
THE EQUINE SCIENCE CENTER PRESENTS

THE 2023 NEW JERSEY EQUINE INDUSTRY SUMMIT

SUMMIT PROCEEDINGS FROM THURSDAY, MARCH 16, 2023





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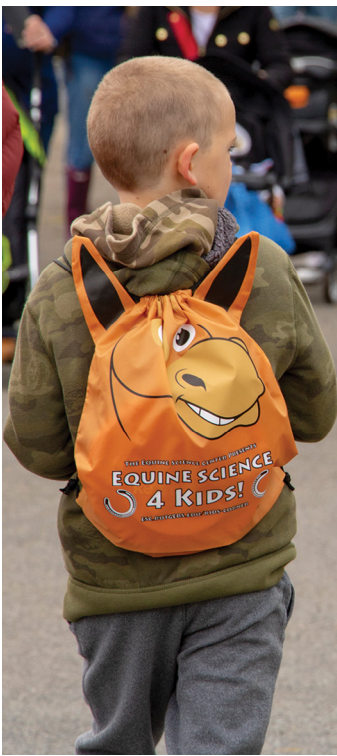


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Professor, Department of Animal
Sciences - School of Environmental
and Biological Sciences
Founding Director, Equine Science
Center at Rutgers, The State
University of New Jersey

WELCOME FROM

The Founding Director Of The Equine Science Center

“The Rutgers Equine Science center is very pleased to be able to host its second New Jersey Equine Industry Summit to set the course for the horse industry for decades to come”

The American people have had a long and meaningful relationship with horses for over two centuries. As a large, economically diverse industry, the United States horse industry contributes significantly to the American economy. The following statistics are from the American Horse Council Foundation’s 2017 National Economic Impact Study.

The horse industry contributes approximately \$50 billion in direct economic impact to the U.S. economy and has a direct employment impact of 988,394 jobs. Additionally, the industry itself contributes \$38 billion in direct wages, salaries, and benefits.

From those direct effects, the horse industry’s contribution ripples out into other sectors of the economy. Adding these ripple effects results in an estimate of the total contribution of the horse industry to the U.S. economy of \$122 billion, and a total employment impact of 1.7 million jobs. There are 7.2 million horses in the United States residing on 32 million acres of land owned and 49 million acres of land leased for horse-related uses.

There is a reason the state animal of New Jersey is the horse. Residents of New Jersey recognize the endearing relationship they have with horses and the impact the equine industry has had on the economy of the state, on traditional agriculture, and on the preservation and maintenance of tax paying open space. They are aware of the role of horses in sport, recreation, youth development and as a partner with humans in equine assisted services. In 2007, the Rutgers Equine Science Center published the first economic impact study for the horse industry “New Jersey Equine Industry—2007: Economic Impact.”

The document showed that the New Jersey horse industry is valued at \$4 billion, generates \$1.1 billion in economic impact, and employs 13,000 people annually. This industry is comparable to such widely recognized sectors as golf courses, landscaping, biotechnology, marine fisheries, and others. In terms of impact on working agriculture, the horse industry in New Jersey accounts for

one in five agricultural acres left in the Garden State, more than any other segment of agriculture. There are 42,500 equine animals housed in New Jersey on 7,200 equine operations which occupy 176,000 total acres. In addition, 46,000 additional acres in New Jersey are used to produce hay, grain, and straw in support of the equine animals in the state.

In 1978, visionaries associated with agricultural sciences and studies at Rutgers University initiated a formal equine science program within the Department of Animal Sciences at Cook College (now the School of Environmental and Biological Sciences). The move proved to be remarkably forward-thinking, as today, the equine industry in New Jersey has become a dominant force in agriculture and a key component in open space and farmland preservation in the state.

In 2001, Rutgers' Board of Governors recognized the excellent science, teaching, and outreach of the equine studies program by declaring the Rutgers Equine Science Center an official institute of the university. In 2021, the Center celebrated its 20-year anniversary of delivering excellent programming in equine science.

The Equine Science Center is the premier resource for everything equine. Known as a national equine treasure, the Center is recognized for its achievements in ensuring the health and well-being of horses and the horse industry. The Equine Science Center's internal programming and outreach to the community are legendary. Every day, it educates students and the public about horses, both in the classroom and in the larger community. Every day, it advances the knowledge base in the equine sciences and explores the unique relationship between horses and humans. Every day, it develops unique new solutions based on integrated, multidisciplinary scientific inquiry.

The Equine Science Center is a place where research to ensure the well-being of horses and the horse industry is ongoing. It is an influential place, where cutting-edge discovery is carried out by scientists and students and is translated into language that real people, such as policy decision-makers, can understand and use. The Center is the entity responsible for delivering useful, science-based information to people around the world through its robust website (esc.rutgers.edu) which disseminates



news; posts scholarly publications, podcasts, webinars, virtual tours, numerous fact sheets and bulletins; and hosts the details of Center annual reports, meetings, and conferences.

The Center is recognized throughout New Jersey, nationally, and internationally for its achievements in:

- Identifying issues in the horse industry
- Finding solutions through science-based inquiry
- Providing answers to the horse industry and to horse owners
- Influencing public policy to ensure the viability of the horse industry
- Studying the horse-human bond

Twenty years ago, the Rutgers Equine Science Center held the first-ever statewide New Jersey Horse Industry Summit. Experts from throughout the state and the country came together with equine professionals and enthusiasts to examine the challenges, opportunities, and the future of the horse industry in New Jersey. Discussions from that event led to several groundbreaking programs benefiting the industry.

On Thursday, March 16, 2023, the Equine Science Center re-examined the present and future of the horse industry at the 2023 New Jersey Equine Industry Summit. The summit gathered equine professionals, veterinarians, educators, horse and farm owners, and enthusiasts to discuss the strengths, weaknesses, opportunities, and challenges of the industry and to suggest visions for the future. This document—the Proceedings from the summit—capsulizes the presentations and discussions of that historic event.



RUTGERS
THE STATE UNIVERSITY
OF NEW JERSEY

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Rutgers was delighted to host the 2023 New Jersey Equine Industry Summit and to have had the honor of welcoming all who attended this important event.

We are proud that the State University of New Jersey has a first-class research institute dedicated to our state animal, the horse. The Rutgers Equine Science Center was launched in 2001 but grew out of an equine science program within the university that dates back to 1978. The center has been providing leadership in the study of horses, the advancement of the horse industry, the sustainability of equine agriculture, research on the health and well-being of these animals, public education, and the preparation of future leaders of the horse industry. I applaud its determination to become the go-to resource for the health and management of horses, both in the United States and internationally.

Just as important, the opportunities the Rutgers Equine Science Center provide for our students are invaluable. The experience that Rutgers students gain from their involvement in the center prepares them well for many career paths, including that of large-animal veterinarians.

The topics of discussion outlined in these Summit Proceedings touch on key factors for the future of the equine industry, which supports approximately 1 million jobs across the country and, here in the Garden State, accounts for about one out of every five acres of agricultural land.

Working toward a future that is sustainable both economically and environmentally is essential, and I am happy to know that Rutgers is facilitating that conversation both at its March 16 Summit and throughout the years.

Sincerely,

A handwritten signature in black ink that reads "Jonathan Holloway".

Jonathan Holloway



State of New Jersey

DEPARTMENT OF AGRICULTURE
PO Box 330
TRENTON NJ 08625-0330

PHILIP D. MURPHY
Governor

SHEILA Y. OLIVER
Lt. Governor

DOUGLAS H. FISHER
Secretary

Dear New Jersey Equine Industry,

The Rutgers Equine Science Center's Industry Summit was a great opportunity for the participants in one of our state's important agricultural sectors to get together and talk about present and future plans with the equine sector.

The issues facing the horseracing industry – as well as broader aspects regarding equine health, land use and policy management, and environmental stewardship – were addressed by some top names in the business and I am sure everyone came away from the summit with some new knowledge or perspective from speakers such as Jim Gagliano and Mike Tanner.

This summit is another example of the incredible resource New Jersey's equine sector enjoys by having the Rutgers Equine Science Center dedicated to success for everyone involved. An industry's future rests on how well its practitioners educate and prepare themselves, and with a facility such as the ESC, New Jersey's equine sector is be poised for even greater days ahead.

Thank you all for attending and best wishes for even more success.

Sincerely,

A handwritten signature in black ink, appearing to read "D. H. Fisher".

Douglas H. Fisher, Secretary of Agriculture



RUTGERS

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and Biological Sciences

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Forty-five years ago, our Department of Animal Sciences initiated a formal equine science program at Rutgers University. This move proved to be remarkably forward-thinking, as today the equine industry in New Jersey has become a dominant force in agriculture and in open space and farmland preservation.

In 2001, the Rutgers University Board of Governors designated the Rutgers Equine Science Center as an official institute of Rutgers, The State University of New Jersey. By doing so, the university publicly recognized the excellent science, teaching, and outreach of the equine studies program within the Department of Animal Sciences.

One of the early major initiatives of the Equine Science Center was to organize the 2003 New Jersey Horse Industry Summit, the first conference bringing together thoughtful leaders from all areas of the equine business—racing, breeding, training, competition, pleasure riding, youth activities, education, research, support services, and more—to create a blueprint for the industry for years to come.

Now 20 years later, on March 16, 2023, and in an ever-changing and ever-challenging environment, the Equine Science Center once again brought the industry together to map out the future growth and sustainability for equine professionals, educators, operators, youth, and enthusiasts. This document—the 2023 New Jersey Equine Industry Summit Proceedings—is a snapshot of the discussions that took place at that important gathering.

It is fitting that the School of Environmental and Biological Sciences and Equine Science Center are in the forefront of leadership and advocacy for one of the most important agricultural components in the state of New Jersey. The Equine Science Center has distinguished itself over the years not only in New Jersey but across the country and in countries around the world as the incubator for essential research, information, and outreach to the equine community.

The Equine Science Center faculty, students, and staff have delivered cutting-edge knowledge, such as demonstrating the ability of food extracts to alleviate exercise-induced inflammation and studying the physiology of aging in horses, resulting in management recommendations for older horses. They have addressed equine nutrition; water, pasture, and waste management; the integrity of equine sport; development of future leaders in agriculture and the horse industry; and, recently, the benefits of equine-assisted activities on military veterans diagnosed with PTSD and how those activities impact the horse.

The center's scholarly work is widely shared in hands-on seminars, workshops, demonstration farms and events, webinars, podcasts, fact sheets, and expert advice, much of which appears on the center's popular website—esc.rutgers.edu, which I invite you to visit and explore.

The 2023 New Jersey Equine Industry Summit and these Proceedings are now part of this body of knowledge and will be a guidepost for years to come. I congratulate the Rutgers Equine Science Center on this Summit and on its continued leadership and scholarship.

Sincerely,

Laura J. Lawson
Executive Dean of Agriculture and Natural Resources
Rutgers, The State University of New Jersey



RUTGERS

New Jersey Agricultural
Experiment Station

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The horse industry – with unwavering support from the Rutgers Equine Science Center – is an essential component of Rutgers Cooperative Extension and the New Jersey Agricultural Experiment Station.

Most people are familiar with the robust New Jersey 4-H program, which helps develop leaders in all areas of New Jersey life, including equine knowledge and leadership. Perhaps not so well known is that 4-H in New Jersey is a central pillar of Rutgers Cooperative Extension. It is our long-standing commitment to the youth of our state in such important areas as citizenship; healthy living; and science, engineering, and technology.

Many delegates who attended this 2023 New Jersey Equine Industry Summit are involved in the 4-H horse and pony program. For this, you have my deep gratitude. The passion and commitment of extension volunteers drive so much of the success of our programs, including the horse and pony program. It encompasses all aspects of equine, including care and feeding, horse science, and veterinary science in addition to the traditional riding and showing disciplines. It even offers a model horse component for horse enthusiasts who may not be owners or riders. All of it is designed with educational goals in mind, and members' knowledge is tested in the annual statewide Horse Bowl competition.

Youth leadership development was an important topic at the Summit, and the Equine Science Center is once again at the forefront. I invite you to check out the Center's "Equine Science 4 Kids," a fun, interactive way to teach STEM education to youth. The Equine Science Center will dedicate even more resources to ensuring industry sustainability by engaging our youth. And your New Jersey Agricultural Experiment Station will be right beside them, with programs such as those aimed at young farmers, "RU Ready to Farm."

In addition to our youth programs, the Equine Science Center and Rutgers Cooperative Extension have contributed significantly to the vibrancy of the equine sector and overall quality of life in New Jersey. Research into barn, pasture, waste, and water management testify to this commitment, along with on-site, hands-on public seminars and demonstrations sharing the research and best practices.

Please know that we are here always to assist you with your educational and information needs and in programs that will improve and enhance the quality of life in New Jersey.

Sincerely,

Brian J. Schilling
Senior Associate Director, NJAES
Director, Rutgers Cooperative Extension



Alisa Herbst, Ph.D.
Post-Doctoral Associate
Department of Animal Sciences
and Rutgers Equine Science Center
at Rutgers, The State University of
New Jersey

REPORT ON THE

2022 Equine Industry Needs Assessment Survey

“Participants regarded various issues related to the Equine Science Center’s five focus areas as extremely important. These results indicate that the Center’s focus areas are still current and appropriate.”

Needs assessment surveys provide valuable information about the demographics, needs, and interests of the equine community. This information can be used to create or refine equine extension programs. So far, the Rutgers Equine Science Center has already conducted two equine industry needs assessment surveys, one in 2002 and one in 2016. Both provided very useful information that helped the Center better understand the community that they serve and refine their program. Six years after the last survey, and after a global pandemic, it was time to conduct a third needs assessment survey in order to stay up to date with the equine industry’s most pressing needs and interests. Purposes of the study included the following:

- To learn about the demographics of the equine community,
- To assess the relevance of the Rutgers Cooperative Extension equine-related program focus areas, and
- To provide the most useful resources for the equine community.

The survey was available online and was open to all members of the U.S. equine community. The survey results were used to determine whether the Equine Science Center’s five focus areas continue to be relevant and central to the community. These five focus areas are:

- Equine Health and Well-Being
- Land Use and Policy Management
- Integrity of Equestrian Sport
- Economic Growth and Industry Sustainability
- Environmental Stewardship

Of the 494 surveys received, 493 were eligible for analysis. As expected, the greatest number of responses (24 percent) came from New Jersey residents, but surveys also were received from 37 other states.

Survey respondents were mainly female (94 percent), white (96 percent), and of middle to older age (36-60 years, 48 percent, and 61 years and up, 38 percent).

Participants indicated that they considered various issues related to the Equine Science Center's five focus areas to be extremely important, thereby confirming these priority areas.

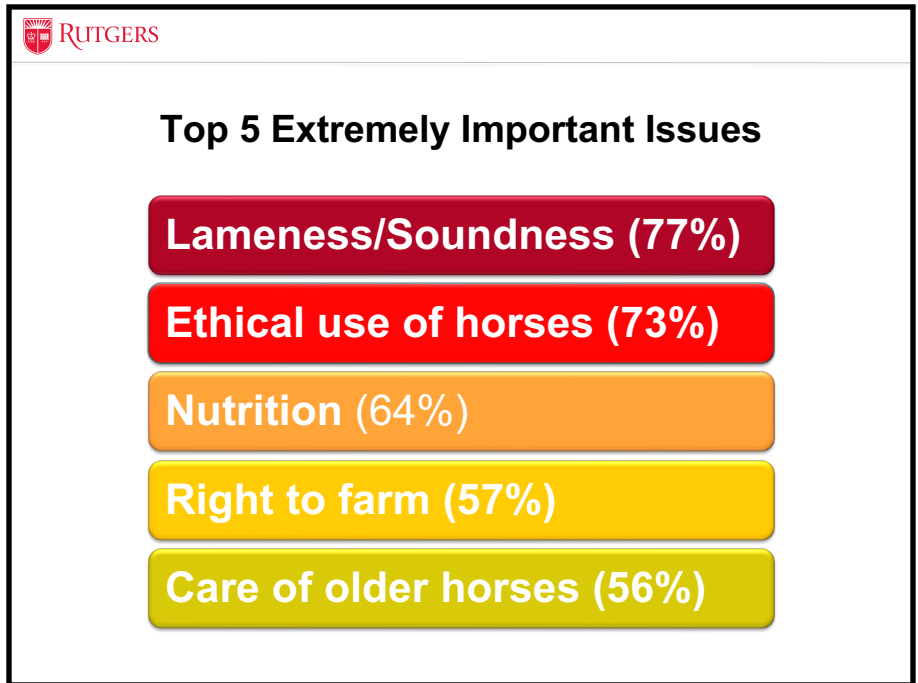
The top five specific issues considered most important overall were "Lameness/Soundness" (77 percent), "Ethical Use of Horses" (73 percent), "Nutrition" (64 percent), "Right to Farm" (57 percent), and "Care of Older Horses" (56 percent).

When asked how the Equine Science Center can be beneficial to the equine community, respondents who identified as veterinarians and other equine health professionals answered mainly "by providing continuing education" (48 percent), while the remaining participants indicated most frequently "by serving as a knowledge base" (29 percent). These findings were in line with the outreach that the Equine Science Center currently provides, such as online and on-site training and seminars on various equine-related research and topics.

The Equine Science Center also provides services that address the top five most important specific issues identified through the survey; for example, seminars on nutrition are carried out and research on older horses is conducted.

Yet, lameness/soundness (an issue related to the focus area Horse Health and Well Being), which was considered the topmost important issue, is currently underrepresented in the outreach program, and thus a greater focus should be placed on this topic in the future.

The Equine Science Center thanks all members of the equine-related community who participated in the survey and shared their thoughts on these issues.



RESOURCES

- Rutgers Equine Science Center Industry Needs Assessment Survey 2016
- Ask The Expert Portal
- Equine Science Center Events
- Equine Science Center Resources



C. Jill Stowe, Ph.D.
Professor of Agricultural Economics
Director of Undergraduate Studies
Equine Science and Management
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ECONOMIC ANALYSIS OF EQUINE OPERATIONS:

Reducing Costs For Horse And Horse Farm Owners

“Improving profitability or reducing costs in this environment is challenging. However, with good records, managers can make the best decisions possible with the information at hand.”

Farm managers wear many different hats, but one of the most important is being a decision maker. Managers across all types of agricultural operations face similar challenges and risks: remaining profitable, competition for land, information overload, more weather extremes, government intervention, and long-run sustainability of small operations.

Making good management decisions is dependent on having good business records. Two of the most important types of records for managers are the operation’s balance sheet and income statement. Understanding these two records is important for external reasons, like obtaining loans, but also for internal reasons – for decision making.

Purpose of Balance Sheet

A balance sheet measures a business’s financial health at a point in time. Balance sheets identify assets, liabilities, and owner equity, and are used to determine a business’s liquidity and solvency. Liquidity is the ability of a business to pay its current debts without affecting daily operations, and solvency is the ability of the business to pay off all debts if all assets were sold. The Farm Financial Standards Council (FFSC) provides recommendations for “healthy” and “unhealthy” values for both liquidity and solvency measures.

Income Statement = P&L

An income statement, commonly referred to as a P&L (profit and loss), measures a business’s financial health over a period of time. Income statements capture the difference between revenues and expenses to determine net

farm profit.

Rate of return on assets (ROA, or also called ROI) and rate of return on equity (ROE) are two primary measures of business performance.

Sometimes, economic analyses of farm operations suggest the need to improve profitability. Two primary strategies to increase profit are raising prices, and reducing costs. This discussion will focus on reducing costs for horse and horse farm owners.

Welfare of the Horse Comes First

The first guiding principle for any management change should be the welfare of the horse. Once that is guaranteed, an economist might analyze a possible change using a partial budgeting approach, estimating the new revenues and reduced costs against the reduced revenues and increased costs.

If the additional benefits (marginal revenue) are greater than the additional costs (marginal cost), the change would be beneficial. Each manager must determine the relevant benefits and costs.

The list of potential ways a horse farm manager might reduce costs is highly dependent on the operation itself—location, amenities, and so forth. In our part of the country, we consider a number of pasture management approaches as a way of reducing the cost of purchased feed. Managers might also consider, for example, changes to facility operations, feed and nutrition, and bedding and waste management.

Avoid Cutting Corners

While there may be many ways to cut costs, it is important that doing so doesn't mean cutting corners—that usually ends up being more expensive in the long run. Thus, horse and horse farm owners and managers need to make sure that they are properly insured and are as prepared as possible for a variety of emergency situations.

Improving profitability or reducing costs in this environment is challenging. However, with good records, managers can make the best decisions possible with the information at hand.

Increased horse-keeping costs

- Ranks in the top three issues facing the equine industry
 - AHP Equine Industry Surveys, 2009 - 2021

Predominant areas of increased costs

2021	Feed	Veterinary services	Animal health products
2018	Feed	Veterinary services	Animal health products
2015	Feed	Veterinary services	Animal health products
2012	Feed	Fuel	Veterinary services
2009	Feed	Fuel	Veterinary services

University of Kentucky

UK Agricultural Economics
agecon.ca.uky.edu

Other things to consider regarding price increases include: general inflation, labor shortages (affecting prices throughout the whole industry), and a impending veterinarian shortage.

RESOURCES

- The Kentucky Center for Agricultural and Rural Development: Financial Development Section
- Farm Financial Standards Council
- Partial Budgeting Description and Decision Tool
- Equine Enterprise Budgets
- Hay, Forage, and Pasture Maintenance Budgets



James L. Gagliano
President and Chief Operating Officer
The Jockey Club

HORSERACING PANEL

The State of Thoroughbred Racing in the United States

“Beyond registering Thoroughbreds, The Jockey Club is also a record keeper for the industry.”

By way of background, The Jockey Club was incorporated by the state of New York in 1894. Its main priority was maintenance of The American Stud Book, and its mission was dedicated to the improvement of Thoroughbred breeding and racing. Both of those hold true today. To further our commitment to the sport, over the past 30 years we have developed a group of commercial, for-profit subsidiaries and partnerships.

The image displays two screenshots of industry websites. The left screenshot is from Equibase.com, showing 'Graded Stakes Entries' and 'Graded Stakes Results' for various races like the Frank E. Kilroe Mile Stakes and Santa Anita H. presented by Yamava. Below this is 'The Leaderboard' section, which includes 'Yesterday's Top Horses' and '2023 Leading Horses' with a table of rankings and earnings.

Rank	Horse Name	Earnings
1	Art Collector	\$1,680,000
2	Defunded	\$620,000
3	Confidence Game	\$601,750
4	Stimelo Boy	\$580,000
5	Above	\$558,000
6	Last Sport	\$508,000
7	Arabian Knight	\$482,250
8	Rae Route One	\$320,000

The right screenshot is from Equineline.com, featuring a horse in a field, a search bar, and various navigation options like 'My Equineline', 'Reports & Pedigrees', and 'Pedigree Builder'. It also includes a 'FREE 3-Cross Pedigrees' section and a 'Get Started' button.

Beyond registering Thoroughbreds, The Jockey Club is also a record keeper for the industry. The online fact book provides statistics on breeding and racing. Equibase.com is the industry’s official database for racing statistics, and Equineline.com provides pedigrees in addition to farm-management and record-keeping software, cataloging services, and other products to help manage racing and breeding operations.

The trends in breeding and racing today are mixed. The North American foal crop is down from a peak of more than 50,000 in 1985 to an estimated 18,700 for 2022. However, purses, race days, races, and starts are all up. Handle is down from this time last year but was about even in 2022 compared to 2021. In New Jersey, although breeding is down, purses, average purse per race, and earnings per starter have been rising over the past few years.

While there are bright spots, The Jockey Club is trying to reverse any negative trends. In 2011 it commissioned McKinsey & Company to study Thoroughbred racing.

Some results of the study indicated that the industry was losing its fan base and the fans we had were concerned with how our sport was perceived: cheating and medication use were considered problems, as well as how we treated our horses. We also were facing competition from other sports, especially in the areas of gambling and television airtime.

New Programs Launched

To address some of these issues, The Jockey Club increased its industry support. New initiatives included “America’s Best Racing,” “OwnerView,” and the “Thoroughbred Incentive Program.”

America’s Best Racing brings new fans to horse racing by sharing the sport, the lifestyle, and the gambling aspect of the game using digital and social media platforms.

This program also has helped increase Thoroughbred racing’s television presence through partnerships, sponsorships, and second-screen shows.

In 2011, racing on television was about 40 hours; today, it’s more than 1,000. In addition, the America’s Best Racing social media following now tops 360,000 followers, with more than 80 percent of those being under the age of 44.

OwnerView was created to bring new owners to the sport and provide a free resource for all owners. OwnerView.com has information on everything from trainers, syndicates, and stallion farms to advisors, licensing, and aftercare. We also host live and virtual conferences.

The Thoroughbred Incentive Program recognizes and rewards the versatility of the Thoroughbred through sponsorship of Thoroughbred classes and high point awards at sanctioned horse shows, performance awards, and non-competition awards. Since 2012 more than 80,000 Thoroughbreds have competed at more than 9,800 shows.

Supporting Research and Racing Community

Other initiatives The Jockey Club supports include the Welfare and Safety of the Racehorse summits, the Thoroughbred Safety Committee, the Equine Injury Database, and the Thoroughbred Aftercare Alliance. We also fully support two charities: The Grayson-Jockey Club Research Foundation, which is the nation’s leading source of equine research funding for all breeds, and The Jockey Club Safety Net Foundation, a charitable trust that provides financial relief and assistance to needy members of the Thoroughbred industry and their families.

Those initiatives and countless others designed to boost the Thoroughbred industry, have been unveiled and/or featured at The Jockey Club’s annual Round Table Conference on Matters Pertaining to Racing, which is held each August in Saratoga Springs, New York, with the first round table held in 1953.

So, we do a lot to support the industry, but we still face challenges. One of the greatest is the lack of uniformity in our rules and regulations and how they are prosecuted. Unlike other major sports, each horse racing jurisdiction—and there are about 38—has a different set of rules.

Working Towards Uniformity

For years we have been working toward uniformity with various initiatives such as interstate compacts, the Racing Medication and Testing Consortium, the National Uniform Medication Program, and more.

In addition, in 2015 we began focusing on federal legislation via the Thoroughbred Horse Racing Anti-Doping Act of 2015 to establish uniform standards for drugs and medication in the American Thoroughbred industry.

Despite these efforts, in 2019 horse racing found

New Jersey Racing Overview

Year	Races	Purses	Starters	Starts	Race Days	Avg. Field Size	Avg. Purse per Race
2002	1,329	38,824,650	3,274	10,123	144	7.6	29,213
2003	1,194	36,184,164	3,296	9,432	125	7.9	30,305
2004	1,194	42,753,504	3,251	9,451	125	7.9	35,807
2005	1,141	41,549,276	2,977	8,626	122	7.6	36,415
2006	1,173	44,415,532	2,790	8,692	125	7.4	37,865
2007	1,167	67,775,266	2,909	8,730	125	7.5	58,076
2008	1,327	46,931,346	3,172	9,700	148	7.3	35,367
2009	1,340	46,845,637	3,284	10,040	147	7.5	34,959
2010	877	50,024,825	3,008	8,062	78	9.2	57,041
2011	888	34,473,256	2,492	6,981	84	7.9	38,821
2012	767	26,055,986	2,368	6,072	79	7.9	33,971
2013	766	26,462,288	2,315	6,021	77	7.9	34,546
2014	719	24,451,772	2,280	5,828	71	8.1	34,008
2015	716	24,616,950	2,227	5,926	69	8.3	34,381
2016	642	20,306,339	1,975	4,809	70	7.5	31,630
2017	564	17,586,403	1,783	4,251	59	7.5	31,182
2018	581	18,327,398	1,679	4,160	57	7.2	31,545
2019	697	28,352,919	1,970	5,124	68	7.4	40,679
2020	476	21,060,666	1,518	3,687	44	7.7	44,245
2021	597	27,577,263	1,820	4,469	62	7.5	46,193
2022	656	32,903,890	1,930	4,826	70	7.4	50,158

itself in a troubling spotlight because of a series of horse fatalities at Santa Anita Park racetrack. This generated widespread media coverage, and the industry called for a referendum for change.

On top of that, doping investigations that were started in 2015 culminated in arrests in 2020, again generating media reports. Meanwhile in Congress, the Horseracing Integrity and Safety Act (HISA) passed in the House of Representatives and the U.S. Senate. It was signed into law in December 2020.

Still, there are challenges to change in the industry. Not everyone favors the HISA law. Some people are defending the status quo, and court challenges are inevitable.

Nonetheless, there are many positives. There is a racetrack safety program in place and an anti-doping and medication control program is planned. The Thoroughbred industry is working hard to address problems, correct issues, and ensure a healthy future.

RESOURCES

- The Jockey Club
- Equibase
- Equiline
- The Jockey Club Safety Net Foundation
- Horseracing Integrity and Safety Act (HISA)



Mike Tanner
Executive Vice President/CEO
United States Trotting Association

HORSERACING PANEL

The State of Standardbred Racing in the United States

“Our [Standardbred] horses are resilient and versatile, evenly tempered and show amazing stamina and versatility.”

The U.S. Trotting Association is a not-for-profit association of Standardbred owners, breeders, drivers, trainers, and officials, organized to provide administrative, rulemaking, licensing, and breed registry services to its members. The association has more than 19,000 members, 60 directors, and 47 employees. It’s headquartered in Columbus, Ohio.

Some history: the USTA was founded in 1939 and brought order to what had been chaos. In prior years, the sport was administered by regional organizations, each with differing rules, that often failed to honor each other's suspensions.

The association ruled as the sport's sole regulatory body until the 1960s when the state racing commissions took over most of those functions, but the USTA retains an important role in the sport today because of its mission and grassroots leadership.

A Look at Key Metrics

Handle has varied over the years but has hovered around the \$1.5 billion mark for the past decade or so. That number was down last year, likely owing to the fact that Canadian racing was closed for half of 2021.

This year, however, we’ve seen significant increases, and as of yesterday, total handle is up \$297 million or 8 percent. Canada is showing similar growth. Why?

I can’t speak for the Meadowlands, which reports say is up 17 percent to the good, which figures because it’s the sport’s flagship track and the leading indicator for the sport’s pari-mutuel health. And I certainly can’t speak for Monticello, a small track in the Catskills that shows an amazing 70 percent year-over-year increase. But I have an idea. I think it’s due to the addition of a few CRW teams into our pools.

What We Do

- License owners, trainers, drivers and officials.
- Formulate the rules of racing.
- Maintain and disseminate racing info and records.
- Endeavor to ensure the integrity of harness racing.
- Insist on the humane treatment of Standardbreds.
- Promote the sport of harness racing and the Standardbred breed.



CRW is shorthand for Computer Robotic Wagering. As described a few years ago by the Blood Horse magazine, CRW bettors are players—typically working in teams—that rely on computer programs to scan for value in pari-mutuel pools.

The computer programs then allow these teams to pour money into each pool where they find value, thanks to the capability of making thousands of wagers in an instant.

They push millions and millions of dollars electronically through the betting windows. They enjoy healthy rebates and win significantly more than the average player.

In the past few months, I've authorized access for two teams to obtain data from the USTA through TrackMaster, our contracted vendor. I have mixed feelings every time I do so.

With few exceptions, racetracks love the handle that CRW teams bring. Horseplayers hate the late odds changes and perceived pari-mutuel prices that come with them. The game, already tough, becomes even more challenging. But love them or hate them, CRW is here to stay.

Reviewing Racing Purses

New Jersey purses lag behind several other states, but this is deceptive as every state ahead of New Jersey enjoys the benefits of slot-infused funding.

The Meadowlands enjoys its status as the world's preeminent harness venue, attracting the sport's best horses for the industry's most important races. Freehold cannot be overlooked, either, offering a competitive meet featuring smaller purses and providing racing opportunities and conditions that expand the state's harness menu.

Still, the Meadowlands is king despite racing's enormous competition on its borders from New York, Pennsylvania, and Delaware. Look at how this has played out over the last 20 years: races, purses, starters, starts, race cards, and race days are all down as compared to 20 years ago. Purses are up moderately. Field size has remained constant.

The good news is that—nationally, at least—foal crops have experienced year-over-year gains, however incremental, for the past six seasons.

New Jersey numbers reflect a mixed bag, but several top stallions, including Trixton, Lazarus, Perfect Sting,

and Six Pack, call the Garden State home and have served to improve the breed.

Focus on the Standardbred

Our focus remains on highlighting the accessibility of our sport and of the Standardbred breed. Our horses are resilient and versatile, evenly tempered and show amazing stamina and versatility.

On average, a Standardbred racehorse makes 18 starts per year, while the typical Thoroughbred goes to the post about six times during the same period. Standardbred breakdowns are extremely rare.

In three years at Harrah's Chester, every single horse—about 30,000 starts—that went on to the track to race walked off under its own power, while the situation on the other side of the game is, unfortunately, not as rosy.

Standardbred horses are far less expensive than Thoroughbreds, both in terms of purchase price and daily training rates, while purses are at all-time highs. And the hands-on accessibility of harness racing is unmatched. I know countless owners who enjoy the experience of helping train their own horses; the barrier to entry in our sport is very low, and it is something that we as an industry need to drive home over and over again.

Congressional Advocacy Efforts

Prior to 2018, the U.S. Trotting Association had done very little, if any, advocacy on Capitol Hill. Over the past five years, however, that has changed. We took several hundred meetings in 2021 and 2022 to campaign for the passage of the John Rainey Stringer Save America's Forgotten Equine (SAFE) Act, which would close the loophole allowing horses to be shipped across the border to be slaughtered for human consumption.

The last Congress ended before that legislation could be passed, but we, along with The Jockey Club and several other industry groups, will try again. We also fought hard to loosen up the number of H2-B visas available because our horsemen are finding it increasingly difficult to hire qualified help who want to work with horses.

These legislative initiatives—and much of our work and the positions we hold—are all part of our overriding goal: for horse racing, racehorses, and horsemen in the United States to thrive, and for the sport to prosper.

RESOURCES

- **The United States Trotting Association**
- **The Meadowlands Racetrack**
- **Computer Robotic Wagering (CRW) - Blood Horse Magazine**
- **Standardbred Breeders & Owners Association of New Jersey**
- **Save America's Forgotten Equines (SAFE) Act - 2023 Versions:**
 - **S.2037 - Senate Version**
 - **H.R.3475 - House Version**



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Sandy Strilec, DVM
New Jersey Department of
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Health

BREAKOUT SESSIONS

Equine Health & Well-Being

“With the input from within the equine community, including those involved in research, veterinary professionals, and organizations setting the standards of care, the status of horse health and well-being can help inform and mold the future of the industry.”

Assessment of the state of horse health and well-being is one hallmark consideration to any strengths and challenges of New Jersey’s equine industry.

The New Jersey Equine Industry Summit provides a platform for key stakeholders within the tristate area to convene and confer on the current status of horse health and how it contributes to the future of the industry.

Established parameters to characterize horse health include a summation of physical, emotional, and physiological factors. An animal’s well-being is predicated on the absence of pain or distress.

The convergence of horse health and well-being and New Jersey’s equine industry involves the industry-accepted standards of care paired with a veterinary professional community that meets the needs of the equine population.

The thriving and exciting New Jersey equine industry boasts modern competition and exhibition facilities, state-of-the-art equine veterinary hospitals, and opportunities for numerous disciplines for enthusiasts and professionals alike. These areas provide avenues to advocate for and support the concepts of contemporary horse health and well-being standards.

Upon close inspection of the industry, challenges to its maintenance can be identified. As with many business entities, the advancement of the industry is linked to the existing state and national economic fluctuations, causing potential inconsistency in equine businesses and interest in related professions. Also, analogous to the nationwide trends, there is a decline in the career pursuit and retention of equine veterinary professionals.

The specialty of equine practice has a principal role in upholding and advancing the concepts of horse health and well-being in the industry at large. With the expert input from summit participants, the New Jersey equine industry has a powerful group of champions and professionals that will prove no challenge insurmountable in support of the industry.

Situation

Veterinary practitioners have a principal role in upholding and advancing horse health and well-being. However, there is a decline in the career pursuit and retention of equine veterinary professionals. How can we change that?

Opportunities

- Create excitement for the veterinary profession to attract the next generation of veterinarians.
 - Opportunities for kids to shadow veterinarians to create enthusiasm for the profession
 - Improved awareness about veterinary school reimbursement programs
- Contribute to veterinarians' physical and mental wellness.
 - More empathy on the part of horse owners and better education/information about veterinarians' needs
 - Emergency practice co-ops to reduce the emergency call burden
 - Routine wellness care plans for horses, with scheduled veterinarian visits
 - "Permission" for veterinarians to manage their schedules to ensure positive mental health
 - Training for first responders, such as fire departments, to help with horses that are down, instead of calling on the veterinarian to assist
- Ensure long-term profitability of veterinary operations – and thereby improving retention – by increasing rates for equine veterinary care.
 - Installment payment plans to ease burden on owners
- Improve the welfare and health of horses.
 - Ongoing relationships between veterinarians and clients to reduce emergency visits and help detect early signs of disease
 - Emergency care backup for the primary veterinarian
 - Routine preventative care/exam plan with the veterinary facility
 - Identify why some owners currently don't have this
- Educate owners about the need for routine care; perhaps the Extension agents can make this part of their farm visits
- Educate owners and provide them with correct, up-to-date horse care information.
 - Rutgers-generated educational content for owners distributed on social media channels
 - Proactively connecting the science to the horse owners, adding to what is already done and promoting increased collaboration with other institutions and organizations
- Increase awareness and training among owners about emergency care and handling emergency situations.
 - Opportunities like first responder training at the Horse Park
 - Emergency plans at boarding facilities and owner awareness of same
- Establish additional channels of communication to convey all the above information/recommendations to owners.

RESOURCES

- New Jersey Association of Equine Practitioners
- American Association of Equine Practitioners
- New Jersey Department of Agriculture - Division of Animal Health



Brittany Rigg
Senior 4-H Program Coordinator,
Rutgers Cooperative Extension

BREAKOUT SESSIONS

Economic Growth & Industry Sustainability

“Today’s youth are the future of tomorrow’s Equine Industry future. How can we provide youth with profound leadership experiences that will prepare them to take the reins?”



Taylor Ross, Ph.D.
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There is a reason the state animal of New Jersey is the horse. Residents of New Jersey recognize the endearing relationship they have with horses and the impact the equine industry has had on the state. They are aware of the role of horses in sport, recreation, youth development, and as a partner with humans in equine-assisted services.

Over time, young enthusiasts, owners, and leaders in the equine industry in the 1980s and ‘90s are beginning to retire. Is there a new cohort of young people to take their place and drive economic growth, sustainability, and leadership in the industry?

Organized youth clubs and groups—such as 4-H and Pony Club, and the various breed groups—traditionally were the incubators of future leaders. In fact, the New Jersey 4-H Horse Program uses a learn by doing approach to enable youth to develop the knowledge, attitudes, and skills they need to become competent, caring, and contributing citizens of the equine industry.

But competing interests and opportunities for youth are depleting that pipeline and putting future growth and sustainability at risk. For example, horses are becoming a luxury item in uncertain economic times.

While the statewide 4-H Horse Program is one of the most robust 4-H interest areas, we are seeing more and more children lease horses or ride at training barns, rather than commit to equine ownership, stewardship, and hands-on involvement.

On the plus side, youth are participating in more educational and “horseless” experiences, but they are removed from some of the everyday responsibilities of owning a horse, and our youth organizations like 4-H, Paint Horse, Quarter Horse, etc., are seeing a decline in older youth members as they take on other opportunities outside of the equine world.

Is there something that we could be doing differently to make our youth

organizations more enticing for kids to join us and stay with us? We have a lot of younger children (kindergarten through seventh grade) who are currently involved, but how do we help sustain the future of the industry with our current participants, attract others to join us, and continue to provide engaging leadership opportunities for youth to grow their resume?

What opportunities can we provide to them to expand their knowledge, spark their interest in an equine career, or help them be lifelong equine industry advocates?

Situation

There is a critical need to prepare youth for future leadership roles in the New Jersey equine industry to ensure the sustainability of the equine industry and programs.

Opportunities

- Using marketing techniques and recruitment, promote the New Jersey 4-H Horse Program as an avenue to leadership in the equine industry.
- Because parents have to be engaged in their minor child's participation in any sport or activity, develop incentives for parents.
 - Scholarships opportunities for youth participants
 - Leadership development by "shadowing" equine professionals
 - Participation as "student representatives" in equine groups, such as the Equine Advisory Board
 - Scheduling some equine-related activities at night, such as educational or social gatherings and advisory board meetings, so that students can attend
- Retain youth participation throughout high school by providing benefits post-graduation.
 - Letters of recommendation by program leaders for college applications
 - Networking opportunities
 - College scholarships or grants
 - Recognition and/or awards for community service

- Engagement with successful horse program alumni
- Develop a Youth Leadership Summit (one day) or Youth Leadership Institute (one week residential).
 - Host on a college campus during summer break, using campus dining facilities and college dorm rooms (if a residential institute) to provide a collegiate experience
- Create a statewide young professionals' organization for those pursuing an equine-related career.
- Establish a charitable fund to support riding lessons and activities at designated, screened training facilities to encourage more diverse participation in equine activities and leadership.

RESOURCES

- New Jersey 4-H
- National 4-H
- New Jersey Pony Club
- American Junior Paint Association
- American Youth Quarter Horse Association
- Modern Careers in the Horse Industry
- Rutgers Equine Science Center
- National FFA
- American Youth Horse Council



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BREAKOUT SESSIONS

Integrity of Equestrian Sport

“Causes of catastrophic injuries in both racing and non-racing equestrian activities must continue to be examined and studied as should the illicit used of drugs and medications.”

The Rutgers Equine Science Center prides itself on the work it has done in the focus area of Integrity of Equestrian Sport. While the predominant focus of our research has been on the horse racing industry, all other equestrian disciplines can benefit from the knowledge gained by the research that is conducted at the Center.

The research lab of Dr. Kenneth H. McKeever has focused on performance altering agents (PAA), in collaboration with a variety of entities, including state racing commissions, state drug testing labs, and associated racing breed associations. His main goal has always been to determine the impact of these agents on the well-being of the horse and, also important, to determine if a specific PAA actually alters performance. If it does not, why test for it?

Through this work, Dr. McKeever’s lab has published multiple scientific peer-reviewed articles showing the effects of these PAAs; substances such as Cobalt, Type-5 Phosphodiesterase Inhibitors, Cobalt, and Clenbuterol.

Any discussion of integrity of equestrian sport also must include an examination of equine welfare after horses are retired from their current “jobs,” whether they are racing, showing, eventing, or performing other equine disciplines. Placing equine athletes responsibly in new venues and new circumstances after their retirement is critical to maintaining the integrity of equestrian sport.

These “second careers” allow for the equine athlete to continue to remain active and engaged into their older years, often times helping them to remain fit and lowering the chance of health-related issues.

As more horses are living longer, with the number geriatric horses increasing, it is also important for owners to think about what comes after their horse’s first (or second) career.

The view of the public regarding what happens to these horses after they fully “retire” is also of concern. Planning for this retirement is something that not only owners, but also the industry must think about. Public perception of

how this is dealt with will affect how the public views equestrian sport, and the use of horses, as a whole.

The public's eye is upon all users of horses regardless of capacity. If the industry is to continue to thrive and survive we need to assure the public that horses engaged in equestrian sport are used and cared for ethically and in compliance with sports guidelines.

Situation

Integrity when owning, using, or caring for our equine athletes covers many bases, from medicating animals to the entire realm of responsible ownership. What opportunities or programs should be developed to address this responsibility?

Opportunities

- Bring attention to the effects of medication on all performance disciplines
 - Wide dissemination of information/warnings about the negative effects of certain drugs on horse health
 - Education on the importance of addressing equine welfare issues irrespective of discipline
 - Need for sound scientific information and backing
- Focus on the needs of retired horses
 - Development of infrastructure and facilities
 - Opportunities for "second careers" for retired horses
- Create programs and education aimed at responsible ownership
 - Programs including the care of the older horse
- Expand communication
 - Within the industry
 - To the general public with an emphasis on changing the public's perception regarding integrity issues in equestrian sport
- Create resources directed at the integrity of breeding
 - Cloning
 - Pressure to breed
 - Betterment of the breed

RESOURCES

- Fédération Équestre Internationale
- United States Anti-Doping Association
- Association of Racing Commissioners International
- Evaluation of Cobalt as a Performance Enhancing Drug in Fit Standardbred Racehorses
- Exercise-Related Factors Affecting Skeletal Muscle Metabolism and Physiologic Performance Measures in Standardbred Horses
- Effects of a Type-5 Phosphodiesterase Inhibitor on Pulmonary Artery Pressure in Race Fit Horses
- Grayson Jockey Club Research Foundation: Welfare & Safety of the Racehorse Summit
- The Horse Industry's Responsibility to Animal Welfare
- Management of Old Horses



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Edward D. Wengryn
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BREAKOUT SESSIONS

Land Use Policy & Management

“New Jersey is a labyrinth of land use regulations and policy considerations and helping landowners navigate them necessitates public agencies disseminate program guidance in layman’s terms.”

While its equine industry is overshadowed by states like Kentucky and Virginia, New Jersey has the second-highest number of horses per square mile (11.2) of all states, which is over four times the national average (2.7). The average equine farm size in New Jersey is 26 acres compared to 76 acres for all New Jersey farms, and equine operations represent 13% of the state’s total farm operations. In fact, New Jersey’s approximately 1,312 equine farms make up the second-largest agricultural commodity group exceeded only by hay farms (1,802), many of which have a direct nexus with equine production.

New Jersey’s proximity to large, affluent cities like New York and Philadelphia offers a robust client base for various types of equine operations, but this adjacency also gives rise to land use conflicts. As the nation’s most densely populated state with the lowest number of farmers per capita, agricultural practices are largely misunderstood, which has led to substantial nuisance complaints from non-farm neighbors and municipal governments. New Jersey also has one of the lowest percentages of legislators from farming backgrounds, making crafting meaningful agricultural policies more challenging.

Nonetheless, New Jersey’s policy history has been replete with innovative agricultural retention programs such as the Farmland Assessment Act (1964), the Right to Farm Act (1983), and the Agriculture Retention and Development Act, better known as farmland preservation (1983).

In addition, there are various exemptions and special dispensations for agricultural activities within the state’s various land use regulations such as the Soil Erosion and Sediment Control Act (1976), Uniform Construction Code (1977), Pinelands Protection Act (1979), the Highlands Water Protection and Planning Act (2004), etc.

Unfortunately, misinformation and lack of general knowledge of these complex statutes and regulations along with chronic understaffing of government agencies has led to limited public outreach and much confusion and consternation regarding equine-related landowner compliance. Thus, it

is forums like the 2023 New Jersey Equine Industry Summit sponsored by the Equine Science Center and the New Jersey Agricultural Experiment Station (NJAES) that provide an opportunity for much needed education on the most pressing matters that affect equine operations. A synopsis of this year's land use issues, which are in fact perennial issues, are detailed in the next section.

Situation

Given the population density of New Jersey, land use is strictly governed compared to more rural states. There is a pervasive feeling among horsepersons that a void exists in accurate and digestible information on compliance with regulations and that an inequity exists in treating equine farms the same as commercial developments in certain instances, such as stormwater management. The presence of exemptions for farms within certain regulations, such as the Uniform Construction Code, isn't widely known in the equine-related community. The consensus is that information written in plain language should be readily available to equine and general agricultural operators, perhaps through a centralized clearinghouse like the Equine Science Center.

Opportunities

- Ensure that timely, accurate, and comprehensible information is available to equine operators in the following critical areas:
 - Stormwater management – more guidance on how these regulations affect farm owners
 - Farmland assessment – more plain language guidance necessary on how equine farms are treated under this statute
 - Federal Farm Bill – development of more program literature on how equine farms can obtain Farm Bill funding
 - Animal waste rules – applicability of these rules to equine farms, written in plain language
 - Right to Farm Act/Agricultural Mediation Program – more illustrative examples of these programs' applicability to equine farms and more information on Right to Farm protection

- for agricultural labor housing, which is an important component of equine operations
- Infrastructure – increase information about agricultural exemptions within the Uniform Construction Code
- Wildlife management – numerous complaints about high deer populations and attendant crop damage but a need for greater awareness of deer fencing grants administered by the State Agriculture Development Committee
- Agritourism – interest in learning more about statutes that govern liability protection for farms that engage in agritourism and whether current protections are enough
- Public lands – Concerns over allowing equine trails on farmland preservation easements and policies that limit trail riding on public lands (Green Acres Program)
- Farmland affordability – concerns about the high price of private land and the lack of long-term leases offered on public land (participants were unaware of the long-term leasing pilot devised by the State Agriculture Development Committee)

RESOURCES

- New Jersey State Agriculture Development Committee
- New Jersey Department of Agriculture Agricultural Assistance Resources
- New Jersey Department of Environmental Protection



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BREAKOUT SESSIONS

Environmental Stewardship

“Equine operations can have environmental effects that extend far beyond the individual farm. With a better understanding of how certain practices impact soil, water, and air, scientists can work with farmers to develop better solutions to minimize the environmental impacts of equine operations.”

The horse industry in New Jersey is responsible for a \$1.1 billion contribution to the economy of the state. The industry provides almost 13,000 jobs and generates about \$160 million in federal, state, and local taxes.

In New Jersey alone, the most recent numbers show that there are 42,500 horses and 7,200 horse operations covering 176,000 acres of land; 96,000 of these acres are directly related to equine activities, of which 78,000 acres are devoted to pasture. An additional 46,000 acres in the state are devoted to hay and grain production. The total acreage devoted to support the equine industry represents about one fifth of the total agricultural acres in the state of New Jersey.

Equine operations can have environmental effects that extend far beyond the individual farm. For example, poor horse pasture and trail management combined with heavy horse hoof traffic can lead to problematic soil erosion. Runoff can carry eroded sediment and pollutants (like nitrogen, phosphorous, and bacteria in horse feed, manure, and bedding) off the farm and deposit them in nearby soils and bodies of water.

Manure disposal is a particularly important issue. Each horse produces approximately 50 pounds of manure per day. To dispose of this waste without the cost and hassle of shipping it off the farm, many farms over-apply manure to surrounding pasture and hay fields. Because horse stall manure often contains bedding material and parasites, this practice can limit the growth of pasture grasses and hay. Horse farmers need affordable, environmentally friendly alternatives for waste disposal.

Horse farmers also need more information about how to manage pastures to meet horses' dietary preferences and nutrient requirements. Well-maintained pasture can also help reduce erosion and runoff. With a better understanding of how certain practices impact soil, water, and air, scientists can develop better

solutions to minimize the impacts of equine operations. Pasture management decisions of operators in New Jersey as well as operators across the U.S. play a very important role in maintaining our environment.

Horses are healthiest in their natural environment outdoors where they can graze at will for 14 to 16 hours a day. If no additional pasture management is performed, a horse will need to graze between 2 to 3 acres in a growing season to get enough nutrients from the pasture to maintain its body weight.

This means that New Jersey would need 85,000 to 127,500 acres of pasture unless more management is performed. The high-end estimate represents more acreage than is available to horses in New Jersey.

Thus, many horse facilities have the problem of too many horses and too few acres on their property leading to pasture overcrowding, poor-quality grass, potentially unhealthy horses, and a possibly contaminated environment.

Situation

Horse farm operations occupy a significant amount of agricultural acreage in the Garden State, but are pastures managed as well as they should be to provide optimal horse nutrition and practice responsible environmental stewardship? How do we get the word out to horse farm and horse owners?

Opportunities

- Capitalize on the current farm management workshops and nutrition seminars.
 - Broad-based marketing to large and small equine operations
 - Accessibility of contact information for Extension specialists with pasture, water, and waste training credentials
- Start early by making youth aware of the necessity for good equine nutrition and environmental education.
 - Youth group efforts such as FFA, Pony Club, 4-H, and high schools
- Engage organizations and professionals in science-based activities and workshops focusing on nutrition and environmental stewardship.

- Therapeutic riding operations
- Veterinary professionals such as equine hospitals and practices as well as statewide groups such as the New Jersey Association of Equine Practitioners
- Make available and widely distribute fact sheets, infographics and other materials that specifically address environmental best practices.
- Create research partnerships with other educational institutions and state offices to address environmental concerns related to equine operations.
- Find solutions for equine farm management problems.
 - Using manure as a source of biofuels, as a possible example
- Continue to help find solutions for equine farm management problems.
- Appeal to the enthusiasm and efforts of the younger generation to find solutions leading to good environmental stewardship.
- Continue to provide training for pasture, water, and waste management.

RESOURCES

- Ryders Lane Environmental Best Management Practices Demonstration Horse Farm
- A Guide To More Productive And Nutrient Dense Horse Pastures
- Crabgrass as an Equine Pasture Forage: Impact of Establishment Method on Yield, Nutrient Composition, and Horse Preference



Al Ochsner
Executive Administrator
Standardbred Breeders and Owners
Association of New Jersey

BREAKOUT SESSIONS

The Future of Horse Racing

“New Jersey must consider other forms of wagering, along with the funding provided by the state, in order to sustain the future of the New Jersey racing industry.”

Background

In 2004, New Jersey casinos provided \$30 million a year to the horse racing industry; this was divided equally among the Standardbreds and Thoroughbreds to offset the negative impact the casinos had on the horse-racing industry. Governor Christie put an end to the funding in 2011.

Surrounding states had the benefit of additional funding through “racinos” (racetrack casinos) which were used to support and improve their racing programs. Unfortunately, New Jersey, by law, is not allowed to have a casino within a 70-mile radius of Atlantic City, which would rule out two New Jersey racetracks. A referendum will be needed to allow casinos at the racetracks.

Current Funding

The most recent funding resource is derived from a state appropriation which came in 2019. The state approved a five-year, \$20 million per year appropriation to be divided equally between the Standardbreds and Thoroughbreds. This allowed New Jersey to once again remain somewhat competitive with surrounding states.

The Standardbred owners implemented programs to encourage breeding and racing in the state. However, the funding ends in 2023. The industry is currently lobbying for another five-year appropriation of \$100 million beginning in 2024.

Sports betting was approved for the state in 2018 which has been coupled with live racing. Racetracks must have a sports betting agreement with the horsemen in place in order to have sports betting at their facility. Money received from sports betting will help support overnight racing purses.

Future Funding

New Jersey must consider other forms of wagering along with the state funding in order to sustain the future of the racing industry. Examples are:

Fixed Odds Wagering – This concept is one in which the odds/payout on a given bet is set when the player makes a wager. It differs from parimutuel betting at a live racetrack in which the final odds are posted only after all the bets are made. Fixed-odds wagering has been approved at Monmouth Racetrack but an agreement with the company providing the service has not been reached.

Historic Wagering – Also known as “instant racing,” historical racing machines (HHR) look and operate much like slot machines. However, instead of randomizing the outcome of play, the HHRs determine winners based on previously run horse races. While this form of gaming is very successful in Kentucky, it currently cannot be done in New Jersey as it is considered a slot machine, which are only allowed at the Atlantic City casinos.

Situation

For decades, horse racing was a highly popular sport in the U.S., but competition from other forms of entertainment and public perception have put it at risk and demonstrated the need for the sport to reinvigorate itself.

Opportunities

- Change the public perception of the industry by combatting negative perceptions.
 - Programs and presentations emphasizing the sport
 - Behind-the-scenes with the workforce – “putting a face” on workers and support personnel
 - Elimination of workforce/labor issues
- Increase education and awareness, emphasizing the “glory of the horse.”
 - Younger people as a viable potential audience
 - Family-friendly events in family-friendly surroundings
- Emphasize the integrity of the sport.
 - Profiles of trainers and more exposure to the public
 - Horse/trainer relationships

- Positive owner involvement
- Maintain interest in betting by increasing the accessibility and variety of betting opportunities.
 - Phone app betting developments
 - Cross-state betting and removing residency restrictions
 - Simplified betting and educating the betting public
- Advocate for continued state funding for racing and breeding.

RESOURCES

- The New Jersey Racing Commission
- The Jockey Club
- The United States Trotting Association
- Harness Racing Update
- The Hambletonian
- The Haskell Stakes
- Jersey Equine - Part of the New Jersey Department of Agriculture
- Harness Horse Youth Foundation

JEFFREY EVERETT

Associate Director, Agricultural Retention, Agricultural Development and Resource Conservation at Rutgers, The State University of New Jersey

A native Virginian, having grown up on an equine operation, Jeff Everett has 25 years of experience in managing public lands and administering conservation easement programs on private lands for federal, state, and local government agencies that include the National Park Service, the New Hampshire Fish and Game Department, and Carroll County, Maryland's Agricultural Land Preservation Program. Most recently, he served as Deputy Director of the NJ State Agriculture Development Committee, where he devised and funded numerous innovative initiatives that include the deer fencing, soil and water conservation cost-share, and rural microenterprises programs. He holds a B.A. in History from Mary Washington College and an M.A. in Public Policy from the University of Delaware, where he was a research assistant in support of the Delaware Agricultural Land Preservation Foundation.

Jeff is a recognized expert in farmland protection, cultural landscape preservation, conservation finance, and incentive-based "whole systems" conservation - the implementation of best management practices on working farms and forests to effectuate wildlife conservation, soil and water conservation, agricultural viability, and climate change mitigation. He co-authored a book on the geography and landscape history of his native Shenandoah Valley, published by the University of Virginia Press, and was awarded The Conservation Fund's National Green Infrastructure Award in Conservation Finance and the Alice Mildred Shipley Land Preservation Award. At the NJ Agricultural Experiment Station, he focuses on applied research in the areas of agricultural retention, agricultural development, and resource conservation.



JAMES L. GAGLIANO

The Jockey Club, President & Chief Operating Officer

James L. Gagliano became president and chief operating officer of The Jockey Club, the breed registry for all Thoroughbred horses in North America, on January 1, 2010. He had served as executive vice president and chief administrative officer for The Jockey Club since June 2005.

Prior to joining The Jockey Club's management team, Gagliano served as executive vice president of Magna Entertainment Corporation's Maryland racing operations, where he was responsible for the day-to-day operations of the Maryland Jockey Club. He also served as president, MEC OTB, and group vice president, MEC Northern Group. Before that, Gagliano served as executive vice president and general manager of Greenwood Racing Inc. and worked in various roles during a 10-year stint with the New Jersey Sports and Exposition Authority.

Since October 2010, he has served as vice chairman representing the Americas for the International Federation of Horseracing Authorities' Executive Council. In January 2013, he was elected to the American Horse Council board of trustees for which he was elected vice chairman in June 2015 and chairman in 2018. In June 2016, he was named to the Humane Society of the United States National Horse Racing Advisory Council. In addition, he was elected to the board of directors of the Thoroughbred Aftercare Alliance in 2016 and of the National Thoroughbred Racing Association in 2018.

Gagliano has a Bachelor of Arts degree in history from Providence College. He lives in Essex Fells, N.J., with his wife, Rozie, and their children, James, William, and Elizabeth.



ALISA C. HERBST, PH.D.

*Post-Doctoral Associate, Department of Animal Sciences &
Rutgers Equine Science Center at Rutgers, The State University of New Jersey*

Dr. Alisa C. Herbst received her B.Sc. in Equine Management from Nuertingen-Geislingen University, Germany in 2016. Her Bachelor's Thesis research was conducted at Massey University in New Zealand and was concerned with identification of management factors that contribute to Standardbred wastage in the racehorse industry. During her undergraduate studies, Dr. Herbst completed a research internship at the College of Veterinary Medicine at Purdue University. She received her Ph.D. from the University of Kentucky in 2021, conducting her research at the Gluck Equine Research Center. Her dissertation focused on muscle mass and immune function in senior horses. In 2022 she joined the Rutgers Equine Science Center as a Postdoctoral Associate. Her main research interests and areas of expertise are the senior horse, the aging equine immune system, and muscle mass assessment in horses.

One of her major projects thus far was the development and evaluation of a muscle atrophy scoring system (MASS) for horses during her time at the Gluck Equine Research Center. Currently at Rutgers University, Dr. Herbst is working on further validating this tool.

In her spare time, she likes to ride horses, play the clarinet, go for runs, and cook or play games with friends and family.



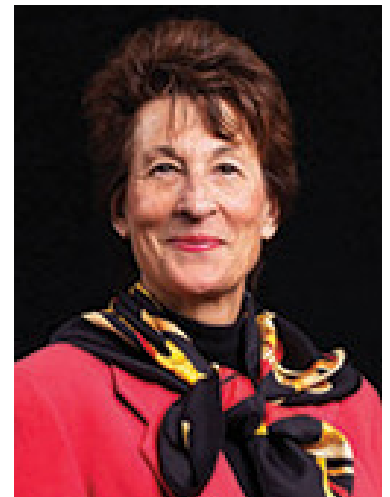
KARYN MALINOWSKI, PH.D.

*Professor, Department of Animal Sciences;
Founding Director, Equine Science Center at Rutgers, The State University of New Jersey*

Dr. Karyn Malinowski has served as a faculty member at the School of Environmental and Biological Sciences since 1978 in various roles. These include: as an Extension Specialist in Equine Sciences, Animal Sciences Professor, Founding Director of the Equine Science Center, and Director of Rutgers Cooperative Extension. Her research and extension programs concentrate on improving the well-being and quality of life of the equine athlete while ensuring the vitality and viability of the equine industry, both statewide and nationally. She played a lead role in building the equine science program at Rutgers University and in the formation of the Rutgers Equine Science Center.

Dr. Malinowski is the author of over 50 refereed journal articles and abstracts, and numerous book chapters. Her expertise in the area of aging and stress management in horses has resulted in her speaking at numerous international venues, and her extension project entitled, "Careers in the Green Industry: Youth Sow Seeds for Their Future," which involved horses and adjudicated youth, has served as a model for similar programs around the globe. Malinowski was a member of the team which conducted the prize-winning study, The New Jersey Equine Industry 2007: Economic Impact.

In 1997, the excellence of the equine science program was recognized with a \$267,000 bequest from the Doris C. Murphy estate and in 2015, a \$835,000 bequest from the estate of Gwendolin E. Stableford. Malinowski has also raised in excess of \$1,250,000 in private donations for use by the Equine Science Center.



KENNETH H. MCKEEVER, PH.D., FACSM, FAPS

*Professor, Department of Animal Sciences;
Associate Director, Equine Science Center at Rutgers, The State University of New Jersey*

Dr. Kenneth McKeever earned his Ph.D. in Animal Physiology at the University of Arizona where he also managed the University Horse Center and Quarter Horse breeding program. Upon completing his Ph.D. McKeever served for two years as a National Academies of Sciences-National Research Council Resident Research Associate in the Cardiovascular Research Lab at the NASA Ames Research Center in California. From 1987 to 1994 Dr. McKeever developed and coordinated research at the Equine Exercise Physiology Laboratory at the Ohio State University.

In 1995 he joined the Faculty in the Department of Animal Sciences at Rutgers University as an Associate Professor and proceeded to build, develop, and coordinate one of the most active Equine Exercise Physiology laboratories in the USA. Dr. McKeever earned the rank of Full Professor in 2009 and currently serves as Associate Director for Research of the Rutgers University Equine Science Center.

He recently served as President of the Equine Science Society as well as the Editor-in-Chief of the journal *Comparative Exercise Physiology*. His research has focused on comparative exercise and cardiovascular physiology, and the effects of performance enhancing practices on the physiological responses of the equine athlete.

In his spare time, he plays water polo goalie at the local, national, and international level and is also an amateur genealogist and historian.



AL OCHSNER,

Executive Administrator, Standardbred Breeders and Owners Association of New Jersey

From raising and marketing pheasants to raising and racing standardbreds, Al Ochsner was destined to have a career in the Standardbred industry.

Al raised and sold pheasants to pay for his college tuition at Utah State University where he majored in economics and marketing. His experience with the game birds became the subject of a school marketing project that earned him high grades and an invitation to pursue graduate studies.

It was day trips to Freehold Raceway many years ago that inspired Al to buy a few horses with his good friend Bob Latzo, with whom he worked cutting grass in his hometown. Bob went on to work as a racing official while Al went from casual horse ownership to serious breeding and racing endeavors. In 1980, Al bought a farm in Monroe Township and converted it into a horse farm where he and his wife of 56 years, Holly, still reside. Al has three children, Todd, Michael and Heather.

Al was fortunate to have many top stakes racehorses who were campaigned by the late great Billy Haughton. It was Precious Bunny, a horse Al bred and sold that earned him Breeder of the Year honors in 1991.

Al joined the SBOANJ as a Director in 2006 having a desire to help and promote the industry. He retired as owner and CEO of Schrader Research and Rating Service in Cranbury which he began in 1965 and was hired as the Executive Administrator of the SBOANJ in 2016.



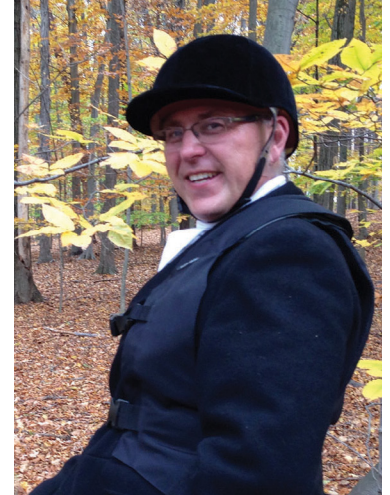
ELIAS E. PERRIS, DVM, DACVIM

*Owner, Perris Equine Veterinary Associates;
President, New Jersey Association of Equine Practitioners*

Dr. Elias E. Perris is a George H. Cook Scholar who graduated from Cook College/Rutgers University in 1986. He is a 1990 graduate of The Ohio State University School of Veterinary Medicine.

Dr. Perris completed an internal medicine residency at Texas A & M University and is a Diplomate of the American College of Veterinary Internal Medicine (Dip. ACVIM). Dr Perris lives in Pennington, NJ where he has a private equine veterinary practice since 1995; Perris Equine Veterinary Associates.

Dr. Perris also serves as the current President of the New Jersey Association for Equine Practitioners; who's mission is to guard, improve, and advocate for the health/welfare of the horse, promote a collaborative forum among equine practitioners, further the professional development of its membership, and foster relationships within the industry of the State.



BRITTANY RIGG

Senior 4-H Program Coordinator, Rutgers Cooperative Extension at Rutgers, The State University of New Jersey

Brittany Rigg is currently the 4-H Senior Program Coordinator for the New Jersey State 4-H Horse Program and the Gloucester County 4-H Program. She attended The Pennsylvania State University to obtain a Bachelor's of Science in Agriculture Extension Education and also a Masters of Professional Studies in the Psychology of Leadership. She plans on obtaining her Doctorate of Education in the near future.

Rigg is passionate about empowering 4-H members through career exploration, leadership opportunities, and hands on learning experiences related to the New Jersey Equine Industry. She values New Jersey 4-H Horse Program's focus on providing members of the with educational opportunities to explore, learn and grow as they progress in their equine careers in and out of the show ring.

In her spare time, she enjoys riding and showing her American Paint Horses in the all-around events and spending time with her dog.



TAYLOR ROSS, PH.D.

Teaching Instructor, Department of Animal Sciences at Rutgers, The State University of New Jersey

Dr. Taylor Ross grew up in Nebraska extensively participating in the 4-H program. Horses were always the priority – especially horse knowledge events like Horse Bowl, Hippology, and Public Speaking, all of in which she earned both state and national championships. 4-H led Dr. Ross to discover her love of teaching about animals which prompted her to attend the University of Nebraska-Lincoln for her B.S. in Animal Science – Biology & Biotechnology Option and her M.S. also in Animal Science focusing on Stress Physiology. While there, she realized that even though she loves Animal Science, she wanted to focus even more on teaching and pedagogy research. She was lucky to be able to do both at Texas A&M University for a Ph.D. in Animal Science Education with a dissertation focusing on undergraduate teaching assistant opportunities for animal science students.

After graduation Dr. Ross was looking for a large or entirely teaching appointment and landed at Rutgers University as a Teaching Instructor and Undergraduate Advisor. Over the last year she has enjoyed teaching both Horse Management and other upper-level Animal Science courses. She has started to get involved with New Jersey 4-H and the horse industry through being a part of the Equine Science Center.

Dr. Ross, her husband Evan, and their three cats have also enjoyed exploring New Jersey and the Northeast by hiking, going to local ice cream shops, and attending community events.



C. JILL STOWE, PH.D.

*Professor of Agricultural Economics & Director of Undergraduate Studies,
Department of Equine Science and Management at the University of Kentucky*

Dr. C. Jill Stowe is a professor in Agricultural Economics at the University of Kentucky. She earned her BS in Mathematics from Texas Tech University and PhD in Economics from Texas A&M University.

Prior to joining the faculty at the University of Kentucky, she was on the faculty in the Decision Sciences group at Duke University's Fuqua School of Business.

She served as Director of the University of Kentucky Ag Equine Programs from 2013 – 2016 and is currently the Director of Undergraduate Studies for the Equine Science and Management degree program.

Dr. Stowe's primary research program focuses on equine markets, with applications in price analysis and decision making. Additional research projects incorporate the fields of behavioral economics, game theory, and sports economics. In addition, she leads efforts to conduct statewide and nationwide equine industry surveys.

Dr. Stowe also participates in equine markets personally, spending much of her spare time and all of her spare money riding dressage.



SANDY STRILEC, DVM

Veterinarian, New Jersey Department of Agriculture, Division of Animal Health

Sandy has long had a great care and respect for all animals and views her current position at the New Jersey Department of Agriculture (NJDA) as a unique opportunity to expand her role in the lives of animals and their people within the state of New Jersey.

Sandy grew up in upstate New York, received a bachelor's degree in animal science from the University of Connecticut and earned a DVM from Atlantic Veterinary College. Upon graduation, she completed a Large Animal Medicine internship at the Western College of Veterinary Medicine. In 2012, she relocated to southern New Jersey to become an associate veterinarian at an equine ambulatory practice which also served other livestock species. In April 2019, her employment as an NJDA field veterinarian and the state's Animal Emergency Preparedness Coordinator began.

At the NJDA, Sandy is able to engage veterinary knowledge in a broad setting and she appreciates working closely with members of the many institutions and organizations involved in the equine industry throughout the state.

In her spare time, Sandy enjoys spending time on the lake and caring for her geriatric, yet remarkably spirited, Appaloosa mare.



MIKE TANNER

Executive Vice President/CEO of the United States Trotting Association

Mike Tanner is the executive vice president/CEO of the USTA, making him the ninth EVP in the organization's history. Tanner came to the association following a stint as the director of racing operations at Harrah's Chester Casino & Racetrack (October 2005-December 2008).

Previously, he held a variety of positions in Thoroughbred racing at Gulfstream Park in Hallandale Beach, Fla., from 1993-2005, including director of marketing, media and simulcasting; assistant to the president; and director of communications. He performed special assignments at various Magna Entertainment Corp. holdings, did additional work for the Breeders' Cup from 2001-2003, and was a member of the National Thoroughbred Racing Association Technology Group's communications task force in 2002.

He began his management career in 1992 at Ladbroke Detroit Race Course and sits on a variety of industry-related boards of directors, including those of the American Horse Council and University of Arizona Race Track Industry Program. Since his start at the USTA, he has been honored with the Lewis Barasch Breakthrough Award (2008), the John Hervey Award for outstanding harness racing column (2012), and Harness Horsemen International's "Dominic Frinzi Person of The Year" (2015).

Tanner graduated with a B.A. degree in psychology from the University of North Carolina-Chapel Hill in 1988. He completed graduate work in clinical psychology at Bowling Green State University from 1989-1991, and subsequently obtained an M.B.A. degree from The Ohio State University. He and his wife, Gail, reside in Blacklick, Ohio.



EDWARD D. WENGRYN

Field Representative & Research Associate, New Jersey Farm Bureau

Ed Wengryn is a Field Representative/Research Associate with New Jersey Farm Bureau. A 1986 graduate of Delaware Valley College of Science and Agriculture (now Delaware Valley University) with a BS in Ornamental Horticulture.

In October 1998 Ed joined New Jersey Farm Bureau His main areas of responsibility are State legislative initiatives, outreach, education, and policy development with Farm Bureau members in the northern counties of the state with emphasis on direct marketing, ornamental horticulture, land use, sales tax, and equine and other livestock issues

From 2002-2004 Ed served as Confidential Assistant to Charles Kuperus the Secretary of Agriculture for the State of New Jersey where he coordinated the development of industry specific action plans to improve the economic viability of New Jersey's varied agriculture sectors.

Ed is a resident of Trenton New Jersey residing in the Mill Hill Historic District where he maintains an 1860 brick Victorian, a yard and garden and keeps bees.



CAREY A. WILLIAMS, PH.D.

*Extension Specialist/Professor, Department of Animal Sciences;
Associate Director, Equine Science Center at Rutgers, The State University of New Jersey*

Carey A. Williams, Ph.D. joined Rutgers University in July 2003 as its Equine Extension Specialist, and Associate Director of Outreach for the Equine Science Center taking an active role in teaching, conducting research and working with the equine and academic communities to ensure the viability of the horse industry in New Jersey.

A Wisconsin native, Dr. Williams earned her doctorate degree with an emphasis on equine nutrition and exercise physiology in June 2003 from Virginia Polytechnic Institute and State University. She holds a master's degree in equine nutrition, also from Virginia Tech, and a bachelor's degree from Colorado State University. At Rutgers, Dr. Williams maintains a herd of Standardbred mares for nutrition, pasture and exercise physiology research. The focus of her research is two-fold: antioxidant supplementation and decreasing the stress of exercise and competition in performance horses and, more recently, pasture management and metabolism of the grazing horse. She has published 51 refereed journal articles and 12 book chapters as main author or co-author for her research, teaching and extension activities.

Dr. Williams has also won many awards, most recently the New Jersey Horseperson of the Year for 2021 and the American Feed Industry Association Award for Equine Nutrition Research in 2019. In 2019 she was promoted to full professor in the Department of Animal Sciences at Rutgers University. As a hobby she currently training her new 4-year-old sport horse, Palmer, for dressage and eventing.



ACKNOWLEDGMENTS

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Without you, events like this wouldn't be possible.*

Dr. Alisa Herbst

Ellen Rankins

Kyle Hartmann

Diana Orban Brown

The New Jersey Agricultural Experiment Station

The School of Environmental & Biological Sciences

Rutgers Cooperative Extension

Rutgers University Catering Staff

Cook Student Center Staff

And Our Student Volunteers Who Gave Their Time To Join Us During Their Spring Break

Paula Agustin

Brittany Baban

Jonathan Hummel

Nadja Knox

Amina Lamrabat

Sarah Paladino

Rafaay Rizwan

Olivia Savage

Victoria Wright



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New Jersey Farm Bureau's primary purpose is to represent the overall interests and improve the financial well-being of farmers and our \$800 million industry. NJFB activities are supported through voluntary membership and annual dues. Members have access to:

- Staff assistance on farming issues and regulatory problems.
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The New Jersey Department of Agriculture (NJDA) is an agency which oversees programs that serve virtually all New Jersey citizens. One of the Department's major priorities is to promote, protect and serve the Garden State's diverse agriculture and agribusiness industries.

In addition to the programs we offer to support production agriculture, NJDA also manages programs that feed schoolchildren, distribute surplus federal foods to soup kitchens and pantries that serve our needy citizens, conserve precious soil and water resources, protect farmland from development and preserve it for future agricultural use, expand export markets for fresh and processed agricultural products, and promote our commercial fishing industry, and administer the complete program of agriculture, food and natural resource education, which includes the State FFA Association.

For more information about NJDA, please visit: www.nj.gov/agriculture



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