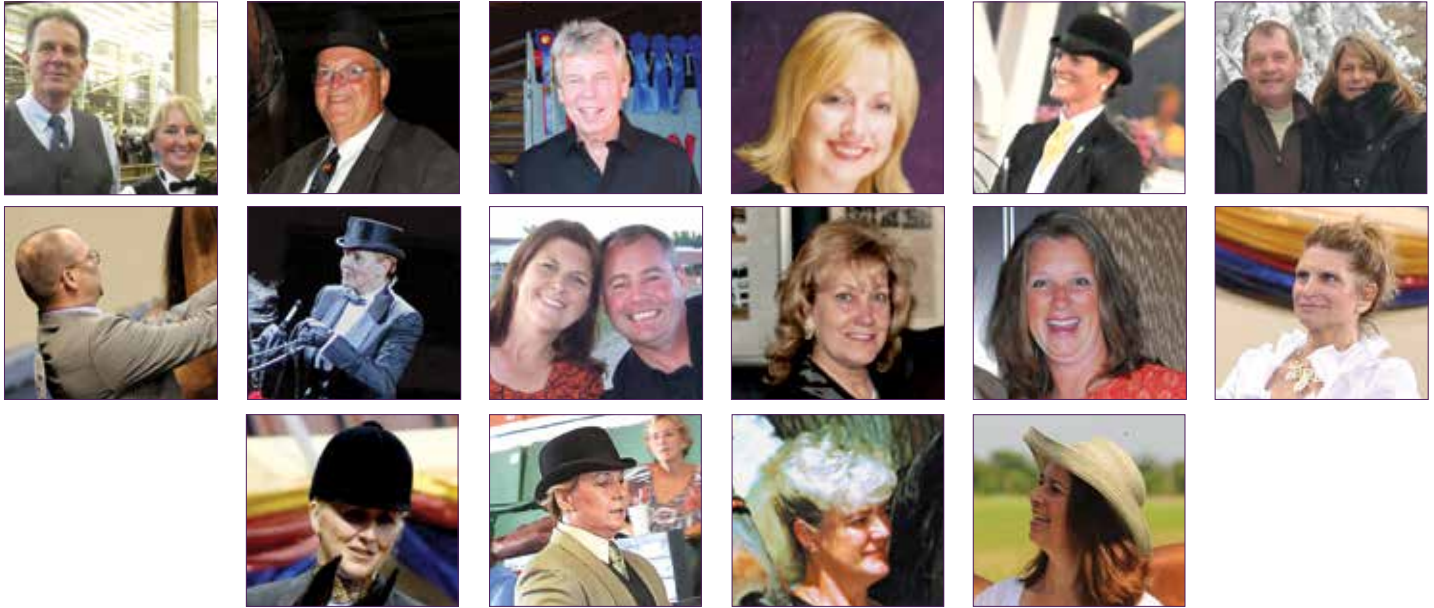


≈ INDUSTRY ROUNDTABLE ≈

THE 21ST CENTURY BREEDING CONUNDRUM

By Stephen Kinney



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The internet has been all abuzz of late about a presentation made at the United Professional Horsemen's Association (UPHA) convention in January. This report, authored by trainers Jim and Jenny Taylor, referenced the downturn of registrations of American Saddlebreds (about 1500 foals registered last year). It went on to catalogue the resultant ripple effect this will have on Saddlebred trainers. The report embraced similar factors in the Morgan and Hackney Pony communities as well. For the training community its conclusion was dire. Many professionals will soon be facing career endangerment due to lack of young horses to train and of inventory to sell.

(Jim and Jenny and their colleagues in the industry have started the United Breeders Committee (UBC) with suggestions to address issues of stud fees, breeding fees, vet and training expenses. The UBC, and their list of participating stallions and trainers, can be accessed on Facebook.)

In a December 2013 "View From The Ingate" column in this magazine we noted that the registration of Morgan foals had declined from around 3000 in 2008 to fewer than 600 in 2012. We also speculated that this was going to cause its own consequences in the Morgan economy with fewer prospects entering training barns, even as demand for proven show horses remains healthy.

The situation has clearly been caused by recent, general economic factors. It is also necessary to note that the decline in productivity has been a reaction by breeders acting intentionally and in good conscience. While partly a response to the lack of demand for prospects (as opposed to finished show horses), breeders have also been responding to the specter of Morgans ending up in slaughter auctions, rescue situations and, even some, in the hands of the SPCA.

If the economy and the resultant situation does not reverse and if we, as an industry, do not respond pro-actively we will soon experience potentially serious consequences. Declining numbers will have a devastating effect on governing organizations, including our own registry. Training barns will run out of inventory. Newcomers and novices, whom we have so assiduously courted, may not be able to purchase starter horses or entries to accompany them into more advanced levels of competition. There will be a ripple effect for veterinarians, tack shops, feed stores, horse shows and more.

We may not be there yet, but our industry, community, and economy could soon face a crisis.

We thought we would ask some of those concerned and, possibly, in a position to react proactively, for their constructive thoughts on this topic.

Our question is: What can be done to effectively and responsibly alter the predicament we are now facing and its resultant ripple effect on our economy?

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**Jim and Jenny Taylor,
Memory Lane Stable**



Thank you for addressing what we foresee as an alarming situation for both the Morgan and the Saddlebred breeds. Jim and I have started a new committee whose mission is to try to find some viable solutions to the problem. In an effort to stimulate breeding, the United Breeders Committee is working with stallion owners, trainers, and veterinarians to help reduce the cost of producing a marketable product. The Morgan representatives on the committee are Tony Lee, Lynn Peeples, and Mark Bodnar. We are working closely with Harry Sebring and Julie Broadway to assist in any way the efforts of the American Morgan Horse Association (AMHA).

**Harry Sebring,
Past President, AMHA; Sebring Stables**



That is not an easy question to answer. The first thing we must do is recognize that it is an equine industry related problem. It is not unique to our breed. So, collaboration among the various breeds is necessary. We, as Morgan lovers, should not fear this collaboration, because we have a good product.

The industry as a whole has to put horses back out in the public eye. Gone are the days of prime time Westerns on television. We must use the press (in the form of news stories for the 6 o'clock news) and any avenue available to us to get the story out there. Perhaps the various breeds can have a summit, if you will, to plan a course of action/promotion. This can only be accomplished by recognizing the elephant in the room.

We all need to think about the prices we charge from the trainers, blacksmiths, veterinarians, tack shops and any entity that makes their living from the horse business. It is too expensive for a breeder to breed a mare, keep her (board), foal her, raise a foal, train it, and try to sell it to break even, much less turn a profit. Breeding is too much of a gamble for that. Larger breeders have hoped for the exceptional foal that will pay for the others. That doesn't always happen. We need to develop a market for the horses that aren't the stars. More and more trainers don't want to develop young horses; they want the trained ones.

I will refer to my 2014 president's address and say we are privileged to have Morgan horses, but we must not feel entitled because we have them. With privilege comes responsibility. We are responsible to welcome new people into our breed and to support young trainers, and support the breeders that we have in our breed. We have a large responsibility to bring more people into our tribe through outreach programs. If we can't develop markets for the horse, perhaps we need to step back and re-evaluate our mission!

**William Haines,
Ledyard Farms**



If the Morgan horse economy were strong we would not be having this discussion. It is not just Morgans; it is most of the horse economy.

For the period 2000 to 2012 Morgan foals decreased from 3,090 to 1,189 respectively. The bottom fell out in 2013 with 600

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foals. The number of Morgans transferred held reasonably steady from 2009 to 2013, about 3,000 per year, but well below the year 2000 when 5,500 Morgans were transferred.

The Morgan business is in decline. What is really worrisome if the Morgan foaling rate remains at 600 as it was in 2013 the breed will no longer be a factor in the show or pleasure arenas. It will take the next five years to equal the number of foals born in the year 2000.

The economic effect will be disastrous. Assuming 40 percent of foals are destined for the show ring, we will only produce 240 show horses a year for all of the Morgan trainers in the country. Of course, the trickle down impact will be felt by the total horse economy. The impact on horse shows and equine events will be equally disastrous. The impact on the number of quality Morgans will significantly diminish quality breeding stock.

What can be done to make sure the Morgan breed survives? First, we must acknowledge the problem. Second, we must commit to increasing the numbers and quality of Morgan foals with every serious breeder increasing production by one to three new foals annually for the next five years. Third, we must increase futurity programs to stimulate economic rewards at all major shows. Fourth, we need to encourage and help small breeders get into or back into breeding through free consulting and in some cases complimentary breeding rights for some of our best stallions. Finally, we have to believe that the Morgan horse is worth saving. If the current trend continues we will have fewer horse shows and far fewer quality Morgans by 2020. I believe, as I hope you do, that our Morgan horse is worth fighting for.

**Julie Irvine,
Anandale**



As a stallion owner, I believe we no longer are in the “If you build it they will come” market. Today it is all about relationship

marketing. I am thrilled to see that some of the Morgan breed’s stallion owners are saying, “We will work with you, how can we help you achieve your dream?” It makes the process less intimidating for the first time breeder. We try to do everything we can to help the mare owner achieve their goal.

In order for us to stand our stallion, we need the numbers to support that venture.

I believe our breeding success is because we partner with the mare owner in this journey. When the foal hits the ground we market their product. Even if it is not for sale, we still promote the offspring through social media and soon in print. Those foals are the stars of the show. Those mare owners took the risk. We need to support their venture.

Finally, as a stallion owner I have to be invested in my product. We lowered our stallion fee, not because he is not worth more, it is because we are invested in this breed. I don’t believe it is my trainer’s responsibility to market my stallion. Their job is to keep him in breeding condition and do the paper work and collection. It is my and my husband’s responsibility to create that connection with the end buyer. We know our stallion. We bring him to life for those who have never seen him or been able to touch him.

**Sarah Gove,
Taylor River Farm**



I have believed, and still do, that we need more people being introduced into our breed and I have always felt that we need to have more lesson programs. Chrislar Farm is a perfect example. Out of Chris Cassenti’s program came many people who have moved on to be a part of the Morgan horse business in one way or another, but more importantly to us she helped create Taylor River Farm. I can only hope someday we raise one special kid to grow up to open their own farm!

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Long story short, I think that UPHA and AMHA need to join forces and finances to give all of us the knowledge and resources necessary to either start (or pay someone to start) some kind of program in their stable, no matter how large or small they can manage. I think we can set up a website or simply a place where people can find lesson horses. I would assume there are a lot of horses out there hanging out in back yards, retired or that people can no longer afford to have in training, that could be very happy working in lesson programs, but the hard part is knowing where to find them.

We need someone to put together a lesson program in a box, and even supply start up money to either have horses shipped or purchased to make it easier for people to do.

I am very happy that this is becoming such a big topic, and very happy to do whatever we need to do to help change things around! Thank you to all who are putting their time into this!!

John and Belle Hufferd, Triumph Stables



We at Triumph feel that the economy is on the upswing. We have several clients who are breeders. They are also concerned about inventory, as we just recently have noticed a big swing upward on inquiries of prospects and we are starting to sell more of them than in recent years. We feel there are plenty of buyers out there for a really nice young horse and they will pay a fair price for that special horse. So we will encourage our clients to breed their best mares to the best stallion they can afford. We are going to try to avoid high vet costs by limiting the use of frozen semen and of poorly managed stallions that don't ship fresh cooled well. And we will try to keep our service fees down. For the stallions we stand we intend to run breeding specials for the 2014 breeding season to help breeders keep their expenses down.

Mark Bodnar, Merriehill Farm



1) I think it is very important for both the Morgan breed as well as the American Saddlebreds to fully support the newly formed United Breeders Committee in its efforts to get everyone involved in the breeding of these horses to work to together to help control the high costs.

2) Trainers should offer a discounted package of three or four months of training for young stock so as to be able to get them started and evaluated for the owners, and should set up a discounted package for prepping and presenting weanlings and yearling for in-hand showing.

3) Stallion owners need to consider reducing the stallion service fees and offering multiple mare discounts. It would be a good idea if stallion stations or breeding facilities that stand multiple stallions with different owners were able to offer multiple mare discounts for breeders who choose several different stallions from the same stallion station or breeding facility.

4) Stallion owners need to go back to the old "Futurities upon request" promise that seems to have fallen by the wayside over the years, although there are still several of us who still do that. It is important to support classes that provide for good paybacks when showing youngsters so there is an incentive to breed.

5) Even as we want to increase breeding we have to be careful not to do so indiscriminately. Not every mare or stallion should reproduce so it is important to consider the pedigrees and quality of the breeding stock. It will not help to just start producing horses and flooding the market with undesirable animals. Breeders need to be sure to keep standards high in spite of these dire times.

6) Arrange partnerships with someone who has a good mare, if you are a trainer, that you as the trainer will train the offspring if they pay all out of pocket expenses for a 50/50 ownership of the offspring with the obvious intent to market.

7) Probably one of the most important issues is to get the

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veterinarians and breeding clinics to consider packages at reduced rates for breeding whether it be handling the stallions or breeding the mares. The high costs involved with this is a definite deterrent to breeding. It would be in their best interest also to realize fewer horses means less business.

Peggy Alderman, Salem Farm



There are so many factors contributing to our present state of breeding, training and horse shows it is hard to know where to begin. I started breeding Morgans in the 70's. We first cultured non-maidens, teased the mares, bred them live cover on the third and fifth day of heat, and perhaps another cover if they didn't tease out. We teased the mare again when she was due to come back and then palpated at 30 days to confirm pregnancy. Total cost in today's dollars was under \$200 in vet bills and the cost of board. Breeding costs today are astronomical. We want the best care for our mares, the best stallions etc. and I would guesstimate the average cost when a foal hits the ground is more than \$10,000. If the cost of the mare were prorated, it would be more.

I would be hard pressed to rally people to breed more—it's still a money pit and with the exception of the superstar foal, it is very difficult to sell young stock. It didn't used to be that way, so what has changed?

The current format of many of our horse shows needs drastic reworking. They are too long, they are too expensive, and have way too many classes with little real competition. Along that same line, who can afford to go to week long horse shows all the time? It's not only the dollars, but also the time spent away from work. In 2014, our modern lives do not work that way. We need to figure out how to make horse shows doable for a larger group of people.

I have been nurturing an idea for our New England area that I will throw out here. I would like to see a series of shows (perhaps starting with six) that are held every two to three weeks, multi-

breed, that would start on a Friday night and end Sunday afternoon. Sunday would be academy classes and a well-developed amateur owned and trained division. I envision large condensed classes running Friday thru Saturday night. I envision a well-developed social scene and an environment where a family gets out of work or school and has a fun event for the weekend. I envision a standard format—perhaps developed by UPHA Chapter 14. Clubs that are supporting struggling shows could run one of these shows instead. I realize that many horse clubs rely on their horse show to support themselves financially. I envision nice horses that might be kept in training mostly for this circuit. Our area trainers have done a great job expanding their lesson programs. Let's capture some of our academy riders that aren't going on to Oklahoma City or Louisville.

The only way to increase the amount of breeding is to increase the ability to sell the animals produced. It's a tall order, but we desperately need to increase our middle market.

Kurt Hufferd and Shanna Gish, Indian Creek Farm



Indian Creek Farm and its clientele have been breeding Morgan horses for many years. There is no question that we all enjoy raising and training these young horses and prospects but, as of late, we have all had to scale back. There is simply one reason getting in the way, and that is cost. The expenses of getting a mare in foal, raising it, and training it to a marketable level has gotten prohibitively expensive. We believe that cost is the reason our whole industry from breeding to showing is suffering.

So what do we do? We have got to put pen to paper and reduce our costs, look for better ways to do things and let our service providers know where we stand. Talk to our vets, farriers and so on and work something out so that we can all continue to breed and raise foals which will in turn keep their professions surviving as

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well. There are also a lot of futurity programs out there selling stud fees that will sell for way less than their advertised service price. Take advantage of these programs and your foal will be eligible for futurity monies down the road, which is always a buying incentive. The demand for horses is there, we just have to work on reducing our costs so that we can grow our industry.

The cost to compete at horse shows has also greatly affected the number of show horses that we can sell. It has become so expensive for show committees to put on shows that we have seen the smaller, local shows become obsolete. But right now, those smaller closer to home shows are exactly what we need to introduce new people to the world of showing. It will also give us a place to market a nice starter horse or give new purpose to some of our older established show horses. We have a decent sized lesson program and we also compete at academy shows throughout the winter. Everyone is very interested in competing at that level but taking the next step is tough for most families. We need to bring back the shows that are shorter in length and less expense so that we can get our new interest started again.

If we tighten up our show schedules and reduce the number of travel/show days for the owners, trainers and show committees, we could see everyone better off for the reduction in expenses. Classes would also be bigger and the thrill of competition would rise again. One-horse classes are not fun for anyone and the expense to run them drains the shows.

Our biggest motivator here is that we all want to see our breed continue and to realize a rebound in growth. We can turn this around if we all do our part in reducing costs, promoting our wonderful breed and not giving up. It is hard work and the hardest may be yet to come. But it will be even harder to live without our Morgan horse.

**Chris Cassenti,
Chrislar Farm**



With the economy the way it is, we need to go back to what we all used to do. For instance, I think the days of the open shows are coming back. It may give us an opportunity to showcase the Morgans to get outsiders involved in our breed. They will be riding our proven horses in maiden/novice/limit rider classes (I have been asking show managers for those classes for the last three years.). We do need those maiden/novice/limit rider classes for those we are

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bringing in as it's not fair for them to have to compete against riders who have been involved for many years. We need qualifying classes and championship classes. (Show manager) John Lampropoulos had the right idea by opening up the shows that he manages to outside breeds (Granite State and Maine Morgan are now open shows). It looks like matters are going back to the basics from whence we all came and there's nothing wrong with that!

Lessons are the guts of Chrislar Farm. Always have been. At this time, Chrislar is fortunate not to have felt a big impact from the downturn in the equine economy. Horse sales are still strong and more entry-level people are stepping up to the plate. Over the last 30 days I have sold four Morgans and two horses of other breeds for pretty good money (\$25K and under).

Another thing: Facilities need to cut costs, refinance, restructure and don't wait until the last minute to do that. I just refinanced a vehicle and cut the percentage rate in half. Same with merchant services charges we pay for accepting credit card payments. Credit card fees are negotiable! Insurance is another critical thing. We are all "insurance poor"—have your policies reviewed and get better rates! Really! When did you ever hear of workmen's comp going down 12 percent? Mine did!

Do I have the answer? No! What would Dr. Phil say? "So, how's this working for you? If it's not working for you do something different!"

Stacy Hennessy, Gerry Rushton Stables



I do agree that the registration numbers are concerning but, in my opinion, it's not our biggest concern. Don't get me wrong, we need horses to train, horses to show, horses to sell. But first, we need people to train them for, people to show them, and people to sell them to. We just aren't getting new people in at the same rate that people are getting older and getting out, or kids aging

out of their junior exhibitor years and families leaving, etc. Some lesson programs thrive, but few really do more than make money on lessons. Many aren't able to turn those riders into owners of Morgans and get them into the world of horse ownership or breeding. We hear all the time, it's gotten so expensive, but the fact is it has not increased in price, for the most part, as much as most things.

I believe the difference is that there are simply different values these days and many more ways to spend money. When I was a kid, my parents drove reliable cars. Perhaps, if we hadn't put so much money into horses, they'd have driven "impressive" cars, but that wasn't the priority. We drove to a vacation most years, in the reliable family car. We had a phone bill that was about \$50.00/month, not a \$50/month home phone and then a \$400/month family plan for a cell phone and data plan for every member of the family. TV was free, not another \$200/month for cable for each TV in the house. Add in the thousands most families spend annually on technology now, such as desktops, laptops, iPads, iPhones, iPods, speakers, chargers, programs and apps. There are so many new costs that there simply isn't the extra left over to show. There was a time that this sport and all it offered in terms of patience, teamwork, sportsmanship, pleasure, responsibility and fitness was a bigger priority than the impressive cars. Priorities have changed and that, in my opinion, is a huge problem for us.

Add to that, because training prices have not risen as much as the cost of keeping horses has, most trainers (equine vets as well) have a considerably lower profit margin than previously. So, while I think asking trainers and stallion owners to help out is a good first step, there just isn't room for them to make a huge difference in a person's decision to breed or show because they can't offer much discount without losing money.

Personally, I think the best thing we could do is get together—together!—with the Saddlebred and Arabian breeds and pool money. Get donations together that would go directly into a fund for promoting show horses and showing. Get an ad in a national magazine, *Parenting* or something like that, work with some of the connections we have in the entertainment industry to try to get a commercial or two on TV, do some mass advertising; all directing people to a website that gives them information on where they can go locally to see horses, take lessons, get involved. Have everyone who donated to the fund listed by area on the website. Not by breed—we need to do this together—just get them into the show horse world, riding and driving, list them all by location. Offer anyone buying a first lesson package a discount (I find free first lessons are tough—not enough fun to return and pay. Get them to take five to six lessons and they'll enjoy it more). But get these people in and doing something. Expose them to this sport. The website could have some well researched costs on other sports. I looked carefully into gymnastics, dance, and skating in my area. Similar cost to having a horse, you just give up your \$50-75.00 each time you go instead of once a month. At first it looks less expensive, but in the end, many sports are not far off in cost to ours. In my opinion, ours benefits kids and families more.

If we are divided by use, breed, etc. from the beginning, we'll get nowhere. Nobody steps in and starts showing. But many people

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end up staying in the breed of horse that they start in. It's what they become comfortable with. We need to get them through our doors. So we get them in the door and then we help them do what they want—ride, drive, show, trail ride, whatever—in our world.

This was sort of a roundabout answer. I'm sorry. I do believe our registration numbers are a concern, but I think more people will breed if they believe there are people to buy those horses already waiting.

**Susan Morey,
Hallmark Farm**



First, thank you and the trainers involved for recognizing the urgency of trying to formulate a plan to help stop this downward spiral. We are not alone, it is an equine industry-wide situation. The solution also needs to be industry-wide. It is time for the Morgan breed, as well as all others, to rebrand itself in a different light:

- A. Breeding fees are too high;
- B. We are catering to only the top end in this economy;
- C. We lack clear strategic plans for the long range future;
- D. We need to instill confidence to show exhibitors about the judging process.

Again I thank you for taking the initiative to at least address some of these problems that our industry has induced on itself. Again, I would like to reiterate, this is not just a Morgan problem, it involves Arabians, Saddlebreds, Quarter Horses, Paints, Pintos, Hackneys—all breeds across the board.

**Kathy Peeples,
Waterford Farm**



We support the United Breeders Committee and pray it will make a difference.

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Tami Johnson,
Morgan Showcase.com



If the professionals and those who consider themselves breeders would think about their actions, I believe our breed could be the one that best survives the downturn in the economy, simply because of their great personality and the breed's ability to adapt. But we all need to think positively and proactively with everything we do. Professionals across all disciplines need to network to help each other sell horses. Sell a horse based on their positive traits. Value every horse on their positives and open your minds to shopping outside of your normal comfort zone. You'd be surprised what you'll find.

Many successful breeders today are thinking long and hard about how and what to breed. Pretty sells. Great personality and disposition sells. Soundness sells. You can't give away a bad thinking horse or one that won't stay sound. Although we're struggling with numbers now, I believe the next few years are going to yield some tremendous improvements from breeders who have learned these lessons and are now slowly getting back on track.

The biggest challenge we have is our horse shows. If we want to keep people spending money training their horses with the goal of attending shows, we're going to need to take a long, hard look at why we've had such a mass exodus from our rings. And if you interview some of the people who are now gone from competition,

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you will find that it's not so much the downturned economy or the sheer expense, but that they were very unhappy with spending all that money and not getting what they feel was a fair evaluation. When an exhibitor attends show after show and sees horses win that are unsound or don't canter one direction or are not any part of the description of a ladies horse in a ladies class, then they will find something else to do with their money. And while many people will try to say politics is just exhibitors with sour grapes, I have sat with many breeders, owners and exhibitors that I respect and that have been in this game for many years who say it's not sour grapes, it's not our imaginations, it's definitely happening, and they're very unhappy with the state of the showing industry. We're a bit like alcoholics—we keep saying we don't have a problem, but the empty bottles keep piling up.

Nancy Eidam,
Crown Morgans



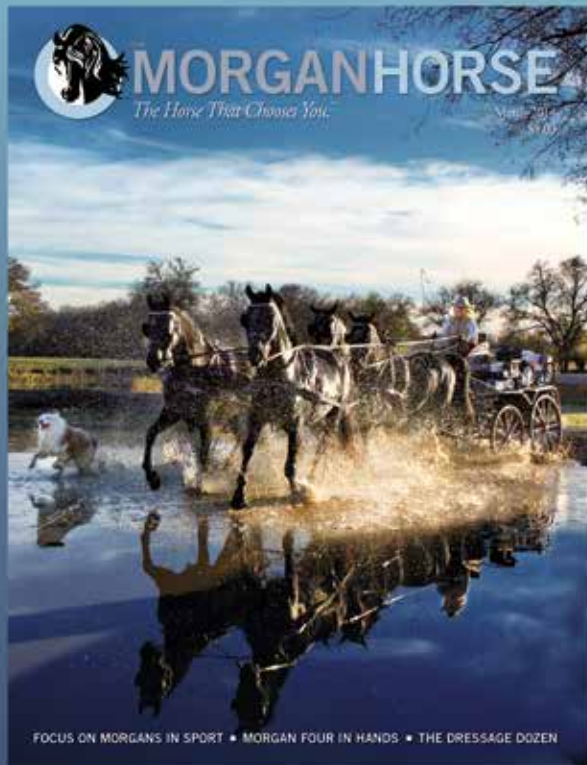
I think the statement from the UPHA presentation that "many professionals soon to be facing career endangerment due to lack of young horses to train and inventory to sell" is misleading. There are plenty of horses out there. Just not enough check books to put them in training.

Our AMHA registry numbers of 3000 in 2008 and 600 in 2012 definitely demonstrate that breeders are intentionally reducing production numbers. Pure economic reaction to current market. So it is an obvious fact that our current general prospective buyer market of the middle class cannot afford or justify the expense to purchase a weanling, yearling or even a two-year-old and maintain it or put it in extended training to have a "finished" horse for show or otherwise. Hence the predicament for the breeder and professional.

"What can be effectively and responsibly done to alter our predicament?" First, we must recognize that non-horse people need to be enticed into our horse world. We need to unite as an industry. We need to create interest and desire to look for the fun opportunities in the horse world. We need to promote "value" in equine involvement—what can being with a horse do for you?

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We need to list out simple examples that non-horse people can recognize and relate to: physical, mental, family togetherness, self-development, kid friendly, positive environment, etc.

Once people are interested in seeking that value, the horse community must step up and provide a fun, rewarding, and obtainable environment that not only brings the people in but holds them in a long lasting, honest, and respectful relationship in the horse community.

After 50 years in the business as a trainer-instructor-breeder, I have found that involvement would begin with a junior rider who in turn brought parents/ grandparents/ friends into the business. We need to reach out to the retired baby boomers who have the time and resources to participate. The driving disciplines, both show and carriage, are wonderful venues for entry-level people of all ages.

The state of the horse business" is not evolving. It is up to each of us to figure out how to turn it around and what will work in each of our communities

Finally, we must stop preaching to the choir! It is time for all of us to be proactive nationwide or there not only will be career endangerment but horse world endangerment!

Julie Broadway,
Executive Director, AMHA



The American Morgan Horse Association welcomes ideas and suggestions to ensure a robust equine industry. We look forward to hearing more about the United Breeders Committee efforts and hopefully their successes.

As an organization AMHA is taking numerous steps to bolster the Morgan horse economy including appealing to new people with our new membership structure. We are currently examining all our registration processes to look for ways to make them more efficient and less complicated—and perhaps less costly. ■