



FLORIDA THOROUGHBRED
BREEDERS' AND OWNERS' ASSN.

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Dear Coastal Connector Project Officials,

The Coastal Connector project reflects several roadway options cutting through Marion County, the heart of the Horse Capital of the World™. The FTBOA represents approx. 1,400 members, which include all of the state's major Thoroughbred breeding farms and training centers, with about 100,000 Thoroughbred horses residing in Florida. The vast majority of those breeding farms and training centers are located in Marion County.

In order to assist government decision-makers at the local, state, and federal level, the FTBOA partners with other organizations to examine the relevant data and provide comprehensive studies that demonstrate the economic impact of all equine breeds and disciplines, both to Marion County and to the State of Florida.

In keeping with those efforts, the FTBOA is pleased to provide some important information for you to consider as you evaluate the Coastal Connector project:

- Marion County is a long-established and "one-of-a-kind" area for breeding and training Thoroughbred racehorses. The area's limestone-rich soil and aquifer system are vital to growing strong horses. Marion County's limestone ridge is unique to the western part of the county and yields some of the most productive land. It is also part of the Farm Preservation area and boasts Scenic Road and Scenic View designations.
- Thoroughbred breeding and training is an established and visible brand for the Marion County region and creates a large-scale economic impact -- approx. 18% of the County's GDP.
- The equine industry in Marion County accounts for \$2.62 billion in economic impact (2015 Ocala/Marion County Chamber and Economic Partnership Study ["2015 CEP Study"]).
- The equine industry in Marion County provides \$1.60 billion in value-added contribution to the County's Gross Domestic Product (GDP) (2015 CEP Study).
- The equine industry in Marion County creates 19,209 full-time and part-time jobs (2015 CEP Study).
- Horse Capital of the World™ was trademarked many years ago by the FTBOA when it was noted that Marion County has more horses and ponies than any

other county in the U.S. This trademark is routinely used and recognized both nationally and internationally, creating a global brand identity for agriculture in Marion County and promoting local commerce, jobs, and tourism. Much of this economic activity and many of the jobs it creates are located within one or more of the proposed Coastal Connector routes.

- Since 2010, Ocala Breeders' Sales Company has sold over 22,000 Thoroughbred horses for more than \$1 billion dollars -- to buyers from 38 different countries and from every state except Alaska.
- Florida is the third biggest equine state by number of horses, with 35% of the state's horse population located in Marion County, 46% of which are Thoroughbreds.
- The equine sector in Marion County is a significant draw for tourism, with substantial economic activity generated by equine activity participants and spectators on hotels, restaurants, gas, retail, air travel, and real estate (2015 CEP Study and 2018 American Horse Council Study ["2018 AHC Study"]).
- Marion County's concentrated Thoroughbred breeding and training industry is also supported by a vast network of world class equine service providers in the county.
- Equine operations preserve land and green space. More than 195,000 acres of the 377,000 acres used for agriculture in Marion County are used for horse-related purposes (American Horse Council study 2018 ["2018 AHC Study"]); total agriculture acres reported by UF/IFAS extension).

As plans and comments are considered, please keep in mind that some of the proposed Coastal Connector routes will negatively impact, or effectively force out of business, Thoroughbred farms both large and small, some with operations over 50 years old. Many concerned farm owners attended the last public meeting held at the Hilton in Ocala, and the vast majority of attendees were against the proposed Ocala corridor.

The County's smaller Thoroughbred farms represent a great deal of love and sweat equity – the culmination of the American dream of small farmers everywhere. The large farms enjoy a high-profile national and global reputation, serving as signature achievements in the industry. All are equally important as economic drivers, job providers, and preservers of pristine farmland that once taken cannot be replaced.

The FTBOA urges you to focus on Coastal Connector routes that will eliminate or minimize the damage to Marion County's very important Thoroughbred breeding and training industry and the men and women who work hard every day to produce horses that they and this state can be proud of. We stand ready to assist you toward that end.

Respectfully yours,



Lonny T. Powell
CEO