

Maryland Horse Industry Strategic Plan

Steering Committee Meeting #2 – Meeting Notes

January 7, 2026, 10:00 a.m - 2:00 p.m.

Annapolis, Maryland

The following individuals were in attendance, representing stakeholder organizations or horse industry interests: Billy Boniface – **Breeding, Farm, Agriculture, and Land Use**, Trish Brown – **Maryland Department of Natural Resources**, Amy Burk, PhD – **Academic Representative**, Sheila Curry – **Economic Development Representative**, Michelle Jennings – **At Large**, Bill Knauf – **Thoroughbred**, Alexandria Liu – **Office of the Secretary of State**, Connie Sawyer – **Sport, Competition, and Recreation Representative**, Judy Smith – **Office of the Secretary of Commerce**, Jennifer Trout, DVM – **Department of Agriculture**, Laura Lane-Unsworth – **Therapeutic, Aftercare, and Equine-Assisted Services Representative**, Lisa Watts – **Standardbred**

Also in attendance were Anne Litz, Executive Director, Maryland Horse Industry Board, Chris Merz, Executive Director, Maryland Racing Commission, and Preston Bryant, McGuireWoods Consulting LLC

Purpose of the Meeting

The second meeting of the Maryland Horse Industry Strategic Plan initiative focused on economic development principles, and communication and collaboration with the broader Maryland horse industry. Discussion was guided by stakeholders through the third party leadership of McGuireWoods Consulting LLC. The objective remains the development of a unified, forward-looking strategic plan that positions Maryland's horse industry, including breeding, training, sport horse, competition, racing, recreational riding, therapeutic horsemanship, lesson stables, and ancillary businesses as a sustainable and growing economic driver for the State.

The second half of the meeting consisted of communication and collaboration across the Maryland horse ecosystem. Communication was identified as central to both industry and public trust. While Maryland benefits from strong institutional relationships, participants agreed the industry lacks a clear, shared narrative explaining its value to residents, policymakers, and external stakeholders. The Industry needs a proactive, unified messaging essential to public understanding, funding decisions, and the industry's social license to operate.

#1 Economic Development

Key Themes and Insights

The Steering Committee reaffirmed that Maryland's horse industry functions as a single, interconnected economic ecosystem rather than a collection of isolated disciplines. Participants emphasized that while individual sectors— sport horses, breeding, recreation, licensed stables, 4H, interscholastic teams, therapeutic, horse welfare, competition, racing, and allied

industries—often operate independently, their economic success is deeply interdependent. When discussed in fragmented terms, the industry’s true scale and value are diminished in statewide economic development conversations.

The horse industry was described as:

- A foundational agricultural activity rooted in land stewardship, farming, and rural economies;
- A competitive sports and events industry that attracts national and international participants;
- A tourism and hospitality driver that brings significant out-of-state dollars into Maryland communities;
- A workforce generator supporting jobs across rural, suburban, and urban regions.

Participants stressed that economic development strategies must intentionally reflect this breadth. Growth in one segment—such as major events, breeding operations, or lesson barns—supports workforce pipelines, tourism activity, and long-term land preservation across the entire ecosystem. A unified framing is therefore essential to ensuring that public and private investment produces lasting, statewide benefit.

Existing Momentum and Strengths

The discussion highlighted substantial existing momentum within Maryland’s horse industry:

- **Diverse Economic Footprint:** The industry supports a wide range of employment, including farm workers, trainers, veterinarians, farriers, instructors, feed and bedding suppliers, equipment dealers, transportation providers, hospitality workers, and professional services. This breadth reinforces the industry’s role as an economic stabilizer in many communities.
- **Events and Tourism Impact:** Horse shows, races, and competitions consistently generate hotel stays, dining activity, fuel purchases, and retail spending. While these benefits are often recognized locally, participants noted that they are not consistently documented or leveraged at the state level.
- **Established Flagship Assets:** Facilities such as Fair Hill, Prince George’s Equestrian Center, Rosecroft, and the Maryland Horse Library serve as anchors for regional and statewide economic activity. These assets support competition, education, youth programming, and tourism, extending their impact far beyond individual events.
- **Institutional and Educational Strength:** The University of Maryland’s Animal Science program and veterinary pipeline were cited as critical long-term assets supporting workforce development, research, and innovation. Other areas of educational growth are lesson barns, 4H, Interscholastic programs, pony club, etc.

- **Growing Cross-Sector Awareness:** Participants noted increasing recognition that sport horse, competition, breeding, racing, recreational sectors are stronger when they support each other. Success in one area strengthens participation, workforce, and public engagement across the industry as a whole. The health and welfare of horses across the entire horse ecosystem was noted as a uniting factor.

Pain Points and Challenges

Despite these strengths, the Steering Committee identified several persistent challenges:

- **Event Sustainability:** While host communities benefit economically from horse events, the events themselves often operate on thin margins and lack mechanisms for reinvestment. Without sustainable funding models, there is a risk that events will decline or relocate, taking their economic impact with them.
- **Infrastructure Gaps:** Many facilities rely heavily on temporary or outdated infrastructure, increasing operational costs and limiting growth. Participants emphasized that reliance on temporary solutions ultimately costs more over time and constrains the ability to attract larger or higher-profile events.
- **Access to Support:** Lesson barns, private facilities, and grassroots operations, critical entry points for youth participation and workforce development, often struggle to access financing, grants, or technical assistance. Larger venues and events struggle to support themselves through ticket sales and sponsorships.
- **Lack of Central Leadership:** There is no clearly defined entity responsible for coordinating a statewide horse industry economic development strategy across agencies, regions, and disciplines.

Pathways Forward and Strategic Planning

Participants identified several strategic pathways to strengthen economic development outcomes:

- **Unified Economic Framing:** Present the horse industry as a single sector intersecting agriculture, tourism, workforce development, education, health, and land use.
- **Reinvestment Models:** Explore event-impact or performance-based grant programs that return a portion of documented economic benefit back into events and facilities.
- **Infrastructure Prioritization:** Develop coordinated capital needs assessments and phased investment plans for key facilities.
- **Cross-Agency Coordination:** Strengthen collaboration among Department of Labor, MHIB, Commerce, Tourism, DNR, counties, industry stakeholders and private partners to align funding opportunities and policy tools.
- **Defined Coordination Role:** A need for an entity to coordinate and convene to support advocacy while exploring broader cross-agency economic development structures.

Participants emphasized that economic development success depends on treating Maryland's horse industry as an integrated system in which investments in infrastructure, workforce, and events generate shared benefits.

#2 Communication and Collaboration

Key Themes and Insights

The Steering Committee identified communication and collaboration as foundational to both economic development and public trust. While Maryland benefits from strong institutional relationships, participants agreed that the industry lacks a clear, shared narrative explaining its value to residents, policymakers, and external stakeholders.

Communication was described as both a strategic tool and a responsibility. Proactive, unified messaging was viewed as essential to strengthening public understanding, supporting funding decisions, and maintaining the industry's social license to operate.

Existing Momentum and Strengths

- **Maryland Horse Industry Board:** MHIB's placement within the Department of Agriculture provides credibility, access to state leadership, and a trusted platform for education and coordination. MHIB has broad representation across many sectors.
- **Improved Industry Relations:** Compared to previous decades, cross-sector relationships are stronger, with fewer internal conflicts and increased willingness to collaborate.
- **Past Government Education:** Maryland's past model of Horse Industry Day where the horse industry came together with a united message spoken to governors and legislators —was cited as rare and highly effective.
- **The New Horse Park System:** Ability to unite the industry under one platform and give a broader reach from the industry to the public. See Pain Point bullet for needs.

Pain Points and Challenges

- **Siloed Messaging:** Most communication remains discipline-specific, with limited proactive coordination across sectors.
- **Reactive Public Relations:** Media coverage tends to focus on crises rather than everyday positive contributions.
- **Lack of Unified Narrative:** There is no shared, industry-wide framework guiding how the horse industry explains itself to the public.
- **Limited Capacity:** The need for a central unified entity is not matched by staffing or resources, limiting the ability to coordinate communications at scale.
- **The New Horse Park System:** Does not have a funding source, and is in need of an Executive Director and staff to further the mission.

Pathways Forward and Strategic Planning

Participants outlined several strategies to strengthen communication and collaboration:

- **One-Voice Framework:** Develop shared, high-level messaging that all sectors can use when engaging the public and policymakers.
- **Audience Prioritization:** Focus on key audiences, including Maryland residents, policymakers, business and tourism leaders, and future participants.
- **Story-Driven Engagement:** Shift from traditional advertising to storytelling that highlights youth development, workforce pathways, daily horse care, community impact, and environmental stewardship.
- **Proactive Media Use:** Treat media and social platforms as vehicles to consistently share positive, and compelling stories.
- **Social License Emphasis:** Clearly communicate shared commitments to horse welfare, aftercare, and responsible stewardship across all breeds and disciplines.
- **Capacity Considerations:** Explore staffing and resource options to support communication coordination, economic development alignment, and cross-agency collaboration.

Unified Industry Perspective

Across economic development and communication discussions, Maryland's horse industry is strongest when it operates and presents itself as a unified ecosystem. Fragmentation—whether in messaging, funding, or planning—limits the industry's ability to sustain growth, earn public trust, and secure long-term support.

Collaboration was repeatedly framed not as an aspirational goal, but as a practical necessity for ensuring that investments in one area strengthen the entire system.