

Forage Trends in the Equine Nutrition Industry

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Perhaps the only certainty regarding forage trends is that sources of such will not be less costly in the immediate future. The cumulative effect of drought over the last several years has depleted hay storage in many parts of the country that typically would have at least a one year inventory on hand. In addition, several parts of the Midwest experienced a winter kill of hay fields. These areas also are parts of the country which typically feed large quantities of hay (beef and dairy production). Although the drought condition has abated in some parts of the country and hay production has been favorable, many producers will need supplies beyond what they typically feed in a given year in order to replenish depleted supplies. Another trend that continues to affect forage availability is the ongoing reduction in pasture and / or hay production acres. In addition to the usual annual urban encroachment contributing to this loss there also are commodity prices driving more acres to crop production. Although ethanol subsidies are projected to remain flat beyond 2020, cellulosic energy production subsidies are expected to increase 5% per year over the next 8-10 years. The result will be additional demand on hay supply and thus the expected cost effect related to supply and demand.

Conventional hay costs may continue to drive a trend of increased utilization of non-conventional forage sources. Alternative forage sources are available from the harvesting / processing, milling and ethanol industries. The primary nutrient source such alternatives can provide is energy. The most popular alternatives consist of soy hulls, beet pulp, wheat midds, oat hulls, rice hulls, peanut hulls and distillers dried grains (DDG). Soy hulls and beet pulp provide the greatest digestibility and energy value, rice and oat hulls provide the least energy value. DDG also can be a highly digestible energy source. However, sources of DDG can be inconsistent in quality and also can be at risk for high levels of mycotoxin. All of these ingredients can be fed "loose" but they are most often fed in the form of a pellet. Often such forage supplement or "hay stretcher" pellets are a mixture of several of these ingredients. Such forage pellets also contain protein, vitamin and mineral supplementation since these alternative forage sources often do not contain adequate vitamin and mineral profiles or adequate protein quality and quantity.

Given the large acreage of corn planted, corn stover and corn stalks could be another alternative consideration in supplementing the forage content of the horse's diet. Other potential alternative sources of forage are haylage and silage, both can provide a digestible source of energy. However, it is critical that both sources are carefully managed during harvest, storage and feeding as spoiled silage or haylage can pose health risks to horses.

An additional trend may be related to the size of conventional hay bales. As hay production costs increase, along with commercial demand, small square bales may continue to give way to large round or large square bales. Of course small square bales will continue to be available and may even increase in numbers if the price discrepancy between small and large bales is enough to entice producers to make small bales. However, small square bales probably will continue to be less cost effective than large bales on a per pound basis. Those that have the

ability to utilize large round or square bales will have greater access to hay at more economical prices. Regardless of the bale size, feeding systems that reduce the amount of hay wasted or lost becomes even more important given the expected trend in the cost of hay and alternative forage sources.