

Submission on Bloodstock and Sports Horse Industry re Kildare County Development Plan 2023-2029

Background:

The Deloitte Report commissioned by Horse Racing Ireland in 2019 states that there are few places in the world with a breeding and racing tradition as rich as that of the county of Kildare. As well as success on the track and in breeding sheds, the industry provides over 4,700 jobs in the county and over €420 million in annual expenditure. In addition to being the home of some of the most iconic studs and training establishments in Europe, the county features world-famous racecourses at The Curragh, Punchestown and Naas.

The thoroughbred breeding industry is particularly strong in Kildare with considerable expenditure being generated from a world class roster of stallions and a strong population of broodmares producing €80 million of bloodstock every year. A total direct expenditure of €206 million is estimated to be generated in Kildare each year, the largest components being breeding at €112 million. The €206 million of direct expenditure in turn leads to an additional indirect expenditure of €215 million composed of the secondary business-to-business spending of suppliers to the core Breeding and Racing industry and secondary expenditure as those people working in the core industry spend their wages on local goods, services and amenities. This results in a total economic impact on Kildare of €421 million.

Kildare is home to over 40 stallions - more than any other county in Ireland - inclusive of many world leaders, based on the success of their progeny. These stallions, although forming 18% of the Irish population, contribute over 34% of the total nomination's income received, higher than average nomination fees reflecting the high quality of stallions based here.

The registered broodmare population of c2,200 (17% of the Irish total) is considerably more than any other county, and also generates a significant amount of expenditure in the region. Mare owners not only from elsewhere in Ireland but also internationally opt to keep their mares in Kildare due to its reputation for high quality facilities, healthy environment, reputation and access to world leading stallions. Kildare's mare population produces c1,400 foals, p.a. 17% of the Irish crop and the most of any county.

Goff's, is the leading bloodstock auctioneer in Ireland. In 2018, €109 million of Flat and National Hunt bred bloodstock passed through the sales there.

Over 20% (c1800) of the racehorses trained in Ireland are based in County Kildare. These are the declared number, but the total will be substantially increased by horses in pre training and resting.

The core racing industry is estimated to employ 1,900 full time people in Kildare. This figure is boosted significantly by part time employment due to the seasonal nature of the business. In addition to the core industry workforce, there are a significant number of individuals employed in activities

which, whilst being reliant on Breeding and Racing industry, will also serve other economic sectors. Estimated at c.1,185 full time equivalent positions in Kildare, these will include roles such as vets and farriers in addition to those working in other sectors such as leisure and hospitality.

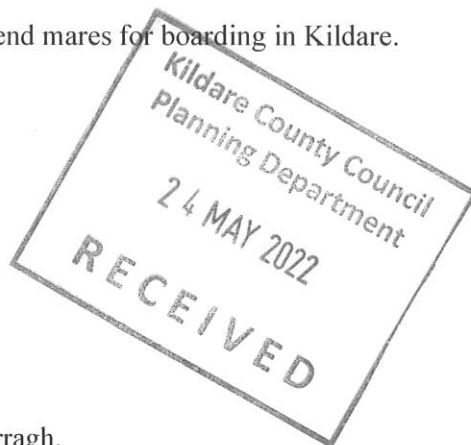
Around €114 million is estimated to have been invested in capital projects in Kildare between 2007 and 2016 with €33 million by breeders to ensure facilities are of the highest standard and sufficient farmland is available. This does not include capital purchase of bloodstock.

There are 3 major racecourses in Kildare including The Curragh racecourse, Naas racecourse and Punchestown racecourse. Punchestown generates the majority of the estimated €53 million off-course expenditure in Kildare (almost 40% of the Irish total) which is attributable to the Punchestown Festival, with accommodation, food and beverage, transport and attire being the main areas of expenditure.

(Deloitte report on The Economic Impact of Breeding and Racing in Kildare commissioned by Horse Racing Ireland 2019)

Stakeholders:

- 1) Thoroughbred and Sport Horse stud farms
- 2) Mare owners from outside county and abroad who send mares for boarding in Kildare.
- 3) Pretraining establishments.
- 4) Smaller equestrian establishments.
- 5) Trainers
- 6) Specialist stud staff
- 7) Veterinary surgeons.
- 8) Farriers.
- 9) Feed merchants.
- 10) Horse transporters.
- 11) Saddlers.
- 12) Numerous ancillary services.
- 13) Local racecourses at Punchestown, Naas and the Curragh.
- 14) Horse sales company Goffs, based at Kill.



Irish sports horse and breeding:

In addition to the thoroughbred there is a substantial sports horse breeding operation in Kildare and in particular around Naas, Killeel, Punchestown, Mullacash, Ballymore Eustace and Brannockstown.

Hartwell Stud in Kill was founded in 1880 and has been brought to its present status by owners David and Mary McCann over the last 40 years. It has concentrated on breeding performance horses for the world equestrian market of Show Jumping and Eventing. Through selective breeding of the Irish Sport Horse, they have combined the Irish Draught (renowned worldwide as a foundation cross for top-class performers) with the three-quarter bred and thoroughbred, to produce some of the best horses jumping and eventing in the world today. Judy Reynolds from Killeel is Ireland's top dressage rider and one of the leading dressage riders in the world. Edward Doyle based near Rathmore is both a successful showjumper and sports horse breeder.

There are major equestrian centres including Jag equestrian centre, in Rathmore, Coilog Equestrian centre in Kilmeague and Emerald International in Kildare.

The sport horse breeding and training operations are generally smaller in size than the larger thoroughbred operations but are more numerous in number and include many amateurs alongside professionals. Dr Noel Cawley is a horse breeder and former director of the Irish Dairy Board based close to Punchestown. He has bred many leading international show jumpers.

The bloodstock industry has thrived in Kildare for many centuries and has proven its worth. This does not mean that its future is guaranteed. It is important that the new Kildare County development plan recognizes the continued importance of the equine sector. The areas around Naas, Kilcullen, Punchestown, Brannockstown, Ballymore Eustace, Athgarvan, Two Mile House, The Curragh, Morristown Lattin, are rich in the most suitable land for rearing horses and have the greatest concentration of thoroughbred studs in the county. These areas are also competing with urban sprawl, industrial development and solar energy. The limestone land here and history of horse breeding is unique and cannot be replaced or moved to other areas. The breeding industry needs to be supported and encouraged and equine farm owners need to be disincentivised from using their land for other purposes which may be more profitable in the short term but detrimental to the county and the rural economy in the long term.

This area is located in and adjacent to the Liffey valley which is of high amenity value for walkers, cyclists, gliding club, tourists and equestrian activities. Punchestown racecourse is the centre of the Kildare Hunt Pony Club, the largest and most active pony club in the country. They host numerous rallies and local competitions as well as national pony club competitions. The pony club camp week every July is the highlight for over 100 children from Kildare. The World and European eventing championships have been hosted there. Eventing Ireland currently host three national one day events at Punchestown. This area is a jewel within the Kildare region and needs to be protected.

World leaders in any field of excellence sometimes have a tendency to take their position for granted. This must not be allowed to happen with the thoroughbred breeding and racing industry and the Sports horse industry. Kildare is a world leader and this must be protected. There is scope to further develop the equestrian tourist and leisure sector with provision of bridle ways and areas for amateur equestrians to ride. This is a rapidly growing sector worldwide which Kildare is in an excellent position to take advantage of.

The proposed inclusion (Objective RD013) "It is an objective of the Council to encourage the expansion of the bloodstock industry by appropriately protecting the environment and amenity value of rural areas from encroachment by urban sprawl and incompatible development." is welcome. It does need to be more specific on what environmental changes could be detrimental to horses such as toxic hazards, noise pollution and adjacent industrial type developments. Horses grow and thrive in a quiet environment on good limestone land. They need predictability and routine which a rural environment can provide. Unpredictability, excessive noise, irregular traffic movement and exposure to toxins are all stressors that not only adversely affect their skeletal development but their emotional wellbeing also. If Kildare is to remain as the world leader in thoroughbred horse breeding, then all these conditions must be safeguarded.

It is a concern that there is less emphasis being placed on the Irish Sports Horse industry in the 2023 - 2029 Kildare County development plan as compared to 2017-2023 County plan.

"KCC CDP 2017-2023"

Policy EQ 5: Recognise and support the development of the Irish Sport Horse industry in the county, including breeding, competing and training"

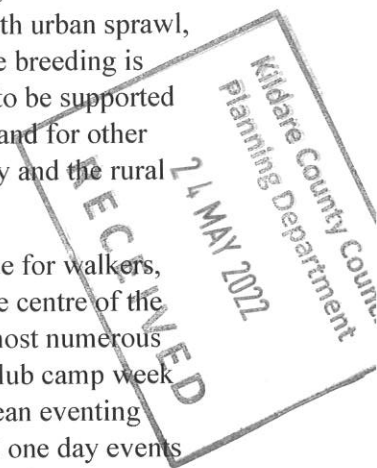
There is no equivalent policy in proposed 2023-2029 Kildare County development plan to specifically support the Irish Sports Horse industry:

"RE P14" Actively promote and support the equine industry as an economic driver for Kildare.

Objectives

RD O16 Promote and encourage the development of activities that relate to the equine industry in the county such as riding schools, pony trekking and the development of bridle paths.

RE O92 Promote and facilitate, at appropriate locations, commercial activities that are directly associated with the Horse Racing and Sport Horse industries"



It is my opinion that Policy EQ 5 (2017-2023) needs to be transposed into County plan (2023-2029)

In view of the above, I would welcome the objectives and policies outlined in the County Development Plan with the additions that I have outlined.



Dr Hugh Dillon, MVB, MRCVS, Cert ESM

24/5/2022

Date:

