

2022

Kentucky Equine Survey

A comprehensive statewide survey of all breeds of horses, ponies, donkeys and mules.



Released July 12, 2023



In Appreciation

The undertaking of a comprehensive statewide equine survey requires the assistance and cooperation of many organizations, institutions and individuals. This project would not have been possible without the dedicated support of many people. Below is a special note of appreciation to the following groups and individuals who provided significant contributions to the 2022 Kentucky Equine Survey.

The **Kentucky Agricultural Development Fund (KADF)** graciously provided a grant that funded much of the cost of this study. We deeply appreciate this partnership and the shared recognition that the equine industry is a key part of Kentucky's agricultural industry and that periodic assessment of its size and distribution is vital.

The **University of Kentucky Martin-Gatton College of Agriculture, Food and Environment (UK)** supplied a substantial investment of internal funds, in addition to numerous administrative, faculty, staff and student hours to assist with grant development, industry fund-raising, survey design and survey promotion across the Commonwealth.

The **Kentucky Horse Council (KHC)** coordinated and submitted the successful grant proposal to KADF. In addition, KHC helped solicit equine industry matching funds, including a large contribution from its own reserves, and helped design the survey instrument and project promotional efforts. KHC spearheaded efforts to collect and assemble information on competitions and other equine-related events across the state and assisted in collecting horse owner names for submission to the surveying agency and compiling the final report.

National Agricultural Statistics Service, U.S. Department of Agriculture (NASS) worked with UK and KHC to design an appropriate survey instrument and served as the sole data collection agency, ensuring confidentiality of the results. In addition, NASS summarized the data and produced the equine operation inventory results.

Many equine associations, organizations and individuals, spearheaded by the Kentucky Thoroughbred Association's major investment, contributed financially to this effort. A complete list of financial partners is available online ([link](#)) and inside the back cover of this report.

As with any survey, the accuracy of results is a direct

reflection of the completeness of the database. The willingness of Kentucky's equine owners and equine operation owners to complete the questionnaire, and to provide details about their equines and operations was an important factor in the survey's completion and accuracy. Their time is genuinely appreciated.

Key Individual Contributors:

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Preface

The 2022 Kentucky Equine Survey is a comprehensive, statewide survey of equine operations and all breeds of horses, ponies, donkeys and mules in Kentucky. This report serves as a follow up to the 2012 Kentucky Equine Survey, which was the first comprehensive equine industry study undertaken in the state since 1977.

The 2022 study was a statewide survey of equine operations, where “equine operation” was defined as an address at which at least one horse, pony, mule or donkey resides. This definition encompasses commercial facilities, competition facilities, training facilities, nonprofit facilities, and personal residences. An inventory of all equine, by breed and by primary use or purpose, was estimated at the state and county levels.

This survey measured sales of equine, income and expenses from activities on equine operations, and the value of assets owned by those operations. In addition, it captured the primary function of those operations and how much acreage was devoted to equine-related activities. This survey also sought to determine the age distribution of Kentucky’s equines and what equine health concerns owners felt were most important.



KEY FINDINGS

Though there are currently fewer equine living in the Commonwealth than were recorded in the 2012 study (which found 242,400 equine in the state), the total value of equine and equine-related assets in Kentucky has increased significantly, from \$23.4 billion in 2012 to \$27.2 billion in 2022.

Acreage devoted to equine use is 84.1% of that in 2012 (900,000 acres in 2022 compared with 1.1 million acres in 2012). Total equine-related income from sales and services for equine operations in 2022 was almost \$2.1 billion, up from \$1.1 billion in 2012, while expenses have increased from \$1.2 billion to \$1.56 billion.

Thoroughbreds are again the most populous breed in the state, followed by Quarter Horses, Walking Horses, Donkeys/Mules and Saddlebreds. In 2022, each breed showed a decline in population compared to the numbers reported in 2012. The top five primary uses of Kentucky's equines include trail/pleasure riding (62,500); broodmare (33,500); idle, retired or otherwise not working (32,500); growing horse (foal/weanling/yearling) (22,000); and competition/show (20,000).

1

Kentucky is home to 209,500 horses, ponies, mules and donkeys.

2

There are approximately 31,000 equine operations in Kentucky.

3

Equine operations reside on 3.5 millions acres, with 900,000 acres solely devoted to equine use.

4

The total value of the state's equine and equine related assets is estimated at \$27.7 billion.

5

The total value of all equine-related sales and income for equine operations in 2021 was nearly \$2.1 billion

6

Equine-related expenditures by equine operations in 2021 totaled almost \$1.6 billion; 82% of operating expenses were spent in Kentucky.

Background

Any adept business manager will affirm that good recordkeeping is vital to an operation's success. The same is true for industries: industries prosper when regularly measured and analyzed, both to determine their strengths and to discover where they might improve. Simply put, good records help decision makers make good decisions. A decade ago, the University of Kentucky and the Kentucky Horse Council joined forces to conduct the *2012 Kentucky Equine Survey*, a comprehensive, statewide survey of all breeds of horses, ponies, donkeys and mules. This study followed a 35-year hiatus of industry measurement.

The 2012 study was produced with the intention that additional, follow-up studies would be completed to accurately monitor the state of the equine industry in Kentucky.

Though 10 years may not seem a lengthy timeframe, a lot can happen in a decade. In 2012, the economy was emerging from the most significant contraction since the Great Depression and World War II. Kentucky's equine industry recovered and then flourished, but then the state's economy, like the rest of the country's, had to navigate economic uncertainty following the COVID-19 pandemic and the highest inflation levels seen since 1980.

Consequently, the *2022 Kentucky Equine Survey* could not be timelier. Information provided by this study is a critical component to keeping our equine community healthy by identifying areas of potential job creation and income expansion, both within the industry and in those businesses that support industry activities. As in 2012, the 2022 Kentucky Equine Survey provides a current inventory of the existing population of equine in the state and of the operations on which they reside.



A Review of the 2012 Kentucky Equine Survey

The *2012 Kentucky Equine Survey* provided a snapshot of how diverse Kentucky's equine were across the state. It illustrated that equine can be found throughout the Commonwealth, indicating that ancillary supporting businesses such as veterinarians and farriers, as well as providers of fencing, feed, bedding, insurance, laundry services, pharmaceuticals and specialized educational opportunities, are needed in these areas as well.

The 2012 survey demonstrated that Kentucky's equine industry, particularly in the Central Bluegrass region, is an economic cluster. Economic clusters are important contributors to an area's economy; results of the last study justified the support and enhancement of the state's equine industry.

While the equine industry remains a signature industry of Kentucky, up-to-date benchmarks are necessary to understand how past changes have impacted the industry. These benchmarks also allow for forecasting how the industry might need to adapt to future changes in the economy, the regulatory environment, the business climate and the American lifestyle to ensure its sustainability. Horses have long been a key component of Kentucky culture, and Kentucky's identity and prestige, both nationally



and internationally, are heavily based on its equine. Conducting regular, comprehensive, state-wide studies allow a diverse set of decision makers the ability to continually monitor the health of the industry. Additionally, these data allow our industry's institutions, organizations and farms to strategically retain and increase their value, which impacts jobs and income, not only for equine operations, but also for the ancillary businesses that support the industry, including tourism and hospitality.

Purpose of the Study

The purpose of the *2022 Kentucky Equine Survey* was to determine accurate inventory estimates (or counts) of equine operations and equines in the state, which was further designated by breed and use (or purpose). For this study, an "equine operation" was defined as an address at which at least one horse, pony, mule or donkey resided. This definition encompasses places like commercial breeding and training facilities, competition facilities, lesson barns and boarding facilities, nonprofit operations and personal residences. Furthermore, an "equine" is defined as a horse, pony, mule or donkey. Kentucky's equine and equine operations are the nucleus of Kentucky's unique culture and the region's economic cluster.

Data from the *2022 Kentucky Equine Survey* is intended to be a resource for a broad set of decision makers, including:

- County officials, to justify improvements to trails and competition facilities in their jurisdiction
- Entrepreneurs and business owners, to define markets for business-planning and workforce expansion purposes
- Equine associations, to increase membership and available activities
- Local, regional and state policymakers, to understand the value and prominence of equine activities in their area
- Researchers and scientists, to tailor studies toward the most important and relevant challenges and questions related to equine
- Nonprofits, to provide support for funding requests and explanation of need for services Veterinarians, to more effectively conduct disease surveillance efforts.



With a thorough understanding of where equine and equine operations are located, decision makers can quickly address challenges and nimbly adapt to an ever-changing market, thus improving the health of the entire equine industry.



Methodology

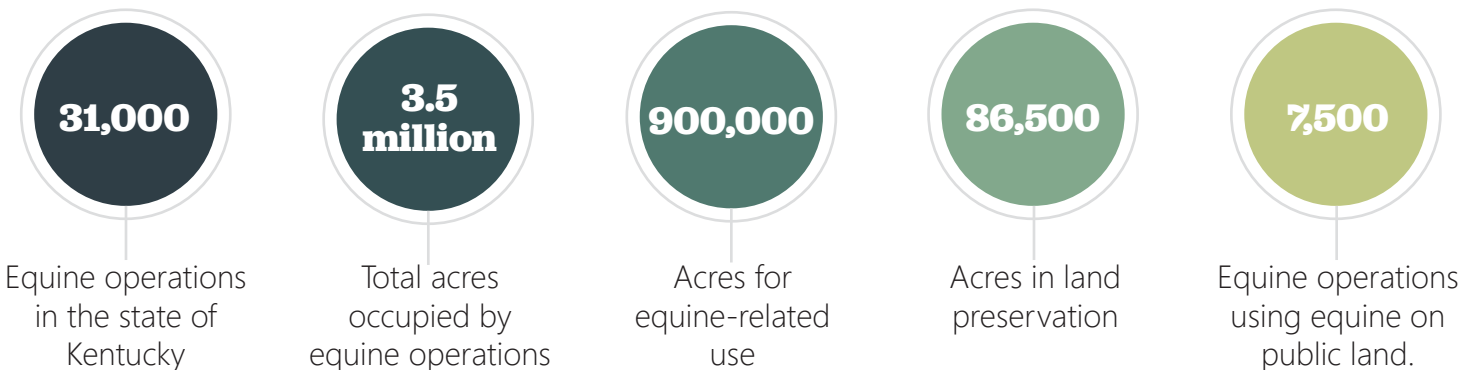
The study was a statewide survey of equine operations that included an inventory of all breeds of horses, ponies, donkeys and mules. It examined sales, income, expenses and assets of those operations. It also reported county-level results.

Data were collected between July and October 2022. The inventory of equine operations was conducted by the Kentucky Field Office of the National Agricultural Statistics Service, which is an agency of the United States Department of Agriculture. NASS mailed hard copies of an eight-page questionnaire to 15,000 randomly sampled equine operations across the state, which included an option to complete the questionnaire online. Complete details of the survey methodology and data analysis are available in the technical methodology summary, available online at <https://equine.ca.uky.edu/kyequinesurvey>, or by contacting equine@uky.edu.

Results: Equine Operations and Inventory

Defining Equine Operations

Equine operations encompass large breeding farms, show grounds, racetracks, training facilities, property on which equines are kept for personal use and other land with a primary use that may not be equine-related, such as a cattle operation or crop farm, that has equine residing on that operation. Using this definition, it is estimated that there are 31,000 equine operations throughout Kentucky which account for 3.5 million acres of land, of which 900,000 acres are devoted to equine-related activities.



Primary Function of Equine Operations

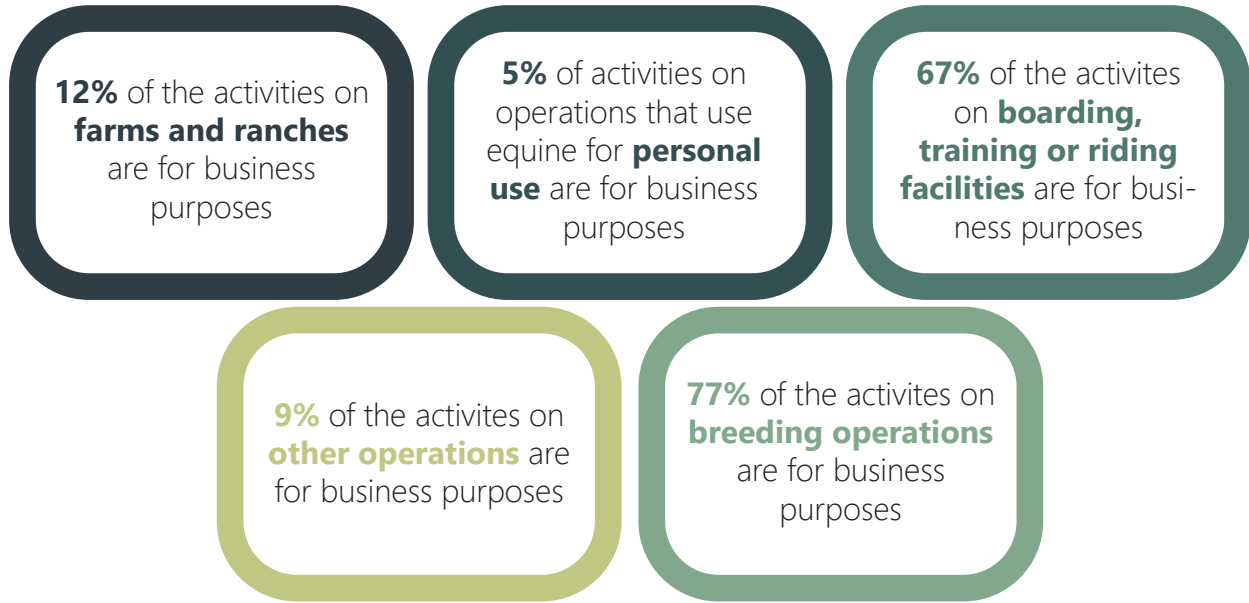
Equine operations are categorized according to primary function. A "farm or ranch" might be focused on equine activities, but may also focus on an entirely different enterprise, like cattle or crop production. "Other" operations may include nonprofits like equine adoption and rescue organizations, equine-assisted activities and therapy organizations, recreational facilities, petting farms, government entities and others. Once again, farms or ranches comprise the largest number of equine operations (18,000), followed by property where equine are kept for personal use (10,000). There are an estimated 1,000 boarding, training or riding facilities in the state and 600 breeding operations. An additional 1,400 operations with horses have other primary functions.

18,000 operations are considered to be a **Farm or Ranch**



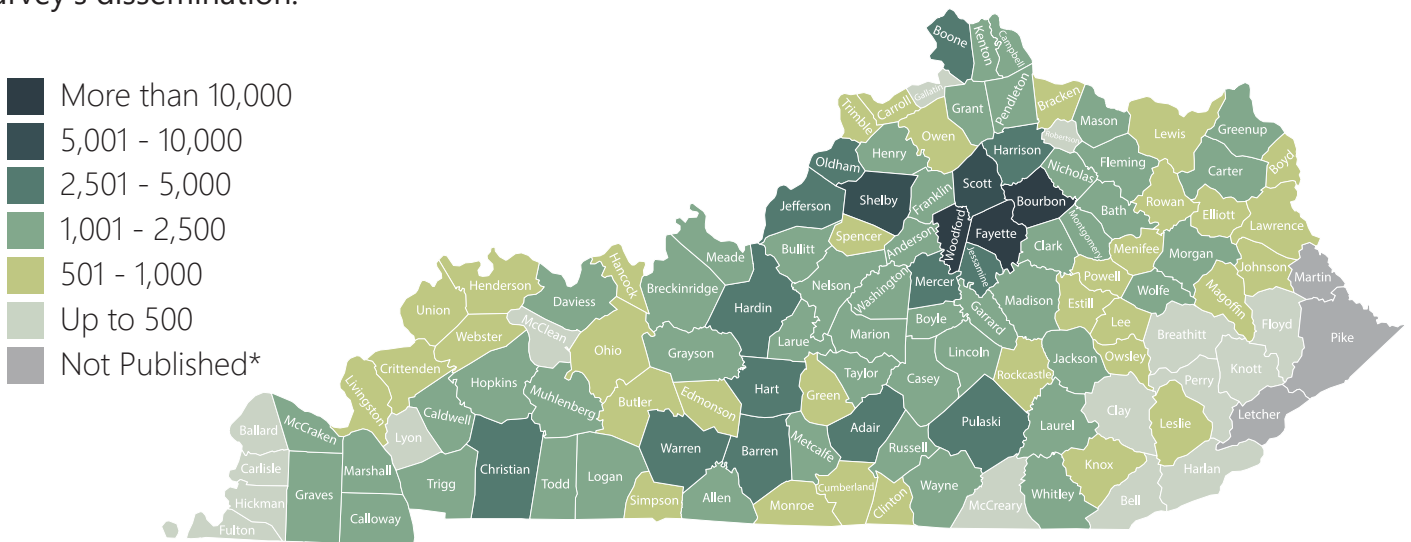
The extent to which an equine operation engages in revenue-producing activities will differ according to primary function. For example, nearly all activities that take place on a commercial breeding operation may be for business purposes, whereas very few activities on a place where horses are kept for personal use would produce revenue. The percentage of equine-related activities that are conducted for business purposes by primary function in Kentucky is the highest for breeding operations, followed boarding/training/riding facilities, farms/ranches, other operations and places where equine are kept for personal use.

Percent of Equine-Related Activities for Business Purposes

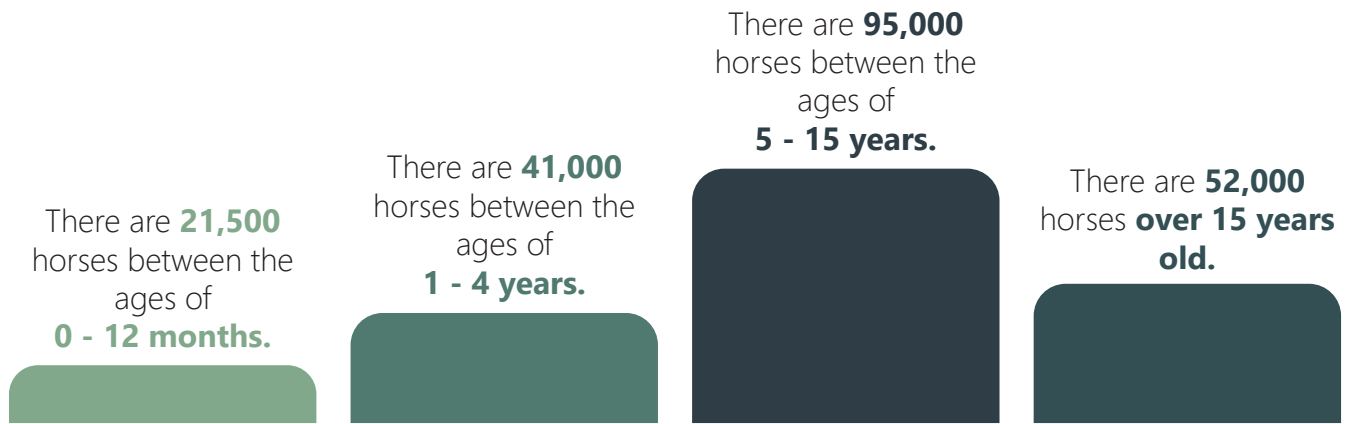


Kentucky Equine Inventory

There were an estimated 209,500 horses, ponies, mules and donkeys in the state of Kentucky on July 1, 2022. Light horse breeds constitute more than 75% of the state’s equine population, followed by Donkeys and Mules (6.4%), Pony breeds and Miniature Horses (6.0%), Warmbloods (3.3%) and Draft Horse breeds (2.3%). The map below illustrates the distribution of equine across the state’s counties. The number of equine was disclosed in all but three of Kentucky’s 120 counties. NASS did not disclose the number of equine in these counties as to do so would remove the confidentiality promised in the survey’s dissemination.



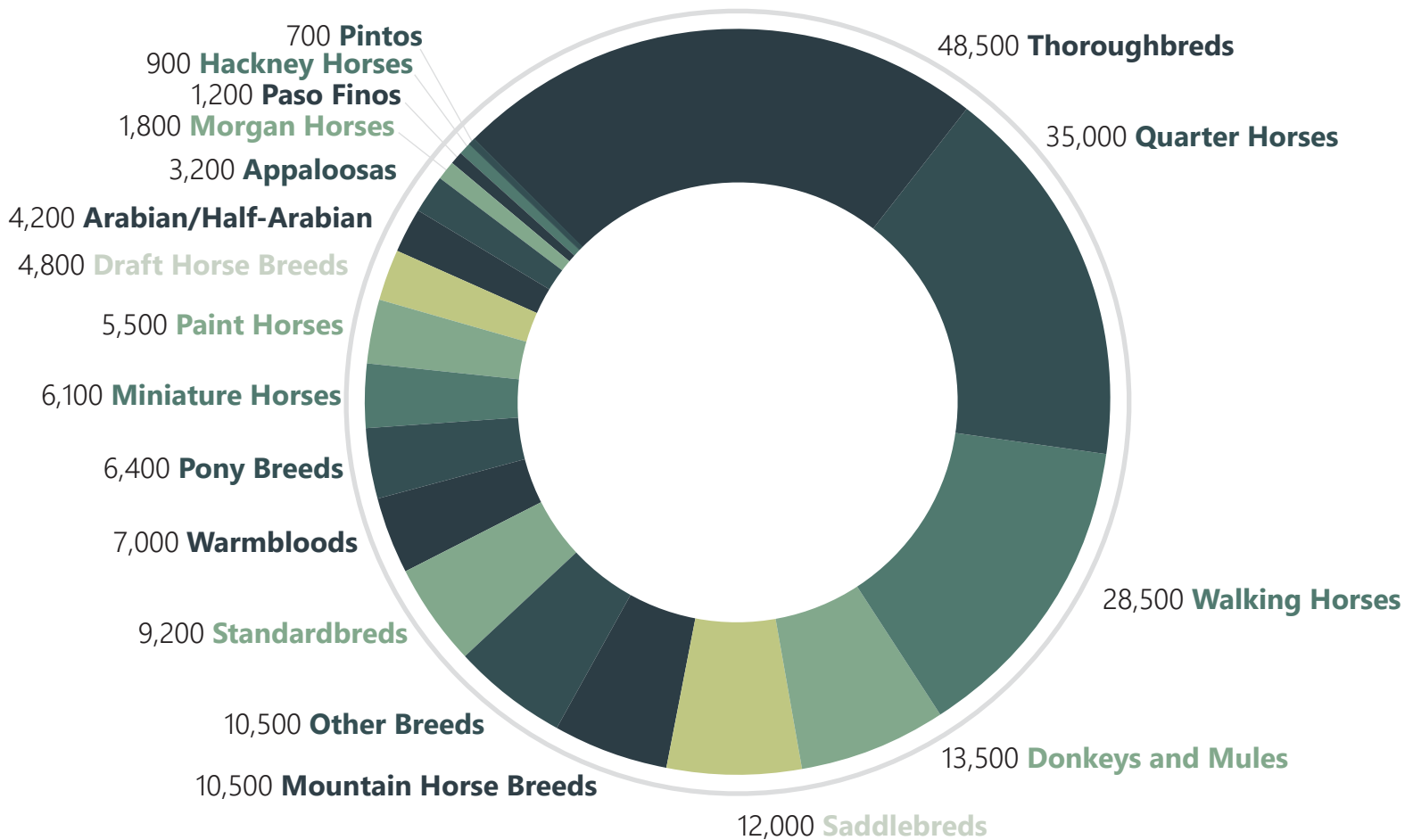
Kentucky Equine Inventory by Age



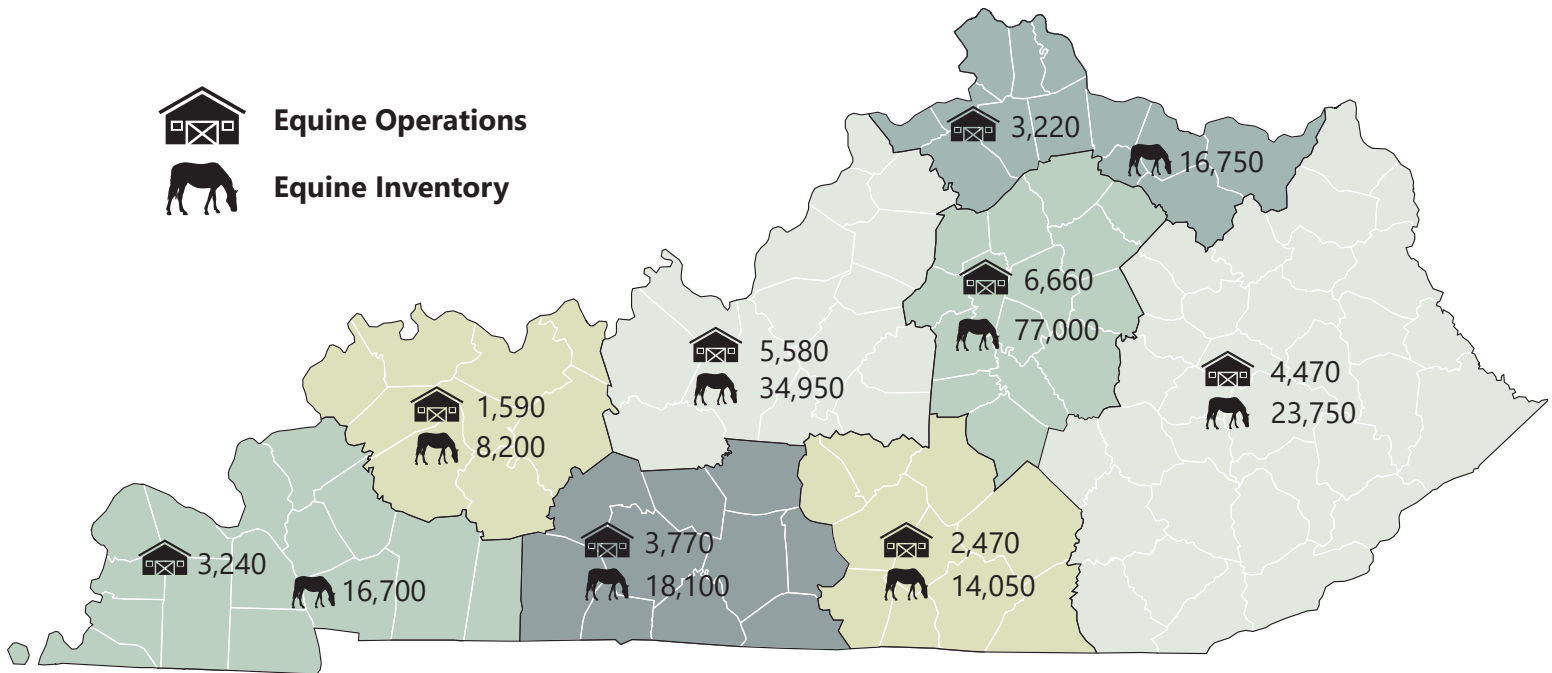
Over 45% of Kentucky’s equine are between 5 and 15 years of age, with nearly one-quarter (24.8%) being classified as “senior” (over the age of 15). About 20% of the state’s equine are young horses, categorized as 1 to 4 years old. Finally, about 10% of the state’s equine are foals and weanlings, or 0 – 12 months of age.

Kentucky Equine Inventory by Breed

As in 2012, Thoroughbreds (48,500) are the most prevalent breed in the state, followed by Quarter Horses (35,000), Walking Horses (28,500), Donkeys and Mules (13,500) and Saddlebreds (12,000). A complete listing of the estimated number of all breeds is provided in the table below.



Kentucky Equine Operation and Equine Distribution by Region



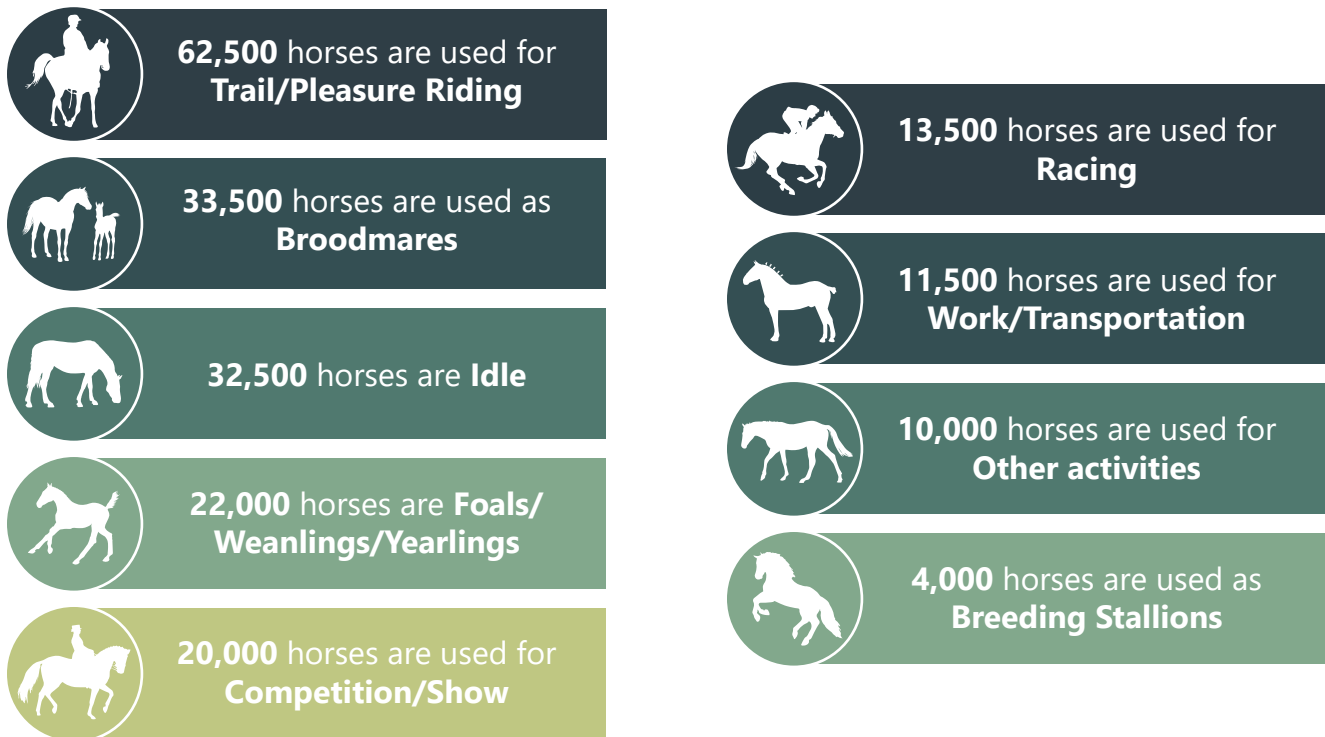
Kentucky Equine Inventory by Operation Type

Over 45% of Kentucky's equine reside on operations described as farms or ranches, while nearly 20% reside on properties where equine are kept for personal use. Breeding operations, which constitute just under 2% of Kentucky's equine operations, house about 18% of the state's equine. Just over 12% of Kentucky's equine reside on boarding/training/riding facilities.

Operation Type	Inventory	Total Inventory %
Farm/Ranch	97,000	46.3%
Personal Use	41,500	19.8%
Breeding	38,000	18.1%
Boarding/ Training/Riding	25,500	12.2%
Other	7,500	3.6%

Primary Uses of Kentucky's Equine

The most prevalent primary use of equine in Kentucky is for trail and pleasure riding (29.8%); the same result was found in 2012. In contrast to other states, Kentucky has a sizable equine population involved in the breeding industry, including broodmares (33,500); growing horses (foals, weanlings and yearlings) (22,000); and stallions (4,000) – in total 28.4% of Kentucky's equine population. More than 33,000 equine (16.0%) are used in competition (non-racing: 20,000; racing: 13,500). Another 32,500 equine (15.5%) are idle, retired or not working.

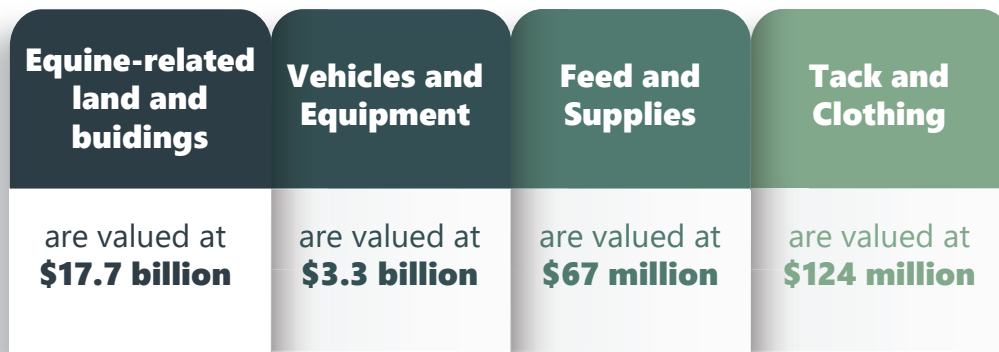


Value of Equine and Equine-Related Assets

The value of all horses, ponies, mules and donkeys on July 1, 2022, was \$6.5 billion. This results in an average value of more than \$31,000 per equine. The estimated total value for Thoroughbred horses was the highest (\$5.5 billion or \$113,814 per horse); followed by Standardbreds (\$190 million or \$20,652 per horse); Quarter Horses (\$180 million or \$5,143 per horse); American Saddlebreds (\$170 million or \$14,167 per horse); Warmbloods (\$136 million or \$19,429 per horse); Walking Horses (\$106 million or \$3,719 per horse); and Mountain Horse breeds (\$42 million or \$4,000 per horse). A complete listing of all estimated breed values can be found in the supplementary materials available online ([link](#)).

Many assets are required to support equine and equine-related activities. These assets include land; buildings like barns and arenas; vehicles, farm machinery and equipment; feed; farm supplies; and tack and clothing. The value of all equine-related assets was estimated at \$21.2 billion.

The total of all assets, including equine and equine-related assets, was estimated at \$27.7 billion.



Equine Operation Revenues and Expenses

Revenues

There are multiple ways equine operations generate revenue. Equine operations can receive income through sales of horses as well as through providing a variety of services. In Kentucky, operations may provide breeding-related services, which include stallion services, broodmare care and foaling of mares. Non-breeding services may include activities like boarding, lessons, training and transportation.

Income from sales of horses, ponies, mules and donkeys was nearly \$1.1 billion. Total income from equine-related services was \$990 million, with \$450 million originating from breeding services and \$540 million generated by non-breeding services. These figures suggest a dynamic industry that encompasses a broad range of activities, including breeding, preparing horses for the marketplace, recreational use and equine and human health endeavors, such as equine-assisted activities and therapies. Total equine-related income from sales and services for equine operations in 2022 was estimated to be almost \$2.1 billion.

Expenses

Total equine-related expenditures in Kentucky in 2022 amounted to \$1.6 billion. Capital expenditures were estimated to be \$535 million. This figure includes the purchase of real estate and equine and accounts for expenditures on improvements and equipment. Operating expenditures, excluding labor, include many items, such as board, feed, bedding, veterinarian and farrier services, supplies, maintenance and repair, insurance premiums, utilities and fuel, taxes, rent or lease fees, professional fees and payments, transportation, training fees and other expenses. In 2022, operation expenditures, excluding labor, totaled \$1.03 billion, with 82% of these operating expenses being spent in Kentucky.

The fact that 82 percent of these expenses are purchased in Kentucky should not be discounted, as the ramifications of these purchases are felt in more than just the industries traditionally affiliated with equine, like veterinary and farrier services. The funds spent in-state allow other Kentucky industries and businesses to flourish, like those related to construction, transportation, logging, tourism, hospitality, research, pharmaceuticals, crop farming and many more.

	Money Spent	% Spent in Kentucky
Maintenance/repair	\$155,000,000	87%
Feed	\$139,000,000	91%
Breeding Fees	\$127,000,000	82%
Vet/Health Fees	\$99,000,000	85%
Training Fees	\$88,000,000	56%
Boarding Fees	\$62,000,000	86%
Insurance Premiums	\$46,000,000	84%
Utilities/Fuel	\$46,000,000	83%
Miscellaneous	\$40,000,000	82%
Farrier Costs	\$39,000,000	90%
Taxes	\$37,000,000	87%
Shipping and Travel	\$36,000,000	74%
Professional Fees	\$31,000,000	71%
Tack and Grooming Supplies	\$31,000,000	86%
Bedding	\$29,000,000	90%
Rent/Lease	\$20,000,000	91%

Equine Operation Employment

Labor is a significant operational expense for any enterprise. The 2022 Kentucky Equine Survey measured employment, payroll expenses and non-wage benefits on equine operations. The figures reported include only those who work directly on an equine operation in some capacity; they do not include those who work with ancillary businesses and professionals that support equine operations, like veterinarians, farriers, therapists, facility maintenance, insurance, etc.

According to the results, there were a total of 12,500 workers reported on Kentucky's equine operations during 2022. This number includes 6,300 full-time and 6,200 part-time employees. The total payroll expenses amounted to \$322 million. Non-wage benefits, which include housing, utilities, meals, clothing, transportation, horse boarding and riding lessons, totaled an estimated \$30 million during the same period. Labor expenses were highest for breeding-related activities (35%), followed by racing (13%), recreation (11%) and competition (9%). Other activities accounted for another 32% of labor expenses.

Where are Kentucky's Equine Located?

Just as in 2012, the 2022 Equine Survey found a concentration of horses in the Bluegrass area of Central Kentucky, including Bourbon, Clark, Fayette, Jessamine, Madison, Scott and Woodford counties. These seven counties account for an estimated 61,100 horses, ponies, mules and donkeys, or 29.2% of the state's population. There is also a dense equine population along the corridor between Louisville and Lexington, with 17,800 equine in four counties (Franklin, Jefferson, Scott and Shelby).

However, there are other areas of the state with significant concentrations of equine:

- Shelby County has the fourth-highest number of equine with more than 5,900; 1,500 of these are American Saddlebreds.
- Jefferson County has 4,800 horses.
- The area just west of Louisville, including the six counties of Breckenridge, Grayson, Hardin, Hart, Larue and Mead, has a combined population of more than 12,700 horses.
- The seven counties just south of the Bluegrass area (Anderson, Boyle, Garrard, Lincoln, Marion, Mercer, and Washington) have a population of more than 13,600 horses.
- The South-Central Kentucky area near the Tennessee border has seven counties (Allen, Barren, Logan, Metcalfe, Monroe, Simpson and Warren) that have a combined population of more than 13,700 equine.
- The Northern Kentucky area (Boone, Bracken, Campbell, Grant, Kenton, Mason and Pendleton counties) represent more than 11,800 equine.
- Nearly 50% of the state's counties have 1,000 equine or more.

Full County Inventory List

County	Equine Operations	Equine Inventory	Value of Equine	County	Equine Operations	Equine Inventory	Value of Equine
Adair	360	3,000	\$14,115,000	Calloway	380	1,800	\$7,410,000
Allen	420	2,400	\$18,378,000	Campbell	310	1,600	\$12,565,000
Anderson	200	1,300	\$7,567,000	Carlisle	90	350	\$1,170,000
Ballard	90	350	\$2,358,000	Carroll	150	600	\$2,438,000
Barren	600	3,000	\$15,993,000	Carter	320	1,500	\$7,558,000
Bath	200	1,200	\$5,698,000	Casey	250	1,200	\$5,595,000
Bell	40	150	\$450,000	Christian	550	3,100	\$13,923,000
Boone	480	3,200	\$61,205,000	Clark	380	2,100	\$37,293,000
Bourbon	500	13,000	\$870,640,000	Clay	100	400	\$2,575,000
Boyd	160	800	\$4,710,000	Clinton	190	850	\$3,530,000
Boyle	310	1,800	\$20,208,000	Crittenden	180	750	\$3,210,000
Bracken	210	900	\$3,213,000	Cumberland	120	550	\$1,783,000
Breathitt	60	250	\$675,000	Daviess	270	1,200	\$4,343,000
Breckenridge	280	1,600	\$4,825,000	Edmonson	170	800	\$1,965,000
Bullitt	310	1,300	\$6,800,000	Elliott	120	600	\$1,990,000
Butler	150	600	\$2,053,000	Estill	130	750	\$3,545,000
Caldwell	190	1,200	\$5,062,000	Fayette	950	22,500	\$2,407,328,000

County	Equine Operations	Equine Inventory	Value of Equine	County	Equine Operations	Equine Inventory	Value of Equine
Fleming	390	2,100	\$8,903,000	Marshall	330	1,400	\$8,045,000
Floyd	80	500	\$2,145,000	Martin	D	D	D
Franklin	240	1,400	\$22,110,000	Mason	250	1,100	\$9,818,000
Fulton	30	100	\$320,000	Meade	300	1,500	\$10,748,000
Gallatin	50	250	\$1,160,000	Menifee	140	700	\$4,425,000
Garrard	300	1,400	\$10,788,000	Mercer	550	3,200	\$69,893,000
Grant	450	2,000	\$9,903,000	Metcalfe	280	1,300	\$5,713,000
Graves	400	2,000	\$8,880,000	Monroe	240	950	\$2,895,000
Grayson	450	2,200	\$6,523,000	Montgomery	230	1,500	\$10,583,000
Green	170	850	\$3,183,000	Morgan	330	1,800	\$5,583,000
Greenup	270	1,200	\$5,645,000	Muhlenberg	260	1,400	\$4,480,000
Hancock	120	550	\$2,005,000	Nelson	450	2,100	\$13,975,000
Hardin	500	3,100	\$29,430,000	Nicholas	200	1,500	\$9,625,000
Harlan	40	150	\$615,000	Ohio	240	900	\$4,400,000
Harrison	350	2,800	\$15,258,000	Oldham	400	3,800	\$196,218,000
Hart	650	3,000	\$19,735,000	Owen	160	800	\$4,653,000
Henderson	160	1,000	\$9,958,000	Owsley	80	600	\$2,158,000
Henry	320	2,100	\$28,363,000	Pendleton	300	1,800	\$9,033,000
Hickman	60	350	\$3,415,000	Perry	50	300	\$880,000
Hopkins	220	1,300	\$6,838,000	Pike	D	D	D
Jackson	210	1,100	\$4,208,000	Powell	100	650	\$1,813,000
Jefferson	550	4,800	\$122,885,000	Pulaski	550	2,800	\$14,260,000
Jessamine	450	4,500	\$308,060,000	Robertson	80	300	\$880,000
Johnson	110	450	\$2,545,000	Rockcastle	200	900	\$3,638,000
Kenton	190	1,200	\$5,968,000	Rowan	140	850	\$3,633,000
Knott	50	200	\$740,000	Russell	210	1,200	\$8,320,000
Knox	140	600	\$2,058,000	Scott	650	5,700	\$330,338,000
LaRue	240	1,300	\$5,223,000	Shelby	800	5,900	\$131,768,000
Laurel	300	1,600	\$6,195,000	Simpson	150	850	\$6,225,000
Lawrence	130	450	\$1,963,000	Spencer	210	1,000	\$4,803,000
Lee	90	600	\$3,575,000	Taylor	300	1,900	\$10,623,000
Leslie	D	150	\$623,000	Todd	270	1,300	\$9,553,000
Letcher	D	D	D	Trigg	220	1,300	\$7,010,000
Lewis	200	900	\$2,490,000	Trimble	170	850	\$5,708,000
Lincoln	480	2,500	\$13,753,000	Union	160	950	\$5,583,000
Livingston	170	950	\$3,653,000	Warren	830	3,700	\$23,363,000
Logan	280	1,500	\$6,770,000	Washington	300	1,700	\$13,240,000
Lyon	60	450	\$1,818,000	Wayne	260	1,400	\$4,188,000
McCracken	220	1,300	\$6,323,000	Webster	100	550	\$2,595,000
McCreary	60	300	\$1,043,000	Whitley	200	1,200	\$3,610,000
McLean	60	350	\$1,343,000	Wolfe	200	1,300	\$3,313,000
Madison	450	2,300	\$11,398,000	Woodford	650	11,000	\$1,279,968,000
Magoffin	150	800	\$2,248,000	Other	100	500	\$2,333,000
Marion	300	1,700	\$9,880,000				

*The inventory value represents the self-reported value of equine owned and boarded on operations in Kentucky. A "D" indicates that data were withheld to avoid disclosing data for individual operations. Estimates in these counties are combined and reported in the "Other" category.

Caring for Kentucky's Horses

A new objective to the 2022 study was to understand which equine health issues are most important to owners of horses, ponies, mules and donkeys. Survey participants were asked to select up to three equine issues (from a list of 12) that were most important to them. The top three equine health concerns were: caring for the senior equine (27.1%), musculoskeletal issues (22.4%) and digestive problems (17.4%).

	% of Respondents
Care of Senior Equine	27.1%
Musculoskeletal Issues	22.4%
Gut/Digestive Problems	17.4%
Parasites and Dewormer Resistance	13.4%
Laminitis	13.0%
Infectious Diseases	12.5%
Reproduction and Foal Care	7.1%
Eye Issues	4.7%
Metabolic Problems	4.2%
Other	3.0%
Neurologic Diseases	2.3%
Genetics	2.2%

A Decade of Change

Undoubtedly, Kentucky's equine industry has experienced significant changes in the past decade. From emerging from the Great Recession to navigating a global pandemic and natural disasters, all facets of the industry have had to adapt rapidly to a changing landscape. The challenges faced – and their outcomes -- are not unique to equine in the Commonwealth; nearly all production livestock in the state – and throughout the United States -- have been experiencing the same trends, for a multitude of reasons.

The number of equine operations in the state has declined 11.4%, which triggered corresponding declines in total operation acreage (18.6%) and equine-related activity acreage (15.9%). In addition, the number of acres being held in land preservation programs was down 3.9%. Total equine inventory declined 13.6%.

The decline in equine and equine operation numbers in Kentucky mirrors those found nationwide by the USDA Census of Agriculture. In 2012, the census reported 154,483 equine in Kentucky. In 2017, that number had dropped to 131,851, a decline of 14.6%. In 2022, the Census found 19,012

operations with horses and ponies and 4,343 operations with mules and donkeys. Even in 2017, the numbers in 2017 reflected a contraction: 16,290 operations with horses and ponies (a 14.3% decline) and 4,940 operations with mules and donkeys (a 13.7% increase). In addition, the contraction experienced in Kentucky's equine industry is being mirrored in beef cattle production across the nation, which is at its lowest level since 1962 (<https://agecon.ca.uky.edu/us-beef-cow-herd-lowest-level-1962>).

As a point of clarification, it is important to note that the discrepancy in counts of horses, ponies, donkeys and mules reported by the USDA Census of Ag and the 2022 Kentucky Equine Survey is based on how a "farm" (and thus the equine on it) is defined. The USDA defines a "farm" as a place that generates at least \$1,000 in cash receipts annually through the sale of products. While some equine operations fit this definition, neither boarding facilities nor residences where equine are kept for personal use qualify. As one might expect, this approach to estimating equine inventory misses a significant portion of the equine population; in Kentucky, the USDA Census of Agriculture estimates underestimate the number of horses by about 50%.

While non-trivial, there are advantages to be realized in the decline of equine and equine operations in Kentucky. In the 10 years since the last survey, equine breeders have become more conscientious about their pairings and the resulting progeny. There was a 67% decrease in "non-paid transfers" of equine since 2012. A "non-paid transfer" includes those horses that are given away, either to an individual, a rescue or an adoption agency.

Though there was an overall decline in the statewide equine population, 16 counties experienced growth in their equine populations.

- Ballard (up 117%)
- Butler (up 120%)
- Carlisle (up 117%)
- Carroll (up 150%)
- Christian (up 115%)
- Franklin (up 117%)
- Knott (up 200%)
- Lyon (up 113%)
- Marshall (up 108%)
- Mason (up 110%)
- Muhlenberg (up 108%)
- Nicholas (up 125%)
- Owen (up 133%)
- Rockcastle (up 113%)
- Simpson (up 106%)
- Trigg (up 108%)

While all breeds experienced a decline in number from 2012 to 2022, this average value of equine has increased, even after adjusting for inflation. This average value of equine increased for nearly all breeds, as well as in 82 of Kentucky's 120 counties. Please see the entire listing of value by breed and by county in the online supplementary materials.

An important trend for commercial equine operations is the significant increase in income and sales over the past 10 years. After adjusting for inflation, equine operations with commercial activities have seen income from breeding services increase by 170%, while income from non-breeding services increased by 165%. Additionally, the value of equine sold also increased by 170% in the past 10 years after adjusting for inflation. Please see the entire listing of value by breed and by county in the online supplementary materials.

Certainly, expenses have increased as well, but at a slightly lower rate than revenues. After adjusting for inflation, operating expenses (not including labor) were just slightly higher than in 2012, and capital expenditures were up 131%. However, labor expenses increased significantly, with payroll expenses increasing 132.3% in the last decade, and non-wage benefits increasing nearly 150%.

Even prior to the COVID-19 pandemic, equine operations across the state faced labor challenges. Like

other industries, these challenges have been exacerbated following the pandemic. Labor on equine operations declined by 3.8% from 2012 to 2022, but an interesting change in the composition of workers took place. The number of full-time workers on equine operations increased by 13% (from 5,600 to 6,300), while the number of part-time workers declined by 16% (7,400 to 6,200).

Summary

Many positives can be extrapolated from the 2022 Kentucky Equine Survey results. Major strengths include the increase in the value of equine sold and the increase in income from sales and services, combined with the fact that revenues increased more than expenses. In addition, a smaller supply of equine, as well as the decline in non-paid transfers, suggests that the risk of horses becoming unwanted and at risk has lessened.

The decline in the number of equine and equine operations in Kentucky is being experienced by all facets of animal agriculture across the nation. Certainly, the reasons for these declines are multifactorial. There is an opportunity to conduct research across the broad agricultural industry to explore the driving factors of these declines.

Understanding how many horses, ponies, mules and donkeys are in Kentucky, as well as where they reside, is critical to ensuring the health of these animals. This information can help drive policy and incentives for veterinary services, research programs and educational outreach.

Finally, and most importantly, this report reinforces the economic significance of equine agriculture, which remains vibrant and strong as a signature industry in Kentucky, generating investment, tourism, recreation and positive symbolism for the state.

This report has explained the state-level results of the 2022 Kentucky Equine Survey. Detailed, county-level data have been compiled into fact sheets to provide additional information for local industry participants and decision makers. These materials can be found in the online supplementary materials.

Questions or concerns? Please email equine@uky.edu

Supplementary Materials

This full report, as well as a number of supplementary materials referenced in the report, are available on the *2022 Kentucky Equine Survey* website: <http://equine.ca.uky.edu/kyequinesurvey>

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