other equine activities. The Committee discussed the importance of equine health and welfare, public scrutiny, transparency, social licensing expectations, and the need for the industry to continue improving and demonstrating compliance with health and welfare standards.

The Committee discussed the Horseracing Integrity and Safety Act (HISA) of 2020 and the Horseracing Integrity and Safety Authority. HISA applies to trainers, owners, breeders, jockeys, racetracks, veterinarians, and others licensed by state racing commissions. The Authority sets and enforces national, uniform standards for safety and integrity in Thoroughbred racing and other covered horses, with a focus on racetrack safety measures and control of prohibited substances. The Committee noted that the industry generally believes HISA is having a positive impact through better reporting on horse safety, health, and track conditions, stronger sanctions, and declining fatalities.

The HISA discussion reflected a broader point: public confidence depends on standards, enforcement, transparency, and communication. The racing sector has long been regulated by state racing commissions, such as the Maryland Racing Commission, but public concern over injuries and fatalities led to greater national attention and a more uniform federal framework. For Maryland, the question is not only whether HISA applies, but how the state's industry can demonstrate that it is complying with and, where appropriate, exceeding public expectations for safety, integrity, reporting, and horse welfare.

The Committee recognized positive trends in equine health and welfare. The Jockey Club maintains an equine horse injury database and has observed that Thoroughbred racing in Maryland has ranked better than the national average over the past five years on reported horse injuries and fatalities. The Committee noted that this may reflect HISA regulations, the industry's greater recognition of public concern, and a growing commitment to transparency in equine health and welfare. The Committee also noted increased use of horse sensor technology to better predict injuries before they occur.

Maryland to better communicate equine health and welfare reports

The Committee's discussion suggests that Maryland should communicate improvements carefully and defensibly. It is not enough to assert that the industry cares about horses; the public increasingly expects evidence of standards, veterinary oversight, track safety, medication controls, reporting, disciplinary systems, aftercare commitments, and continued improvement. Maryland's experience, including better-than-national-average reported Thoroughbred injury and fatality performance over recent years, can be an important part of that message, but the message must be grounded in data and accompanied by acknowledgement that equine health and welfare require constant attention.

Additionally, it should be noted that Maryland is the only state that maintains a dedicated, statewide board – the Maryland Horse Industry Board – that licenses and inspects all commercial horse stables (boarding, lesson, rental, rescue, and sanctuary facilities). The MHIB's licensing and inspection responsibility helps monitor horse welfare and safety.

The Committee also discussed sport and competition standards, including the U.S. Equestrian Federation (USFE) and the Fédération Équestre Internationale (FEI). USEF and FEI are committed to stronger onsite veterinarian and steward oversight, drug testing, equipment inspections, horse care, and stabling conditions. FEI has also advanced an Equine Welfare Strategy addressing training, riding, tack and equipment, physical and emotional stress, accountability, enforcement, knowledge, non-competition time, and horse fitness. The Committee observed that USEF, FEI, and other sport horse professional associations recognize public scrutiny and expectations concerning horse health, safety, and welfare.

The Committee broadened the welfare conversation beyond racing. Public concern about horse safety is not limited to racetracks. Eventing, hunter-jumper competition, dressage, rodeo, recreational riding, equine-assisted services, and other disciplines each have their own standards, risks, and oversight structures. The Committee's treatment of USEF, FEI, and other discipline-specific organizations reflects the need to discuss equine health and welfare as an industry-wide obligation, even though the regulatory frameworks differ across sectors.

Social license to operate is important to public sentiment

The social license to operate concept is central. The industry's ability to operate, expand, secure public investment, attract youth participants, and maintain public trust depends on whether Marylanders believe horses are treated responsibly and humanely. The social license to operate concept is not conferred once and for all; it must be maintained through conduct, transparency, and accountability. For that reason, equine health and welfare should be treated as both an ethical responsibility and a strategic priority.

How Maryland regulates equine health and welfare

The Committee discussed Maryland's regulatory role in equine health and welfare. The Maryland Racing Commission regulates pari-mutuel betting, the safety of racing participants, enforces horse health and safety laws and regulations, conducts drug testing, and maintains an online database of disciplinary actions. The MHIB licenses stables and employs inspectors to visit and inspects over 800 licensed stables. The University of Maryland's Animal Sciences Department also has an Institutional Animal Care and Use Committee that sets standards for student and other interactions with horses and voluntarily submits to twice-yearly inspections by external veterinarians.

These Maryland-specific structures are important because they show that equine health and welfare is already embedded in state and institutional systems. The Maryland Racing Commission's work, the MHIB's stable licensing and inspection responsibilities, veterinary reporting obligations, and university oversight mechanisms each contribute to the broader welfare framework.

At the same time, the Committee's discussion suggests that oversight capacity matters. Inspection responsibilities, data collection, public education, and enforcement require staff,

expertise, and coordination. If the MHIB is expected to expand its role in industry promotion, collaboration, communications, or welfare messaging, the agency's existing regulatory and inspection workload must be considered. The same is true for any recommendation that depends on veterinary availability, data reporting, or coordination with state agencies.

All this adds up to say that Maryland has multiple layers of equine health and welfare oversight. The Maryland Racing Commission and industry partners should not be shy to explain this to the public. Indeed, the public would likely find it reassuring. This would contribute to the social license to operate goals. The horse industry, in its government relations coordination and planning, should include in its advocacy that the General Assembly should provide sufficient funds and staffing to continue proper regulatory oversight and reporting.

Veterinarians' Oversight

Veterinarians are essential to the horse industry's health and welfare framework. Veterinarians are onsite at racetracks, courses, and sporting venues, where they inspect horses and enforce health and welfare regulations and standards. In Maryland, veterinarians have ethical and legal responsibility to report observed food, water, and lack-of-care violations to the State Veterinarian.

Equine Lifecycle Initiatives and Aftercare

The Committee also identified equine lifecycle initiatives and aftercare needing further attention. Stakeholders noted that the industry nationally does not do a strong enough job tracking retired horses in their post-racing or post-sporting years. The Committee therefore recognized that the industry should improve its ability to follow retired racehorses and understand their locations and conditions. The Committee also noted that the Maryland General Assembly passed legislation in 2026 prohibiting the sale, purchase, transport, importation, or slaughter of racehorses for commercial purposes.

A horse's lifecycle and its aftercare are particularly important issues because they go directly to public trust. The public may be willing to support racing, sport, recreation, and other equine activities when it believes the industry accepts responsibility for horses during and beyond their active competition or working years. If the industry cannot explain where retired horses go, how they are supported, and what protections exist against harmful outcomes, critics may define the narrative. The Committee's discussion therefore points toward the need for stronger aftercare tracking, clearer messaging, and perhaps deeper coordination among racing organizations, sport horse groups, rescue and sanctuary operators, veterinarians, and policymakers.

The aftercare issue also connects to workforce development and education. Retired horse care, retraining, transitioning, and sanctuary operations require knowledgeable workers and sustainable support systems. A credentialing or training program that includes equine aftercare could serve both welfare and workforce goals. It could also help the industry demonstrate that horse guardianship is not merely a slogan, but a practice supported by training, standards, and organized responsibility.

The Committee recognized increased interest in equine health and welfare from the Maryland General Assembly. Legislators, like the public, have noted horse fatalities in recent years at Preakness and at Laurel Park. The Committee also noted that Laurel Park, after noteworthy

reported incidents, was closed, assessed, and had its surface improved to address horse injuries, and that the public and legislature noted those actions.

University of Maryland Eastern Shore – School of Veterinary Medicine

The Committee applauds the General Assembly's commitment to establishing the University of Maryland Eastern Shore School of Veterinary Medicine (UMESSVM). That the School anticipates admitting some one hundred veterinary students annually speaks to the almost immediate effect it can have in helping address the national – and Maryland – demand for veterinarians, especially large-animal and equine veterinarians. The School is expected to enroll its first class in 2027 and graduate its first class in 2030.

Virginia-Maryland College of Veterinary Medicine

Additionally, it should be noted that the Virginia-Maryland College of Veterinary Medicine (VMRCVM) was established in 1978, in Blacksburg, Virginia, and is the veterinary school of Virginia Tech and the University of Maryland College Park. It admits at least thirty Maryland applicants annually. This has long contributed to a certain number of VMCVM graduates establishing veterinary services in Maryland.

General Assembly should explore incentives to keep UMESSVM and VRCVM graduates in Maryland

The Committee recommended that the General Assembly explore incentives to encourage UMESSVM and VMCVM graduates to remain in Maryland to practice large-animal and equine veterinary medicine.

This recommendation is significant because veterinarian availability affects multiple sectors of the horse industry. Racing, competition, breeding, boarding, therapeutic riding, recreational riding, and event operations all depend on access to qualified equine veterinarians. Veterinarians also play a role in regulatory compliance, event safety, emergency response, medication oversight, welfare reporting, and public confidence. If Maryland faces shortages in equine veterinary capacity – and it does – the consequences could affect not only animal care but also the state's ability to host events, support farms, and maintain high welfare standards.

Industry should collaborate with UMESSVM on internships, partnerships

The University of Maryland Eastern Shore School of Veterinary Medicine therefore represents a long-term strategic opportunity. The first class will not graduate until 2030, so the industry should view the school as part of a future pipeline rather than an immediate solution. Still, early coordination among UMESSVM, the General Assembly, the Maryland Department of Agriculture, the Maryland Horse Industry Board, private practices, racetracks, sport horse venues, and farms could help identify incentives, externships, mentorships, scholarships, loan repayment concepts, or practice opportunities that encourage graduates to remain in Maryland and serve the equine sector.

The equine health and welfare discussion, taken as a whole, reinforces one of the central themes of the strategic planning process: Maryland must be able to tell a positive story, but it must also be able to prove it. The industry's welfare message should be accurate, transparent, and supported by standards, data, oversight, veterinary capacity, aftercare practices, and continued

improvement. In that sense, equine health and welfare is not only one of the Executive Order's focus areas. It is also a foundation for public awareness, legislative advocacy, workforce development, economic development, and long-term industry legitimacy.

RECOMMENDATIONS

The Committee worked through its prior meeting summaries and discussion notes and addressed each focus area in turn. The Committee's deliberation regarding recommendations was extensive.

The recommendations listed in this section are in abbreviated form. Each recommendation should be read and understood in their fuller context in report.

The recommendations that follow are organized by focus area and presented in the same order as the report: Advocacy, Public Awareness, and Promotion; Education and Workforce Development; Economic Development; Collaboration and Communication; Sustainability and Land Use; and Equine Health and Welfare.

Advocacy, Public Awareness, and Promotion Recommendations

The Committee's Advocacy, Public Awareness, and Promotion recommendations are as follows.

For the General Public:

- ***Establish and commit to a new industry "unified voice" ethos.*** – The Committee treated as stipulated the need for a new industry ethos and culture toward speaking with a unified voice and for greater public awareness of the industry and its venues.

  Lead Organizations: MHIB; new horse leadership organization (recommended in report)

- ***Express clear, strong industry support for Pimlico redevelopment project.*** – The Committee notes the Preakness's globally recognized stature, its economic impact, and its importance to the entire horse ecosystem. The Pimlico Race Course and the Laurel Park equestrian training center redevelopment projects are valuable to the state and industry. The projects' respective economic and other impacts are expected to increase as the work proceeds. The Committee affirmatively declared the need for industry to express "one voice" position in unwavering support of the Pimlico redevelopment project and the state's acquisition of the Preakness intellectual property.

  Lead Organizations: Horse industry organizations; MHIB; Maryland Stadium Authority

- ***More prominently highlight horse industry's economic impact.*** – The Committee emphasized that the $2.9 billion economic impact figure must be more prominently communicated to the public, the General Assembly, and industry advocates.

  Lead Organizations: Entire horse ecosystem

- ***Recognize that Maryland's urban and suburban youth are important to horse industry's future.*** – The Committee underscored the importance of deepening suburban and urban youth interest in horses, recognizing that Maryland's growing suburban and urban areas will be increasingly vital audiences and patrons for the overall horse industry.

  Lead Organizations: Maryland Higher Education Commission; University of Maryland Extension; Department of Education; Department of Commerce; Maryland Horse Foundation

- ***State to engage private racetracks and other industry stakeholders for collaboration on horse industry marketing.*** – The Committee recommends the state actively engage private-sector equine stakeholders with significant marketing budgets to incorporate complementary, supportive horse ecosystem-wide messaging. This should be coordinated through the Maryland Horse Industry Board and the Maryland Office of Tourism. The Department of Natural Resources Office of Outdoor Recreation may be an important partner to develop collaborative messaging.

  Lead Organizations: MHIB; new horse leadership organization (recommended in report); Maryland Office of Tourism; Department of Natural Resources/Office of Outdoor Recreation; Maryland Department of Commerce

For the General Assembly:

- ***An industry unified, one-voice approach is necessary for effective engagement with the General Assembly.*** – The Committee confirmed the need for a cross-industry "one-voice" stakeholder approach. Such is a central tenet of Governor Moore's executive order.

  Lead Organizations: new horse leadership organization (recommended in report); Maryland Horse Council

- ***Maryland Horse Council to collaborate, develop, and execute a year-round government relations plan.*** – The Committee recommends the Maryland Horse Council and other industry advocacy groups develop complementary government relations plans that demonstrate to the Governor and General Assembly that the horse industry is largely unified on important cross-sector matters. In particular, the Maryland Horse Council, as the General Assembly's long-recognized voice of the industry, should develop, in collaboration with other principal industry associations, a month-by-month government relations plan covering in-session and out-of-session periods, and factual advocacy materials and website content communicating the industry's breadth and economic impact.

  Lead Organizations: new horse leadership organization (recommended in report); Maryland Horse Council

The Committee also identified several additional general advocacy priorities.

- ***Industry to more greatly promote Maryland branding in signature industry events.*** – In promotions, an underlying goal should be to generate more demonstrable Maryland equine branding and awareness for major equine events.

  Lead Organizations: new horse leadership organization (recommended in report); Maryland Office of Tourism; MHIB

- ***Resource-sharing for industry collaboration.*** – Racetracks using their marketing and simulcast resources promote the Maryland horse ecosystem as a whole rather than just focusing entirely on their own industry. Signals reach hundreds of thousands of people each race day.

  Lead Organizations: Maryland horse ecosystem; selected state agencies

- ***Private-sector liability insurance is a major industry concern; explore options to address it.*** – Explore ways to address private-sector business liability insurance concerns, which are especially important to small- and medium-size businesses and nonprofit organizations such as recreational and equine-assisted services programs. On the insurance issue, and on suggestion from the Advisory Committee, the Committee envisions the Maryland Horse Council as a convening entity to explore a "universal collective" insurance program. (It was suggested that the U.S. Equestrian Federation or another industry association may offer such programs.)

  Lead Organizations: Maryland Horse Council

Education and Workforce Development Recommendations

The Committee's Education and Workforce Development recommendations are as follows.

- ***Conduct a baseline labor data will be an important part of economic impact study.*** – A Maryland-specific horse industry economic impact study should be expanded to include sector-by-sector baseline labor data, including a focus on labor demand. The Maryland Department of Labor will collaborate with the University of Maryland and/or other institutions and private parties to conduct such Maryland horse-industry specific economic impact study.

  Lead Organizations: Department of Commerce; Department of Labor; MHIB; new horse leadership organization (recommended in report)

- ***The horse industry to benefit from a Commerce Department state programs accessibility tool.*** – The Maryland Department of Commerce will include the horse industry among its first participants in developing its online tool to make beneficial state programs more accessible to the private sector.

  Lead Organization: Department of Commerce

- ***Maryland Horse Industry Board to develop a comprehensive list of state job-recruitment and training programs to benefit the horse industry.*** – The Maryland Horse Industry Board will collaborate with the Department of Commerce and Department of Labor to develop a comprehensive list of existing job-recruitment and training programs that may benefit the horse industry. MHIB will then work with the Departments and industry to determine how best to disseminate this information for industry benefit.

  Lead Organizations: MHIB; Department of Labor; Department of Commerce; new horse leadership organization (recommended in report)

- ***Industry to Collaborate with the Department of Education and the Maryland Higher Education Commission on industry-specific credentialing and other programs.*** – The industry should collaborate with the Maryland Department of Education and the Maryland Higher Education Commission on horse industry-specific certificate, credentialing, and continuing education programs, and equine workforce needs are represented in MHEC's annual Workforce Needs Analysis, with particular attention to improving entry-level training, including basic horsemanship. The Committee noted that Hispanic nonprofit workforce development organizations can be helpful to the industry in ongoing training.

  Lead Organizations: Maryland Higher Education Commission; Department of Education; University of Maryland; Department of Labor; horse ecosystem

- ***Industry leaders to consider an industry-led micro-credentialing program (pilot project).*** – Industry leaders across sectors should explore an industry-led micro-credentialing curriculum, with a pilot project considered. State agencies should engage the Maryland Horse Foundation to explore a state-sanctioned career program partnership.

  Lead Organizations: Department of Labor; Maryland Higher Education Commission; horse industry leaders

- ***Develop a youth pipeline and long-term outreach strategy for suburban and urban youth.*** – A broader workforce strategy should include both near-term training for current labor shortages and long-term outreach to young people, particularly in suburban and urban communities, who may have little exposure to horses or equine careers. Building on programs such as 4-H, FFA, Pony Club, and other youth equine organizations, the industry should cultivate future riders, workers, veterinarians, farriers, trainers, instructors, researchers, entrepreneurs, volunteers, and advocates.

  Lead Organizations: MHIB; Maryland Horse Foundation; 4-H, Pony Club, FFA; Department of Education; entire horse ecosystem

Economic Development Recommendations

The Committee's Economic Development recommendations are as follows.

- ***Maryland Department of Agriculture and Maryland Department of Labor to form a workgroup to explore integrating certain Maryland Horse Industry Board responsibilities with the Maryland Racing Commission; workgroup to consider additional MHIB staff and funding.*** – The Committee recommends that the Maryland Department of , whose secretariat includes the MHIB, and the Department of Labor, whose secretariat includes the Maryland Racing Commission, form a workgroup to consider transferring certain MHIB responsibilities to MRC. Specifically, the Committee recommends, as guidance to the workgroup, the following.
    - MHIB remains an entity, with an Executive Director.
    - MHIB's stable licensing responsibilities would be transferred to MRC, which has licensing staff, expertise, and infrastructure.
    - MHIB would receive two additional staff: (i) one position responsible for marketing and communications across all horse industry sectors; this position also would serve as a coordinator for the Maryland Horse Park System; (ii) another position would focus on MHIB programs and regulatory responsibilities.
    - Consider additional operational funding for MHIB to better fulfill its statutory responsibilities as well as fund recommend two additional full-time positions. (See next recommendation.)

  Lead Organizations: Department of Agriculture; Department of Labor

- ***Increase Funding for MHIB so that it can more adequately fulfill its statutory responsibilities and meet other recommended responsibilities*** – The Committee recommends that the MHIB revenues be enhanced by the following mechanisms.

  Lead Organization: Department of Agriculture

- ***The General Assembly should consider increasing the Maryland Feed Fund to better support MHIB's operations.*** – The Maryland Feed Fund, a $6/ton fee on horse feed sold in the state, is the MHIB's primary funding source and has not been increased for many years. The Committee recommends increasing it, while remaining mindful not to raise fees more than may be prudent and necessary.

  Lead Organization: Department of Agriculture

- ***The General Assembly should require all horse buyers public auctions to pay the 6% state sales tax, with any revenue increase over a baseline year earmarked to MHIB.*** – As a parity matter, all buyers who purchase Maryland horses at all public auction sales should pay the 6% state sales tax, regardless of whether the

horse is kept in state or shipped out of state. Further, no less than 1% of the 6% state sales tax on purchased horses at public auctions should go to MHIB to support its operations.

Lead Organization: Department of Agriculture

- ***The General Assembly should consider increasing the horse stable licensing fee to better support MHIB's operations and fund additional staff***. – The Committee recommends increasing the annual $125 commercial stable licensing fee, with the fees continuing to support MHIB operations. The Committee is not recommending changes to existing licensing exceptions.

  Lead Organization: Department of Agriculture

- ***Private sector to collaborate with State tourism officials to develop a horse tourism program.*** – The state is to collaborate with private-sector tour operators to develop a "horse tourism" program encompassing horse farms, wineries, breweries, farm markets, and other attractions, coordinated through MHIB, industry associations, and the Maryland Office of Tourism.

  Lead Organizations: MHIB; Maryland Office of Tourism; horse ecosystem

- ***Conduct a public-private partnership feasibility study of a Mid-Atlantic animal import facility.*** – The Committee recommends revisiting potential development of a Mid-Atlantic animal import facility on or in the vicinity of the Baltimore/Washington International Thurgood Marshall Airport. The Committee recommends that the feasibility study focus on a public-private partnership construct for the Mid-Atlantic animal import facility development and operation.

  Lead Organizations: Maryland Department of Agriculture; US Department of Agriculture Animal and Plant Inspection Service; Department of Commerce; private sector

- ***Promote Pimlico redevelopment project's local community benefits.*** – The Committee recommends there be central messaging developed regarding the Pimlico redevelopment project's benefits to the entire horse ecosystem, to the Park Heights community, and regarding the Laurel Park Training Center's benefits to its surrounding counties.

  Lead Organizations: The Maryland Jockey Club; Thoroughbred industry

- ***Prepare a Maryland horse industry economic development plan.*** – The Committee strongly believes a professional Maryland horse industry economic development plan – which includes, but is not limited to, evaluating economic development incentives, tax policies, program, and other business recruitment strategies used by competing horse states – should be conducted in conjunction with an industry

economic impact study and labor market baseline analysis to provide critical, defensible information underpinning many of the other recommendations.

Lead Organizations: new horse leadership organization (recommended in report); Department of Commerce; MHIB; Office of the Secretary of State

- ***State and industry to work with counties that award Local Impact Grants to help fund eligible venue capital improvements.*** – Six Maryland jurisdictions that host state-licensed casinos receive Video Lottery Terminal (VLT) revenues for Local Impact Grants to support the communities surrounding the gaming facilities: Anne Arundel County (Live! Casino & Hotel Maryland), Baltimore City (Horseshoe Casino Baltimore), Prince George's County (MGM National Harbor), Cecil County (Hollywood Casino Perryville), Worcester County (Ocean Downs Casino), and Allegany County (Rocky Gap Casino Resort). Horse racing and competition venues – including publicly-owned facilities – in these jurisdictions may be eligible for grants for venue capital infrastructure improvements, which each jurisdiction's Local Development Council awards. The Committee recommends that the industry work closely with these jurisdictions to pursue Local Impact Grants to help fund venues' capital improvement needs.

  Lead Organizations: Local Development Councils; Counties; horse organizations within certain counties

- ***Provide dedicated leadership and a support structure for the Maryland Horse Park System.*** – The Committee recommends, as part of the MHIB reorganization with additional staff, that the recommended marketing and communications position also server as coordinator for the Maryland Horse Park System. This MHPS coordinator would pursue event recruitment, statewide tourism, business development, and clearer public access across its pillars. (As noted, the MHPS currently operates without dedicated funding or staff beyond what the MHIB provides.)

  Lead Organization: MHIB

- ***Integrate the horse industry into the Governor's economic development strategy.*** – The Committee recommends elevating the horse industry's contributions and growth potential within state economic development planning and including a horse industry representative in the Department of Commerce's economic development strategy process, including its Biannual Integrated Economic Development Plan due in December 2026.

  Lead Organizations: Department of Commerce; MHIB

- ***Conduct a capital infrastructure needs assessment of horse industry venues.*** – The Committee recommends that the state and industry assess the capital infrastructure improvement needs of Maryland's horse industry venues – including Fair Hill Special Event Zone, the Prince George's Equestrian Center, and Rosecroft Raceway

– and evaluate those needs as statewide economic development considerations rather than only local facility issues.

Lead Organizations: Venue parties responsible for infrastructure planning and improvements

- ***Encourage the University of Maryland to expand its Animal Science Department and undertake a campus farm feasibility study.*** – The Committee encourages the University of Maryland to consider expanding its Animal Science Department's equine education and research programs, to undertake a feasibility study for a new campus farm facility (potentially including an indoor arena), to establish a University-affiliated equestrian center supporting teaching, research, and industry engagement, and to identify and pursue funding mechanisms and partnerships to support implementation.

  Lead Organization: University of Maryland

Collaboration and Communication Recommendations

The Committee's Collaboration and Communication recommendations are as follows.

- ***Industry to coordinate on strategic messaging***. – The Committee recommends industry associations, organizations, and advocates formulate cross-sector interests and unified positions, and agree on shared messaging and communications avenues. As discussed in the Collaboration and Communication section, the industry may wish to consider creating an umbrella organization – modeled on the Virginia Equine Alliance – to convene the State's sector associations and develop unified positions for the Executive Branch, General Assembly, and public.

  Lead Organizations: MHIB; Maryland Horse Council; new horse leadership organization (recommended in report)

- ***Horse industry to consider creating an umbrella organization to develop unified positions***. – The Committee recommends that the Maryland horse industry consider forming a formal umbrella organization, perhaps a nonprofit entity, to serve as a convening forum for the industry's principal associations and advocacy groups to discuss important issues and coalesce around positions benefiting all industry sectors. An example is the Virginia Equine Alliance, which includes major Thoroughbred, Standardbred, competition, breeding, and horsemen's associations, and which has successfully promoted – with a single, respected, and unified voice – the industry's interests before policymakers.

  Lead Organizations: horse industry organizations

- ***MHIB to be more centrally and robustly responsible for coordinating horse industry collaborations and communications***. – The Committee recommends industry communications as an MHIB responsibility and proposes additional staff and

financial resources to enable its collaborations and communications responsibility to be carried out. (See Economic Development recommendations.) The MHIB, as the single entity with the most comprehensive view and understanding of the state horse ecosystem, should be more centrally and robustly responsible for coordinating horse industry cross-sector collaborations and communications, and should be given sufficient financial resources and staff to carry out this critical function. MHIB can work with the Maryland Horse Council and other organizations to ensure that while individual industry sectors' interests are known, there is a broader unifying narrative for the Executive Branch, General Assembly, and public to hear.

Lead Organizations: MHIB; new horse leadership organization (recommended in report)

- ***MHIB to coordinate with industry sectors and state agencies on an industry marketing approach.*** – The Committee recommends that MHIB increasingly coordinate its statutory marketing responsibilities with horse industry sectors and other state agencies whose marketing responsibilities and budgets have a nexus to promoting the Maryland horse industry. This recommendation is consistent with the Committee's other recommendation that MHIB receive additional staff and funding to better focus on marketing and communications.

  Lead Organizations: MHIB; new horse leadership organization (recommended in report)

- ***Department of Agriculture to review MHIB to ensure its board is appropriately comprised to support its mission and any potential revisions to its scope.*** – The MHIB is a 12-member body with certain designated industry representations. As MHIB's structure or mission may be revised per strategic planning, the Department should review MHIB's board composition to ensure it is adequately comprised to support it. Given the strategic emphasis on reaching urban and suburban youth, the Committee believes a seat representing community youth organizations should be added, and, in light of the State's growing equine-assisted riding sector, an equine-assisted services representative may also be beneficial. Any addition of sector seats warrants a fuller review of the Board's composition to ensure it is sufficiently constituted to support the MHIB's reformed purpose and scope and to strengthen industry collaborations and communications.

  Lead Organization: Department of Agriculture

Sustainability and Land Use Recommendations

The Committee's Sustainability and Land Use recommendations are as follows.

- ***Industry to collaborate with State land conservation agencies and organizations***. – The Committee recommends collaboration with the Maryland Agriculture Land Preservation Foundation, the Maryland Environmental Trust, and other land conservation organizations to coordinate purposeful outreach to landowners

who may most be interested in permanent conservation easements, particularly those most benefiting the state horse ecosystem.

Lead Organizations: Maryland Agricultural Land Preservation Foundation; Maryland Environmental Trust

- ***Governor, General Assembly, land conservation agencies and organizations to align on common land preservation initiatives and goals.*** – The Committee recommends that the Governor, General Assembly, horse industry, and land conservation agencies and organizations should align their common interests to maximize greatest success, notably regarding shared goals embedded in the Governor's initiative to conserve 40 percent of Maryland's land by 2040, the 2025 Chesapeake Bay Watershed Agreement's land conservation goals, and the horse industry's need for additional agricultural lands to be preserved to sustain breeding and other operations.

  Lead Organizations: Maryland Agricultural Land Preservation Foundation

- ***General Assembly to stabilize state land conservation agencies' funding.*** – The Committee recommends that the General Assembly stabilize state appropriations to state land conversation agencies and programs in order to provide consistency in staffing, operations, and landowner outreach, particularly regarding the Maryland Agricultural Land Preservation Foundation.

  Lead Organizations: Department of Agriculture; Maryland Agricultural Land Preservation Foundation

- ***General Assembly should consider transferable land conservation tax credits.*** – The Committee recommends that the General Assembly consider legislation to make Maryland's land conservation tax credits are transferable. Currently, such state income tax credits are exclusively designed for the benefit of the original property owner who conveys the easement. Any unused tax credits, under current law, may not be donated or gifted to other landowners, who often are family members, business partners, and other entities, who could then claim them on their state income tax returns. Transferable tax credits are a compelling feature that makes land conservation more attractive to potential easement donors.

  Lead Organizations: Department of Agriculture; Maryland Agricultural Land Preservation Foundation

- ***General Assembly should consider allowing Maryland residents' unused land preservation tax credits to be sold to other Maryland residents to offset state income tax liabilities.*** – The Committee recommends that the General Assembly consider legislation to landowners with unused state income tax credits to sell unused tax credits to other state taxpayers on the open market for the buyer's tax benefit. Currently, state law does not permit this. Saleable unused tax credits is a compelling feature that makes land conservation more attractive to potential easement donors.

Lead Organizations: Department of Agriculture; Maryland Agricultural Land Preservation Foundation

- ***MALPF requested to better define "horse farm" and "horse farm operation" criteria***. – The Committee recommends MALPF create "horse farm" and "horse farm operation" criteria. Anecdotally, many horse farm owners are uncertain, if not wary, of what MALPF may permit for commercial activity. Thus, MALPF is requested to better define "horse farms" and to establish horse farm operations-specific criteria, with examples of the types of commercial activity MALPF would consider consistent for conservation easements.

  Lead Organization: Maryland Agricultural Land Preservation Foundation

- ***MALPF requested to revise minimum-acreage criteria for horse farms***. – The Committee recommends that MALPF's board revise its current 50-acre easement minimum to 25 acres for horse farms, which better reflects the size of most equine operations.

  Lead Organization: Maryland Agricultural Land Preservation Foundation

- ***MALPF requested to consider preferential ranking for horse farm owners***. – The Committee recommends that MALPF work with counties to give an appropriate level of priority ranking to horse farm owners interested in land conservation and its benefits.

  Lead Organizations: Maryland Agricultural Land Preservation Foundation; Counties

Equine Health and Welfare Recommendations

The Committee's Equine Health and Welfare recommendations are as follows.

- ***Social license to operate is acknowledged as important to increase public confidence in industry***. – The Maryland horse industry – across all sectors – and regulators should continue acknowledging the public's keen interest is social license to operate and in equine health, safety, and welfare not only during a horse's competitive years but in its aftercare. The industry's and regulators' full embrace of social licensing will instill greater public confidence in racing, competitions, and recreation.

  Lead Organizations: Horse industry organizations; MHIB; Maryland Racing Commission

- ***Maryland horse industry and regulators to engage in more concerted equine health and welfare public education programs; better communicate equine health and welfare reports***. – The Committee that Maryland horse industry and regulators undertake more concerted public education programs on its numerous initiatives to improve equine health, safety, and welfare as well as horse facility conditions (tracks, stables) and equipment.

Lead Organizations: MHIB; Department of Agriculture - Animal Health; Maryland Horse Council; horse ecosystem

- ***Maryland horse industry to review and update Maryland Horse Council's "Minimum Standards of Care for Equines."*** – The Committee recommends that the Maryland Horse Council's "Minimum Standards of Care for Equines" guidelines, which set standards for food, drink, shelter, veterinary care, air quality, and space for free movement, be reviewed and revised, as might be necessary. The MHIB's Maryland Equine Health Advisory Committee should review and update the Maryland Horse Council's "Minimum Standards of Care for Equines" and then publicize the final, updated version.

  Lead Organizations: MHIB Equine Health Advisory Committee; Maryland Horse Council

- ***Maryland horse industry and regulators to better communicate on equine lifecycle initiatives and to identify and enact aftercare improvements.*** – The Committee recommends that the horse industry strengthen aftercare collaborations with key nonprofit organizations and other stakeholders to develop a statewide strategy promoting responsible horse ownership and lifecycle planning to ensure all horses are served well throughout their lives. Such strategic lifecycle planning should be made public.

  Lead Organizations: MHIB; Aftercare organizations; Maryland Racing Commission; entire horse ecosystem

- ***Incentives to be provided to students attending Virginia-Maryland College of Veterinary Medicine and University of Maryland Eastern Shore School of Veterinary Medicine to boost in-state veterinary ranks.*** –The Committee recommends that the Governor, General Assembly, and state higher education planners provide incentives for students attending the Virginia-Maryland College of Veterinary Medicine in Blacksburg, Virginia, and the University of Maryland Eastern Shore School of Veterinary Medicine who, upon graduation, will practice large-animal and equine veterinary medicine in Maryland, helping meet the in-state demand.

  Lead Organizations: Maryland Higher Education Commission; University of Maryland Eastern Shore; Virginia-Maryland College of Veterinary Medicine; Maryland Racing Commission; Department of Agriculture

- ***Maryland Higher Education Commission, University of Maryland Eastern Shore School of Veterinary Medicine, and industry to collaborate on externships, mentorships, partnerships, scholarships, and other incentives to improver state veterinary medicine pipeline.*** – The Committee recommends that the Maryland Higher Education Commission, the University of Maryland Eastern Shore School of Veterinary Medicine, and the Maryland horse industry collaborate and develop externships, mentorships, clinical partnerships, scholarships, loan-repayment

concepts, and practice opportunities that strengthen Maryland's equine veterinary workforce pipeline, extend experiential learning, and encourage graduates to establish careers serving Maryland's horse ecosystem.

Lead Organizations: University of Maryland Eastern Shore School of Veterinary Medicine; entire horse ecosystem

- ***Maryland Racing Commission to establish a pilot program to monitor the lifecycle of Maryland racehorses.*** – The Committee recommends that the Maryland Racing Commission expand its role in equine health, welfare, and reporting by establishing a pilot program to monitor the lifecycle of Maryland racehorses. Tracking horses from active racing through retirement and post-racing placement would provide critical information on outcomes, identify deficiencies in the state's aftercare infrastructure, and support the development of a comprehensive, data-driven strategy to improve equine welfare and ensure adequate resources are available throughout a horse's lifetime.

  Lead Organizations: Department of Labor; Maryland Racing Commission

APPENDIX

About the Facilitation Process

Horse Industry At-Large Survey

Glossary of Terms

APPENDIX A

About the Facilitation Process

The Maryland Horse Industry Strategic Planning Initiative is administered by the Maryland Department of Agriculture in consultation with the Secretary of State, the Maryland Racing Commission, and the Department of Labor, the Department of Natural Resources, and the Department of Commerce. The Executive Order directs that the strategic plan address strategic planning and policy guidance, economic development, advocacy, public awareness and promotion, education and workforce development, sustainability and land use, health and welfare, and collaboration and communication, and it directs the Department of Agriculture to submit a report to the Governor and General Assembly on or before September 1, 2026. The Department of Agriculture procured the services of McGuireWoods Consulting LLC (Richmond, Virginia) to facilitate the Strategic Planning Committee's discussions, conduct research to assist the Committee's work, and draft the Committee's final report and recommendations.

McGuireWoods Consulting's role was to facilitate a structured stakeholder process rather than to dictate outcomes. As neutral facilitators, they supported the deliberative process and pushed toward consensus, while the stakeholders investigated, shared information, tested options, debated differences, and produced consensus-based outcomes – precisely what the Committee did in carrying out the Executive Order's charge.

This structure matters because the Committee includes thirteen participants with different institutional responsibilities and sector-specific interests, from racing and breeding to government, land conservation, higher education, equine health, advocacy, and recreational and therapeutic sectors. Rather than reinforce fragmentation through a sector-by-sector process, the facilitated process asked participants to identify where their interests overlap and where common priorities can be shaped into recommendations credible to the Governor, the General Assembly, state and local governments, industry organizations, and the public.

APPENDIX B

Horse Industry At-Large Survey

Horse Ecosystem Strategic Plan Online Form

Reasoning for the Maryland Horse Industry Strategic Plan

The State challenged Maryland's horse industry to demonstrate how it can come together — not only to evaluate where collaboration can improve, but to generate bold, innovative ideas that will help the industry thrive for generations to come. This plan represents an important first step on that journey.

Through shared vision and cooperation, individual groups will be encouraged to look beyond their own sectors, embrace the big picture, and work collectively toward a common goal: a strong, unified, and sustainable future for Maryland's horse industry ecosystem. The plan honors our past, assesses our present, and charts a visionary course for our future.

A core steering committee representing all major sectors will guide the process, supported by specialized advisory groups and an interactive online platform that allows everyone to contribute ideas and solutions. Together, we are asking Maryland's horse community to think creatively, act collaboratively, and lead confidently strengthening our foundation while positioning Maryland as a world leader in equine excellence and innovation.

Thank you for being a part of the solutions!

* Indicates required question

1. What currently concerns you in the Horse Ecosystem? *

2. What \ Sector or Sectors does this fall under? *

Check all that apply.

- Maryland Department of Agriculture
- Thoroughbred Industry
- Standardbred Industry
- Sport, Competition & Recreation
- Department of Natural Resources
- Academic
- Secretary of State
- Health & Welfare (Veterinarian)
- Therapeutic, Aftercare & Equine-Assisted Services
- Economic Development (Trade, Commerce, Tourism)
- Breeding/Farms in the State

3. What Pillar does this fall under? *

Check all that apply.

- Strategic Planning and Policy Guidance
- Collaboration and Communication
- Economic Development
- Advocacy, Public Awareness, and Promotion
- Education and Workforce Development
- Sustainability and Land Use
- Health and Welfare

4. What are specific solutions you see as being a path forward? *

5. Please leave your email if you would like updates on the planning process.

APPENDIX C

Glossary of Terms

4-H A national youth development organization teaching children and teens hands-on learning identified in the report as one of the existing state youth equine organizations that can help introduce young people to horses, horsemanship, and future equine careers.

40 Percent by 2040 / "40 x 40" Initiative Governor Moore's land conservation goal to preserve 40 percent of Maryland's total lands by 2040, which the report connects to the horse industry's need for preserved agricultural land, working farms, and equine operations.

Advisory Committees Sector-based committees convened as part of the Strategic Planning Initiative to gather perspectives from Maryland horse industry stakeholders beyond the Strategic Planning Committee, including participants from economic development, racing, sport, recreation, equine health and welfare, therapeutic and equine-assisted services, land use, and at-large interests.

Aftercare The planning, support, tracking, retraining, transitioning, or sanctuary care provided to horses after their racing, sporting, working, or active-use years.

American Horse Council Foundation Economic Impact Study The 2023 study relied upon in the report for certain economic impact data regarding Maryland's horse industry, including the reported $2.9 billion total economic impact, $1.05 billion contribution to State GDP, and 28,434 jobs directly and indirectly supported.

Animal Import Facility / Mid-Atlantic Animal Import Facility A proposed facility, potentially located at or near Baltimore/Washington International Thurgood Marshall Airport, that would support the import and export of horses and other animals and that the report recommends be reassessed through a public-private partnership feasibility study.

Baseline Labor Data Industry-specific information on labor supply, labor demand, occupations, geography, wages, skill needs, and training pathways that the report identifies as necessary to support workforce planning, policymaking, and funding requests.

Biannual Integrated Economic Development Plan The Department of Commerce's statewide economic development planning process, due in December 2026, into which the report recommends the horse industry be integrated.

Breeding Farms Horse farms engaged in breeding activities that the report describes as agricultural, economic, land-based, and central to Maryland's equine identity and horse tourism potential.

Capital Infrastructure Needs Assessment A recommended assessment of the improvement needs of Maryland horse industry venues, including facilities such as Fair Hill Special Event Zone, Prince George's Equestrian Center, and Rosecroft Raceway.

Chesapeake Bay Watershed Agreement The Chesapeake Bay Commission's regional conservation framework referenced in the report as aligned with Maryland's land preservation

goals and the horse industry's need to preserve agricultural land, healthy landscapes, and protected lands.

Commercial Stable Licensing Fee The annual fee paid by commercial horse stables that solicit the general public for boarding, riding lessons, rentals, or horse rescues, which the report identifies as a funding source for the Maryland Horse Industry Board.

Conservation Easement A permanent land protection tool used to preserve agricultural or conservation lands, which the report discusses as especially relevant to horse farm owners and working equine operations.

Cross-Sector Collaboration Coordination among the many parts of Maryland's horse ecosystem, including racing, breeding, sport, recreation, equine-assisted services, agriculture, education, land preservation, veterinary services, and related businesses.

Department of Agriculture / Maryland Department of Agriculture The state agency charged by the Executive Order with administering the Strategic Planning Initiative and leading development of the strategic plan for Maryland's horse industry. The Department promotes, protects, and advances Maryland's agricultural industry while safeguarding animal health, food safety, natural resources, and consumers.

Department of Commerce / Maryland Department of Commerce The state agency referenced in the report as relevant to economic development strategy, state business programs, and potential integration of the horse industry into broader statewide economic development planning. The Department is the state's primary economic development agency, stimulating private investment, new business attraction and expansion, and job creation.

Department of Labor / Maryland Department of Labor The state agency referenced in the report as relevant to job recruitment, workforce training, apprenticeship programs, and the Maryland Racing Commission.

Department of Natural / Maryland Department of Natural Resources The Maryland Department of Natural Resources conserves and manages Maryland's natural resources, public lands, waterways, wildlife, and outdoor recreation opportunities for the benefit of current and future generations.

Maryland Secretary of State Office

The Maryland Secretary of State promotes Maryland's interests through international relations, charitable oversight, business and legal services, and civic engagement while serving as the Governor's liaison on international affairs.

Economic Development Plan A more detailed, data-driven plan recommended by the report to assess the horse industry's economic structure, capital needs, labor market, revenue streams, supply chains, tourism opportunities, and growth potential.

Economic Impact The measurable economic contribution of the Maryland horse industry, which the report identifies as $2.9 billion in total economic impact, $1.05 billion in contribution to State GDP, and 28,434 direct and indirect jobs.

Equine-Assisted Services Horse-related services, including therapeutic, adaptive, rehabilitative, educational, or similar programs, that use horses to support human health, wellbeing, learning, or development.

Equine Health and Welfare The standards, oversight, reporting, veterinary care, facility conditions, safety practices, aftercare, and public accountability measures used to protect horses throughout their lives.

Equine Lifecycle The full span of a horse's life and care needs, including active racing, sport, recreation, work, retirement, transition, aftercare, and end-of-life planning.

Equine Sector Another term for the horse industry, encompassing racing, breeding, sport, recreation, education, therapeutic stables, trail riding, related professions, small businesses, farms, programs, and support services.

Executive Order 01.01.2025.23 Governor Moore's Executive Order, issued on November 6, 2025, establishing the Maryland Horse Industry Strategic Planning Initiative and directing development of a strategic plan to support a coordinated and sustainable future for Maryland's horse industry.

Fair Hill Special Event Zone A Maryland Horse Park System asset and nationally or internationally significant equestrian venue identified in the report as having capital infrastructure needs and statewide economic development importance.

Farrier A horse industry professional who provides hoof care and related services, identified in the report as one of the occupations and vocations that support Maryland's broader horse ecosystem.

Fédération Équestre Internationale / FEI The international governing body for equestrian sport, referenced in the report in connection with standards for veterinary oversight, steward oversight, drug testing, equipment inspections, horse care, stabling conditions, and equine welfare strategy.

FFA A youth agricultural education organization, historically known as Future Farmers of America, identified in the report as part of the broader youth pipeline that may help cultivate future riders, workers, veterinarians, farriers, trainers, instructors, researchers, entrepreneurs, volunteers, and advocates.

General Assembly / Maryland General Assembly Maryland's state legislature, which the report identifies as important to the horse industry through laws, regulations, appropriations, oversight, land conservation funding, tax credits, workforce support, and equine health and welfare funding.

Government Relations Plan A recommended month-by-month advocacy and engagement plan to help the horse industry educate legislators, coordinate messages, prepare factual materials, and remain engaged during both legislative session and interim periods.

Harness Racing A form of horse racing identified in the Executive Order and report as one of the sectors within Maryland's horse industry, along with Thoroughbred racing, sport, recreation, and other equine activities. Harness racing is an equestrian sport in which

Standardbred horses compete while pulling a two-wheeled cart, called a sulky, driven by a driver rather than ridden by a jock

Horse Ecosystem / Maryland Horse Ecosystem Maryland's horse ecosystem is a network of interconnected and interdependent sectors that collectively create and support the health, sustainability, and economic vitality of the industry, including lesson and training programs, breeding, sport horse competition, racing, equine-assisted services, recreation and trail riding, youth development, veterinary services, equine professional services, agriculture, tourism, education, land conservation, and the related businesses.

Horse Farm Operation An equine agricultural or commercial activity conducted on a horse farm, such as breeding, training, boarding, riding, equine-assisted services, or other activities that the report recommends MALPF better define for easement purposes.

Horse Industry At-Large Survey / Horse Ecosystem Strategic Plan Form The public input form distributed through the Advisory Committees to gather feedback from the broader Maryland horse community, resulting in nearly 400 stakeholder responses.

Horse Tourism A tourism strategy that would promote Maryland horse farms, venues, events, wineries, breweries, farm markets, and other attractions as part of a coordinated horse industry tourism program.

Horseracing Integrity and Safety Act / HISA The federal horseracing safety and integrity framework discussed in the report as applying to trainers, owners, breeders, jockeys, racetracks, veterinarians, and others licensed by state racing commissions, with a focus on racetrack safety and prohibited substances.

Horseracing Integrity and Safety Authority The authority established under HISA to set and enforce national, uniform standards for safety and integrity in Thoroughbred racing and other covered horses.

IMPLAN The economic impact modeling approach used in the American Horse Council Foundation's 2023 Economic Impact Study for the Maryland horse industry.

Industry-Recognized Credential A credential, certificate, micro-credential, or other training marker recognized by the horse industry as demonstrating baseline skills for equine occupations and career pathways.

Local Development Council A local body in a jurisdiction that hosts a state-licensed casino and helps determine the use of VLT-generated Local Impact Grants for community benefit.

Local Impact Grants Grants supported by Video Lottery Terminal revenues in Maryland casino jurisdictions, which the report identifies as a potential funding source for eligible horse racing and competition venue capital improvements.

Maryland Agricultural Land Preservation Foundation / MALPF A Maryland land preservation program focused on agricultural lands and working farmland, identified in the report as a key partner for preserving horse farms and supporting the horse industry's land base.

Maryland-Bred Race Fund A state-administered program referenced in the report in connection with breeding, farm-level economics, and the relationship between the Maryland Racing Commission and the broader breeding sector.

Maryland Environmental Trust / MET A Maryland land conservation entity identified in the report as an important partner for land preservation and outreach to horse farm owners.

Maryland Feed Fund A statutory fee on horse feed sold in Maryland that serves as the primary funding source for the Maryland Horse Industry Board and that the report recommends considering for increase to better support MHIB operations.

Maryland Horse Council A private, nonprofit, volunteer association described in the report as the long-recognized industry-wide organization promoting and protecting horse industry interests before the Maryland General Assembly and Executive Branch.

Maryland Horse Career Program A Maryland Horse Foundation program, administered by the Maryland Horse Breeders Association's chartered foundation, that focuses principally on Thoroughbred industry career awareness, access to industry leaders, recruitment, and retention.

Maryland Horse Industry Board / MHIB The state board within the Maryland Department of Agriculture described in the report as having the broadest cross-sector view of Maryland's horse industry and responsibilities including stable licensing, inspections, promotion, outreach, grants, industry support programs, and coordination of the Maryland Horse Park System.

Maryland Horse Industry Strategic Planning Committee The Committee of stakeholders representing various horse industry sectors and state-related interests that developed the strategic planning recommendations in the report.

Maryland Horse Park System / MHPS A statewide marketing, education, and navigation platform led by MHIB and anchored by assets such as Fair Hill Special Event Zone, the Maryland Horse Library and Education Center, Pimlico Race Course, and Prince George's Equestrian Center.

Maryland Horse Library and Education Center Owned and operated by the Maryland Horse Foundation. The educational and cultural center of the Maryland Horse Park System, offering one of the East Coast's largest equine libraries, exhibits, educational programs, meeting space, and resources that celebrate and preserve Maryland's rich horse heritage while connecting people to every sector of the state's horse industry.

Maryland Higher Education Commission / MHEC The state higher education agency referenced in the report as a potential partner for horse industry certificate, training, credentialing, and continuing education programs.

Maryland Office of Tourism A state tourism partner identified in the report as relevant to horse industry marketing, horse tourism, and broader promotion of Maryland's equine assets.

Maryland Racing Commission / MRC The state racing regulator referenced in the report as overseeing pari-mutuel betting, racing participant safety, horse health and safety laws and regulations, drug testing, disciplinary actions, and racing-related licensing.

Maryland Standardbred Race Fund A state-administered program referenced in the report in connection with breeding, farm-level economics, and Standardbred racing.

Micro-Credentialing Short, targeted, industry-led training or certification for specific equine skills or competencies, such as equine safety, groom technician work, foaling and breeding assistance, exercise riding, barn management, biosecurity, or aftercare.

One Voice / Unified Voice he report's recurring concept that Maryland's horse industry should coordinate across sectors to communicate shared priorities, advocate effectively, and present a common narrative to the public, policymakers, and partners.

Pari-Mutuel Betting The form of wagering regulated by the Maryland Racing Commission in connection with horse racing in Maryland.

Pimlico Redevelopment Project The redevelopment of Pimlico Race Course, identified in the report as an important opportunity to generate interest in racing, support the broader horse ecosystem, benefit the Park Heights community, and reinforce Maryland's historic role in American racing.

Pony Club A youth equine organization identified in the report as one of the existing programs that can support early exposure to horses and future equine career pathways.

Preakness Stakes A globally recognized Maryland racing event that the report connects to Maryland's horse industry history, public visibility, economic development, and the broader horse ecosystem.

Prince George's Equestrian Center A Maryland Horse Park System asset and horse industry venue that hosts breed shows, dressage, hunter-jumper, carriage driving, and other competitions, and that the report identifies as needing major improvements or potential replacement.

Program Open Space A Maryland land preservation program identified in the report as part of the state's broader land conservation infrastructure.

Public-Private Partnership / P3 A collaborative approach involving public and private entities, which the report identifies as relevant to horse industry programmatic investments, infrastructure investments, and potential development of a Mid-Atlantic animal import facility.

Racetrack Facilities Renewal Account A funding mechanism referenced in the report as potentially relevant to capital needs at Rosecroft Raceway.

Rosecroft Raceway A privately owned Maryland harness racing venue identified in the report as potentially eligible for certain Racetrack Facilities Renewal Account matching funds and Local Impact Grant opportunities.

Rural Legacy Program A Maryland land preservation program identified in the report as part of the state's broader conservation framework.

Social License to Operate The public trust and acceptance that allow the horse industry to continue operating, expanding, receiving public support, and attracting participants, which the report states must be maintained through conduct, transparency, accountability, and commitment to equine health and welfare.

Stable Licensing The licensing of commercial horse stables, currently described in the report as an MHIB responsibility involving more than 800 commercial stables.

Strategic Planning Initiative The initiative established by Governor Wes Moore via Executive Order 01.01.2025.23, issued on November 6, 2025, to develop a coordinated strategic plan for Maryland's horse industry and to address objectives including policy guidance, economic development, advocacy, workforce, sustainability, health and welfare, and collaboration.

Thoroughbred Racing A major sector of Maryland's horse industry identified throughout the report, including in connection with the Preakness, Pimlico, breeding, HISA, economic impact, and racing safety.

Transferable Land Conservation Tax Credits A proposed enhancement to Maryland's land conservation tax credit program that would allow unused credits to be transferred, gifted, or potentially sold, making conservation easements more financially attractive to landowners.

University of Maryland Animal Science Department A University of Maryland program identified in the report as an important education and workforce asset and as a potential foundation for expanded equine education, research, and workforce development.

University of Maryland Eastern Shore School of Veterinary Medicine / UMESSVM A new veterinary school discussed in the report is expected to enroll its first class in 2027 and graduate its first class in 2030, with potential long-term importance for Maryland's large-animal and equine veterinary workforce.

U.S. Equestrian Federation / USEF The national governing body referenced in the report in connection with sport and competition standards, including veterinarian and steward oversight, drug testing, equipment inspections, horse care, and stabling conditions.

Veterinary Pipeline The education, recruitment, incentive, externship, mentorship, scholarship, loan-repayment, and practice-opportunity pathways needed to increase the number of large-animal and equine veterinarians serving Maryland.

Video Lottery Terminal Revenues / VLT Revenues Gaming revenues generated in Maryland casino jurisdictions that support Local Impact Grants and that the report identifies as a possible funding source for eligible horse racing and competition venue improvements.

Virginia Equine Alliance / VEA A Virginia nonprofit cross-sector convening organization identified in the report as a potential model for a Maryland umbrella organization that could help develop unified horse industry positions before policymakers.

Virginia-Maryland College of Veterinary Medicine / VMCVM The veterinary school of Virginia Tech and the University of Maryland College Park, located in Blacksburg, Virginia, which the report states admits at least thirty Maryland applicants annually and contributes to Maryland's veterinary workforce.