

# 2022

## Kentucky Equine Survey

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



*Released July 12, 2023*

Ten years ago, the University of Kentucky and the Kentucky Horse Council, two organizations devoted to protecting and advancing the health of equines and equine agriculture, joined forces to conduct the *2012 Kentucky Equine Survey*, a comprehensive, statewide survey of all breeds of horses, ponies, donkeys and mules. A lot can happen in a decade, and regular measurement is vital to monitoring the state of Kentucky's equine industry. Fast forward to 2022: UK and the KHC, with support from many equine-affiliated organizations and spearheaded by the Kentucky Thoroughbred Association, have again partnered to measure and analyze core population, demographic, and economic data in the state's signature equine industry. In addition to this in-

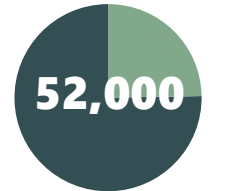
formation, equine owners were asked for the first time about the age of their equine as well as their most-pressing equine health concerns.

The *2022 Kentucky Equine Survey* is an essential component to keeping our equine agriculture community healthy. Its results can help identify areas of potential job creation and income expansion, both within the equine industry and in those businesses that support equine industry activities. Highlights of the 2022 Kentucky Equine Survey are presented in this Executive Summary and the changes that have taken place since 2012 are demonstrated. For the full report and access to all supplementary material, please visit <https://equine.ca.uky.edu/kyequinesurvey>.

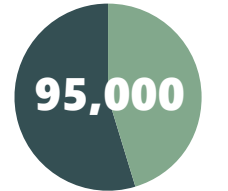
## Highlights of the 2022 Kentucky Equine Survey

- An estimated 209,500 equine live in Kentucky.
- There are approximately 31,000 equine operations in Kentucky.
- About 900,000 acres are devoted to equine agriculture and equine-related activities in the Commonwealth.
- The total value of the state's equine and equine-related assets is estimated at \$27.7 billion.
- The total of all equine-related sales and income for equine operations in Kentucky in 2021 was about \$2.1 billion.
- Equine-related expenditures by equine operations in 2021 totaled about \$1.6 billion; 82% of operating expenses are spent in Kentucky.

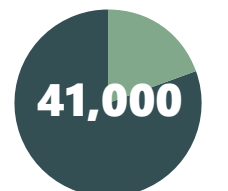
## Inventory by Age



0 - 12 months old



1 - 4 years old



5 - 15 years old

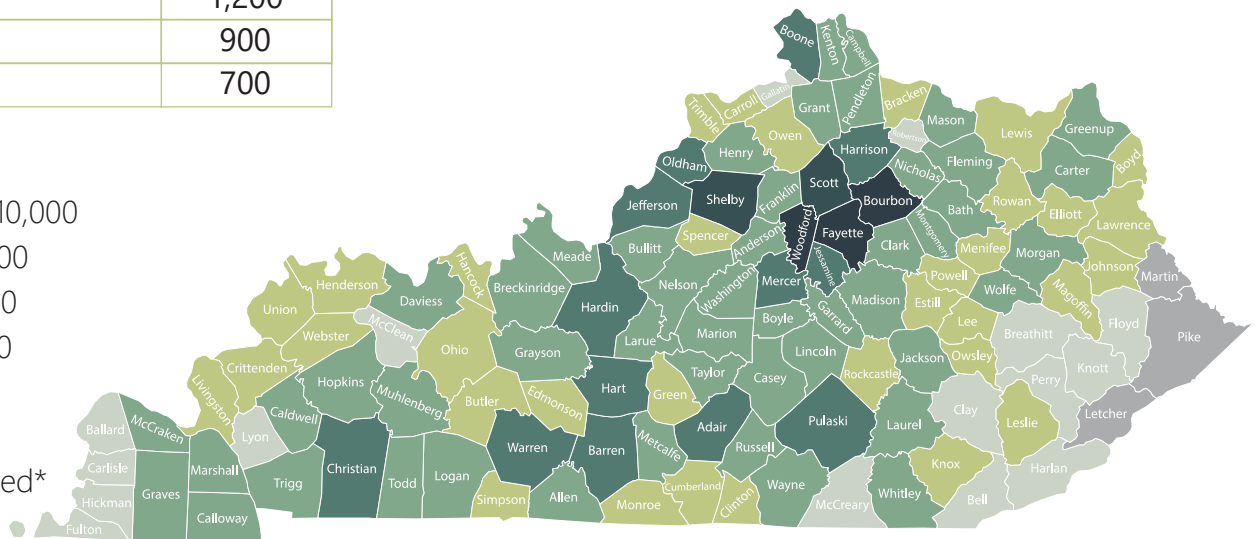
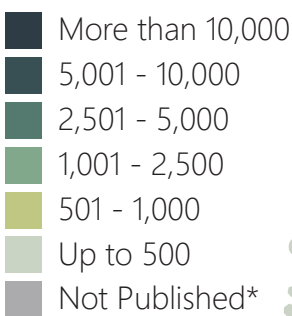


> 15 years old

| Inventory of Breeds        |        |
|----------------------------|--------|
| Thoroughbreds              | 48,500 |
| Quarter Horses             | 35,000 |
| Walking Horses             | 28,500 |
| Donkeys and Mules          | 13,500 |
| Saddlebreds                | 12,000 |
| Mountain Horse Breeds      | 10,500 |
| Other Breeds               | 10,500 |
| Standardbreds              | 9,200  |
| Warmbloods                 | 7,000  |
| Pony Breeds                | 6,400  |
| Miniature Horses           | 6,100  |
| Paints                     | 5,500  |
| Draft Horses               | 4,800  |
| Arabians and Half-Arabians | 4,200  |
| Appaloosas                 | 3,200  |
| Morgans                    | 1,800  |
| Paso Finos                 | 1,200  |
| Hackney Ponies             | 900    |
| Pintos                     | 700    |

| Inventory of Primary Use/Purpose |        |
|----------------------------------|--------|
| Trail/Pleasure Riding            | 62,500 |
| Broodmare                        | 33,500 |
| Idle                             | 32,500 |
| Foal/Weanling/Yearling           | 22,000 |
| Competition/Show                 | 20,000 |
| Racing                           | 13,500 |
| Work/Transportation              | 11,500 |
| Other Activities                 | 10,000 |
| Breeding Stallion                | 4,000  |

| Kentucky Equine Inventory by Operation Type |           |                       |
|---------------------------------------------|-----------|-----------------------|
| Operation Type                              | Inventory | % of Equine 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%                  |



| <b>Equine Operation Income</b> ( <i>% of 2012 value, adjusted for inflation</i> ) |                               |
|-----------------------------------------------------------------------------------|-------------------------------|
| Income from sales of horses, ponies, mules and donkeys                            | \$1,100,000,000 (170%)        |
| Income from equine-related services                                               | \$990,000,000 (167%)          |
| <i>Breeding services</i>                                                          | \$450,000,000 (170%)          |
| <i>Non-breeding services</i>                                                      | \$540,000,000 (165%)          |
| <b>Total equine-related income from sales and services</b>                        | <b>\$2,100,000,000 (169%)</b> |

| <b>Value of Equine and Equine-related Assets on July 1, 2022</b><br>( <i>% of 2012 value, adjusted for inflation</i> ) |                               |
|------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| Value of all horses, ponies, mules and donkeys                                                                         | \$6,500,000,000 (81%)         |
| Value of equine-related land, fencing and buildings                                                                    | \$17,700,000,000 (99%)        |
| Value of equine-related vehicles and equipment                                                                         | \$3,300,000,000 (86%)         |
| Value of tack and equestrian clothing                                                                                  | \$124,000,000 (85%)           |
| Value of feed and supplies                                                                                             | \$67,000,000 (90%)            |
| <b>Value of all equine-related assets, including the value of equine</b>                                               | <b>\$27,700,000,000 (93%)</b> |

### Equine Operation Expenses - Operating, Excluding Labor

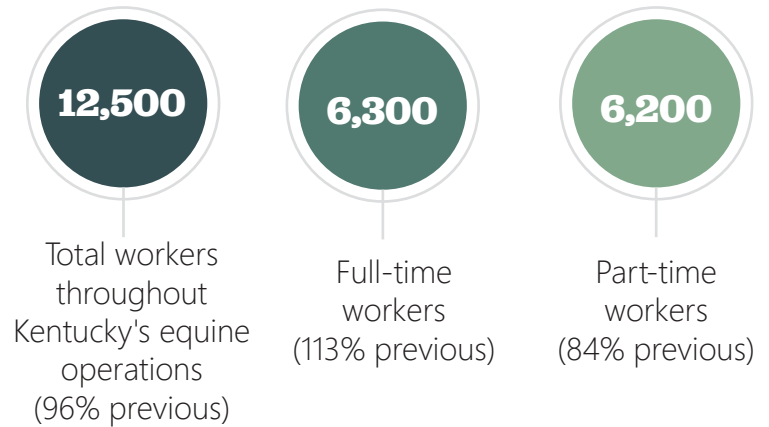
| <b>Category</b>                | <b>Expense</b><br>( <i>% of 2012 value, adjusted for inflation</i> ) | <b>% Spent in KY</b> |
|--------------------------------|----------------------------------------------------------------------|----------------------|
| Maintenance/repair             | \$155,000,000 (86%)                                                  | 87%                  |
| Feed                           | \$139,000,000 (94%)                                                  | 91%                  |
| Breeding fees                  | \$127,00,000 (124%)                                                  | 82%                  |
| Veterinarian/health fees       | \$99,000,000 (116%)                                                  | 85%                  |
| Training fees                  | \$88,000,000 (106%)                                                  | 56%                  |
| Boarding fees paid to others   | \$62,000,000 (107%)                                                  | 86%                  |
| Insurance premiums             | \$46,000,000 (93%)                                                   | 84%                  |
| Utilities/fuel                 | \$46,000,000 (100%)                                                  | 83%                  |
| Miscellaneous                  | \$40,000,000 (128%)                                                  | 82%                  |
| Farrier costs                  | \$39,000,000 (95%)                                                   | 90%                  |
| Taxes                          | \$37,000,000 (90%)                                                   | 87%                  |
| Shipping and travel            | \$36,000,000 (88%)                                                   | 74%                  |
| Professional fees and payments | \$31,000,000 (103%)                                                  | 71%                  |
| Tack and grooming supplies     | \$31,000,000 (95%)                                                   | 86%                  |
| Bedding                        | \$29,000,000 (115%)                                                  | 90%                  |
| Rent/lease                     | \$20,000,000 (119%)                                                  | 91%                  |
| <b>Total</b>                   | <b>\$1,025,000,000</b>                                               | <b>82%</b>           |

| <b>Equine Operation Expenses - Capital</b> ( <i>% of 2012 value, adjusted for inflation</i> ) |                             |
|-----------------------------------------------------------------------------------------------|-----------------------------|
| Purchase of equine                                                                            | \$299,000,000 (134%)        |
| Capital improvements                                                                          | \$142,000,000 (144%)        |
| Equipment purchases                                                                           | \$94,00,000 (110%)          |
| <b>Total capital expenses</b>                                                                 | <b>\$535,000,000 (131%)</b> |

## Labor on Equine Operations

Equine operations serve as the nucleus of Kentucky's equine economic cluster; the activities that take place on these operations are often dependent on workforce availability. While this study estimates labor on equine operations only, employment effects extend far beyond the initial equine operations to the ancillary businesses that support the equine industry.

| Wage and Non-wage Benefits on Equine Operations<br>(% of 2012 value, adjusted for inflation) |               |        |
|----------------------------------------------------------------------------------------------|---------------|--------|
| Payroll expenses                                                                             | \$322,000,000 | (132%) |
| Non-wage benefits                                                                            | \$30,000,000  | (149%) |



## Caring for Kentucky's Horses

A new objective for the 2022 study was to understand which equine health issues are most important to owners of Kentucky's equine. Participants' responses can help guide future research and educational efforts.

| Health Issue                          | % of Respondents |
|---------------------------------------|------------------|
| Care for senior equine                | 27.1%            |
| Musculoskeletal issues                | 22.4%            |
| Gut/digestive problems                | 17.4%            |
| Parasites and resistance to dewormers | 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%             |

## Summary - Perspectives Over A Decade

Although the number of equine and equine operations declined slightly over the past decade, a trend also observed in other animal agriculture sectors, there are many reasons for optimism. These include an increase in the value of equine sold and an increase in income from sales and services, combined with the fact that revenues increased more than expenses. A smaller supply of equine, coupled with the decline in non-paid transfers, suggests that the potential for horses to become unwanted and at risk has lessened. 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.