Equine Priority Challenges & Opportunities

The New York Farm Viability Institute, Inc. is a farmer-led non-profit organization dedicated to strengthening agriculture in New York State by helping individual agricultural producers succeed. While each farming enterprise faces its own challenges, some issues are common to many producers in a given production sector or industry segment. NYFVI seeks to identify priority issues of industry-wide scope that can be addressed either with resources at the Institute’s disposal, or through the efforts of collaborating organizations.

NYFVI, along with the Saratoga County CCE Equine Program, organized an effort in winter 2009 to identify barriers to success and profitability for the equine industry in New York State. Several producer and agri-service focus groups identified intermediate-term Industry threats and opportunities, along with potential production and business management research and education that could make a difference to enterprise success.

Focus group participants and other industry leaders subsequently rated these challenges, opportunities, and research and education needs as “low”, “medium” or “high” priority. This yielded a composite score for all the issues on a scale of 100 (lowest possible score) to 300 (highest possible score). A score of 300 indicates that every person who rated the item gave it a “high” priority rating. The lowest possible score is 100, meaning that every individual gave that item a “low” relative priority rating. The first number in each row of the following list is the composite ranking score across 74 participants (including 58 farmers) who rated the items.

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Score</th>
<th>Challenges</th>
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<tbody>
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<td></td>
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<td>259 Insurance and liability protection (i.e. the lack of any inherent risk legislation to cover riding, lessons, or training, lack of client understanding, etc.) – no liability protection as an industry.</td>
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<td>258</td>
<td>Increased cost of inputs (electric, fuel, shavings, repairs, feed, health care)</td>
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<td>250</td>
<td>Lack of understanding the extent and economic impact of the equine industry in New York State.</td>
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<td>246</td>
<td>Legislative representatives and policy makers that do not understand or care about agriculture and do not consult agricultural experts.</td>
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<td>245</td>
<td>Disposition of unwanted horses.</td>
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Perception of equine industry as recreational and not a production ag business, and thus the lack of eligibility for FSA programs and funding.

Keeping horses classified as "livestock" within Ag & Markets.

Horse slaughter regulations.

Taxes (property, school, municipal) increasing.

Lack of representation of horse industry in public policy development.

Loss of agricultural land to development and urban sprawl.

Economic downturn and the reluctance to investing in horses, lessons, and training, and thereby forcing farms out of business.

Lack of knowledge and training on the part of local planning, zoning, and supervisory boards, inspectors and enforcement officials. Board members and local code enforcers don't understand agricultural code – confusion between state/local/Ag & Markets code. No one knows which codes supersede which codes creating uncertainty and an un-level playing field for farms.

Development pressures increasing the cost of land.

Lack of knowledge and horsemanship among horse owners.

Lack of knowledge of grant availability and how to apply for the funding.

Shifting agricultural land use away from hay production (e.g., growing biomass, corn or soybeans).

Availability and cost of health insurance.

The "Performance Horse" not recognized as a legitimate business option within the equine industry as compared to the racing industry.

Labor regulations and Workers’ Compensation in New York.

The lack of capital and financing options for horse farmers.

Inability to pay employees a competitive wage.

Diversity and fragmentation of the equine industry.

Diminishing quality educational opportunities (e.g., 4-H, FFA, SUNY programs).

Equine businesses charged more than other ag enterprises for the same services (feed, medicine, equipment)

Indiscriminate breeding.

Availability of good/qualified labor – declining pool of workers.
DOT regulations: inconsistently understood and enforced. Legal issues relating to trucking, trailer hauling, interstate travel.

Disposal of dead animals.

Horse owners not accurately reporting census data leading to incorrect (low) estimates of the industry's size and value.

Neighbor relations, public perception and public complaints and the lack of understanding of agriculture.

Lack of available quality venues for horse events.

Maintaining customer base and difficulty in attracting new clients.

Lack of large animal veterinary coverage and vet techs.

Competition with green energy industry – effect on hay and shavings in terms of biomass for energy.

Reluctance to pass along rising costs to clients (clients still being able to afford a horse and all that goes with it).

Breeders' awards and incentives programs in New York State are not keeping pace with those in neighboring states.

Cost fluctuation and the inability to predict or prepare for shifting costs.

Need for immigration reform.

Lack of minimum standards and requirements for boarding facilities.

Attracting youth to equine careers.

Lack of minimum standards, requirements and certification for teaching lessons and training.

Availability and accessibility of supplies and materials (feed, bedding).

Public perception of horse owners as an elite, wealthy or snobbish group.

No farmer to farmer network for equine farmers.

State contract bidding process inhibits supporting local economy.

Use of exclusive land leases that limit availability and accessibility to trails, e.g. land leases to hunting clubs.

Manure regulations and CAFO regulations.

Impending enforcement of existing pesticide application regulations.

Inability to find Custom Services to put up hay and other crops.
Ag & Markets regulations that prevent non-boarders from participating in a show at a farm.

Broadband internet connections (e.g., dsl vs. satellite or dial-up).

Storm water management requirements on agricultural construction sites.

Knowledge and understanding of Hispanic workforce issues and available services, and the lack of social opportunities for Hispanics employees.

Tolls related to travel and transporting horses.

Opportunities

Positive public perception of horses and horse farming.

Farm Bureau recognition that the equine industry is a viable agricultural endeavor.

Size and value of the industry. Equine owners add significantly to the local economy by supporting multiple businesses.

Agricultural incentives (i.e., wind energy, property tax exemption, ag assessment reduction, farmer school tax refund).

Offering a physical, healthy, outdoor exercise and fitness activity for people, especially children.

Promoting and publicizing all aspects of the equine industry (e.g., promoting equine events, printing show results and other equine events in local papers, show the economic value of the industry to communities).

Local government support for the equine industry.

High quality equine professionals, managers and educators as resources for the New York equine industry.

More equine people getting active on town boards, planning committees, and policy making.

Industry coming together over common issues and concerns.

Horse events (i.e., top quality shows, races and educational conferences) attract people and stimulate local economies.

Horses contribute to open space by providing an alternative agricultural use.

Passion of equine people and willing volunteers create the strength of Cornell Cooperative Extension, NYS Farm Bureau, equine shows, as well as breed and other equine organizations.

The opportunity to create incentives for land owners to allow access to trails.
Potential for growth in the equine industry when the NY economy rebounds.

Equine recreational resources in NYS – state facilities, trails, tourist attractions.

Colleges increasingly offering equine scholarships and higher education opportunities. Increased mentoring and internship opportunities for young people looking to enter the equine industry.

The equine industry’s role in agri-tourism.

Solid core of support infrastructure (e.g., veterinarians, farriers).

Nationally and internationally known equine events: racing, shows, etc.

Animals should/could be productive even in death – (slaughter – meat, leather, other byproducts, medical research).

Aging horse owners (baby boomers) with economic means and leisure time to be involved with horses.

Therapeutic riding and equine facilitated therapeutic programs.

Opportunities to get involved with horses through leasing, borrowing, and 4-H activities, with a minimal investment.

Diversity of the equine industry.

Large number of part-time farmers resulting in an increase in hay availability.

Personal development opportunities from the formation of teams participating in sports around horses.

Land is readily available for the expansion of the equine industry.

Adequate labor available for trainers (i.e., cleaning stalls) and veterinarians (i.e., vet techs & assistants).

Proximity to a large population for a client base and with the economic downturn people are searching for local equine opportunities.

Land values in New York State haven’t dramatically decreased in comparison to other parts of the country.

Internet access, web, connectivity within the industry.

Perception of horse ownership associated with upper social class and wealth.

“Saratoga Brand” boosts the image and economy of the equine industry.

Strong New York State transportation infrastructure.

Location of tracks, consistent year round racing, breeder incentives, betting revenues.
Production Management Changes

238 Prevention of easily transmittable equine diseases (e.g., EPM, West Nile Virus, Potomac Horse Fever, Strangles).

235 Creating a single, authoritative “go to” web site/organization/clearinghouse for equine information.

234 Alternative energy sources and energy management for equine farms (e.g., wind, solar, biomass, etc.)

226 Pasture management (e.g., increasing yield, rotational grazing, hay production, nutritional testing, improving nutritional value of pasture and hay)

219 Equine nutrition education (e.g., legumes, grasses, pasture, grains, ration balancing, purchasing quality hay).

218 Educating farm owners on horsemanship skills, health, facilities management, nutrition, etc.

218 Equine facility management (e.g., ventilation and design of facilities, health quality assurance issues, structural management, fencing design)

218 Public awareness of agri-tourism

209 Energy recovery options from manure/bedding.

209 Responsible breeding education for improving stock quality.

208 Development of standards for basic horse care, training, lessons, appraising, etc.

208 Vaccination programs – long term health effects and schedules (e.g., titers, cost effectiveness, alternatives to vaccinations-measures of efficacy).

204 Knowing what best management practices are for equine producers (e.g., new equine people, new ideas for “old” equine people).

200 Creation of regional sites for disposal of deceased horses.

199 Alternatives for production cost controls (e.g., more efficient stall cleaning, other labor and cost saving practices)

199 Workforce development and training (e.g., hands-on skills, foal watch, horse handling and safety).

199 Production of “How to Brochures” (e.g., build a run-in shed, set up a pasture system, vaccinate).

197 Ensure that the latest developments in equine production practices are added to Cornell website.
Survey the number of animals in the equine industry.

Long-term studies of impact/value of equine therapy on behavior modification and life choices of troubled youth

More networking opportunities, discussion groups and training venues/opportunities.

Mobile farm-to-farm manure collection and shipping system.

Efficient methods for building, utilizing and managing indoor arenas (e.g., heating, lighting, footing, ventilation).

Equine rehabilitation facilities—education about options (e.g., costs, conditioning/re-training, performance horse management).

How to grow a good weanling/yearling – standards for young stock growth and development

Promotion of and broader participation in New York State Horse Health Assurance Program.

Manure nutrient analysis and balancing manure and fertilizer field application.

Education about keeping and using health, reproduction and feeding records.

Research into methods of quick, easy forage testing.

Pesticide application training.

**Business Management Changes**

Determination of the equine industry’s value to the New York State economy.

Educating producers about grant opportunities, tax exemptions and incentives, and how to apply for them.

Passage of inherent risk legislation in NYS.

Marketing/promoting/branding equine businesses to clientele, community leaders, policy makers.

Liability, risk and insurance analysis and management.

Education of inherent risk with equine activities and distribution of release/advisement forms.

Communicating positive stories to the media through press releases, developing relationships with reporters and developing the skills to effectively manage an interview.

Having equine activities considered as agricultural events vs. carnivals for permitting, approvals, permits, etc.
Equine industry promotion/marketing, inclusive of all breeds and industry sectors, and tied in with existing promotion campaigns like “I Love NY”.

Simplified paperwork and affordable benefits, like health insurance, retirement planning, etc.

Opportunities for group advertising and promotions for horse events, camps, and shows.

Promoting/developing equine industry in tourism to promote/attract people from the city; collaborating with other Ag commodities in developing agri-tourism opportunities.

Education in zoning/planning needs and working with local government (i.e., town to town zoning inconsistencies and lack of knowledge on the part of policy makers).

Cooperative Extension – need more extension educators with equine responsibilities to support adult equine extension education work.

Research or education focused in finance, cash flow, cost control, break-even analysis, taxes, profit/loss, and simple accounting procedures to give farmers the tools they need to manage their business.

Creating and promoting business owner cooperatives for bulk purchasing. Many farmers purchasing jointly in order to reduce the expense load on each individual farmer (e.g., equipment, bedding, feed, medical supplies).

Education on business planning and business plan development.

Knowing and understanding cost of production.

Development and sharing of statewide and regional equine business directories.

The basics of business management and how to adapt to changes in the market spurred on by factors such as a poor economy, rising costs, the ban of equine slaughter in the US and other issues that might affect an equine business.

Farm business marketing education and increased use of on-line marketing techniques for individual farm businesses (e.g., websites, e-mail, blogs, Facebook, etc.).

Master Horseman program – similar to Cornell’s Master Gardener Program

Cooperative insurance pools and cooperative arrangement for human resource administration, employee training, benefits administration and payroll.

Measuring the equine economic stimulation and multiples in a community.

Educational use of internet and new media programs for small businesses (e.g., podcasts, webinars, twitter).

Education on “Scale” economics – small farm management and sizing assets to the size of the business.

Education about sales tax and the need to track, report and submit sales tax collections to New York State (e.g., farriers, boarding costs, etc. are all taxable revenues).
Education on the availability and use of equine business management software.

Develop discussion groups or tours by farm owners to other farms for the purposes of networking, business analysis and learning.

Customer retention.

Education on basic financial record keeping.

Education on how to hire, maintain, and manage quality employees.

Developing industry standards for different types of equine operations.

Training, development, and retention of key employees.

Cooperative arrangements between farms close in distance for employee sharing.

Economics of renting and leasing pasture and land vs. purchasing.

Understanding labor regulations.

Networking outside traditional equine industries (e.g., unions, senior centers) for labor requirements (e.g., unemployed construction worker or an experienced retired worker "volunteering" to work on a horse farm).

Profit centers and vertically integrated business models.

Education about positive Animal Identification Program.