



Estimate, Doncaster Cup, Doncaster, 2014



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION

The Thoroughbred Breeders' Association

## A Study into British Stayers and Staying Races

---

February 2015

Produced by: CWC Clive Webb-Carter  
bloodstock services

Strictly private and confidential



## Contents

<b>PROJECT BRIEF</b>	Page 2
<b>EXECUTIVE SUMMARY AND OVERVIEW</b>	Page 3
<b>HISTORY</b>	Page 9
<b>CURRENT STATUS</b>	Page 12
<b>CONCLUSIONS</b>	Page 20

## Appendices

APPENDIX I <i>BRITAIN'S PATTERN RACES</i>	Page 24
APPENDIX II <i>ANNUAL RATINGS</i>	Page 57
APPENDIX III <i>2014 EUROPEAN STAKES RACE CALENDAR</i>	Page 64
APPENDIX IV <i>WORLD THOROUGHBRED RATINGS</i>	Page 66
APPENDIX V <i>SIRES</i>	Page 73
APPENDIX IV <i>BREEDERS, TRAINERS, SALES AND EXPORTS</i>	Page 84
APPENDIX VII <i>NATIONAL HUNT INDUSTRY</i>	Page 89



## Project Brief

With the European Pattern Committee downgrading the Queen's Vase, held at Royal Ascot, from Group 3 level to Listed and putting the Group 3 Bahrain Trophy, also restricted to three-year-olds and held at Newmarket's July meeting, on the 'at risk' list, there is a concern among both the Thoroughbred Breeders' Association (TBA) and the British Horseracing Authority's (BHA) Race Planning Committee that the staying Pattern and Black Type programme (run over 12 furlongs plus) is under threat. As a consequence the TBA commissioned this review into the racing and breeding programmes of the stayer in Britain.

**Clive Webb-Carter**



Hartnell, Bahrain Trophy, Newmarket, 2014

A Study into British Stayers  
and Staying Races

# Executive Summary and Overview



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



## Executive Summary

- Britain's staying programme is one of the strongest in the world and makes up an important part of the sport's heritage, but there have to be concerns that the British stayer is in decline.
- There has been a decline in the three-year-old stayer, which has contributed to the downgrading to Listed level of the Queen's Vase by the European Pattern Committee.
- With National Hunt breeding so reliant on top-class, smart middle-distance and staying performers, there will, in time, be drastic implications for National Hunt racing, which makes up a large proportion of the British and Irish racing industries.
- With a substantial number of small British breeders running their operations at a loss, it is inevitable that the more precocious sires will dominate. This has led to less sires standing in Britain with staying influences as they have lower appeal in the heavily dependent commercial marketplace.
- There need to be more incentives to encourage British stallion studs to stand and breeders to use sires capable of producing high-class stayers.
- British racing should re-examine the race programme for stayers and consider incentives to owners to race and keep stayers in training in Britain.
- More opportunities for fillies and mares races might also be considered, particularly in order to encourage more staying mares in Britain's broodmare population.
- Adjustments could be made to the Pattern and other races. Examination of the placement of the St Legers (Gr 1) in Britain and Ireland and the timing of the British Champions Long Distance Cup (Gr 2) and the Prix Royal-Oak (Gr 1) are two instances.



## Consequences of Decline

If the British breeding and racing programmes for stayers are allowed to decline, the consequences will be serious.

- British racing's diversity, for which it is world renowned, would be significantly jeopardised.
- There will be an adverse effect on the families and pedigrees that make up a vital part of Europe's top-class thoroughbreds.
- The gene pool of horses with the soundness and stamina to compete over longer distances will suffer.
- A vital part of the attractive lure for investment, particularly from overseas, will be lost.
- Significant investment through yearling sales, particularly Tattersalls October Book 1, could be lost.
- The number and quality of sires and mares capable of breeding National Hunt progeny will decline



## Overview

### Current Status

- There are 27 staying races (12½ furlong plus) in the British stakes programme, which makes up approximately 9% of the Black Type programme.
- The British stakes staying programme seems well balanced, with races from 12½ furlongs through to 20 furlongs, including 205 races of Class 4 and above.
- Staying Patterns races make up a small proportion of the stakes programmes of leading racing nations outside the European Pattern.

### Britain's Staying-Race Programme

- Although the Queen's Vase comes early in the three-year-old season, there are no conditions races for three-year-old before or after Royal Ascot.
- All three three-year-old-only Class 2 handicaps are run on Northern racecourses. There are no maidens or races restricted to fillies in the three-year-old-only division.
- Most of the leading, and valuable, staying handicaps are open to three-year-olds and up.
- The first staying handicap of the season open to three-year-olds and up is the Northumberland Plate. No three-year-old has run in the race for last ten years and the last three-year-old winner of the Northumberland Plate was Archduke Ferdinand in 2001.
- There are three fillies-only races in the three-year-old and up division and all are stakes races.

### Britain's Staying-Race Pattern

- The annual ratings for the 2012 and 2013 runnings of the St Leger were below European Group 1 requirements. Annual rating of the 2014 St Leger on par with EPC Gr 1 requirement
- The Bahrain Trophy (Gr 3) enjoyed strong annual ratings from 2006-11, when field sizes were strong. Small field sizes appear to have contributed to the fall in annual ratings in 2012 and 2013.
- The Geoffrey Freer Stakes annual ratings have proved to be well above the European Group 3 requirements.



- The Queen's Vase recorded a good mark in 2014 (108.75), however, downgrading to Listed status resulted from placed horses not being good enough to keep the race at required Group 3 level, despite its attracting large fields.
- The River Eden Stakes, the only three-year-old up fillies & mares Listed race, has attracted strong field sizes since its introduction in 2006, with 12 runners on average per year.

#### 2014 European Stakes Race Calendar

- Both the English and Irish St Legers (Gr 1) are held over the same weekend.
- The British Champions Long Distance Cup, which has been promoted to Group 2 status for 2014, was run the weekend before Longchamp's Prix Royal-Oak (Gr 1).
- The percentage of high-class stayers (Extreme) with a Group 1 performance rated 115 or over in the WTR rankings has fallen from 5.3% in 2009 to 3.8% in 2012 and 2013, with a low of 3% in 2011. WTR 2014 percentage of extreme performances was 4.3%

#### Sires

- There has been a 17% increase since 2005 in the number of GB-based stallions who sire 50% or more of their three-year-old-plus winners over 5-7 furlongs.
- There has been a rise of 55% in the number of stallions at stud in GB who sired 4.9% or less of their three-year-old-plus winners over 11-12 furlongs.
- Proven staying sires in Britain are in decline; they are being retired and exported, while young promising staying sires are, on the whole, covering small books of mares.
- Irish-based Sadler's Wells-line sires have dominated staying stakes races.
- 53% of staying stakes winners in Britain from 2004-13 were bred in Ireland.
- It is hard for commercial stallion farms to stand sires who have strong stamina influences.

#### Trainers and Breeders

- Leading stayers are trained in Britain.



- Leading breeders of stakes-winning stayers have been dominated by either the large stallion/breeding operations or owner-breeders.

### **Sales and Exports**

- More than 50 individual stakes winners bred in Europe have won over 9 furlongs or more for Australian-based trainers since 2011.

### **National Hunt**

- The majority of leading National Hunt stallions have been high-class middle distance or staying performers.



Yeats, Gold Cup, Ascot, 2009

A Study into British Stayers  
and Staying Races

# History



THE  
THOROUGHbred  
BREEDERS'  
ASSOCIATION



## History

British racing has a long history of staging staying races. A number of Britain's staying races, run over 12 furlongs plus, originate in the late 18<sup>th</sup> century as some of the oldest races of the British turf.

The Doncaster Cup was first run 1766 over four miles, before being shortened to two miles and five furlongs in 1825. In 1891 it was again shortened to today's distance of 2 miles and two furlongs (18 furlongs). The great Eclipse, who raced between 1769 and 1770, won his nine races over distances between two and four miles.

The oldest English Classic, the St Leger, was first run in 1776. The first Derby was run three years later.

The Gold Cup was first run in 1807, while the following year saw the first running of the Goodwood Cup, which too was over an extended distance of three miles. The Park Hill Stakes, one of the three staying races restricted to fillies, was first run in 1839. The Jockey Club Cup (now the British Champions Long Distance Cup) was first run 1873, over a distance of two and a half miles. The Yorkshire Cup was first staged in 1927.

### The Staying Question

The staying debate was raised in the 1980s and the early 1990s. In 1990 the Flat Race Pattern Committee discussed the future and reductions of distances of the Cup races – Gold Cup, Doncaster Cup and Yorkshire Cup - which was never carried out. However, the commissioned paper did conclude "there is every indication that this category, which is so much a part of our racing scene, will suffer an inexorable decline unless immediate steps are taken to arrest such a process." British racing was not keen to follow the example of North America, which had seen such as the Jockey Club Gold Cup reduced from 16 furlongs to the current distance of 10 furlongs within the period 1975-90.

The motion that the Cup races, such as the Gold Cup, should be reduced to 16 furlongs, was dropped by 2004.

On the lesser staying races, it was felt that field sizes were too small for satisfactory betting turnover. There was also little demand to increase the number of extended-distance maidens, but it was suggested there should be "three or four valuable 14 furlong maiden races introduced in various parts of the season."

The 1990 paper also devised the idea of a three-year-old Listed staying race to run as part of the Newmarket's July meeting, which was to become the now Group 3 Bahrain Trophy, to follow on from the Queen's Vase.

It was also recognised that the leading British stayers were a strong source of National Hunt stallions.

It was concluded that "little progress will really be made until owners and breeders have confidence in the future of the staying horse." The 1990 report also recommended that every suitable racecourse should run a least one 12 furlong plus race, which would have increased the number of staying races by 30 in a season.

A graduation programme was recommended, as the link between Flat and National Hunt racing was indispensable.



In 2002 there was a concerted effort to get a number of staying Cup races upgraded to Group 2 status, against the European Patterns Committee's objections. However, it was pointed out that the British staying Pattern was then the strongest in Europe and as a result British-trained horses supported most of Europe's leading staying races. Moves were made to upgrade the races concerned - \*Henry II Stakes, Doncaster Cup, Lonsdale Stakes and then Jockey Club Cup - to Group 2 status. Both the Henry II Stakes and Doncaster Cup were upgraded for 2003 while the Lonsdale Stakes (Cup) became Group 2 in 2004.

\* Henry II Stakes reverted to Group 3 status in 2012



The Queen's Vase, Ascot, 2014

## A Study into British Stayers and Staying Races

# Current Status

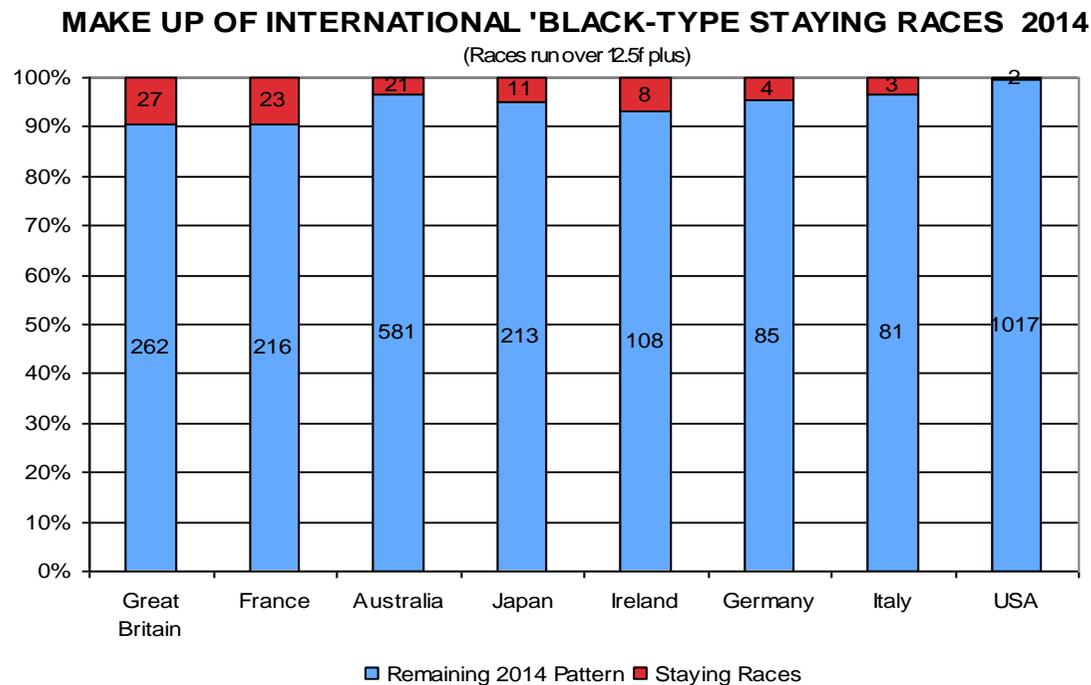


THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



## Current Status

The staying programme makes up a significant part of the 2014 international Pattern. This is very much led by European dominance, headed by Britain, which was scheduled to stage 27 staying races making up the 9.3% of the 289 stakes races held in 2014. France's 23 black-type staying races make up the largest percentage of staying races to all stakes races at 9.6%. Ireland is next with eight races making up 6.9% of their stakes programme. Although Australia has the third largest number of staying races, it makes up just 3.4% of their stakes race programme. The staying programme in the US has all but vanished.

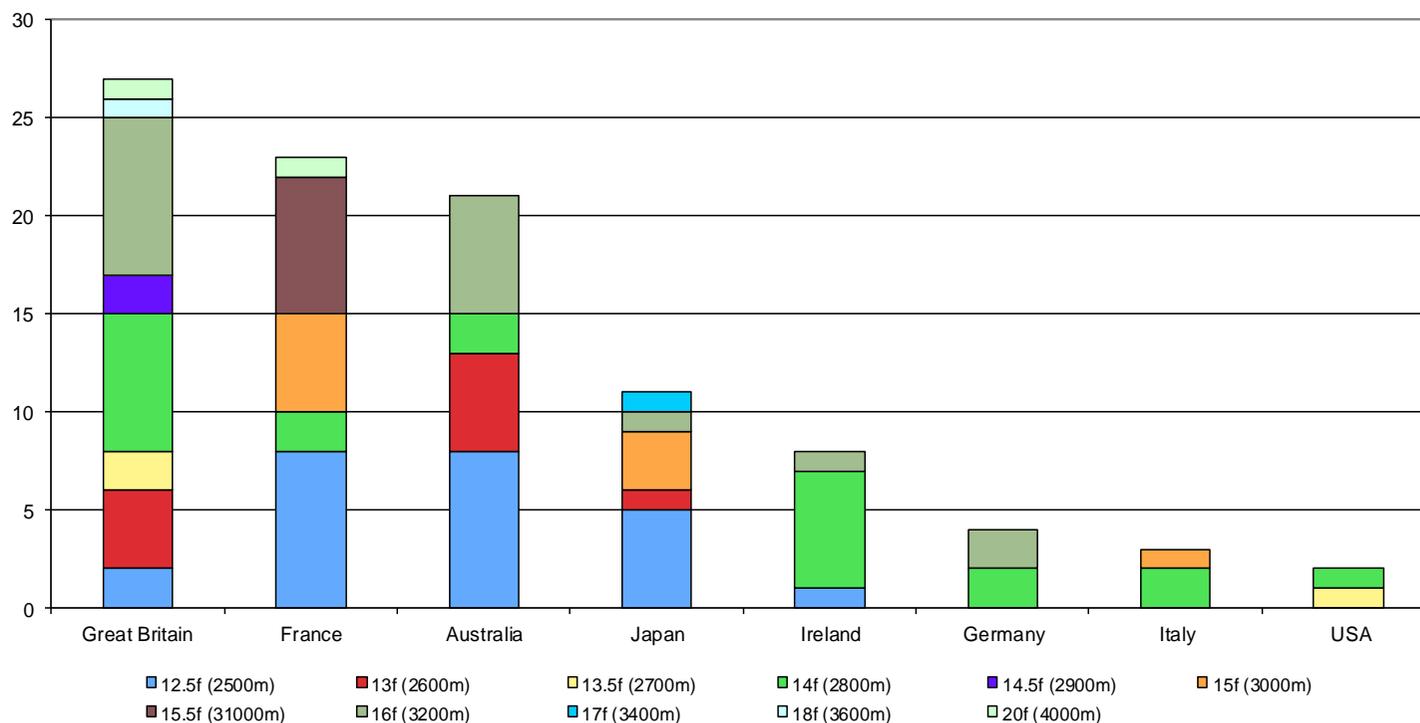




## Stakes Programme

Britain's staying stakes programme is the strongest and most balanced, with 27 races run over a variety of distances from 12½-20 furlongs, allowing stayers to develop in trip. The majority are run over distances of 14 furlongs (25%) and 16 furlongs (29%). France run the majority of its races over 12½ furlongs (34%) and between 15 and 15½ furlongs (52%). Six of Ireland's races are run over 14 furlongs, which makes up 75% of their staying stakes races. The majority of Australia's staying stakes races are run at the distances of 12½ (38%) and 16 furlongs (28%). Japan joins Britain and France in being the only countries that run stakes races beyond 16 furlongs. Britain runs the Doncaster Cup (Gr 2) over 18f and the Gold Cup (Gr 1) over 20 furlongs. France's longest stakes race is their Prix Royal-Oak (Gr 1) over 20 furlongs, while Japan holds the Diamond Stakes (Gr 3) over 17 furlongs.

MAKE UP OF STAYING RACE DISTANCES OF MAJOR RACING NATIONS - 2014





## Stakes Programmes – 2004-14

Britain and France are the only countries to have retained their staying stakes programme over a ten-year period. Britain's percentage of staying stakes races to total stakes races has remained at just above 9%, while France's is a few percent higher. There was an increase in Japan's total number of stakes races between 2004 and 2009, as they became a member of Part I of the International Cataloguing Standard in 2007. The US increased its staying stakes programme between 2004 and 2009 by 0.3%. However, numbers of staying stakes races in both Japan and the US declined between 2009 and 2014, despite Japan's overall stakes programme have recently increased slightly. The US has all but abandoned its attempt to have a stakes staying programme and abolished the Breeders' Cup Marathon (Gr 2) in 2014, due to the quality of previous years not being in keeping with other Breeders' Cup races. This leaves the US with just two staying stakes races; the 14-furlong San Juan Capistrano Handicap (Gr 2), run on Santa Anita Park's turf track, and the American St Leger (L), also run on turf at Arlington Park.

Ireland and Australia are the only countries to have increased their staying stakes programme in the last five years, but are some way from achieving the programme that Britain and France have in place. With the Melbourne Cup now among the 50 top-rated Group 1 races in the world, it seems that Australia is making solid attempts to strengthen its staying stakes programme.

STAKES STAYING RACES OVER 10 YEARS									
	2014 Stakes Programme			2009 Stakes Programme			2004 Stakes Programme		
Country	Total Stks	Staying	%	Total Stks	Staying	%	Total Stks	Staying	%
Britain	289	27	9.3	295	27	9.1	281	26	9.2
France	239	23	9.6	234	23	9.8	232	24	10.3
Ireland	116	8	6.9	109	6	5.5	97	6	6.2
Germany	89	4	4.4	100	5	5	110	6	6.2
Italy	84	3	3	96	4	4.1	78	3	3.8
Australia	602	21	3.4	542	15	2.7	542	18	3.3
Japan	224	11	4.9	218	13	5.5	222	8	3.6
US	1019	2	0.2	1148	6	0.5	753	2	0.2



## Britain's Race Programme

A total of 205 races, of Class 4 or above are scheduled to be run over 12 furlongs 50 yards or more, as part of the BHA's 2014 fixture list. A copy of all Class 4 or above races run over 12 furlongs 50 yards or more in 2014 is at the back of this study.

### Three-Year-Olds Only Races

3yo Only Races	Over 12f	13f	14f	15f	16f	17f	18f	20f	21f	Totals
Class 4 Hcp	4	4	6	0	2	0	0	0	0	16
Class 3 Hcp	2	0	2	1	0	0	0	0	0	5
Class 2 Hcp	0	0	3	0	0	0	0	0	0	3
Class 1	1	1	2	0	1	0	0	0	0	5
										29

The first three-year-olds-only handicap over a greater distance than 12 furlongs is the Class 4 Mezzanine Handicap Stakes, run on 22 May at Sandown in 2014 with eight runners.

Although the 16-furlong Listed Queen's Vase, which was downgraded from group 3 in 2014, comes early in the season, there are few opportunities for three-year-olds to step up in trip before Royal Ascot. There is no conditions race for three-year-olds before or after Royal Ascot.

The 13-furlong Bahrain Trophy (Gr 3), currently on the 'at risk' list of being downgraded, is the year's second staying stakes for three-year-olds, held at Newmarket in mid-July.

A total of 16 Class 4 handicaps are spread over the season. The five Class 3 handicaps are all between the beginning of June and the end September, while all three Class 2 handicaps are over 14 furlongs with one each in July, August and September, and all at Northern racecourses - two at Haydock Park and one at York. The most valuable three-year-old-only staying handicap is the Melrose Handicap, run over 14 furlongs at York's Ebor meeting, with a total prize fund of £85,000.

There is no race restricted to fillies in the three-year-old-only division.



### Three-Year-Olds and Up Races

3yo Plus Races	Over 12f	13f	14f	15f	16f	17f	18f	20f	21f	Totals
Class 4 Mdn	1	0	0	0	0	0	0	0	0	1
Class 4 Hcp	4	7	6	2	11	0	1	0	0	31
Class 3 Hcp	2	4	6	1	3	0	0	0	0	16
Class 3 Cond	0	0	0	0	0	1	0	0	0	1
Class 2 Hcp	0	3	6	0	5	0	2	0	1	17
Class 2 Cond	0	0	1	0	0	0	0	0	0	1
Class 1	1	3	4	0	4	0	1	0	0	13
										80

Most of the leading, and valuable, staying handicaps are open to three-year-olds and up, headed by the Ebor Handicap, over 14 furlongs and with a total prize fund of £265,000. The average field size for the Ebor Handicap from 2004-13 was 18.9. Since 2010 there has been no three-year-old runner.

The second most valuable staying handicap is the 18-furlong Cesarewitch with a total value of £250,000. The average field size between 2004 and 2013 was 32.8, with an average of 1.4 three-year-olds. The last three-year-old to win the Cesarewitch was Darley Sun in 2009.

A total of 80 races are scheduled for three-year-olds and up of Class 4 and above. The only maiden race over an extended 12 furlongs was run at Musselburgh on 20 April. It had six runners and was won by the Mark Johnston-trained Alex My Boy, who went on the run eighth in the King George V Stakes (Handicap) at Royal Ascot over 12 furlongs, and has won a further twice.

Thirty one of these are Class 4 handicaps, run over an extended 12-16 furlongs and staged throughout the summer. The 16 Class 3 handicaps run from July to the end of October. They are evenly balanced between Northern and Southern racecourses. A few similar races are scheduled close together.

These include:

03/05/2014	Doncaster	Bardi Hcap Stks	42003	14F +132Y	4	Hcap	4+	A	66	85	8000
04/05/2014	Hamilton Park	Buttonhook Hcap Stks	42051	13F +9Y	3	Hcap	4+	A	76	95	25000
12/08/2014	Nottingham	EBF Stallions Hcap	45812	14F +15Y	3	Hcap	3+	A	71	90	12000
15/08/2014	Newbury	Punter Southall Hcap	45952	13F +61Y	3	Hcap	3+	A	71	90	11500



Class 2 handicaps begin with the 16-furlong Northumberland Plate, which is open to three-year-olds and up and run on the last Saturday in June. No three-year-old has run in the race for last ten years, and the last three-year-old winner was Archduke Ferdinand in 2001. The Northumberland Plate, which has become the most valuable 16-furlong handicap of the year, attracted an average field of 18 from 2005-14. Class 2 staying handicaps are staged evenly until the end of the year. There is just one Class 2 conditions race over an extended 14 furlongs at the beginning of August, before the late-summer and autumn Cup races.

There are three fillies-only races in this three-year-old and up division, all stakes races: the Park Hill Stakes (Gr 2), Lillie Langtry Stakes (Gr 3) and EBF River Eden Stakes (L).

#### Four-Year-Olds and Up Races

4yo Plus Races	Over 12f	13f	14f	15f	16f	17f	18f	20f	21f	Totals
Class 4 Hcp	11	2	14	1	22	4	0	0	0	54
Class 3 Hcp	1	2	3	0	8	1	0	0	0	15
Class 2 Hcp	2	0	3	0	6	0	1	1	0	13
Class 2 Cond	0	0	0	1	3	0	0	0	1	5
Class 1	0	2	3	0	3	0	0	1	0	9
										96

The majority (77%) of four-year-olds and up races are held before three-year-olds are able to take on older horses (the last weekend in June in the Northumberland Plate). 56% of these races are run at Class 4 handicap level, with just 28 handicaps at Class 2 and 3 levels.

There are five Class 2 conditions races. Only one is run on turf, the Queen Alexandra Stakes, the closing race of Royal Ascot over 21 furlongs. The other four are run on the all-weather before April and include the valuable (£150,000 total prize fund) Marathon Stakes (15½ furlongs), created for the inaugural 2014 All-weather Championships, run on Good Friday.

There two just two fillies-only races for four-year-olds and up, both Class 4 handicaps run in June and July.



### **British Owners and Breeders Incentive Scheme (BOBIS)**

BOBIS (the British Owners and Breeders Incentive Scheme) is open to the winners of all Class 2-4 maidens, nurseries, three-year-old-only handicaps and conditions races and Class 5 two-year-old fillies' maidens in Britain. A £10,000 prize fund has been awarded to winners of novice races and class 2-4 fillies-only races.

Under these criteria, only staying races for three-year-olds are eligible. Excluding Class 1 (stakes) races, this leaves 24 staying races, from a total 205, eligible for BOBIS Scheme payments of £6,000 per race. There is no opportunity for staying fillies to win a £10,000 prize for winning a Class 2-4 fillies-only race.

The amalgamation of BOBIS and the Racing Post Yearling Bonus Scheme to form Plus 10 in 2015 means the incentive programme will change.



Persian Punch, Jockey Club Cup, Newmarket, 2003

A Study into British Stayers  
and Staying Races

## Conclusions



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



## Conclusions

Although Britain's staying programme is one of the strongest in world and makes up an important part of the sport's heritage, there has to be concerns that the British stayer is in decline. With a substantial number of small British breeders running their operations at a loss, it is inevitable that the more precocious sires will dominate. As long as Britain's two-year-old programme is one of the strongest and busiest in the world, it is not surprising that speedy sires dominate, allowing investors a quicker return on the track, thus giving commercial breeders a better return. Britain's leading stallions, who are capable of siring high-class stayers, demand high stud fees, which only cash-rich breeders' can afford. This has led to lesser sires standing in Britain with staying influences having far lower appeal in the heavily dependent commercial marketplace. In turn, there has been a decline in the three-year-old stayer, which has contributed to the downgrading to Listed level of the Queen's Vase by the European Pattern Committee, and the Bahrain Trophy (Gr 3) being placed on the 'at risk' list in 2014.

With National Hunt breeding so reliant on top-class, smart middle-distance and staying performers, there will, in time, be drastic implications for National Hunt racing, which makes up a large proportion of the British and Irish racing industries.

Is this situation reversible?

Although the leading stayers in Britain have been dominated mostly by the Irish-based Sadler's Wells sire line, there need to be more incentives to encourage British stallion studs to stand and breeders to use sires capable of producing high-class stayers. Since Britain no longer stands such as Halling, Singspiel and Rainbow Quest, there has been little to suggest that these sires have successors.

British racing must consider incentives to owners to race and keep stayers in training in Britain. Of course, owners cannot ignore expensive sales to overseas interests, but to secure the future of the British stayer well-bred horses with the potential to be successful stallions need to be encouraged to remain in training in Britain.

Although the British staying-race programme looks well balanced, a few adjustments could be made to the Pattern and other races. Examination of the placement of the St Legers (Gr 1) in Britain and Ireland and the timing of the British Champions Long Distance Cup (Gr 2) and the Prix Royal-Oak (Gr 1) are two instances.

Ireland's Qualified Rider (QR) races are a popular way of both Flat and dual-purpose and National Hunt-bred runners competing against each other on the Flat. While these are mostly used as educational races for aspiring National Hunt performers, they do allow otherwise dual-purpose-bred performers to emerge as stayers. Examples include Missunited (by Golan), winner of the Lillie Langry Stakes (Gr 3) in 2014, who won a QR race in 2012. While the amateur-rider programme in Ireland is considerably different from Britain's, staging staying conditions and maiden races for dual-purpose-bred horses could create an opportunity for more stayers in Britain.

More opportunities for fillies and mares races might also be considered, particularly in order to encourage more staying mares in Britain's broodmare population.

The 2014 British staying Pattern produced some high-class performances. The British-bred and trained Cavalryman (by Halling), as well as winning the 12-furlong Princess of Wales's Stakes (Gr 2), beat stablemate Ahzeemah (by Dubawi) in the Goodwood Cup (Gr 2), and Leading Light (Montjeu) stamped himself as a top-class stayer by winning the Gold Cup (Gr 1), with the filly Estimate a fine second. Without concerted effort in preserving the staying breed, it will become increasingly difficult for the status and history of leading Cup and staying races to maintain their prominence.

As Federico Tesio pointed out in *Breeding the Racehorse*, first published in 1958. "If we raced ten sprinters against each other in a 2½-mile race, one is bound to finish first, but this does not make him a stayer."



## Consequences of Decline

If the British breeding and racing programmes for stayers are allowed to decline, the consequences will be serious.

### Diversity

**British racing's diversity, for which it is world renowned, would be seriously jeopardised.**

Spectacular horseracing events from Cheltenham to Royal Ascot and Aintree to Epsom have been founded on staying races that are part of British racing's heritage and vital to its continued success.

### Pedigrees

**There will be an adverse effect on the families and pedigrees that make up a vital part of Europe's top-class thoroughbreds.**

If there are not suitable opportunities for top-class stayers to win over extended distances, breeders will be forced to use speedier sires, and in time they will breed out the staying ability from these Classic and smart families, which have been crucial to British racing and bloodstock over the years. This will affect owner-breeders, who in order to keep their families strong rely on racecourse success, particularly via fillies' races such as the Park Hill Stakes (Gr 2) and Lillie Langtry Stakes (Gr 3).

As described in the study, there have been notable exports of potential and proven stayers to Australia, to balance that country's lack of a breeding programme for stayers. British racing could eventually find itself in similar position and thus relying on other European countries, such as Ireland, France and Germany, to supply stayers.

### Soundness and the Gene Pool

**The gene pool of horses with the soundness and stamina to compete over longer distances will suffer.**

Although there is little prospect that the Sadler's Wells sire-line will be bred out soon, it could become a speedier influence, as it is bred to speedier mares. Galileo's sons Teofilo, New Approach and Rip Van Winkle have already sired Group 1-winning juveniles, having themselves been Group 1 winners over 10-12 furlongs. If there are not the type of high-class staying races that these Sadler's Wells/Galileo sire-lines have thrived on over recent years, the line will become speedier, as has happened in the US with most of the Seattle Slew-line sires.

### Investment

**A vital part of the attractive lure for investment, particularly from overseas, will be lost.**

British racing has one of the most attractive models in the world. The Pattern programme, history and prestige, as well as the diversity of racecourses and well-balanced, historic race programme, have attracted an impressive amount of foreign investment that has become vital for the success of the sport over the last 20-30 years. The Maktoum family, their associates (such as Rabbah Bloodstock), Khalid Abdullah and other members of the Saudi royal family, and George Strawbridge from the US, as well as more recently branches of Qatar's Al Thani royal family, acquired their passion for the sport from racing horses in Britain. All have had significant success with stayers and have played a vital part in keeping the staying programme strong. Darley (Godolphin), Shadwell and Juddmonte Farms have had



considerable success as both breeders and owners of stayers and have also stood sires cable of producing smart stayers. More recently Sheikh Fahad of Qatar Racing and Pearl Bloodstock, owned Dunaden, winner of the Melbourne Cup, and he has retired as a dual-purpose sire for 2015.

## Yearling Sales

### **Significant investment through yearling sales, particularly Tattersalls October Book 1, could be lost.**

Turnover at the British yearling sales in 2013 was more than £132 million. Tattersalls Book 1, which alone generated approximately a third of this total, has become arguably the strongest yearling sale in the world in recent years. Its select catalogue is dominated by yearlings bred by Classic sires out of some of Europe's leading families, and breeders of these well-bred yearlings rely heavily on the current staying-race programme to keep these Classic families active and strong. The leading lots in Tattersalls Book 1 in 2012 and 2013 were dominated by the Sadler's Wells sire-line via such as Galileo, Montjeu, New Approach and Teofilo. Although other leading sires, such as Sea The Stars, Dansili and Dubawi, are capable of producing high-class, middle-distance and staying performers, often via Sadler's Wells-line mares, it is imperative that these families and sires are allowed to stay strong through the staying programme. Graduates from Tattersalls Books 1 & 2 in 2012 include the winners of the 2,000 Guineas, Derby and St Leger in Britain in 2014 - Night Of Thunder (by Dubawi), Australia (by Galileo) and Kingston Hill (by Mastercraftsman) respectively. With Britain's other yearling sales leaning towards speedier-bred yearlings, it is important that British bloodstock and the vast investment in it is maintained at its current status through a strong staying-race programme.

## National Hunt

### **The number and quality of sires and mares capable of breeding National Hunt progeny will decline.**

The loss of top-class stayers would have a drastic affect on the National Hunt breeding programme. Not only would there be a sharp drop in potential National Hunt and dual-purpose sires, the National Hunt broodmare population, in which stamina influences are so important, will be damaged. If the leading stamina influenced sire lines are allowed to 'speed up', this too will have implications on the National Hunt breed that could be irreversible.

The National Hunt breed is not all that will suffer, The Levy Board's financial contribution to British racing, of which National Hunt makes up 40%. Would be at risk. British racing already faces an increasing number and range of gambling opportunities, and any loss of National Hunt racing would jeopardise vital revenue.



Gospel Choir, Yorkshire Cup, York, 2014

# Appendix I

Britain's Pattern Races



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



## Britain's Pattern Races

## Appendix I

### The Gold Cup (Gr 1), Royal Ascot, 2of, 4yo+

**19-Jun-2014**, Good to Firm, £375000

1.LEADING LIGHT	117
2.MISSUNITED	113 (118)
3.BROWN PANTHER	118
4.SIMENON	111

**Race Rating 116**

**20-Jun-2013**, Good to Firm, £350000

1.ESTIMATE	108 (113)
2.SIMENON	113
3.TOP TRIP	113
4.COLOUR VISION	109

**Race Rating 112**

**21-Jun-2012**, Good to Soft, £350000

1.COLOUR VISION	116
2.OPINION POLL	116
3.SADDLER'S ROCK	113
4.GULF OF NAPLES	112

**Race Rating 114.25**

**16-Jun-2011**, Good to Soft, Soft in places, £250000

1.FAME AND GLORY	120
2.OPINION POLL	116
3.BRIGANTIN	113
4.MANIGHAR	111

**Race Rating 115**

**Three Year Average (14-12) 114.33**

**Four Year Average (14-11) 114.3**

The Gold Cup, over 20 furlongs, is the longest staying Pattern race held in Britain. It is also the first staying Group 1 of the European Pattern.

The Gold Cup has fallen below the Group 1 Pattern requirements of 115 for the last two years. Although the 2012 event only just fell below, that in 2013 was well short, and because the winner Estimate was entitled to the 5lb fillies' allowance, she was rated only 108.

2014 renewal saw the race gain a rating of 116, which falls within the Group 1 EPC requirements



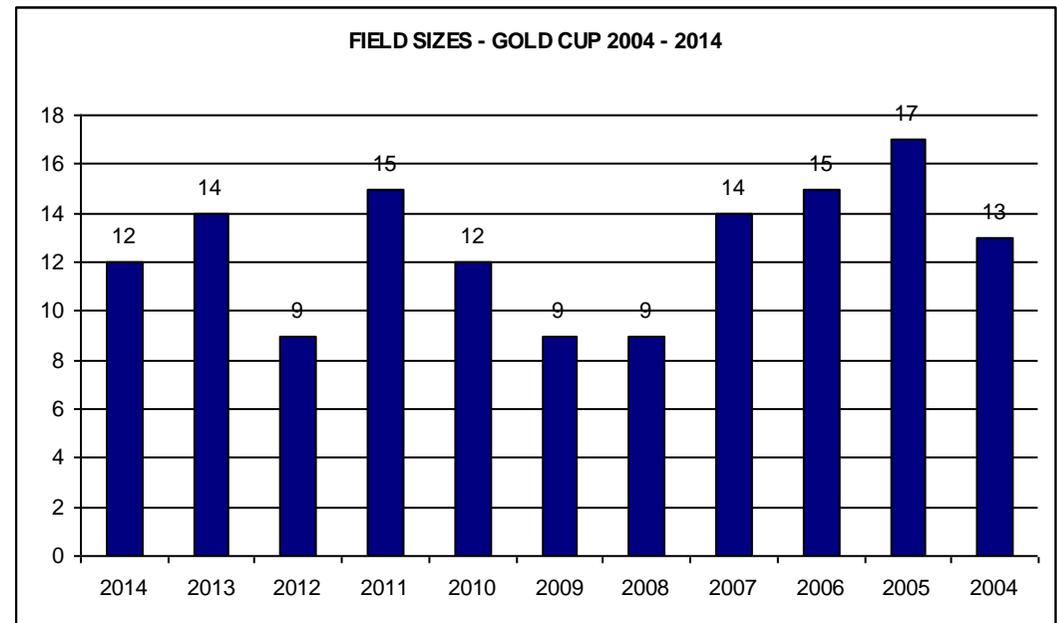
The Gold Cup ratings were well up to standard for a Group 1, but the last two years have seen below par rated fields. As the 2013 winner, Estimate, was a filly, this brought the 2013 average well below the 115 Gr 1 requirements.

The average eleven-year race rating is 114.72.

For the years 2006, 2007 and 2008 an official rating was not given for one of the placed horses. Rating was divided by three for the rating obtained.

The largest field to start a Gold Cup was 17 in 2005 and the smallest was nine in 2008 and 2009.

The average field size over the 11 period is 12.6 runners.





### St Leger Stakes (Gr 1), Doncaster, 14f, 3yo

**13-Sep-2014**, Good to Soft, Soft in places, £650000

1.KINGSTON HILL	120
2.ROMSDAL	115
3.SNOW SKY	113
4.WINDSHEAR	112

**Race Rating 115**

**14-Sep-2013**, Good to Soft, Soft in places, £600000

1.LEADING LIGHT	118
2.TALENT	114 (117)
3.GALILEO ROCK	116
4.LIBERTARIAN	116

**Race Rating 116.75**

**15-Sep-2012**, Good, £550000

1.ENCKE	120
2.CAMELOT	124
3.MICHELANGELO	114
4.URSA MAJOR	112

**Race Rating 117.50**

**10-Sep-2011**, Good to Firm, £540,000

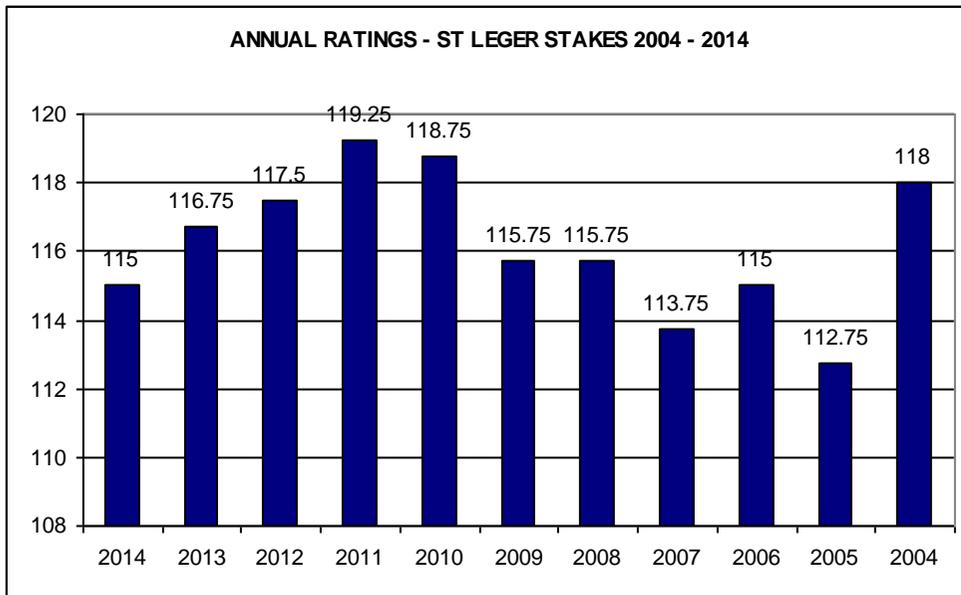
1.MASKED MARVEL	121
2.BROWN PANTHER	116
3.SEA MOON	121
4.SEVILLE	119

**Race Rating 119.25**

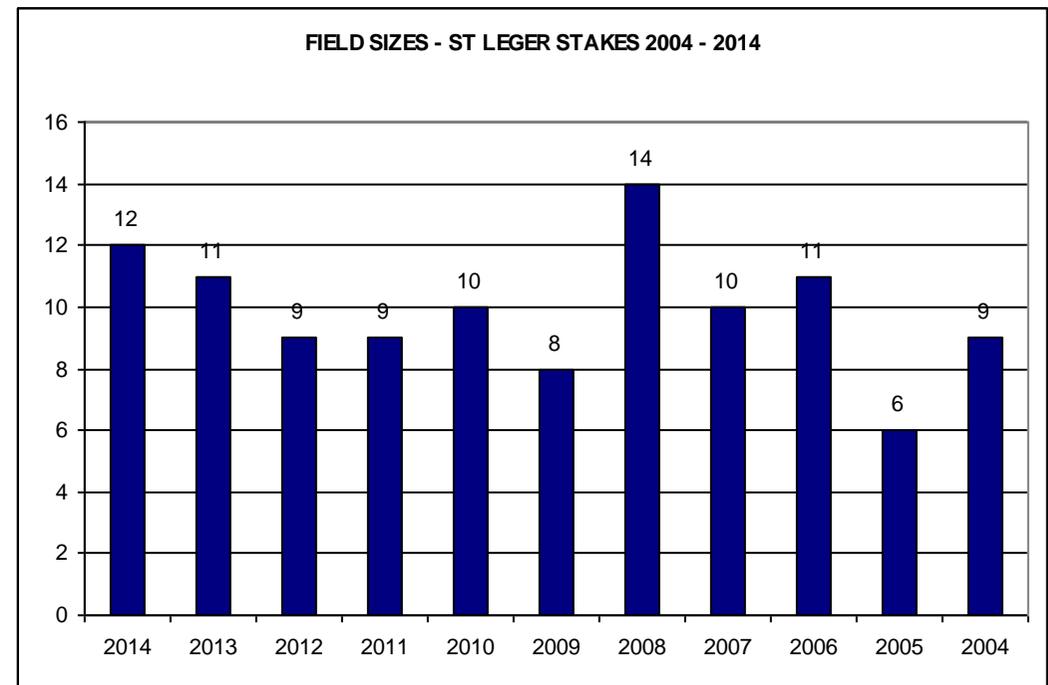
**Three Year Average (14-12) 116.41**

**Four Year Average (14-11) 117.12**

Over the last three years the St Leger has fallen well within the Group 1 Pattern requirements. The winner and the second in both 2013 and 2012 were high-class horses. Encke beat Camelot, who was trying to complete the British Triple Crown, having won the 2,000 Guineas and Derby. The 2013 winner Leading Light, who previously won the Queen's Vase and beat the 2013 Oaks winner at Doncaster, went on to win the 2014 Gold Cup over 20 furlongs. The 2014 winner Kingston Hill, is a high-class performer having been second in Derby, but rest of the field below Gr 1 standard average.



The St Leger has remained consistently within the Group 1 Pattern requirements. The average over a eleven-year period is 116.20, although 2005 and 2007 slipped below the 115 mark. The 2005 figure was lowered because the fourth Kong was rated only 107.



The smallest field of six coincided with the lowest annual rating for the St Leger. The average field size between 2004 and 2014 is 9.9.



**Doncaster Cup (Gr 2), Doncaster, 18 furlongs, 3yo+**

**12-Sep-2014**, Good to Soft, Good in places £100000

1. ESTIMATE	107 (112)
2. WHIPLASH WILLIE	108
3. KALANN	105
4. CLEVER COOKIE	106

**Race Rating 107.75**

**13-Sep-2013**, Good to Soft, £100000

1. TIMES UP	112
2. HIGH JINX	110
3. REPEATER	107
4. BIOGRAPHER	110

**Race Rating 109.75**

**14-Sep-2012**, Good, £100000

1. TIMES UP	115
2. HIGH JINX	113
3. HURRICANE HIGGINS	106
4. REPEATER	106

**Race Rating 110**

**09-Sep-2011**, Good, £100000

1. SADDLER'S ROCK	114
2. OPINION POLL	116
3. MOTRICE	107
4. BERGO	108

**Race Rating 111.25**

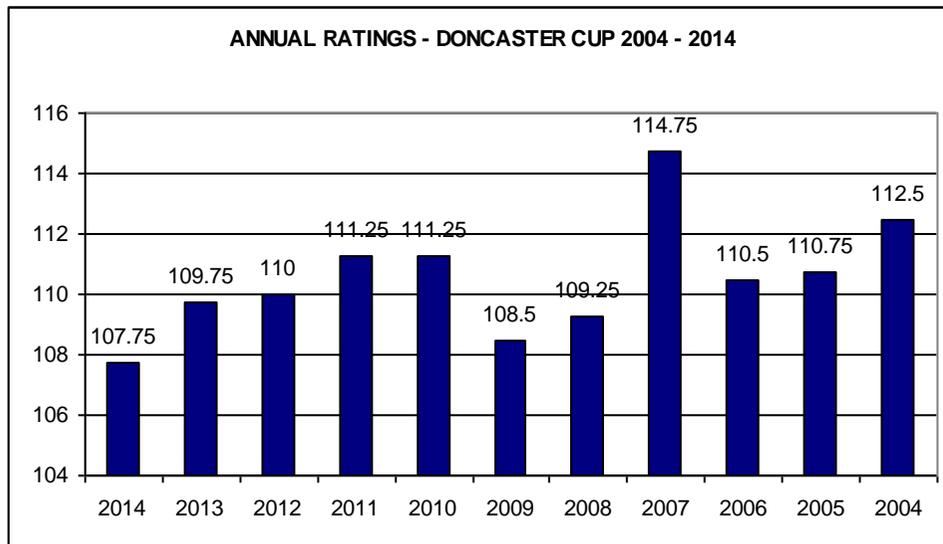
**Three Year Average (14-12) 109.16**

**Four Year Average (14-11) 109.6**

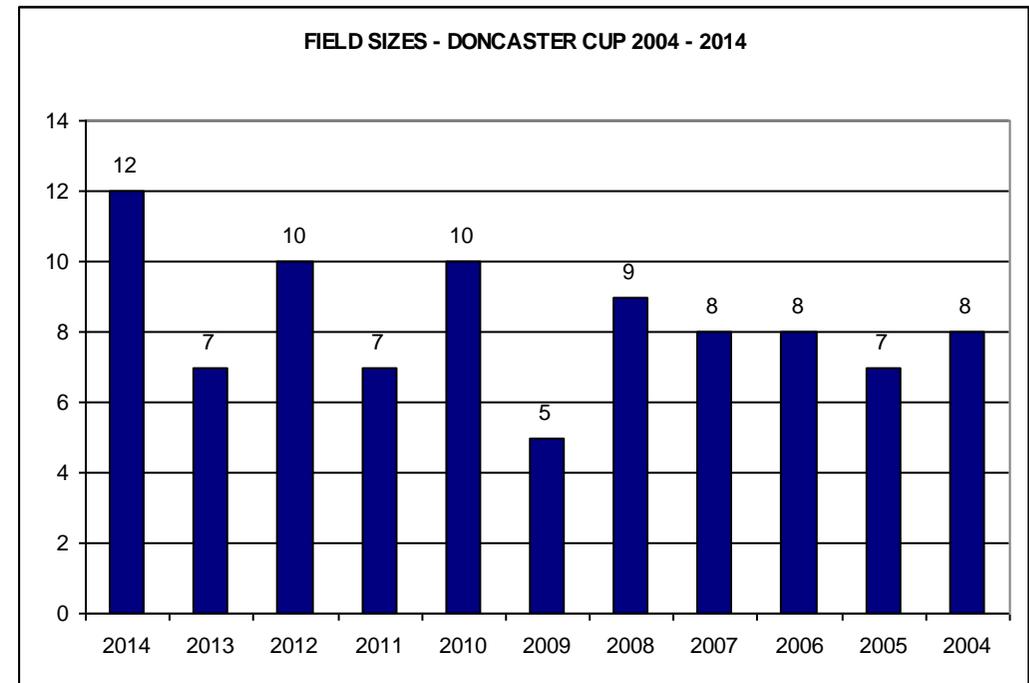
The Doncaster Cup is the second longest staying race of the British Pattern, over 18 furlongs. The 2013 Doncaster Cup was not as strong a renewal as the previous two years, despite three of the first four in 2012 finishing in the first three places in 2013. The only horse to be rated higher in 2013 than in 2012 was Repeater, who was raised from 106 to 107.

The 2009 race only just missed the Group 2 rating requirement of 110.

2014 was won by Estimate, who not only is a filly, but was having a weaker season than the previous year.



The annual rating for the Doncaster Cup remained at Group 2 level for a eleven-year span, with an average of 110.56. Years 2008 and 2009 were below the Group 2 level of 110 but the following two years were well up to the requirement.



The Doncaster Cup has not attracted a bigger field than ten in the last ten years.

The average field size from 2004-14 is 8.3. The race is on a four year decline, the 2014 field of 12 runners was the biggest over the eleven year period.



**Goodwood Cup (Gr 2), Goodwood, 16 furlongs, 3yo+**

**31-Jul-2014**, Good, £120000

1.CAVALRYMAN	115
2.AHZEEMAH	113
3.BROWN PANTHER	118
4.BRASS RING	105

**Race Rating 112.75**

**01-Aug-2013**, Good, £100000

1.BROWN PANTHER	113
2.AHZEEMAH	112
3.ALTANO	117
4.NUMBER THEORY	109

**Race Rating 112.75**

**02-Aug-2012**, Good, £100000

1.SADDLER'S ROCK	113
2.ASKAR TAU	111
3.COLOUR VISION	116
4.ELECTROLYSER	110

**Race Rating 112.5**

**28-Jul-2011**, Good, £100000

1.OPINION POLL	116
2.LOST IN THE MOMENT	111
3.BLUE BAJAN	111
4.FOX HUNT	110

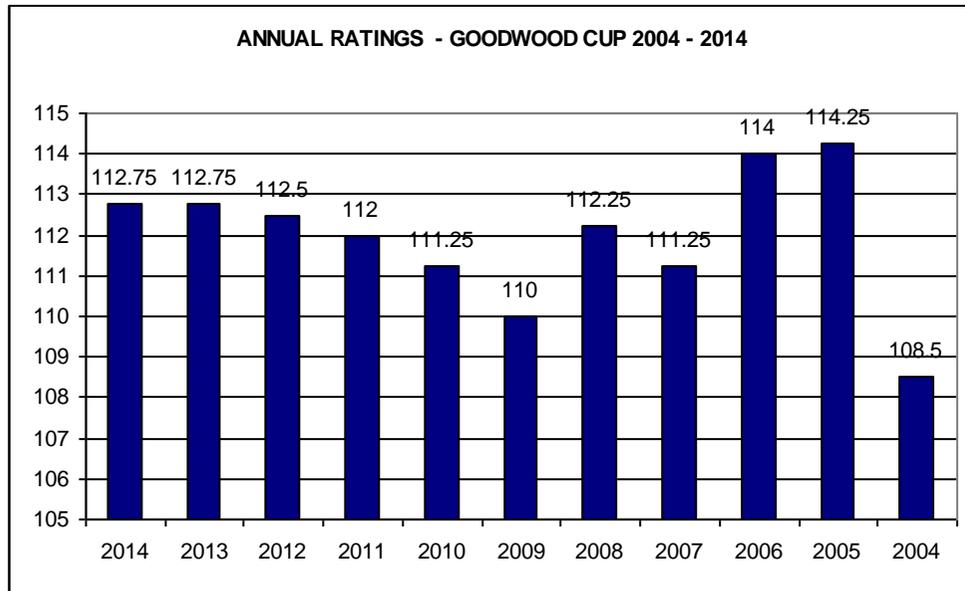
**Race Rating 112**

**Three Year Average (14-12) 112.66**

**Four Year Average (14-11) 112.5**

The annual ratings of the Goodwood Cup over the last three years have remained consistent for a Group 2. Run as part of the Glorious meeting, the 16-furlong Goodwood Cup is the first staying Group 2 of the British Pattern as well as the first staying Group race, open to 3yo's and up in Britain after Royal Ascot.

The 2013 race is the strongest, with the winner Brown Panther going on to have a good 2014 season, and both and second and third winning leading staying races in the autumn. Ahzeemah won the Lonsdale Cup (Gr 2), while Altano won the Prix du Cadran (Gr 1).

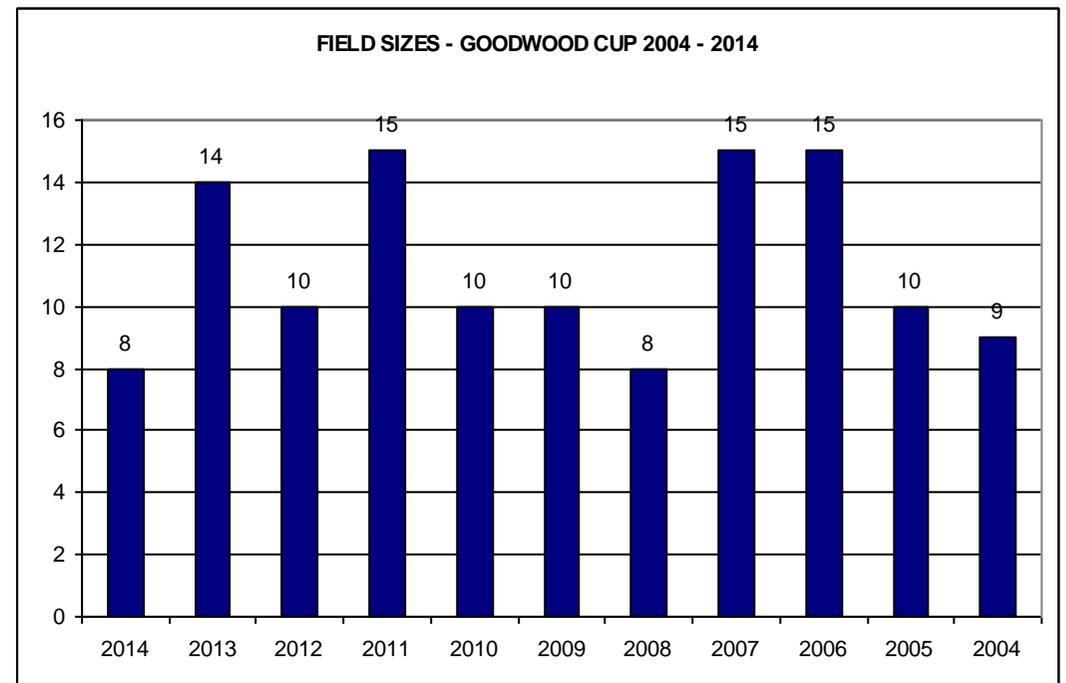


The Goodwood Cup has attracted some strongly-rated fields over the last ten years, which could be because it is the year's first staying Group 2, as well as the first Group 16-furlong race in Britain after the Henry II Stakes (Gr 2). It is also the first staying Pattern race in Britain after the mid-June Gold Cup. The 2009 renewal was the weakest since 2004.

The 2014 race was rated same as a 2013 race.

The average eleven-year annual rating is 111.9.

Being an early scheduled staying Pattern race, the Goodwood Cup has attracted some good-sized fields. Although the average between 2004 and 2014 is 11.3 runners, there have been ten or more runners on eight occasions, with four years having 14 or more. The 2014 race only attracted eight runners





### Lonsdale Stakes (Gr 2), York, 16 furlongs, 3yo+

**22-Aug-2014**, Good, £150000

1. PALE MIMOSA	108 (114)
2. ESTIMATE	107 (112)
3. TIMES UP	104
4. CAVALRYMAN	115

**Race Rating 111.25**

**23-Aug-2013**, Good to Soft, £150000

1. AHZEEMAH	112
2. SIMENON	113
3. TIMES UP	112
4. CAUCUS	110

**Race Rating 111.75**

**25-Aug-2012**, Good to Soft, £140000

1. TIMES UP	115
2. HIGH JINX	113
3. LOST IN THE MOMENT	110
4. CAVALRYMAN	113

**Race Rating 112.75**

**20-Aug-2011**, Good, £140000

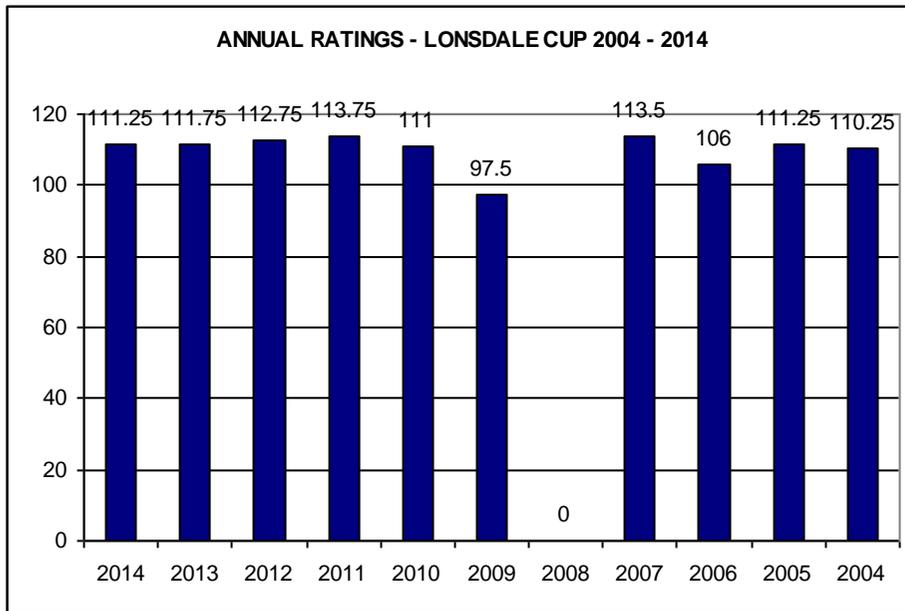
1. OPINION POLL	116
2. DUNCAN	116
3. BERGO	108
4. HARRIS TWEED	115

**Race Rating 113.75**

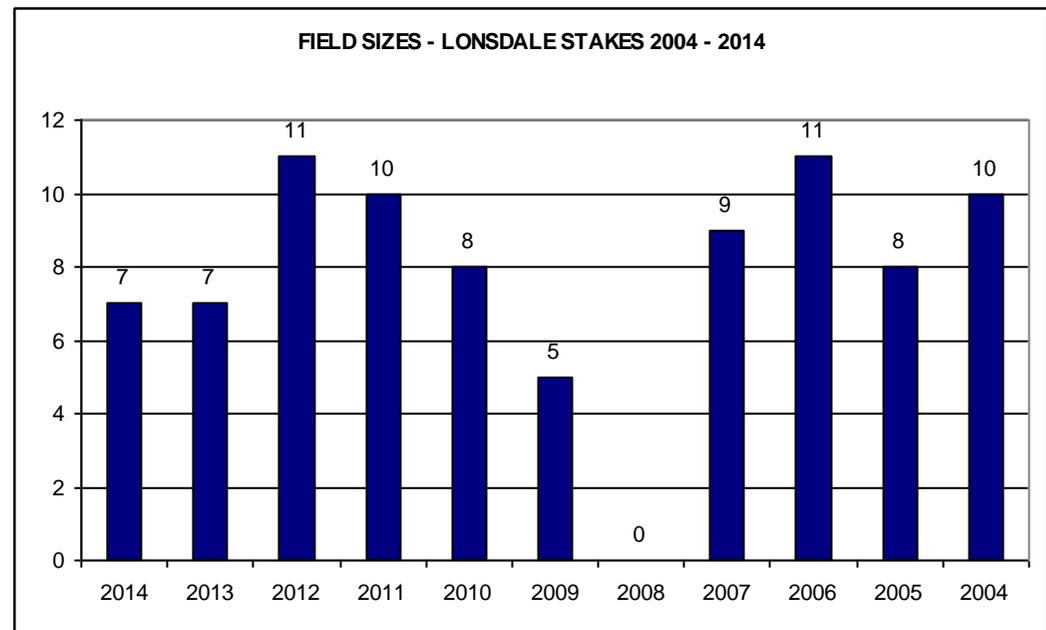
**Three Year Average (14-12) 111.9**

**Four Year Average (14-11) 112.37**

The Lonsdale Stakes, run as part of the Ebor meeting in late-August, approximately three weeks after the Goodwood Cup, has remained a consistent Group 2 on ratings. However the winner of the 2013 race was rated only 112, when the winners of the previous two years had been rated 115 or above. 2014 race saw the same rating a previous years, with the first two home both fillies. Again the winner was rated under 115



The five recent runnings of the Lonsdale Stakes have been well over the required Group 2 Pattern requirement of 110. The 2008 race was not run due to York's Ebor meeting being abandoned. The 2004-14 average is 109.9, brought down due in particular to the weak 2009 renewal.



The average field size for the Lonsdale Stakes is 8.6, with the maximum field never more than 11. 2009 was the weakest year for field size and ratings.



**Park Hill Stakes (Gr 2), Doncaster, 14.5 furlongs, 3yo+ fillies and mares**

**11-Sep-2014**, Good to Soft, £90000

1.SILK SARI	110
2.GROOVEJET	100
3.CRITERIA	103
4.SEA OF APPROVAL	108

**Race Rating 105.25 (adjusted 110.75)**

**12-Sep-2013**, Good to Soft, £90000

1.THE LARK	107
2.PHIZ	103
3.ALTA LILEA	100
4.JATHABAH	97

**Race Rating 101.75 (adjusted 106.75)**

**13-Sep-2012**, Good, Good to Soft in places

1.WILD COCO	113
2.HAZEL LAVERY	108
3.ESTIMATE	108
4.GALLIPOT	102

**Race Rating 107.75 (adjusted 112.75)**

**08-Sep-2011**, Good, £80000

1.MEEZNAH	114
2.SET TO MUSIC	110
3.POLLY'S MARK	104
4.CRACKING LASS	104

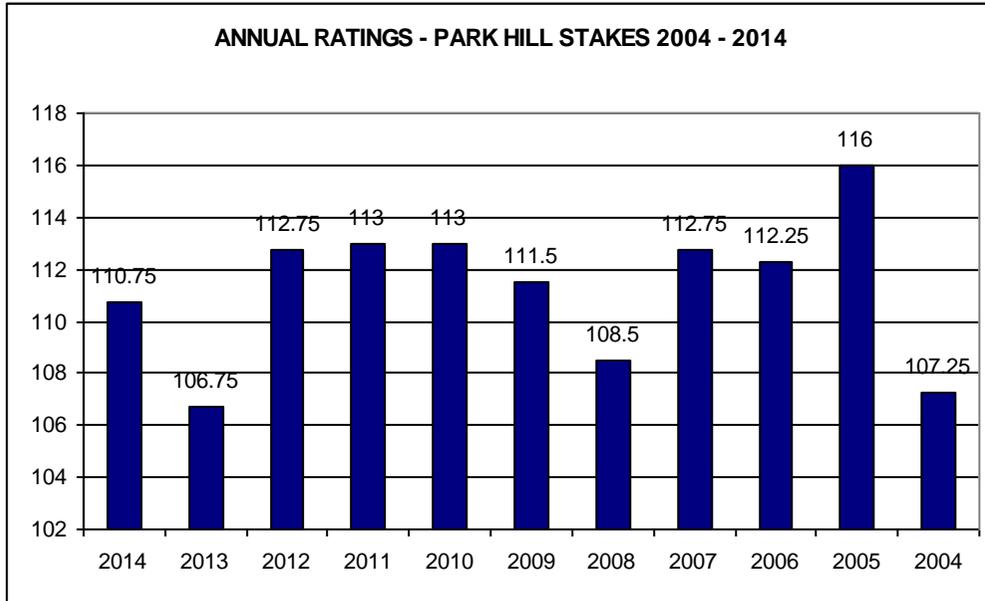
**Race Rating 108 (adjusted 113)**

**Three Year Average (14-12) 104.9 (adjusted 109.9)**

**Four Year Average (14-11) 105.7 (adjusted 110.7)**

The Park Hill Stakes, the leading staying race restricted to fillies and mares, is held during Doncaster's St Leger meeting in mid-September. The 2013 Park Hill Stakes was the weakest race, falling below the Group 2 Pattern requirement. Not only was the winner rated inferior to the winners in the previous two years, but the fourth-placed was rated only 97. The result was not helped by the fact that subsequent Group 1 winner Sea of Approval was a faller.

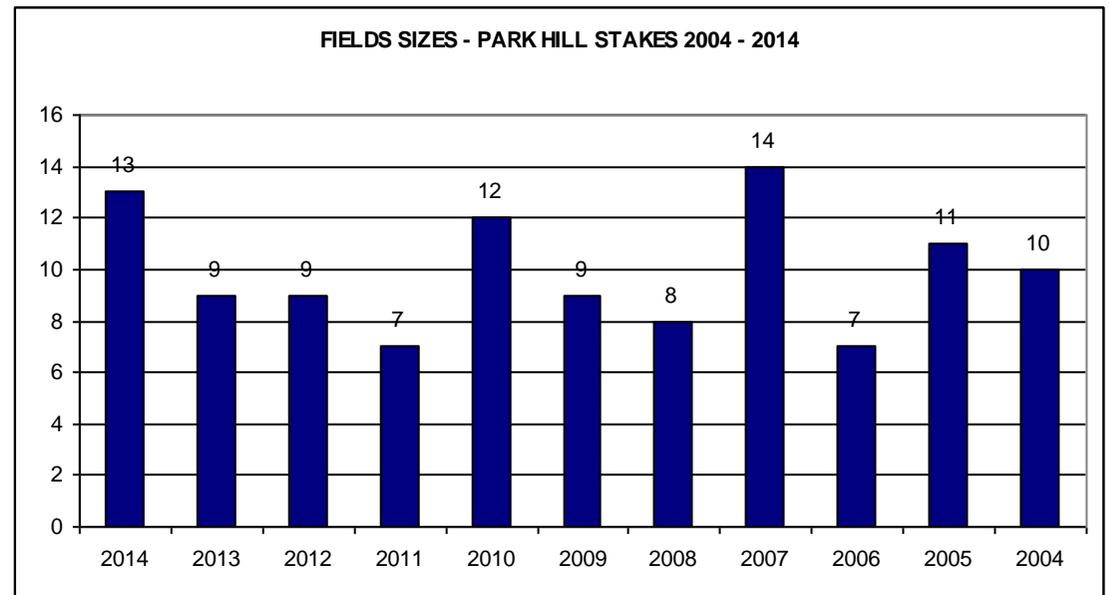
The last three years' average of 109.9 comes within the Group 2 Pattern requirement. Although the 2014 Park Hill Stakes, came within the EPC Group 2 requirements, the winner was only rated 110, compared with the 2011 and 2012 winners.



The 2013 renewal of the Park Hill Stakes is also the weakest in the last eleven years. Despite this the Park Hill Stakes has remained well within the Group 2 Pattern level with a eleven-year average of 111.3.

For the 2005 race an annual rating was not found for the winner, Sweet Stream. Rating was divided by three for the ratings obtained.

Between 2010 and 2014 the Park Hill Stakes has failed to attract more than ten runners, the longest period that the race failed to attract double figures since 2004.





### Yorkshire Cup (Gr 2), York, 14 furlongs, 3yo+

**16-May-2014**, Good, £140000

1.GOSPEL CHOIR	115
2.TAC DE BOISTRON	117
3.TIGER CLIFF	112
4.SEA OF APPROVAL	108 (113)

**Race Rating 114.25**

**17-May-2013**, Soft, Good to Soft in places, £140000

1.GLEN'S DIAMOND	109
2.TOP TRIP	113
3.ROYAL DIAMOND	114
4.A BOY NAMED SUZI	103

**Race Rating 109.75**

**18-May-2012**, Good, £140000

1.RED CADEAUX	116
2.GLEN'S DIAMOND	104
3.HARRIS TWEED	110
4.TIMES UP	115

**Race Rating 111.25**

**13-May-2011**, Good, Good to Firm in places, £140000

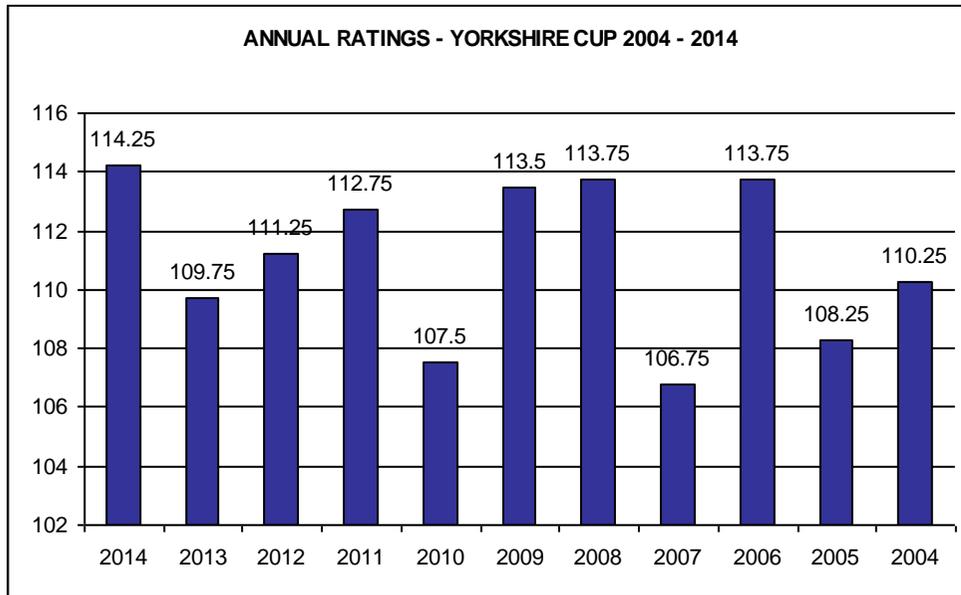
1.DUNCAN	116
2.BLUE BAJAN	111
3.MANIGHAR	111
4.NATIVE RULER	112

**Race Rating 112.25**

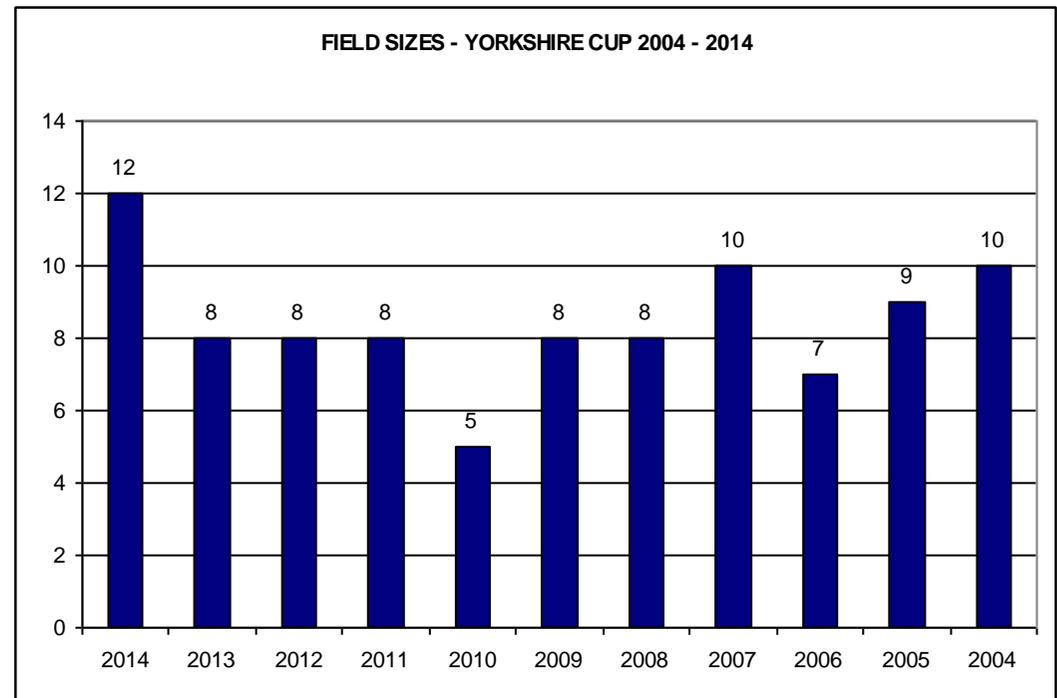
**Three Year Average (14-12) 111.75**

**Four Year Average (14-11) 111.87**

The Yorkshire Cup is the first staying Group 2 Pattern race in both Britain and Europe, being held during York's Dante meeting in May and run over 14 furlongs. The 2013 race is the weakest, with the winner Glen's Diamond rated below 110. The 2014 race is the strongest for eleven years, with a rating of 114.25, with the winner rated 115 and the runner-up rated 117.



Although the eleven-year average for the Yorkshire Cup is 111, annual ratings have been somewhat varied. Although the 2013 rating is not the lowest since 2004, it is another Group 2 race that came under Pattern requirement in 2013.



The average field size for the Yorkshire Cup is 8.4, and five runnings between 2008 and 2013 had exactly eight runners.



**British Champions Long Distance Cup (formerly the Jockey Club Cup Stakes) (Gr 2), Ascot, 16 furlongs, 3yo+**

**18-Oct-2014**, Heavy, £315000

1.FORGOTTEN RULES	113
2.BIOGRAPHER	110
3.PALLASATOR	110
4.WHIPLASH WILLIE	108

**Race Rating 110.25**

**19-Oct-2013**, Soft, £300000

1.ROYAL DIAMOND	114
2.HARRIS TWEED	112
3.EYE OF THE STORM	112
4.PALE MIMOSA	109

**Race Rating 111.75**

**20-Oct-2012**, Soft, Heavy in places, £200000

1.RITE OF PASSAGE	113
2.AIKEN	112
3.ASKAR TAU	111
4.ELECTROLYSER	110

**Race Rating 111.5**

**15-Oct-2011**, Good, £200000

1.FAME AND GLORY	120
2.OPINION POLL	116
3.COLOUR VISION	110
4.NEHAAM	110

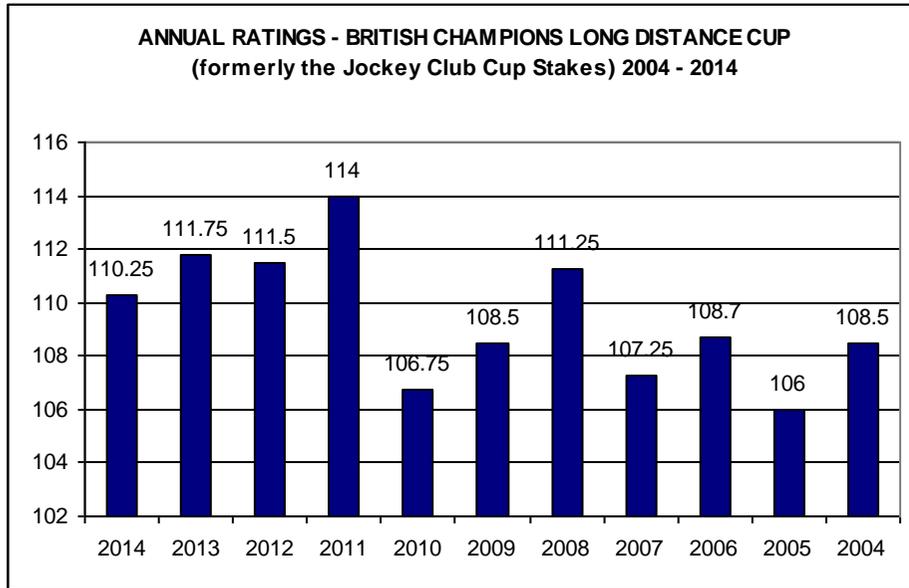
**Race Rating 114**

**Three Year Average (14-12) 111.16**

**Four Year Average (14-11) 111.87**

British Champions Long Distance Cup, formerly the Jockey Club Cup, was renamed and moved to Ascot from Newmarket in 2011, on the formation of British Champions Day and held in late-October. The race was upgraded to Group 2 status in 2014. Its total prizemoney fund of £200,000 has made it the third most valuable staying Pattern race in Britain, behind only the two Group 1s, the Gold Cup and St Leger.

The first three runnings all came within Group 2 Pattern requirements, therefore earning it the upgrading to Group 2. The race was given a strong boost in its inaugural year when Fame and Glory won. The 2014 race had a total prize-money fund of £300,000.



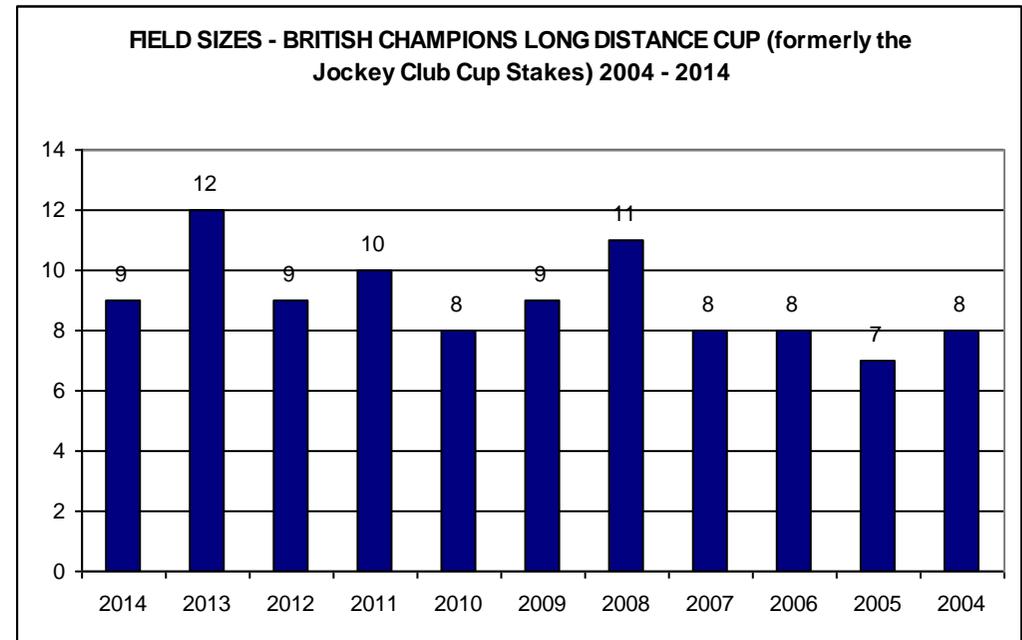
Since 2011, when the race was renamed and moved to British Champions Day, ratings for the British Champions Long Distance Cup have risen substantially.

Between the years 2004 to 2010 the race was run as the Jockey Club Cup, at Newmarket.

Annual Ratings - The 2014 race posted the weakest rating since 2011, not helped by the heavy going which led to many of the leading candidates to run below par. The winner, Forgotten Rules, was an unexposed four-year-old, running only for the third time.

The average field size for this Group three between the years of 2004 and 2014 is 9 runners, although since 2011, when the race was renamed, the average has been approximately 10, with the largest field of 12 runners taking their chances in 2013.

Between the years 2004 to 2010 race was run as the Jockey Club Cup Stakes, at Newmarket.





### Bahrain Trophy (Gr 3), Newmarket, 13 furlongs, 3yo

**10-Jul-2014**, Good to Firm, £80000

1.HARTNELL	110
2.WINDSHEAR	112
3.FOREVER NOW	110
4.HONOR BOUND	95 (100)

**Race Rating 108**

**11-Jul-2013**, Good to Firm, £60000

1.FEEL LIKE DANCING	101
2.JATHABAH	97
3.HAVANA BEAT	103
4.TESTUDO	104

**Race Rating 101.25**

**12-Jul-2012**, Soft, £55000

1.SHANTARAM	104
2.NASEEM ALYASMEEN	91
3.GOOD MORNING STAR	94
4.REWARDED	99

**Race Rating 97**

**07-Jul-2011**, Good, £50000

1.MASKED MARVEL	111
2.CENSUS	117
3.ZAIN AL BOLDAN	96
4.HURRICANE HIGGINS	101

**Race Rating 106.25**

**Three Year Average (14-12) 102.08**

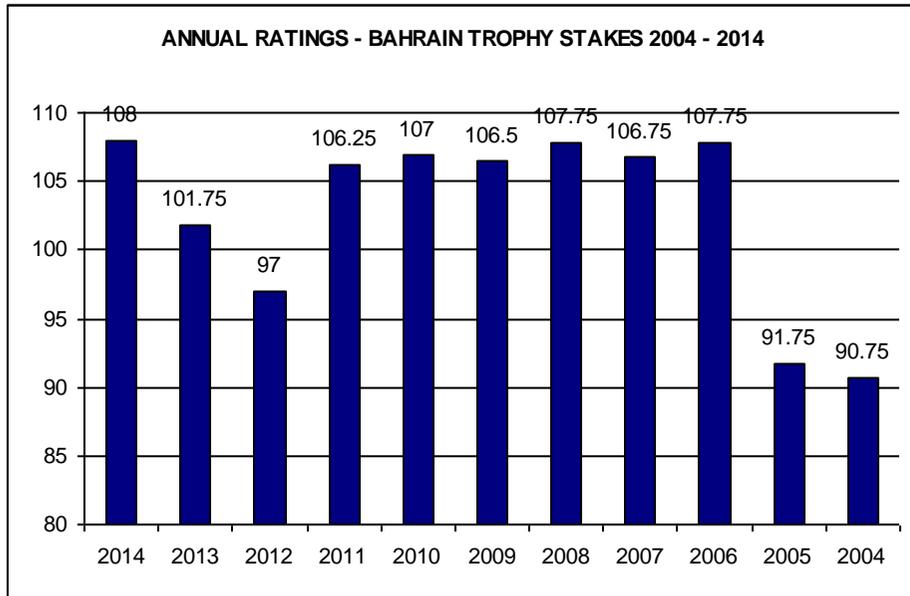
**Four Year Average (14-11) 103.12**

The Bahrain Trophy, run in mid-July, is the second stakes race of the season for three-year-olds only after the Queens Vase. The 2014 race received a timely boost, with the first three proving to be smart three-year-old stayers' and all ran with credit in the St Leger (Gr 1).

The race produced substandard races in 2012 and 2013. The Bahrain Trophy, which was only upgraded to Group 3 status in 2009, is often targeted by unexposed, progressive three-year-old middle-distance/stayers and can be used as an early St Leger trial.

The 2013 winner Feels Like Dancing never raced again, while the third Havana Beat progressed to win the Esher Stakes (Listed) at the Coral-Eclipse meeting at Sandown in 2014. Although the 2012 winner did not progress, the 2011 winner went on to win the St Leger that year.

All three winners between 2011 and 2013 were trained by John Gosden.



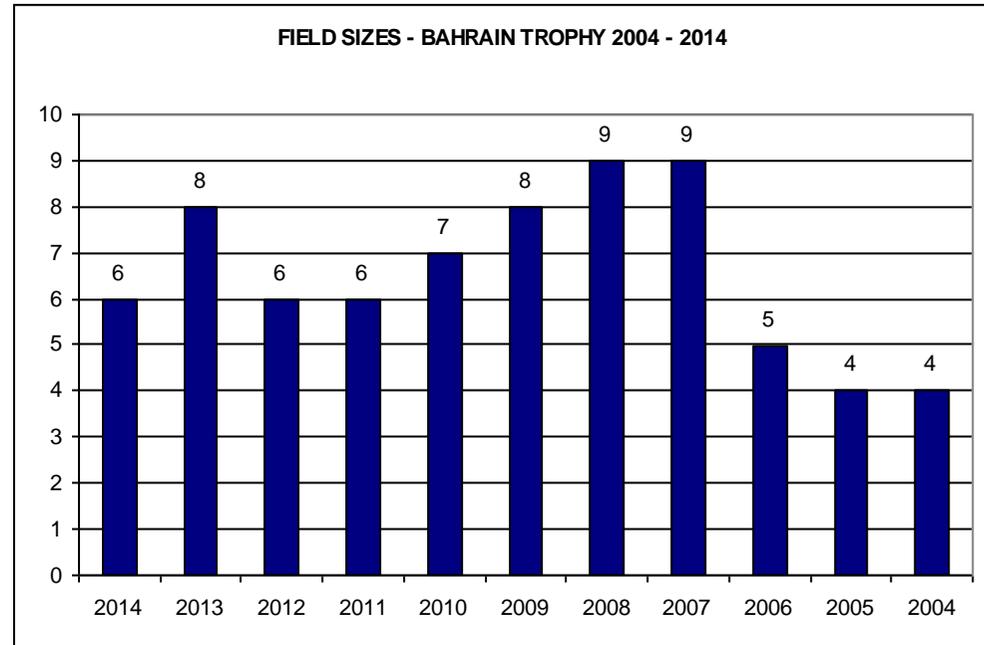
The annual rating the Bahrain Trophy achieved between 2006 and 2008 earned the race a rise from Listed standard to Group 3. As explained above, the last two runnings have failed to live up to European Pattern requirements. 2012/13 running's have failed to live up to European Pattern requirements.

Between 2004 and 2014 the average annual rating is 102.8.

Between the years 2004 to 2008 the Bahrain Trophy was run as a Listed status race.

The Bahrain Trophy has failed to attract a field larger than nine runners in the last ten years, which has resulted in lowly-rated placed horses depressing the annual rating. The average field size between 2004 and 2014 is 6.5 runners.

Between the years 2004 to 2008 the Bahrain Trophy was run as a Listed race.





**Chester Vase (Gr 3), Chester, 12.5 furlongs, 3yo**

**08-May-2014**, Soft, £75000

1. ORCHESTRA	110
2. ROMSDAL	115
3. SCOTLAND	109
4. SEAGULL STAR	97

**Race Rating 107.75**

**09-May-2013**, Good, £60000

1. RULER OF THE WORLD	122
2. MISTER IMPATIENCE	98
3. HAVANA BEAT	103
4. FEEL LIKE DANCING	101

**Race Rating 106**

**10-May-2012**, Soft, Heavy in places, £55000

1. MICKDAAM	108
2. MODEL PUPIL	107
3. CALL TO BATTLE	105
4. DAVID LIVINGSTON	102

**Race Rating 105.5**

**05-May-2011**, Good to Firm, £50000

1. TREASURE BEACH	120
2. NATHANIEL	126
3. SLUMBER	110
4. SADLER'S RISK	90

**Race Rating 111.5**

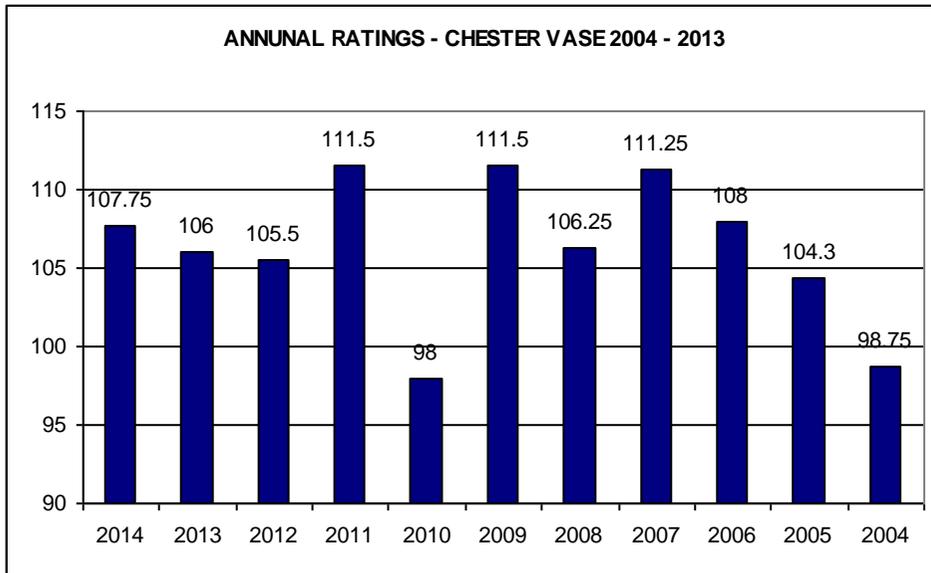
**Three Year Average (14-12) 106.41**

**Four Year Average (14-11) 107.7**

The Chester Vase, run over 12½ furlongs, is a recognised trial for the Derby. Run at the Chester May meeting, the race is restricted to three-years-olds. Two of the three races between 2011 and 2013 have proved to be strong, with the 2013 winner Ruler Of The World going on to win the Derby, and the first two finishers in 2011 went on to win Group 1s as three-year-olds.

Many placed horses have progressed to be stakes stayers. Examples include Feel Like Dancing, who won the Bahrain Trophy in 2013, and Havana Beat, who won the Esher Stakes in 2014.

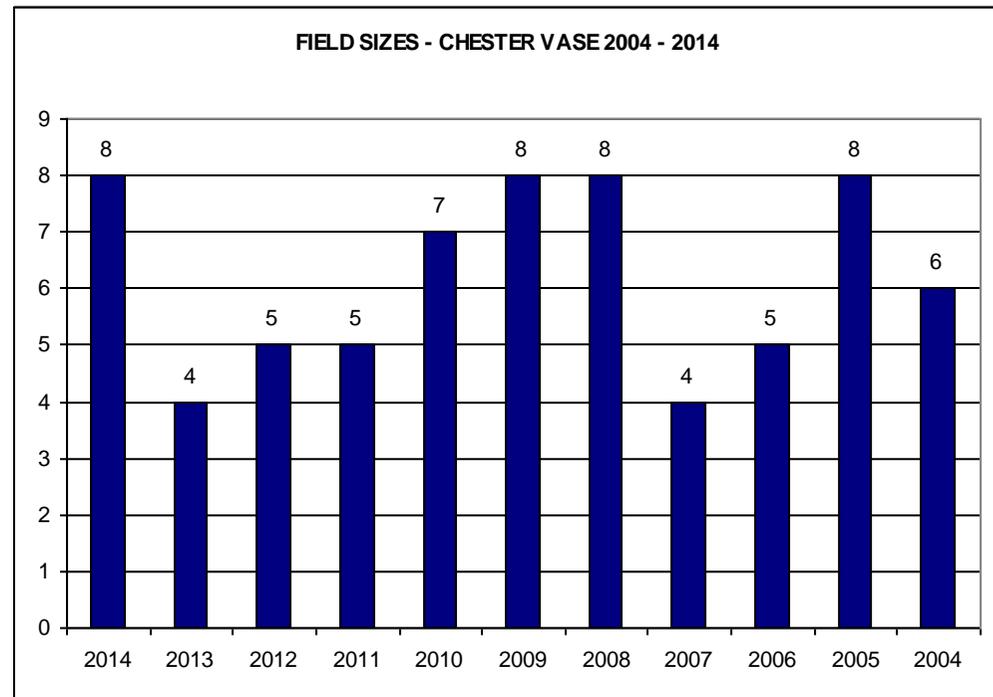
The 2014 race was also a strong renewal. The 2014 runner-up Romsdal subsequently finished runner-up to Kingston Hill in the St Leger (Gr 1).



With an average annual rating of 106.2 between 2004 and 2014, the Chester Vase has very much kept within the Group 3 European Pattern requirement. Although there have been weak years, there have been other years when the race annual rating has been over 110. The race has benefited from being strongly supported by Aidan O'Brien and the Coolmore syndicates, who have won five times between 2004 and 2014.

No rating was obtained for the 4<sup>th</sup> place in the 2005 race. Rating was divided by three for the ratings obtained.

As often the case with three-year-old Derby trials, the Chester Vase never attracts big fields with the average number of runners between the years 2004 to 2014 being just six.





**Geoffrey Freer Stakes (Gr 3), Newbury, 13.5 furlongs, 3yo+**

**16-Aug-2014**, Good to Soft, £60000

1. SEISMOS	112
2. WILLING FOE	111
3. SEAL OF APPROVAL	108 (113)
4. RED CADEAUX	115

**Races Rating 112.75**

**17-Aug-2013**, Good, £60000

1. ROYAL EMPIRE	112
2. RED CADEAUX	120
3. LOST IN THE MOMENT	114
4. GENZY	103

**Races Rating 112.25**

**18-Aug-2012**, Good to Firm, £55000

1. MOUNT ATHOS	117
2. BROWN PANTHER	113
3. MODUN	107
4. MASKED MARVEL	111

**Races Rating 112**

**13-Aug-2011**, Good, £50000

1. CENSUS	117
2. BROWN PANTHER	116
3. TIMES UP	111
4. BUTHELEZI	100

**Races Rating 111**

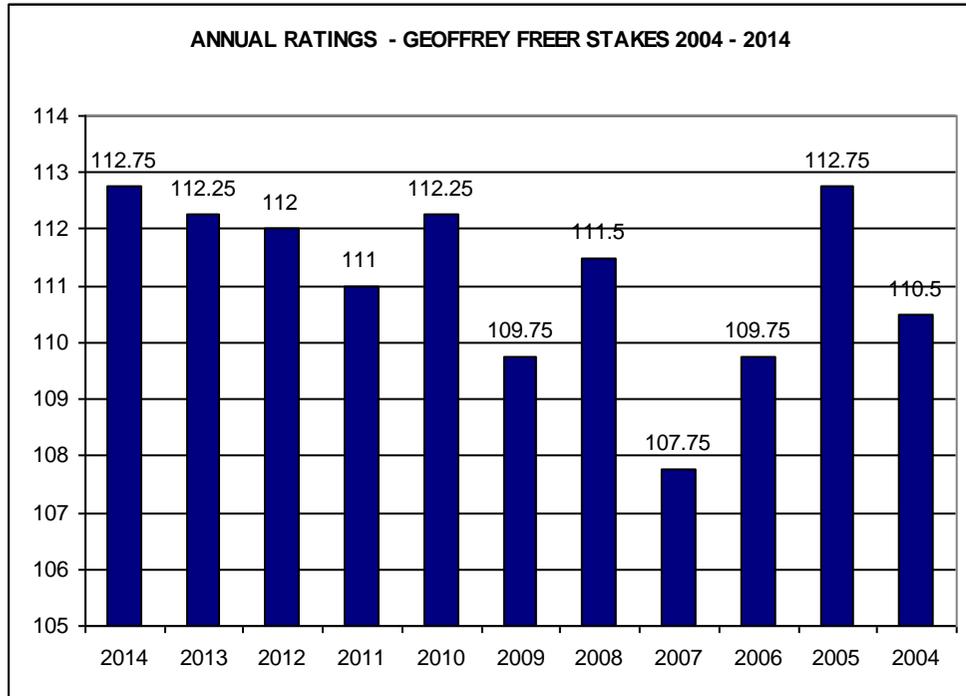
**Three Year Average (14-12) 112.33**

**Four Year Average (14-11) 112**

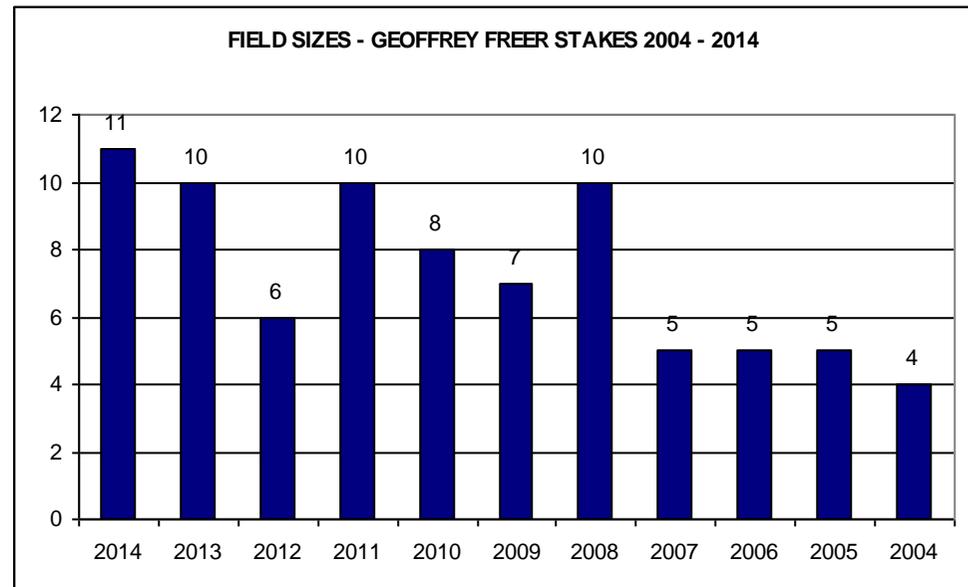
The 13-furlong Geoffrey Freer Stakes has proved to be a strong Group 3. The last three renewals have all gained annual ratings of 111 or more, which within the requirements for a European Group 2 race.

The last three winners have gone on to compete in the Melbourne Cup (Gr 1).

The Geoffrey Freer Stakes has proved popular with three-year-olds as Kite Wood won in 2009 and Census in 2011.



The last four renewals of the Geoffrey Freer Stakes have proved strong races, all coming in at ratings of 111 or more. With a ten-year average of 111, the Geoffrey Freer Stakes has performed well above its Group 3 European Pattern requirements.



Field sizes have varied for the Geoffrey Freer Stakes, but this has not adversely affected the annual rating. The average field size between 2004 and 2014 is seven.



**Henry II Stakes (Gr 3), Sandown Park, 16.5 furlongs, 4yo+**

**29-May-2014**, Soft, £62500

1.BROWN PANTHER	118
2.HIGH JINX	112
3.WHIPLASH WILLIE	108
4.GIROLAMO	107

**Race Rating 111.25**

**30-May-2013**, Good to Soft, £60000

1.GLOOMY SUNDAY	109
2.NUMBER THEORY	109
3.MODEL PUPIL	100
4.HIGH JINX	110

**Race Rating 107**

**31-May-2012**, Good to Firm, £55000

1.OPINION POLL	116
2.IBICENCO	108
3.CHIBERTA KING	105
4.TIMES UP	115

**Race Rating 111**

**26-May-2011**, Good to Soft, £80000

1.BLUE BAJAN	111
2.MONTAFF	102
3.HOLBERG	109
4.AAIM TO PROSPER	107

**Race Rating 107.25**

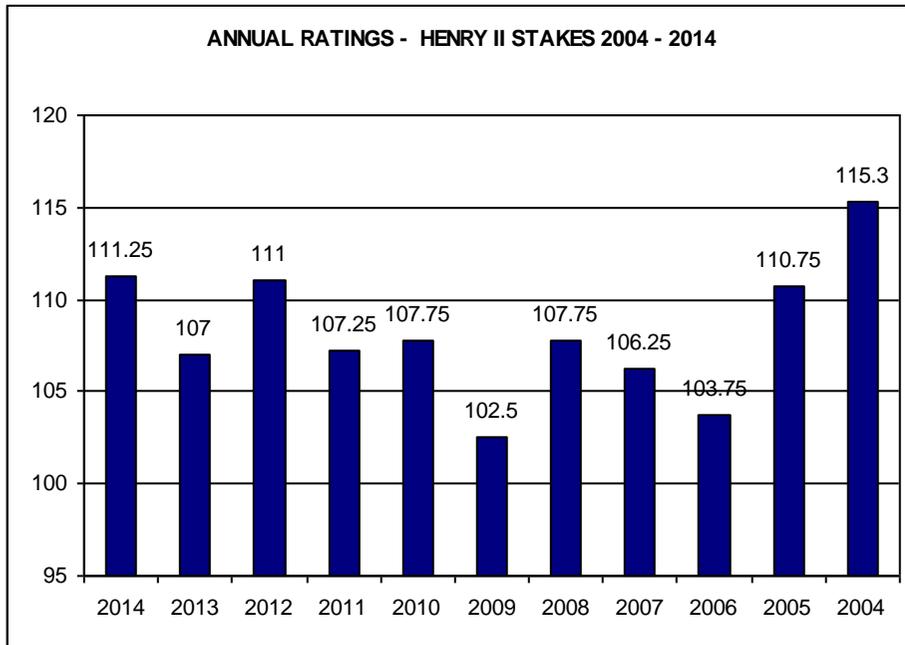
**Three Year Average (14-12) 109.75**

**Four Year Average (14-11) 109.12**

The Henry II Stakes, run at Sandown Park, is the second race run over 16 furlongs in the European Pattern. It is often used as preparation for the Gold Cup (Gr 1).

The Henry II Stakes was downgraded to Group 3 status in 2012. The three-year average of annual ratings is within the European Pattern Group 3 parameter.

2014 race recorded strongest rating since 2004, helped by Brown Panther recording his strongest season, to be Europe's leading stayer on ratings in 2014.

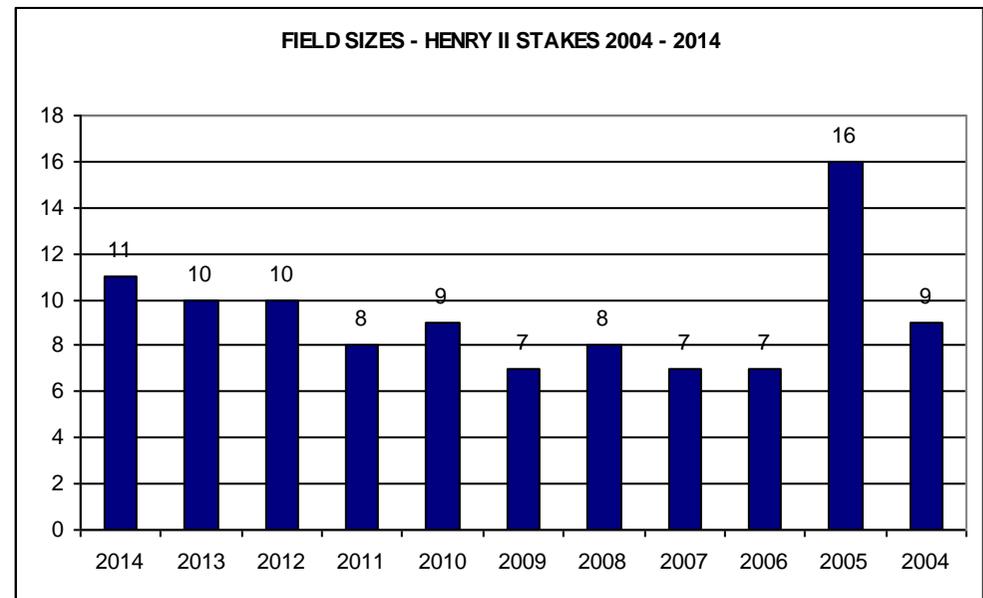


The annual ratings for the Henry II Stakes were below par for a Group 2 between 2006 and 2011. Since 2012 the annual ratings have held up as a Group 3.

From 2004 to 2011 the Henry II Stakes was run as a Gr 2, and from 2012 as a Gr 3. There was no rating for the 4<sup>th</sup> placed in 2004, when the rating was divided by three for the rating obtained.

Field sizes in 2006, 2007 and 2011 were small, which contributed to the low rating achieved for the-then Group 2 Henry II Stakes. Since the race was downgraded to a Group 3, the field has numbered ten or more each year.

From 2004 to 2011 Henry II Stakes run as a Gr 2. From 2012 run as a Gr 3.





### Lillie Langtry Stakes (Gr 3), Goodwood, 14 furlongs, 3yo+, fillies & mares

**31-Jul-2014**, Good to Firm, £60000

1.MISSUNITED	113
2.ARABIAN COMET	104
3.WAILA	99
4.SOUVIENS TOI	99

The Lillie Langtry Stakes, run during Goodwood's Glorious meeting, is the first staying stakes race restricted to three-year-olds and up fillies and mares in the European Pattern. With the adjustment of 5lb, the Group 3 has proved to be a strong race over the last three years, twice won by Wild Coco.

**Race Rating 103.75 (adjusted 108.75)**

**01-Aug-2013**, Good, £60000

1.WILD COCO	116
2.ELIK	105
3.ALTA LILEA	100
4.SOUVIENS TOI	96

**Race Rating 104.25 (adjusted 109.25)**

**02-Aug-2012**, Good, £55000

1.WILD COCO	113
2.JEHANNEDARC	102
3.ESTIMATE	108
4.HAWAAFEZ	110

**Race Rating 108.25 (adjusted 113.25)**

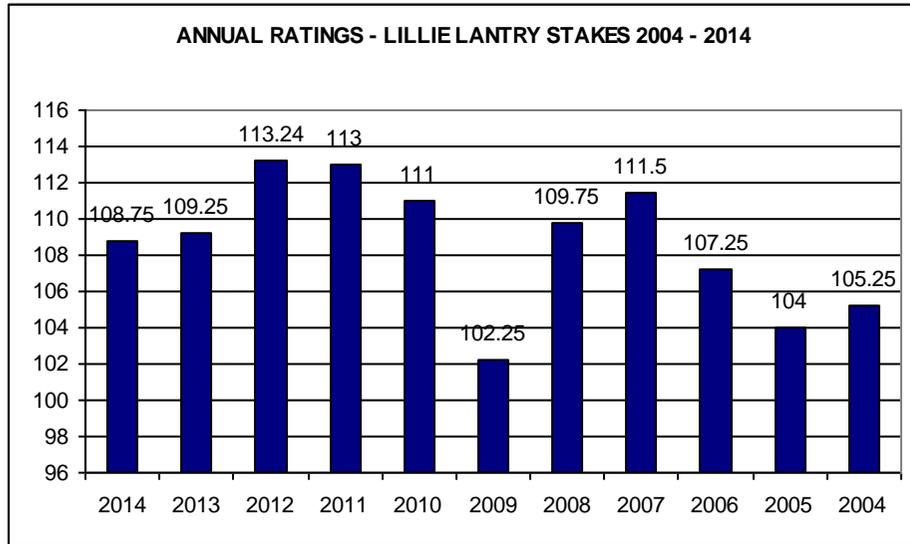
**28-Jul-2011**, Good, £50000

1.MEEZNAH	114
2.SHANKARDEH	107
3.MOTRICE	107
4.POLLY'S MARK	104

**Race Rating 108 (adjusted 113)**

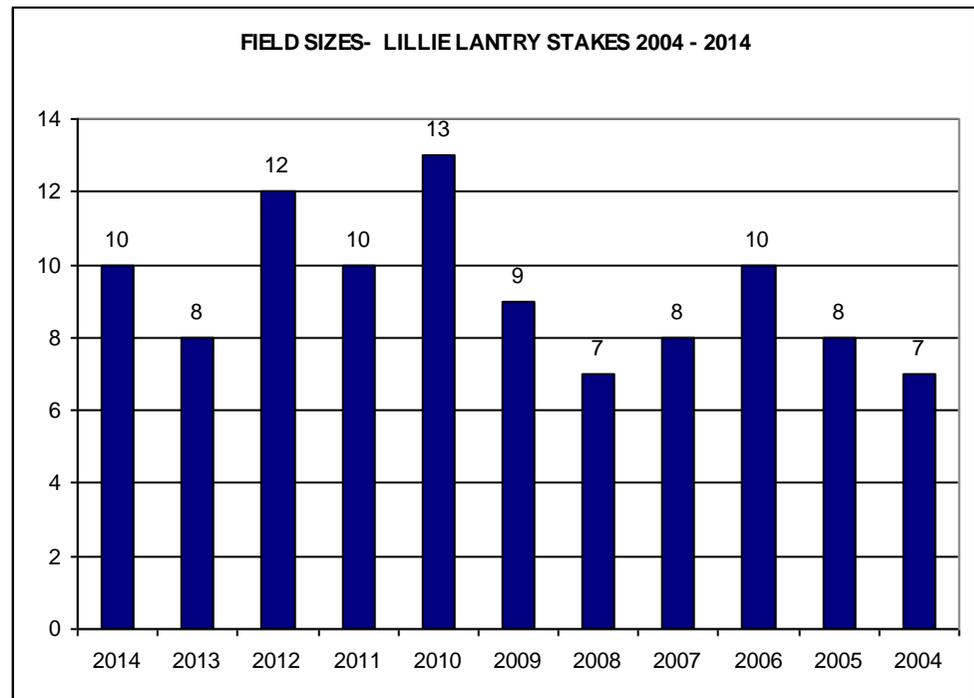
**Three Year Average (14-12) 105.4 (adjusted 110.4)**

**Four Year Average (14-11) 106 (adjusted 111)**



Annual ratings for the Lillie Langtry Stakes have remained at a high standard for a Group 3. 2009 is the weakest year on annual ratings. The annual eleven-year average is 108.65.

The Lillie Langtry Stakes has attracted an average field of 9.3 runners between 2004 and 2014. Three of the last four years have attracted ten or more runners. The Lillie Langtry Stakes is the first staying races of the year restricted to fillies and mares, which has to be considered a positive when it comes to field sizes.





### Ormonde Stakes (Gr 3), Chester, 13.5 furlongs, 4yo+

**09-May-2014**, Soft, £75000

1.BROWN PANTHER	118
2.HILLSTAR	117
3.BANOFFEE	99 (104)
4.JATHABAH	89 (94)

**Race Rating 108.25**

**10-May-2013**, Good to soft, £75000

1.MOUNT ATHOS	115
2.MAD MOOSE	98
3.COMMUNICATOR	90
4.MEMPHIS TENNESSEE	108

**Race Rating 102.75**

**11-May-2012**, Soft, Heavy in places, £70000

1.MEMPHIS TENNESSEE	117
2.VIVACIOUS VIVIENNE	100
3.CALICO CAT	108
4.BROWN PANTHER	113

**Race Rating 109.5**

**06-May-2011**, Good to Firm, £65000

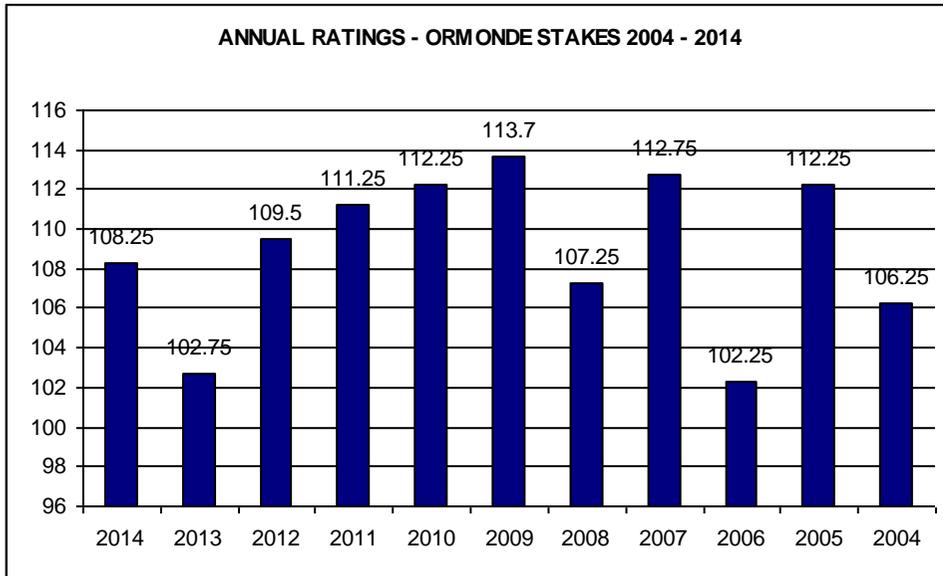
1.ST NICHOLAS ABBEY	124
2.ALLIED POWERS	107
3.HARRIS TWEED	115
4.FANDITHA	99

**Race Rating 111.25**

**Three Year Average (14-11) 106.8**

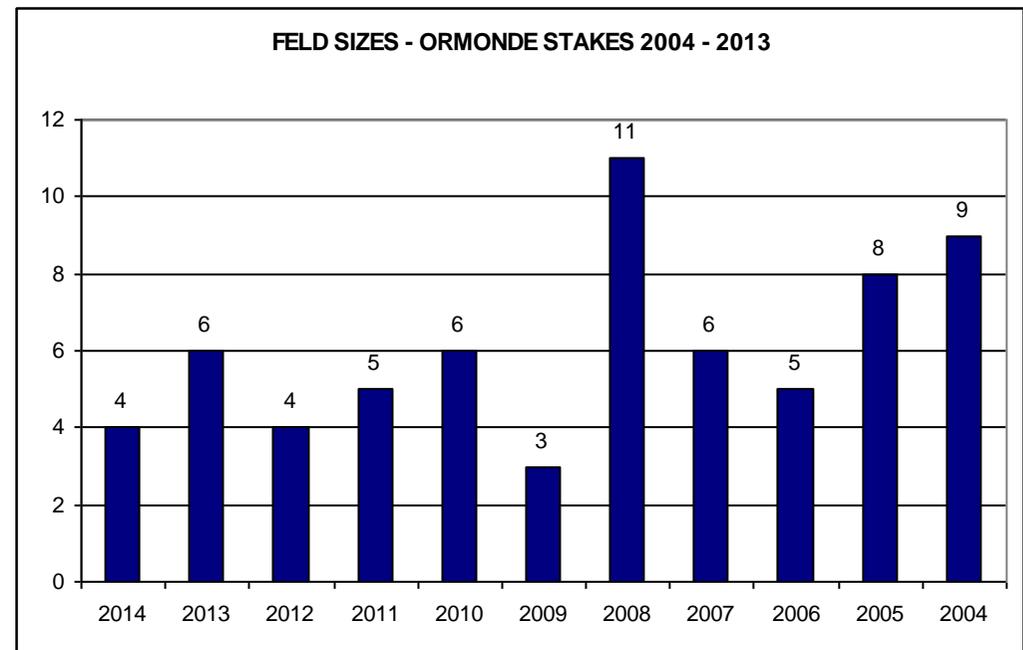
**Four Year Average (14-11) 107.9**

Although the 2013 Chester May meeting's Ormonde Stakes was below average race, the 13½-furlong Group 3 has proved to be a good race for high-class stayers to start their season. The race has well been supported by Aidan O'Brien, whose high-class middle-distance/stayers have helped to keep the annual ratings at the Group 3 European Pattern level.



The annual rating for the Ormonde Stakes has remained at a strong level for a Group 3, although the 2013 race was the weakest for six years.

Field sizes have decreased since 2008, although 2013's was the biggest for four years. However, the tight, turning track is not one that suits all stayers. The average field size between 2004 and 2014 is 6.





### Queen's Vase (L), Royal Ascot, 16 furlongs, 3yo (Gr 3 to 2013)

**20-Jun-2014**, Good to Firm, £85000

1.HARTNELL	110
2.CENTURY	107
3.MARZOCCO	108
4.BIG ORANGE	110

**Race Rating 108.75**

**21-Jun-2013**, Good to Firm, £75000

1.LEADING LIGHT	118
2.FEEL LIKE DANCING	101
3.BOITE	97
4.MISTER IMPATIENCE	98

**Race Rating 103.5**

**22-Jun-2012**, Soft, £60000

1.ESTIMATE	108 (113)
2.ATHENS	104
3.ED DE GAS	100
4.MACBETH	91

**Race Rating 102**

**17-Jun-2011**, Good to Soft, Soft in places, £60000

1.NAMIBIAN	112
2.SOLAR SKY	100
3.ETERNAL HEART	103
4.REGENT STREET	104

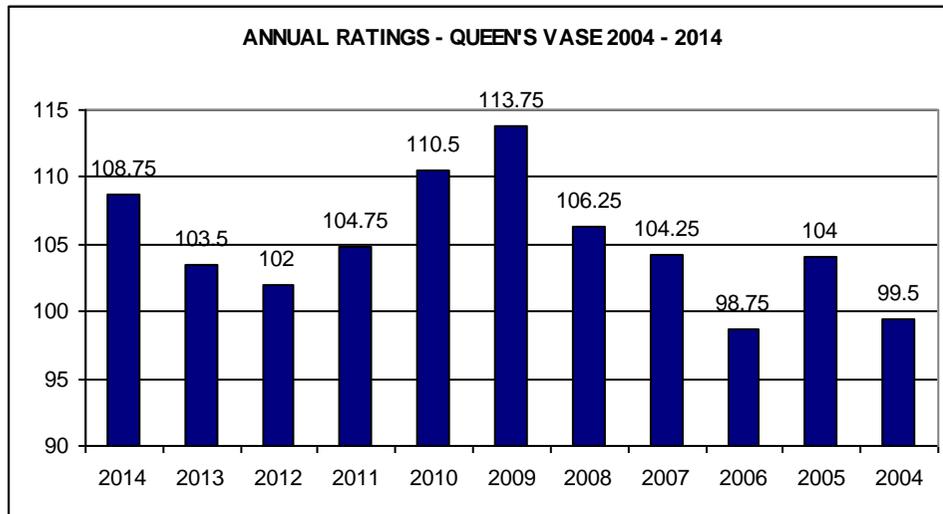
**Race Rating 104.75**

**Three Year Average (14-12) 104.75**

**Four Year Average (14-11) 104.75**

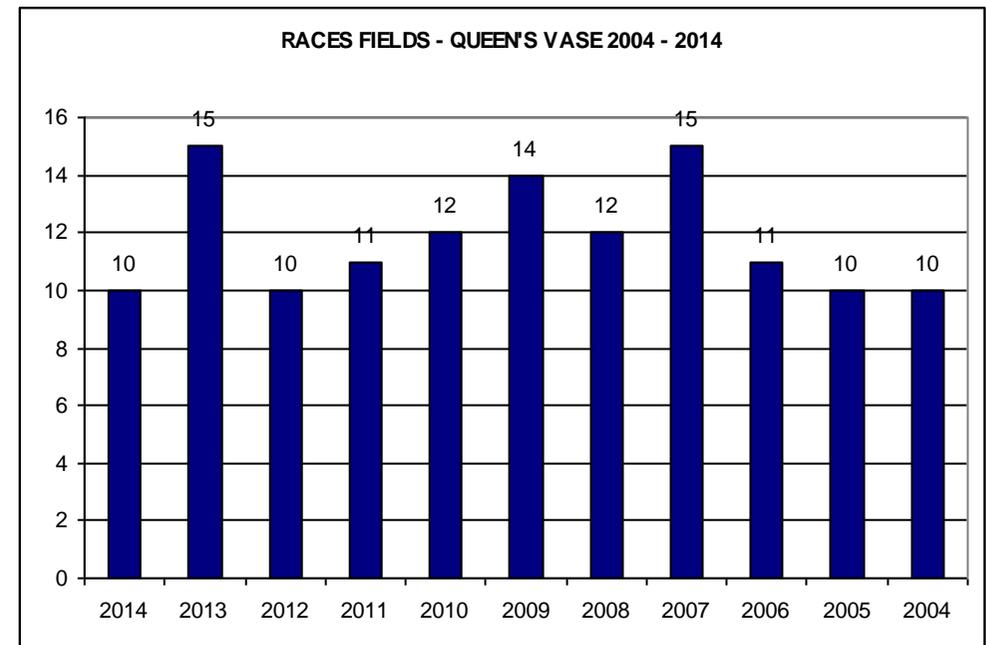
Results of the Queen's Vase from 2011 to 2013 demonstrate why it was downgraded to Listed status for 2014. Although winners between 2013 and 2011 races were well within Group 3 level, the placed horses brought down the annual rating, proving that this is an extreme test for three-year-olds in the June of their Classic year.

Although run as a Listed race in 2014, the race returned its strong rating since 2010, with all of placed horses proving to be useful stakes performers, including the fourth horse, Big Orange, who won two Listed races later in the season.



The eleven year average of 105 (Gr 3 EPC level) proves that it was hard for a race for three-year-olds at this time of year to achieve the annual rating of a Group 3 European Pattern Race. The 2009 average was highest and was helped by the third-placed horse, Mastery, winning the St Leger later that season.

Although the annual ratings meant that Queen's Vase was downgraded to Listed level in 2014, there has been little problem in attracting double-figure field numbers.





### Sagaro Stakes (Gr 3), Ascot, 16 furlongs, 4yo+

**30-April-2014**, Soft, £60000

1.TAC DE BOISTRON	117
2.EARTH AMBER	96 (101)
3.ORIENTAL FOX	105
4.MISSUNITED	113 (118)

**Race Rating 110.25**

**01-May-2013**, Good, £60000

1.ESTIMATE	112 (117)
2.CAUCUS	113
3.SIR GRAHAM WADE	99
4.BUCKLAND	95

**Race Rating 106**

**02-May-2012**, Standard, £40000 (run at Kempton Park (AV

1.COLOUR VISION	116
2.RED CADEAUX	116
3.THIMAAR	107
4.BARBICAN	104

**Race Rating 110.75**

**27-Apr-2011**, Good to Firm, Good in places, £60000

1.ASKAR TAU	110
2.AKMAL	102
3.FREE AGENT	103
4.THE BETCHWORTH KID	97

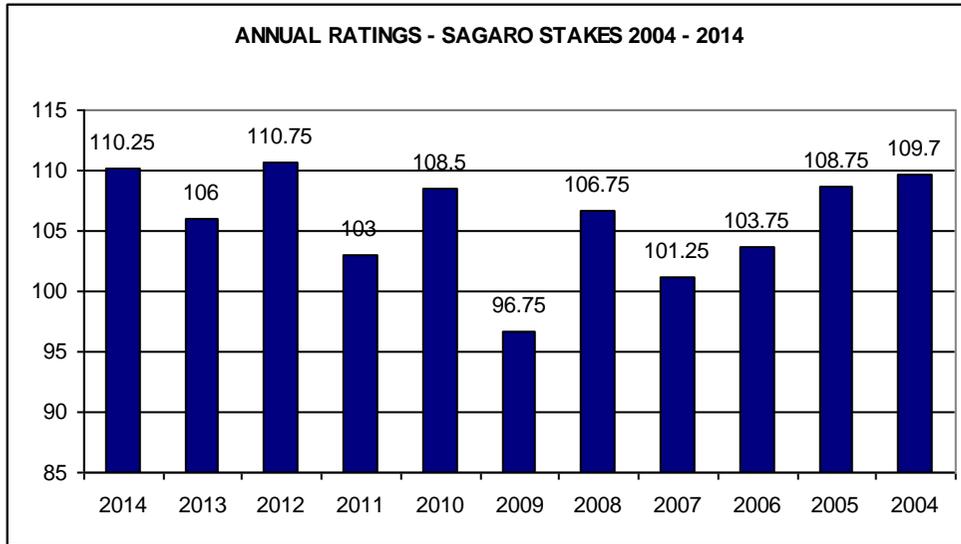
**Race Rating 103**

**Three Year Average (14-12) 109**

**Four Year Average (14-11) 107.5**

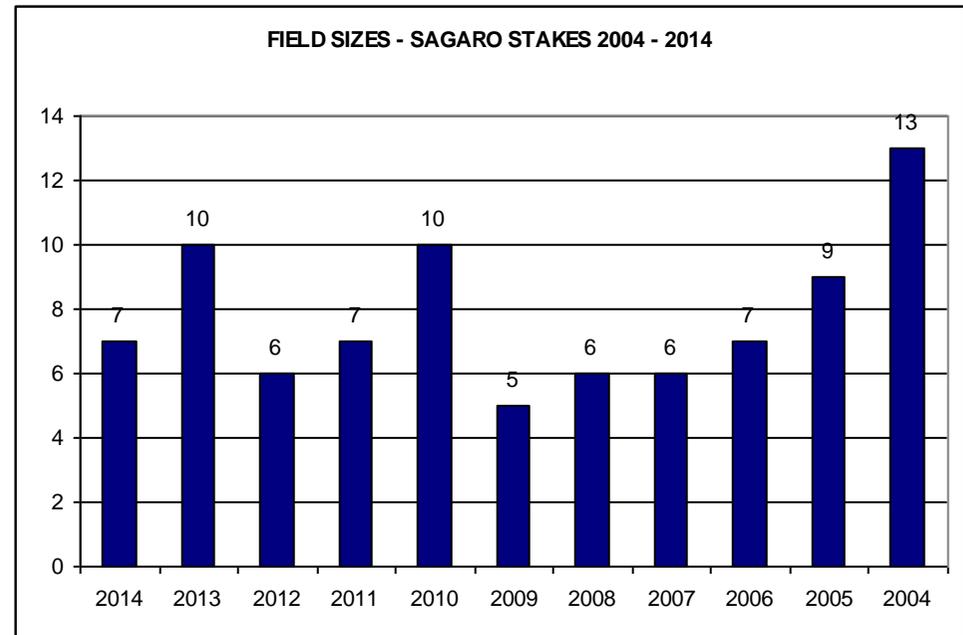
The Group 3 Sagaro Stakes, run at Ascot in late-April or the beginning of May, is the first 16-furlong European Pattern race. Like the Henry II Stakes, run at the end of May, it is used as a trial for the Gold Cup (Gr 1). Both the 2012 and 2013 winners went on to win the Gold Cup in their respective years.

The three-year annual rating comes within Group 3 Pattern requirements. The 2014 winner Tac De Boistron, went on to win his second consecutive Prix Royal-Oak (Gr 1) in October 2014.



Although the 2009 Sagaro Stakes was well below European Pattern Committee Group 3 requirements, the ten annual ratings average is 105.95. This race has clearly been used by some of Europe's leading stayers as a starting point of the season.

The average field size for the Sagaro Stakes between 2004 and 2014 is 7.8. Larger field sizes have generally come in races with bigger annual rating figures.



Kingston Hill, St Leger Stakes , Doncaster, 2014



# Appendix II

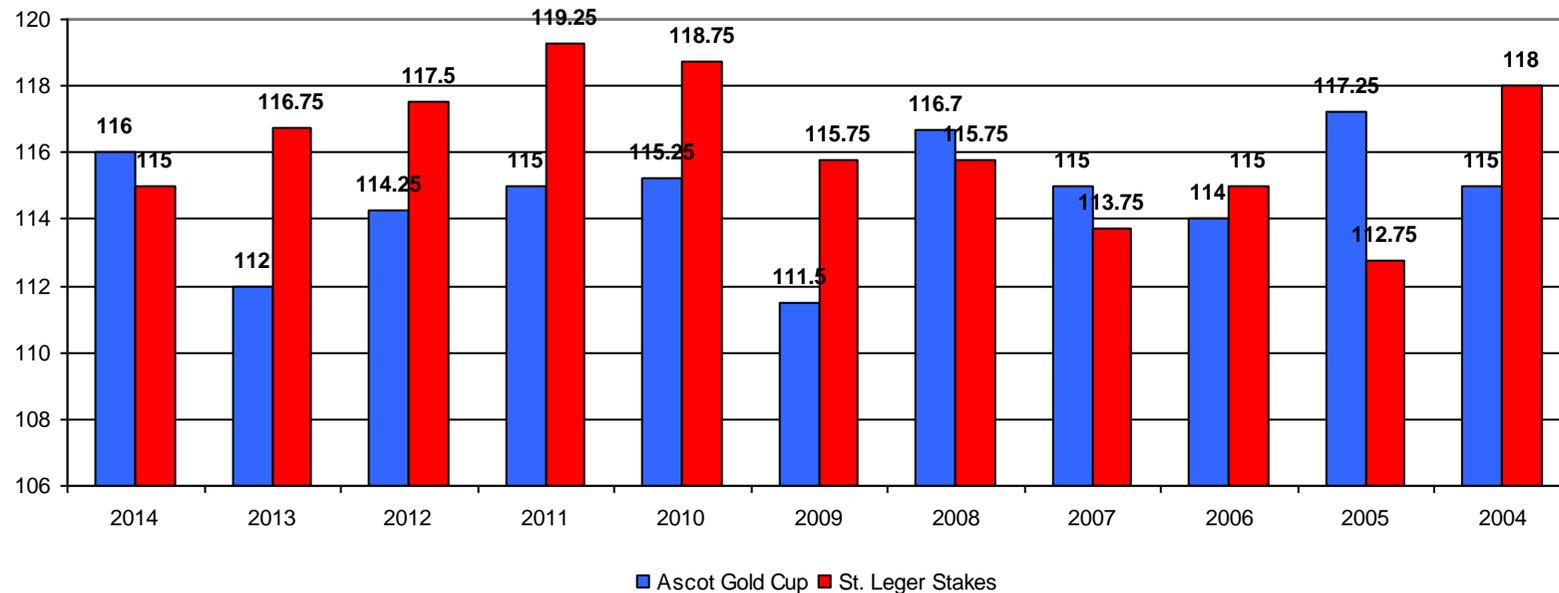
## Annual Ratings



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



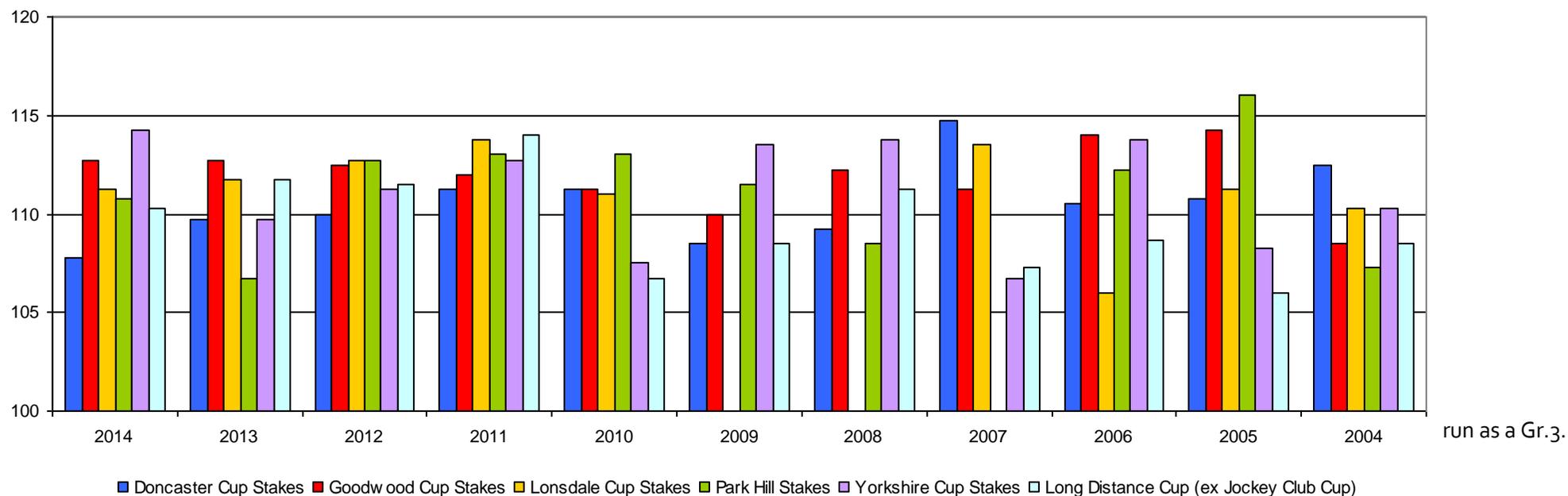
### ANNUAL RATINGS STAYING GROUP 1'S 2004 - 2014



There has been a decline in the annual ratings of the staying Group 1s held in Britain between 2010 and 2013. Although the 2013 Gold Cup's rating is not a ten-year low, this is the first time two annual ratings in a row have been below the European Pattern Committee's Group 1 requirements. In 2014 The Ascot Gold Cup recorded its highest rating since 2008



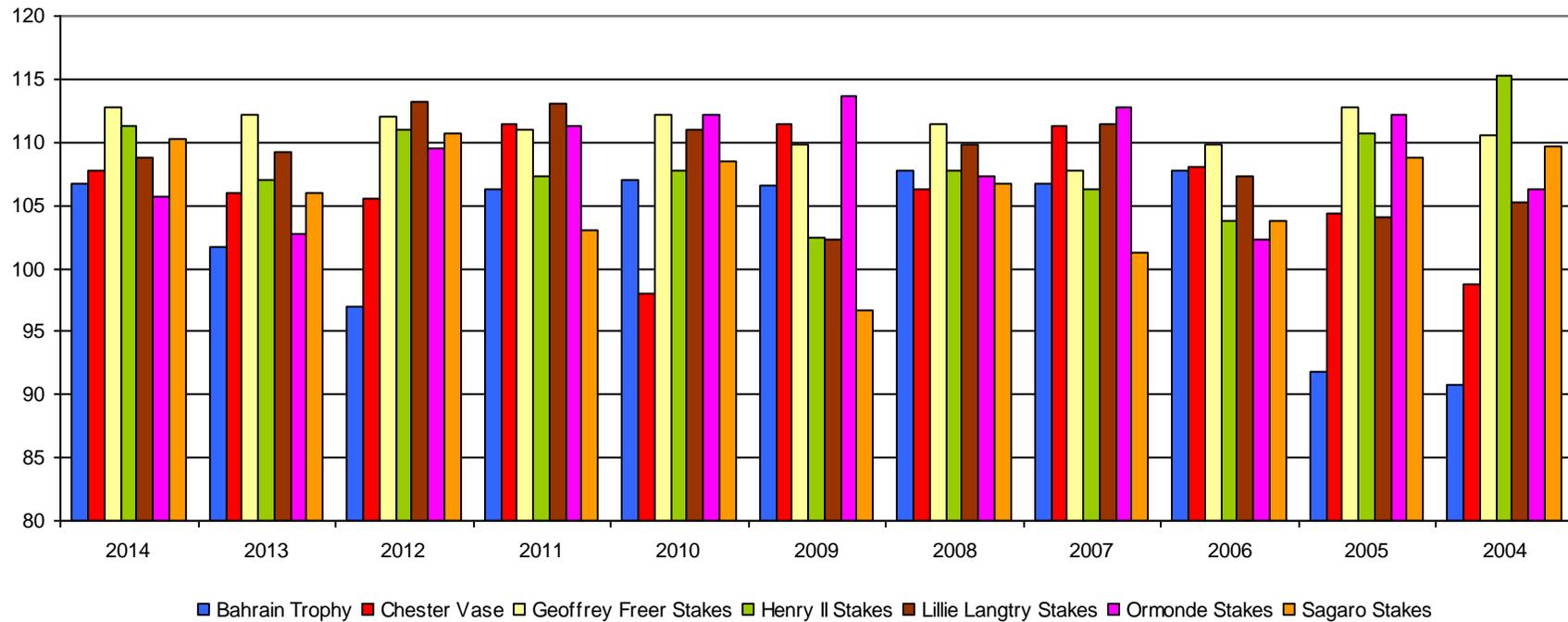
### ANNUAL RATINGS STAYING GROUP 2'S 2004 - 2014



The Group 2 staying races have held up within the 110 annual rating set by the European Pattern Committee. The only race to fall well below was the 2013 Park Hill Stakes, where the fourth-placed horse was rated below 100. On the whole the 2013 races had lower annual ratings to those of the previous two years. The Long Distance Cup/Jockey Club Cup ratings (Gr 2 in 2014) and Doncaster Cup fell to below Gr 2 level in 2014.



### ANNUAL RATINGS STAYING GROUP 3'S 2004 - 2014



The Henry II Stakes run as Group 2 until 2011/Barhrian Trophy a Listed race until 2009

The annual ratings for Britain's staying Group 3s have fluctuated much more than in the other Groups over the last ten years. However, 2013 was the first year since 2009 to have three races below the Group 3 parameter of 105. All Group 3's were above the 105 level in 2014.



## WORLD'S LEADING GROUP 1 RACES

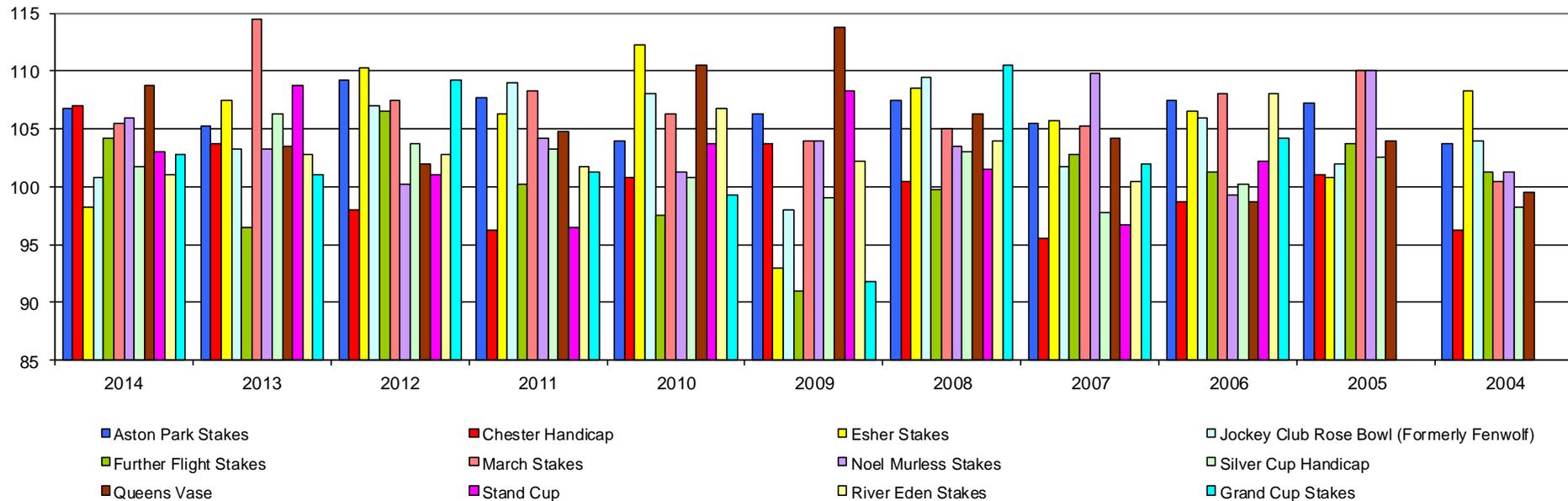
Of the world's top 50 three-year-old-plus Group/Grade 1 races, on an average of a three-year annual rating between 2011 and 2013, only two staying races qualified. As you would expect, most of these races are run over 8-12 furlongs. Only two races are over 12 furlongs-plus - the Melbourne Cup, ranked joint 43<sup>rd</sup>, and the St Leger, joint 48<sup>th</sup>.

The Melbourne Cup is in fact the only handicap in the top 50 races, and the first four places in both 2012 and 2013 went to European-bred horses. This raises questions: are Australian trainers better at training stayers than their European compatriots, or are they being overrated compared to European stayers, or is it a better race?



## Britain's Listed Races

### ANNUAL RATINGS STAYING LISTED RACES 2004 - 2014



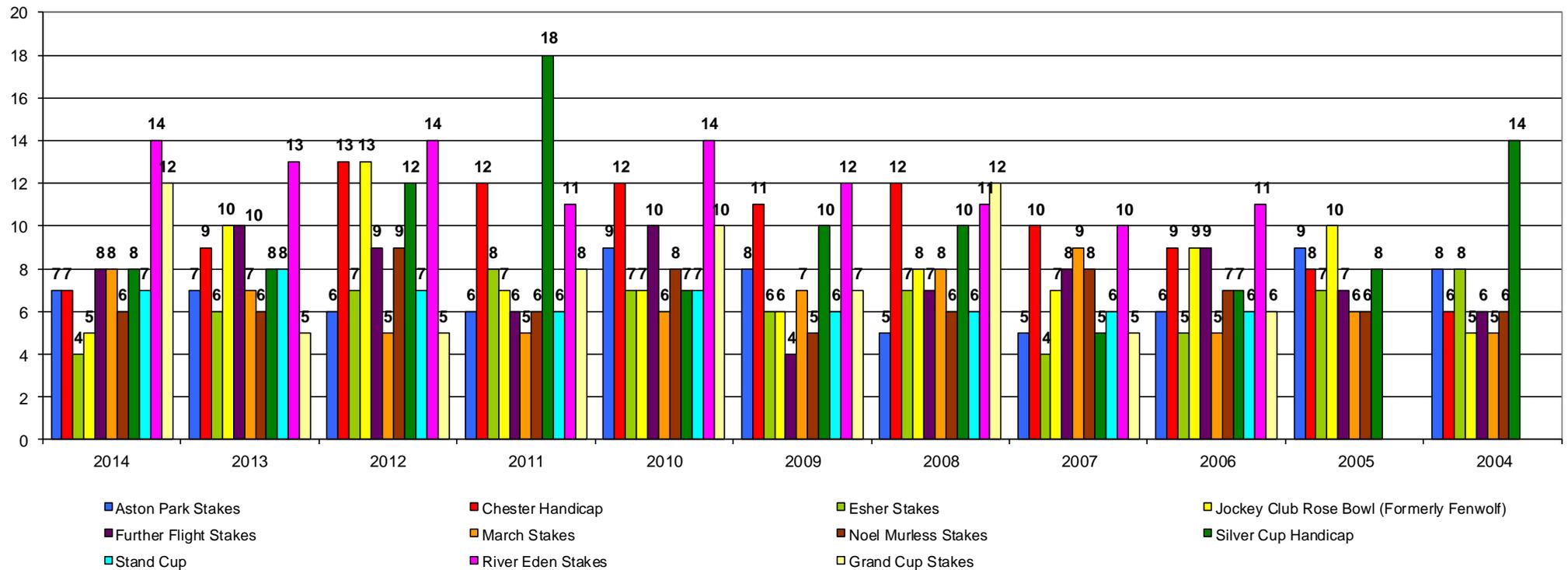
The Grand Cup, Stand Cup the River Eden Stakes were first run as Listed races in 2006. The Noel Murless Stakes was moved from Newmarket to Ascot in 2011. Queens Vase was demoted to Listed status, from a Gr 3 in 2014

The staying Listed races have remained on a par with previous years. The strongest races are the Aston Park Stakes, Jockey Club Rose Bowl and March **Stakes**. The **weakest races are the Chester Handicap, Further Flight Stakes and the River Eden Stakes, run on the all-weather at the end of the season.** The Queen's Vase has seen a decline since 2011, although 2014 saw a dramatic improvement in its annual rating.

Races such as the Aston Park Stakes and March Stakes used as trials, either for bigger Summer targets or Melbourne Cup preps runs.



### ANNUAL FIELD SIZES STAYING LISTED RACES 2004 - 2014



The Grand Cup, Stand Cup and River Eden Stakes were first run as Listed races in 2006. The Noel Murless Stakes was moved from Newmarket in Ascot in 2011.

The River Eden Stakes run in November on Lingfield’s all-weather surface for three-year-old and up, fillies and mares, has attracted the strongest field numbers, with ten or more runners, since it was made a Listed race in 2006. The Listed handicaps, the Chester Handicap and Silver Cup, run at York, have proved to be popular with trainers and both attracted good field sizes over the six years. York’s Grand Cup, which failed to attract good sizes of field numbers when run at Musselburgh in 2006 and 2007, has declined to five runners in each of 2012 and 2013. Both the Aston Park Stakes and March Stakes, which are held on grade one Southern racecourses, Newbury and Goodwood respectively, have never attracted particularly large field sizes but have returned strong annual ratings. Grand Cup Stakes, attracted a good field in 2014



# Appendix III

2014 European Stakes  
Race Calendar

Flying Office winning the Further Flight Stakes 2014



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



## 2014 EUROPEAN STAKES RACE CALENDAR

Race	Racecourse	Country	Grade	Dis.	Cond.	Date
Prix Conseil General des Alpes-Maritimes	Cagnes-sur-Mer	France	L	12.5f	4yrs & up	22/02/2014
Prix Right Royal	Saint-Cloud	France	L	15.5f	4yo & up	08/04/2014
Chester Vase	Chester	Great Britain	Gr 3	12.5f	3yo c&g	08/04/2014
Further Flight Stakes	Nottingham	Great Britain	L	14f	4yo & up	09/04/2014
Martin Moloney Stakes	Limerick	Ireland	L	12.5f	4yo & up	26/04/2014
Prix de Barbeville	Longchamp	France	Gr 3	15.5f	4yo & up	27/04/2014
Sagaro Stakes	Ascot	Great Britain	Gr 3	16f	4yo & up	30/04/2014
Ormonde Stakes	Chester	Great Britain	Gr 3	13.5f	4yo & up	09/05/2014
Yorkshire Cup Stakes	York	Great Britain	Gr 2	14f	4yo & up	16/05/2014
Aston Park Stakes	Newbury	Great Britain	L	13.5f	4yo & up	17/05/2014
Vintage Crop Stakes	Navan	Ireland	Gr 3	14f	4yo & up	18/05/2014
Prix Vicomtesse Vigier	Longchamp	France	Gr 2	15.5f	4yo & up	25/05/2014
Henry II Stakes	Sandown	Great Britain	Gr 3	16f	4yo & up	29/05/2014
Grand Cup Stakes	York	Great Britain	L	14f	4yo & up	31/05/2014
Saval Beg Stakes	Leopardstown	Ireland	L	14f	4yo & up	06/06/2014
Ascot Gold Cup Stakes	Royal Ascot	Great Britain	Gr 1	20f	4yo & up	10/06/2014
Queen's Vase Stakes	Royal Ascot	Great Britain	L	16f	3yo	20/06/2014
Prix La Moskowa	Chantilly	France	L	15f	3yo	23/06/2014
Curragh Cup	Curragh	Ireland	Gr 3	14f	3yo & up	29/06/2014
Esher Stakes	Sandown	Great Britain	L	16f	4yo & up	05/07/2014
Bahrain Trophy Stakes	Newmarket	Great Britain	Gr 3	13f	3yo	10/07/2014
Silver Cup Handicap	York	Great Britain	L	14f	3yo & up	12/07/2014
Prix Maurice de Nieuil	Longchamp	France	Gr 2	14f	4yo & up	13/07/2014
Challenge Stakes	Leopardstown	Ireland	L	14f	3yo & up	17/07/2014
Prix du Carrousel	Maisons-Laffitte	France	L	15.5f	4yo & up	27/07/2014
Lillie Langtry Stakes	Goodwood	Great Britain	Gr 3	14f	3yo & up f&m	31/07/2014
Goodwood Cup Stakes	Goodwood	Great Britain	Gr 2	16f	3yo & up	31/07/2014
Prix de Reux	Deauville	France	Gr 3	12.5f	3yo & up	10/08/2014
Prix de Pomone	Deauville	France	Gr 2	12.5f	3yo & up f&m	16/08/2014
Geoffrey Freer Stakes	Newbury	Great Britain	Gr 3	13f	3yo & up	16/08/2014



Prix Minerve	Deauville	France	Gr 3	12.5f	3yo fillies	17/08/2014
Prix Michel Houyvet	Deauville	France	L	15f	3yo	17/08/2014
Lonsdale Cup Stakes	York	Great Britain	Gr 2	16f	3yo & up	22/08/2014
Ballycullen Stakes	Curragh	Ireland	Gr 3	14f	3yo & up	23/08/2014
Prix Kergorlay	Deauville	France	Gr 2	15f	3yo & up	24/08/2014
Chester Handicap	Chester	Great Britain	L	13f	3yo & up	30/08/2014
Grand Prix de Deauville	Deauville	France	Gr 2	12.5f	3yo & up	31/08/2014
Prix de Lutece	Longchamp	France	Gr 3	15f	3yo	07/09/2014
Park Hill Stakes	Doncaster	Great Britain	Gr 2	14.5f	3yo & up f&m	11/09/2014
Doncaster Cup Stakes	Doncaster	Great Britain	Gr 2	18f	3yo & up	12/09/2014
Stand Cup	Chester	Great Britain	L	12.5f	3yo+	13/09/2014
St. Leger Stakes	Doncaster	Great Britain	Gr 1	14.5f	3yo c&f	13/09/2014
Prix Gladiateur	Longchamp	France	Gr 3	15.5f	4yo & up	14/09/2014
Irish St. Leger	Curragh	Ireland	Gr 1	14f	3yo & up	14/09/2014
March Stakes	Goodwood	Great Britain	L	14f	3yo & up	23/09/2014
Jockey Club Rose Bowl (Formerly Fenwolf)	Newmarket	Great Britain	L	16f	3yo & up	25/09/2014
Loughbrown Stakes	Curragh	Ireland	L	16f	3yo	28/09/2014
Prix Scaramouche	Saint-Cloud	France	L	14f	3yo & up	03/10/2014
Noel Murless Stakes	Newmarket	Great Britain	L	14f	3yo	03/10/2014
Prix de Royallieu	Longchamp	France	Gr 2	12.5f	3yo & up f&m	04/10/2014
Prix Chaudenay	Longchamp	France	Gr 2	15f	3yo	04/10/2014
Prix du Cadran	Longchamp	France	Gr 1	20f	4yo & up	05/10/2014
British Champions Long Distance Cup Stakes	Ascot	Great Britain	Gr 2	16f	3yo & up	18/10/2014
Prix Vulcain	Deauville	France	L	12.5f	3yo	22/10/2014
Prix Royal Oak	Longchamp	France	Gr 1	15.5f	3yo & up	26/10/2014
River Eden Stakes	Lingfield (AW)	Great Britain	L	13f	3yo & up f&m	30/10/2014
Prix Belle de Nuit	Saint-Cloud	France	L	12.5f	3yo & up f&m	13/11/2014
Prix Denisy	Saint-Cloud	France	L	15.5f	3yo & up	13/11/2014

There were 58 staying Pattern races (12 furlongs plus) scheduled to be run in the leading European countries (Britain, Ireland and France) in 2014. These are run between February and mid-November. A number are staged very close together. These include two 14-furlong races run within two days of each other. Due to



Navan's Vintage Crop Stakes being promoted to Group 3 status for 2014, it is now run two days after the Yorkshire Cup (Gr 2), with the Listed Aston Park Stakes on the day in between.

Also in close proximity are the Prix Vicomtesse Vigier (Gr 2) and the Henry II Stakes (Gr 3), run within four days of each other.

With the Queen's Vase Stakes having been demoted to Listed status in 2014, it now run three days before Chantilly's Prix La Moskowa (L). Both are over a similar distance and restricted to three-year-olds.

Although the formation of the Irish Champions Weekend did not involve a change of date for the Irish St Leger (Gr 1), it resulted in two large race meetings being run over the same weekend, both with Group 1 staying races. Although Doncaster's St Leger (Gr 1) is restricted to three-year-olds, the Irish St Leger is also open to three-year-olds, and runners from this age category have performed well over the last four years.

The other big-race clash involves the British Champions Long Distance Cup Stakes, which has been promoted to Group 2 status for 2014, and is run on the weekend before Longchamp's Prix Royal-Oak (Gr 1), over half a furlong shorter. Both races are open to three-year-old and up and have prizemoney funds of more than £275,000.

There are also two Listed races, both over 14 furlongs, that are run on the same day - Newmarket's Noel Murless Stakes, for three-year-olds only, and the Prix Scaramouche at Saint-Cloud.

Brown Panther, Goodwood  
Cup, Goodwood, 2013



## Appendix IV

World Thoroughbred Ratings  
2008 – 2014



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION

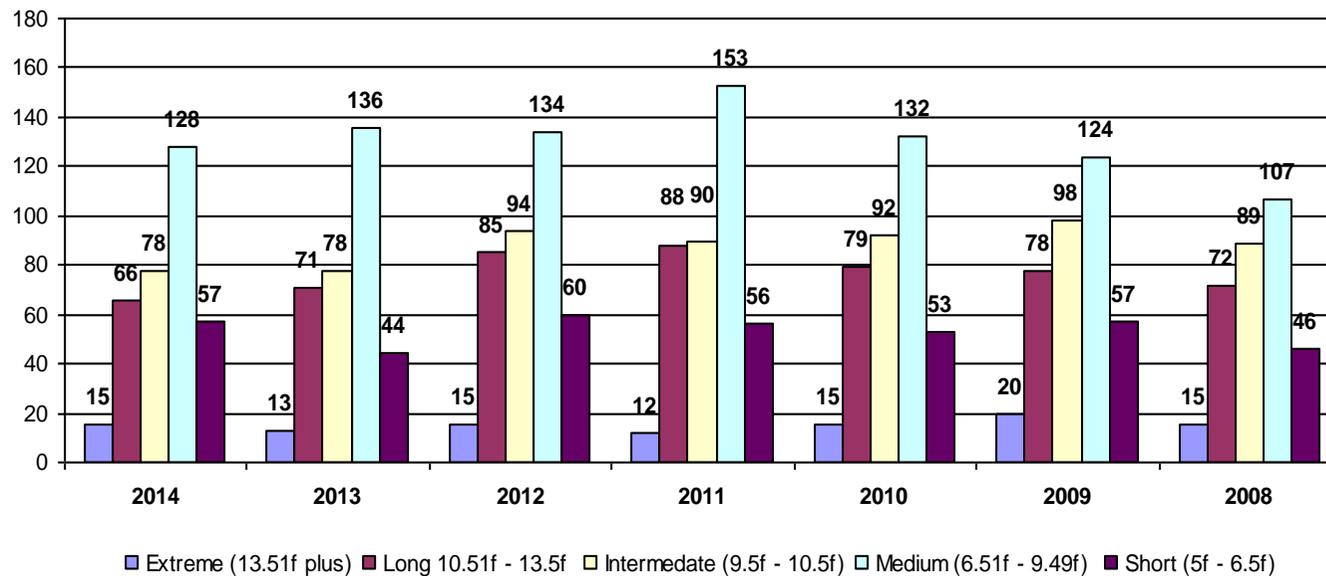


WORLD THOROUGHBRED RATINGS 2008-14

Appendix IV

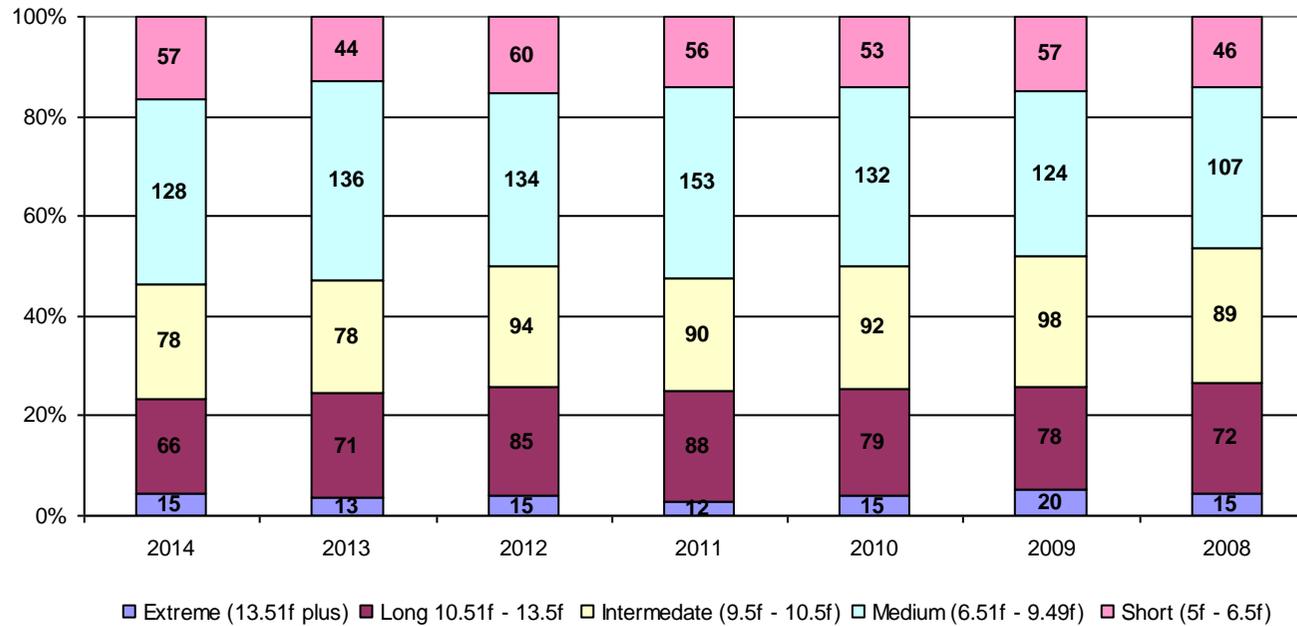
The number of stayers, labelled as belonging to the Extreme distance category and achieving a performance of 115 or greater, as listed in the annual World Thoroughbred Rankings (WTR), has remained much the same between 2008 and 2014 at 15 per year, although two of the last four years have been the lowest number in a seven-year period.

DISTANCE CATEGORIES OF THE WORLD THOROUGHBRED RANKINGS - 2008 to 2014





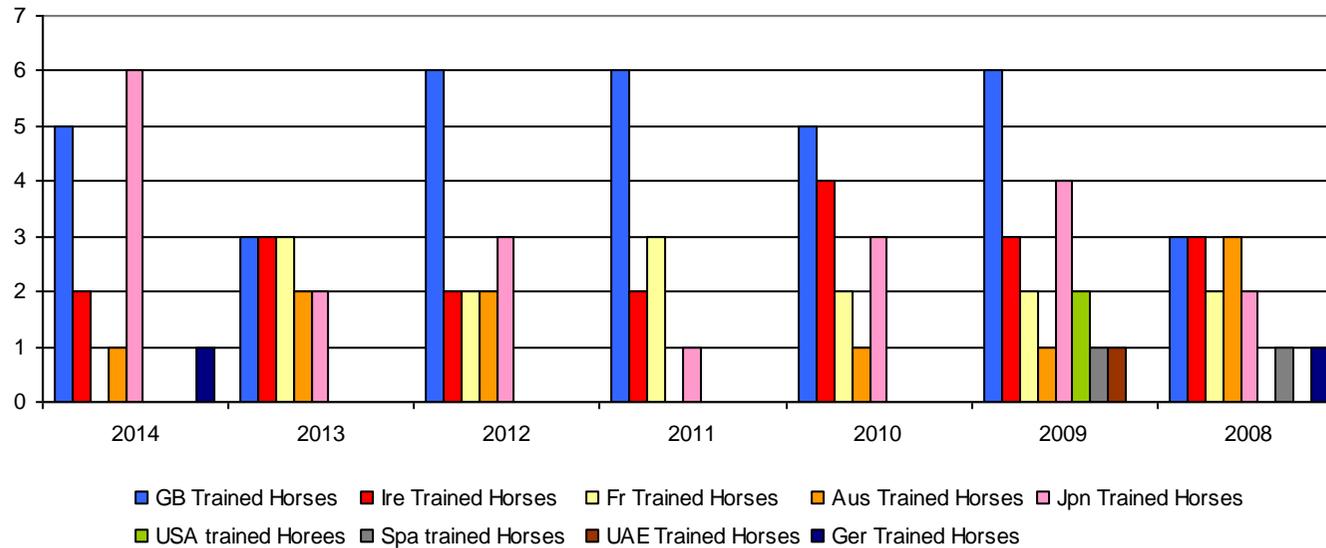
### PERCENTAGE OF DISTANCE CATEGORIES OF WTR 2008 - 2014



The percentage of high-class stayers (Extreme) with a performance rated 115 or over in the WTR rankings has fallen from 5.3% in 2009 to 3.8% in 2012 and 2013, with a low of 3% in 2011. There was a slight increase in 2014 with 4.3% of horses producing a rating of 115 or more over an extreme distance performance.



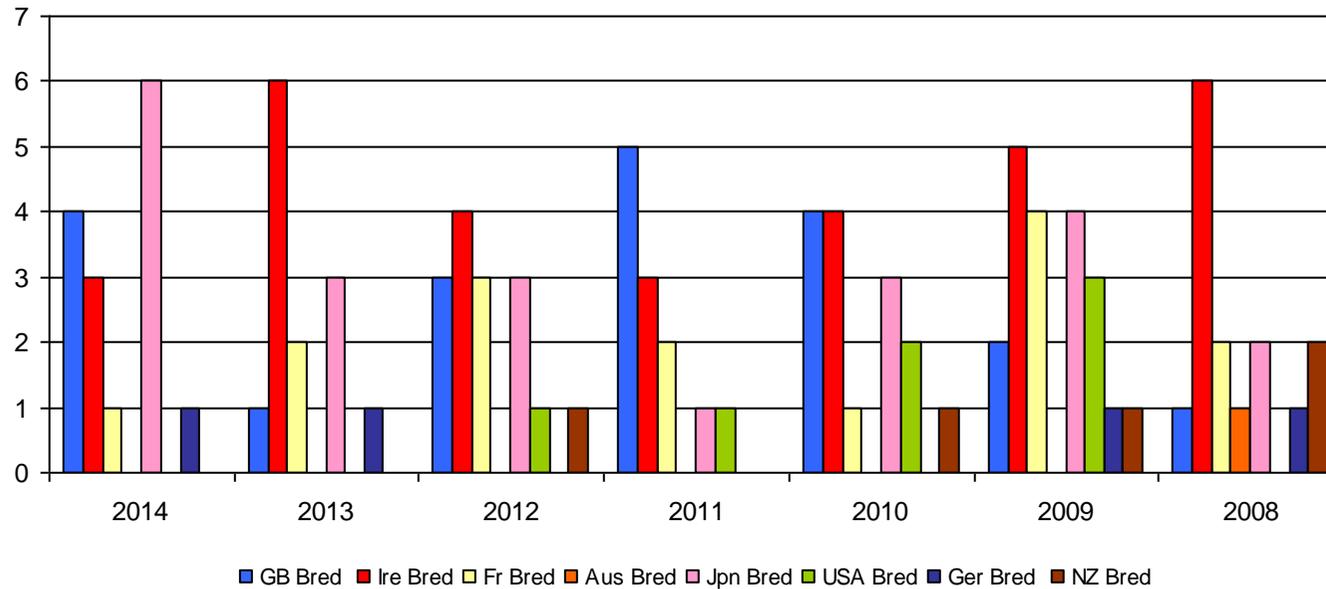
### COUNTRIES OF TRAINERS OF LEADING WTR'S STAYERS 2008 - 2014



British-based trainers have dominated the training of WTR leading stayers (Extreme) between 2009 and 2014, although 2013's sample was not as strong as previous years'. Japan, who had a strong 2014 in the WTR's, is proving to be a reliable source of top-class stayers



### COUNTRIES OF BIRTH OF WTR'S LEADING STAYERS 2008 - 2014



Ireland dominates the country of birth of the world's leading stayers (Extreme). The years 2010 and 2011 saw British born stayers hold their own. Although Australian-trained stayers are well represented, it is clear that trainers in Australia rely on runners imported from New Zealand and Europe. As is the case with trainers, Japanese bred and raced stayers are having an increased presence in the WTR's.



Sadler's Wells in portrait in 2006

# Appendix V

Sires



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



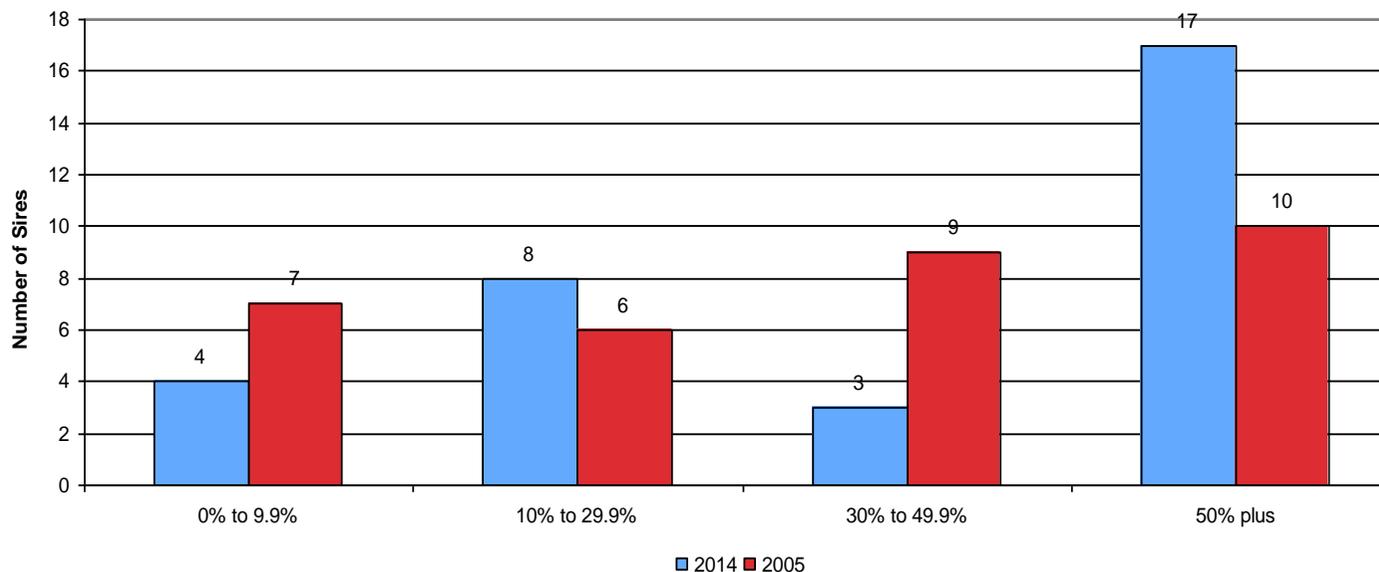
## Sires

## Appendix V

The following stallion tables are taken from sires standing at stud in 2005 and 2014 for an advertised fee of £2,500 or more. In order to have consistent comparison we have only included sires that have got three or more crops of racing age and the number 3yo-plus career winners in Ireland and Britain until the end of the previous year, 2004 and 2013 respectively. Distances refer to the whole furlongs completed.

### MAKE UP OF GB BASED SIRES IN 2005 & 2014 ON % WINNERS BETWEEN 5 to 7F

(Figures are up to the end of 2004 and 2013 respectively 3yo plus career Ire/GB winners only included and sires standing for £2,500 or more with 3 or more crops of racing included)

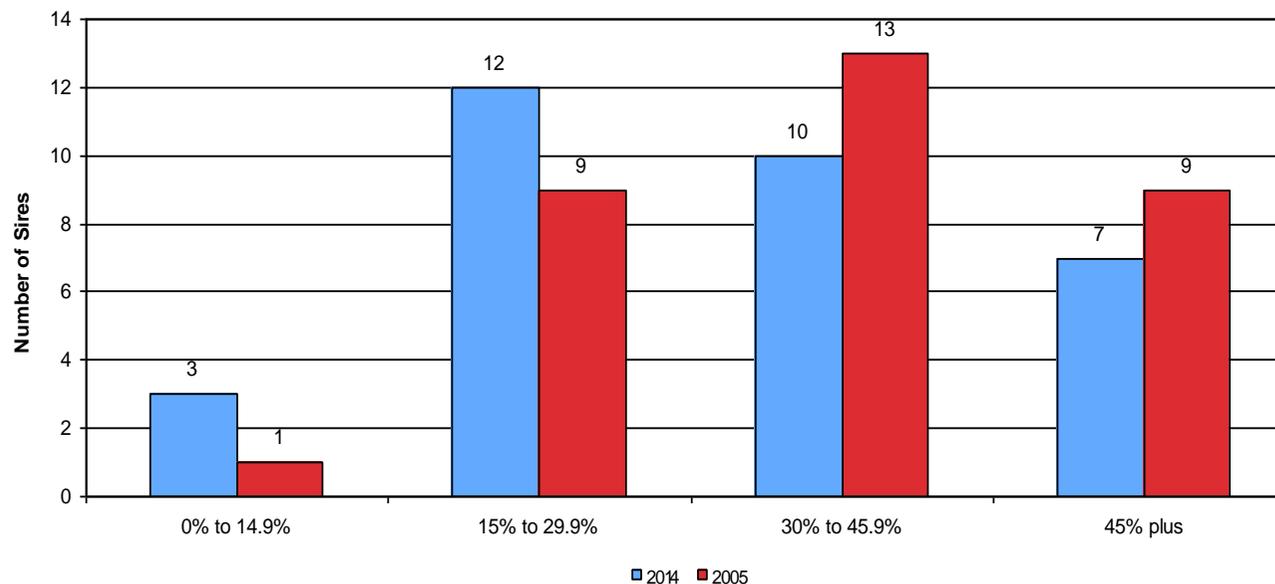


There are more sires responsible for more 5-7-furlong winners in 2014 than in 2005. There has been a 17% increase in the number of sires producing 50% or more three-year-old and up 5-7-furlong winners. Although the 10% to 29.9% category of 5-to-7-furlong winners has risen from six sires to eight, the 0% to 9.95% and 30% to 49.9% categories have fallen, of which the latter has fallen by 66.6%



### MAKE UP OF GB BASED SIRES IN 2005 & 2014 ON % WINNERS BETWEEN 8 to 10F

(Figures are up to the end of 2004 and 2013 respectively 3yo plus career Ire/GB winners only included and sires standing for £2,500 or more with 3 or more crops of racing included)

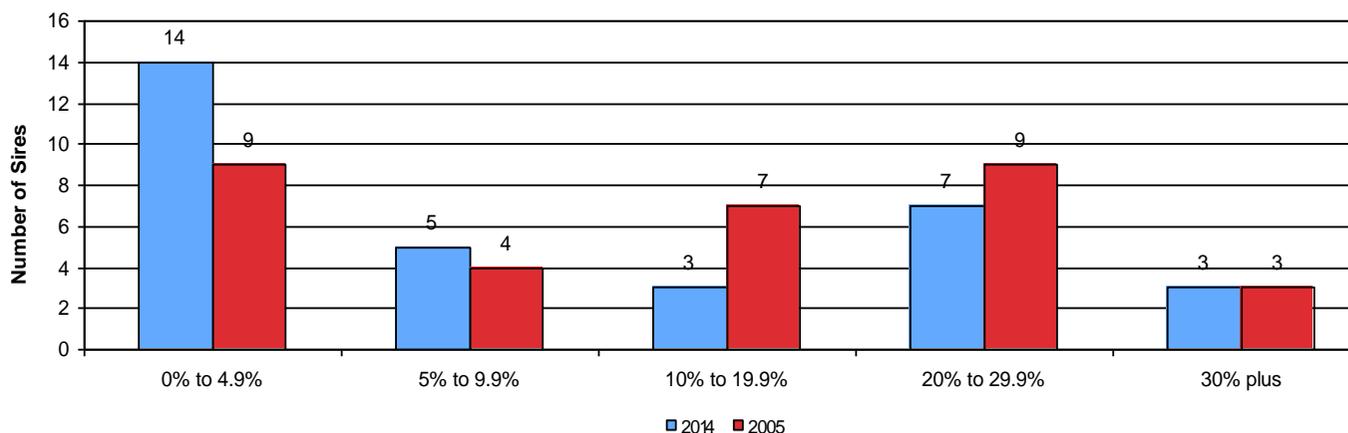


The number of sires producing 8-10-furlong winners provides a much more consistent comparison. The number of sires only managing 15% to 29.9% of their winners over 8-10 furlongs increased by 33%, with the 30% to 45.9% and 45% plus categories decreasing 23% and 22% respectively, between 2005 and 2013. The number of sires who could manage only 14.9% or less of their winners over 8-10 furlongs has risen from one to three sires (200%), and confirms the previous tables' findings.



### MAKE UP OF GB BASED SIRES IN 2005 & 2014 ON % WINNERS BETWEEN 11 to 12F

(Figures are up to the end of 2004 and 2013 respectively 3yo plus career Ire/GB winners only included and sires standing for £2,500 or more with 3 or more crops of racing included)

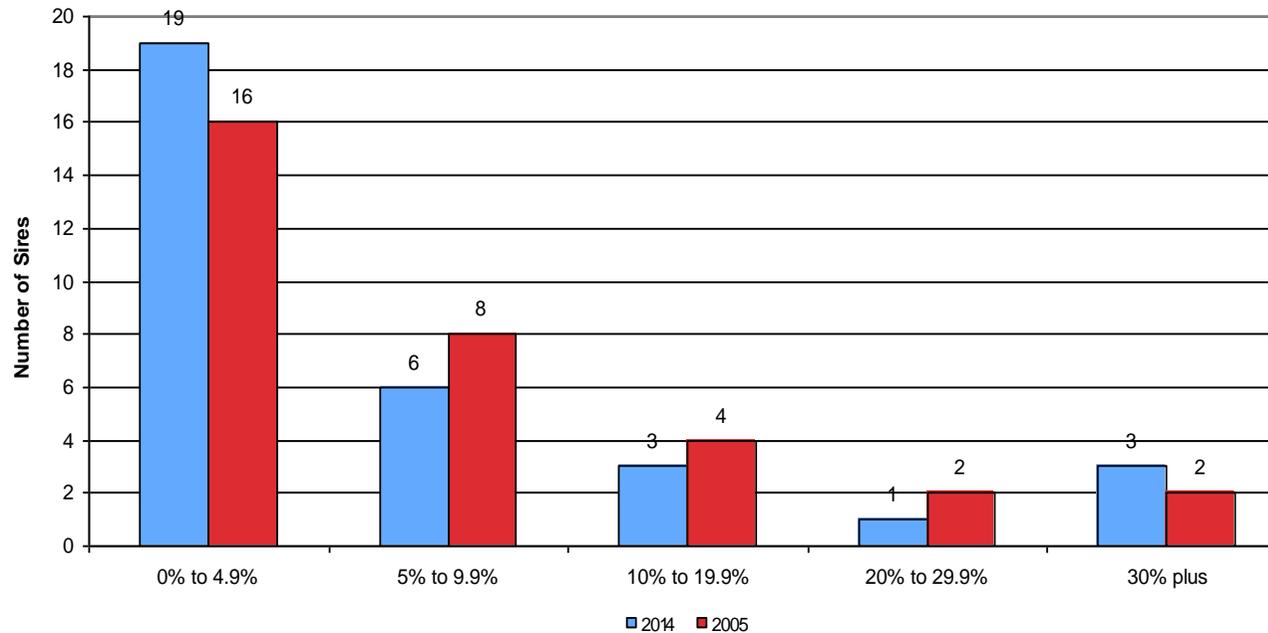


There has been a rise of 55.5% in the number of sires only able to produce 0% to 4.9% of their winners over 11-12 furlongs. Although the number of sires producing 20% to 29.9% of their winners has fallen only by two, there was 57% decrease in the number of stallions producing 10% to 19.9% of their winners over 11-12 furlongs. On the extreme the number of sires producing 30% plus of their winners has remained unchanged.



### MAKE OF GB BASED SIRES IN 2005 & 2014 ON % WINNERS OVER 13 PLUS

(Figures are up to the end of 2004 and 2013 respectively 3yo plus career Ire/GB winners only included and sires standing for £2,500 or more with 3 or more crops of racing included)



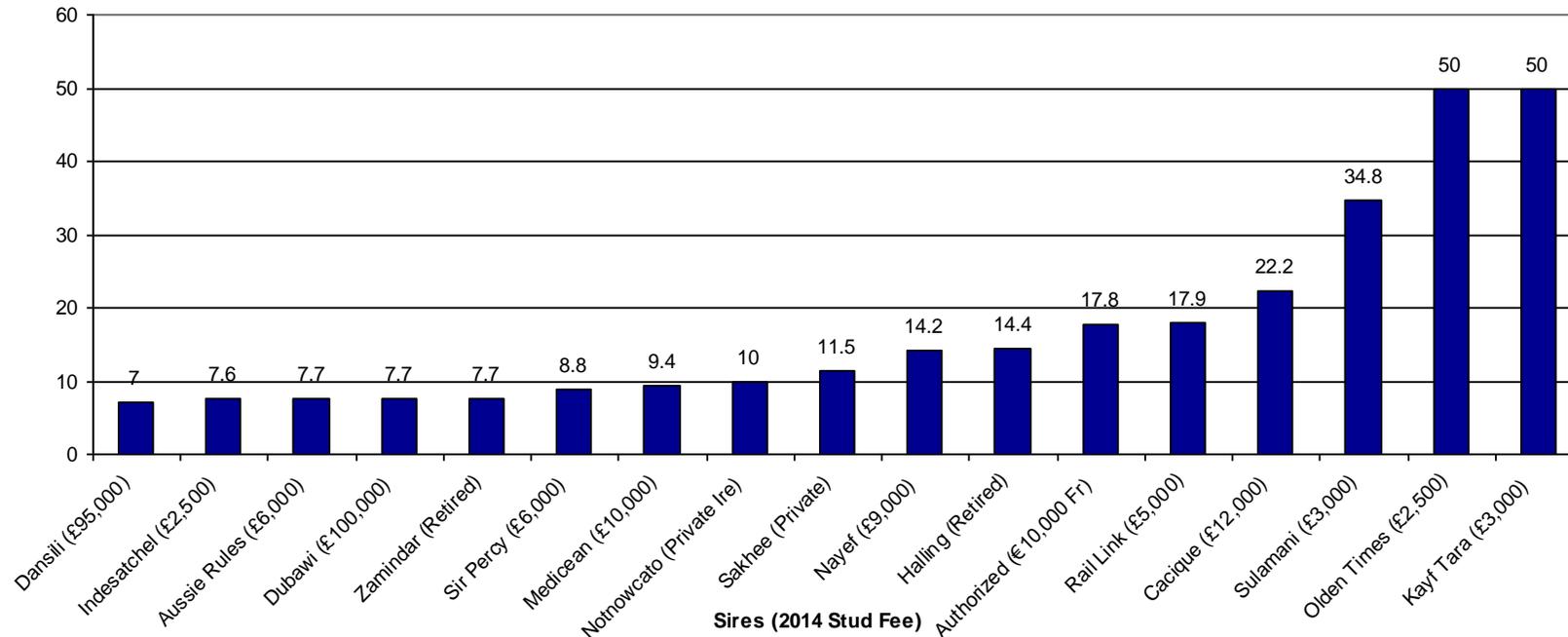
As one would expect from the range of opportunity, the majority of sires standing in Britain will produce 4.9% or less of their winners over 13 furlongs-plus, but their number has increased by 18.75% over the last ten years. This is confirmed by both the number of sires producing 5% to 9.9% and 10% to 19.9% winners decreasing by 25%. The number of sires producing 20% plus of their winners over 13 furlongs-plus remains unchanged



### The Leading Staying Sires – Future Opportunity

#### LIFETIME % OF LEADING GB BASED SIRES OF STAYERS STANDING AT STUD IN 2013

(Sires of 3 crops or more in 2013 only standing for more than £2,500 in 2013 3yo career plus winners in GB/Ire only to the end of 2013)

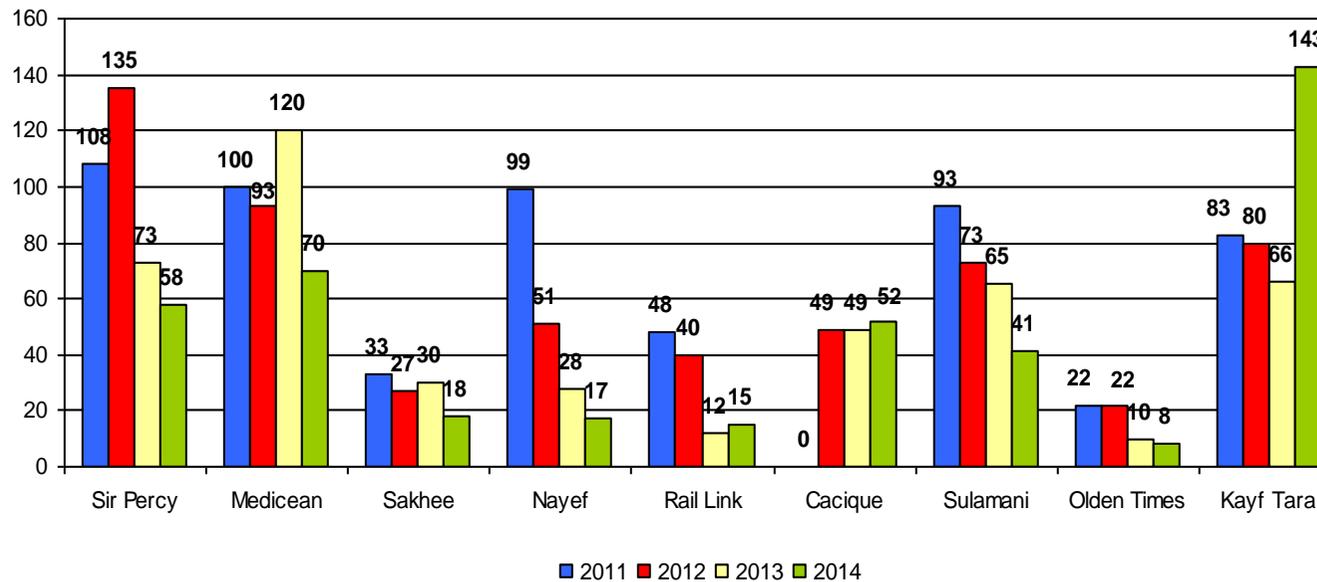


Of the 17 leading sires (7% plus) of career 13-furlong-plus winners that were standing at stud in Britain in 2013, eight commanded an advertised 2014 fee of £9,000 or less (nine, if you include Sakhee). The young promising staying sire Authorized was exported to France, where he will receive more opportunities to cover bigger books of mare, while Notnowcato, has entered the National Hunt breeding roster in Ireland. A further two sires have been retired, including Britain's leading staying sire Halling, resulting in a total decrease of 17.6% in sires standing at stud in Britain in 2014 with 7% or more of their winners winning over 13 furlongs or more.

Although Dubawi (7.7%) and Dansili (7%), Britain's two leading proven sires, have sired at least 7% of their career winners over 13 furlongs or more, it is clearly difficult for commercial stallion farms to stand sires that have strong stamina influences.



### COVERING FIGURES FOR ACTIVE SIRES BETWEEN 2011 TO 2014



Comparing the leading sires of 13-furlong-plus winners against mares covered between 2011 and 2014 confirms that it is harder to stand commercial sires that have strong stamina influences. Olden Times covered only 22 mares in 2011 and 2012, while Kayf Tara is a leading National Hunt sire. Sulamani has made a strong start as a staying sire and covered a healthy book of 93 mares in 2011, his first season at Yorton Farm Stud, where he was standing for a fee of £2,500, after previously having stood at Haras du Logis. Other sires capable of producing winners over 13-furlong-plus, such as Nayef, Rail Link and Sakhee, all suffered a decrease in the number of mares they covered between 2011 and 2014 as their offspring show they can stay further than the commercial market demands.

Medicean, who has a 9.4% career record for 13-furlong-plus winners, and his mare numbers increased in 2013, but decreased in 2014.

Cacique, who has made a strong start as a sire, returned to covering duty in 2012 and but due to fertility management had his book limited.

Sir Percy, who has 8.8% of 13-furlong-plus career winners, has received two strong books of mares, but suffered a sharp drop in the number of mares he covered in 2013/2014.



## Young Flat Sires

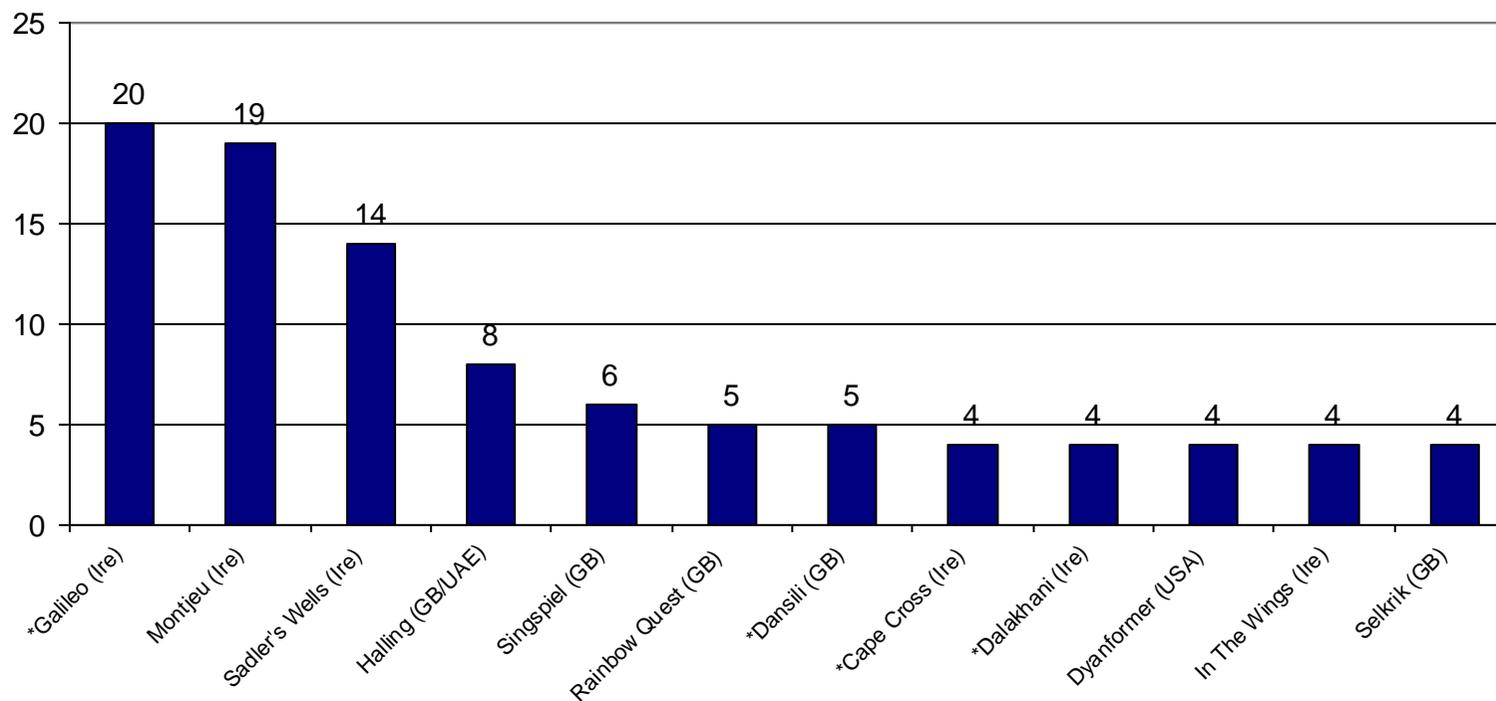
There are a number of young sires not included in the above tables due to having had fewer than three crops of racing age in 2013. The list below comprises stallions who have retired since 2009 having won over 10 furlongs or more, so could have the potential to sire winners over staying distances. Sires with a 2015 advertised stud of £2,500 or more included.

Sire (Sire)	2015 Stud Fee	Year to Stud in GB	Max. Win Dis.
Farhh (Pivotal)	£12,000	2014	10 furlongs
Universal (Dubawi)	£2,500	2014	12 furlongs
*North Light (Danehill)	£6,000 (2014)	2014	12 furlongs
Frankel (Galileo)	£125,000	2013	10 furlongs
Nathaniel (Galileo)	£20,000	2013	12 furlongs
Mawathee (Danzig)	Private	2011	12 furlongs
Archipenko (Kingmambo)	£10,000	2010	10 furlongs
Champs Elysees (Danehill)	£10,000	2010	12 furlongs
Mount Nelson (Rock Of Gibraltar)	£6,000	2009	10 furlongs
New Approach (Galileo)	£80,000	2009	12 furlongs
Sixties Icon (Galileo)	£6,000	2009	14 furlongs
Mukhadram (Shamardal)	£7,000	2015	10 furlongs
Dunaden (Nicobar)	£3,000	2015	16 furlongs
Sea The Moon (Sea The Stars)	£15,000	2015	12 furlongs
* retired to stud in US in 2006, moved to GB for 2014 season, before returning to US for 2015.			



Sires of Stakes Winners

LEADING SIRES OF INDIVIDUAL STAKES WINNERS 2004 - 2014



Suffix after sires equals country where stood / \* = active sires

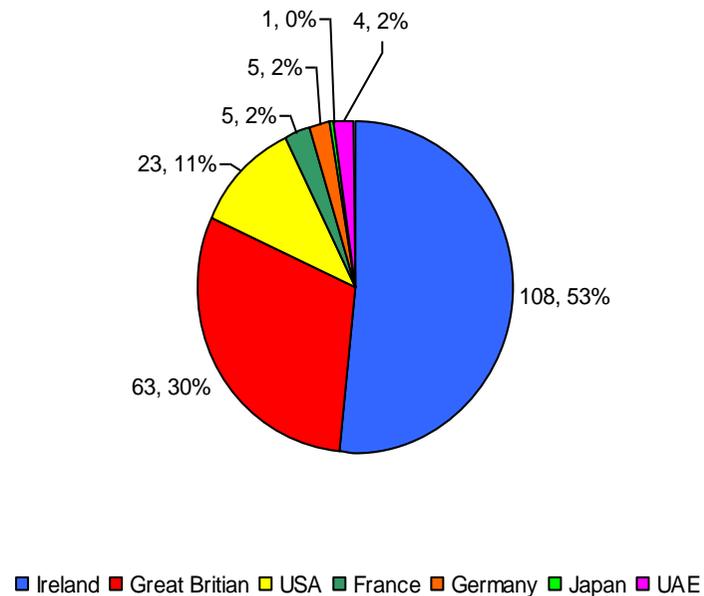
A total 209 staying GB stakes winners between 2004 and 2014

Irish-based sires from the Sadler's Wells sire-line have dominated the staying division of stakes winners over the last ten years. The majority of leading sires of staying stakes winners over such a period are likely to have ended their stud careers, and of these ten only Galileo, Cape Cross and Dansili are still at stud. All ten have stood at just four different stud operations. Of the 209 staying stakes winners between 2004 and 2014, 9.5% have come via Galileo, while three of the leading sires that have stood or are standing at Coolmore make up 25% of the staying stakes winners between 2004 and 2014. Darley Stud Management, which has stallion stations in Britain and Ireland, had or have Halling, Singpiel, Cape Cross and In The Wings on their rosters. The British-based Juddmonte Farms stands Dansili, as well as having stood Rainbow Quest. Kirsten Rausing's Newmarket-based Lanwades Stud stood Selkirk, who like Halling is from the Sharpen Up sire-line. All four of these breeding operations have supported their own sires and race their progeny. Dalakhani is an emerging staying sire and the late Dynaformer has proven to be leading staying influence from the US.



### COUNTRIES OF WHERE SIRES OF STAYING STAKES WINNERS STAND

(Figures taken at the time of covering of each stakes winner)

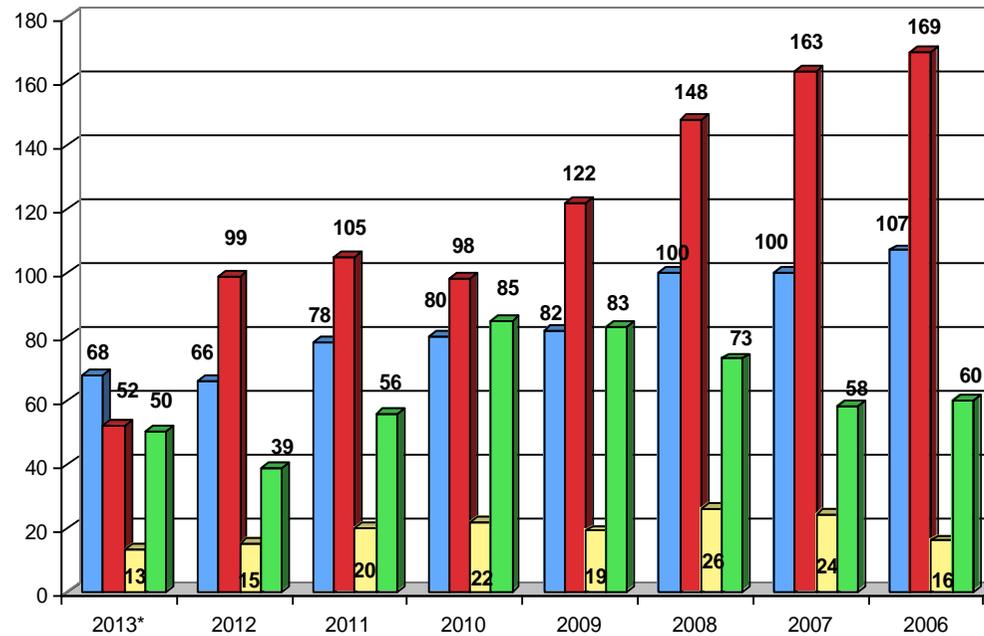


Of the 209 British staying stakes winners between 2004 and 2014, 108 (53%) were by sires standing in Ireland, and 63 (30%) by British-based sires at the year of covering. There were four stakes winners (2%) from UAE, sired by Halling, who stood there for the 2004-06 breeding seasons. All four of Halling's UAE-sired stakes winners were bred by Darley. American-based sires make up 11% of the stakes winners.



## Registered Sires in Britain

### STALLIONS STANDING IN GB 2006 - 2013



\* as of 31/12/13

■ Flat ■ Duel ■ NH ■ Unclassified

Statistics Weatherbys Facts Book 2007 to 2013

There has been a decline in the number of stallions at stud in Britain since 2006. The biggest decline has been among dual-based sires, whose numbers have fallen by 69% since 2006. There were 68 registered Flat sires in 2013, an increase of two from 2012 but still a 37% decrease from 2006. Although there was a peak of 22 National Hunt sires in 2010, the number had declined to an eight-year low of 13 in 2013.



Saeed Bin Suroor and Cavalryman

# Appendix VI

Breeders, Trainers, Sales  
and Exports



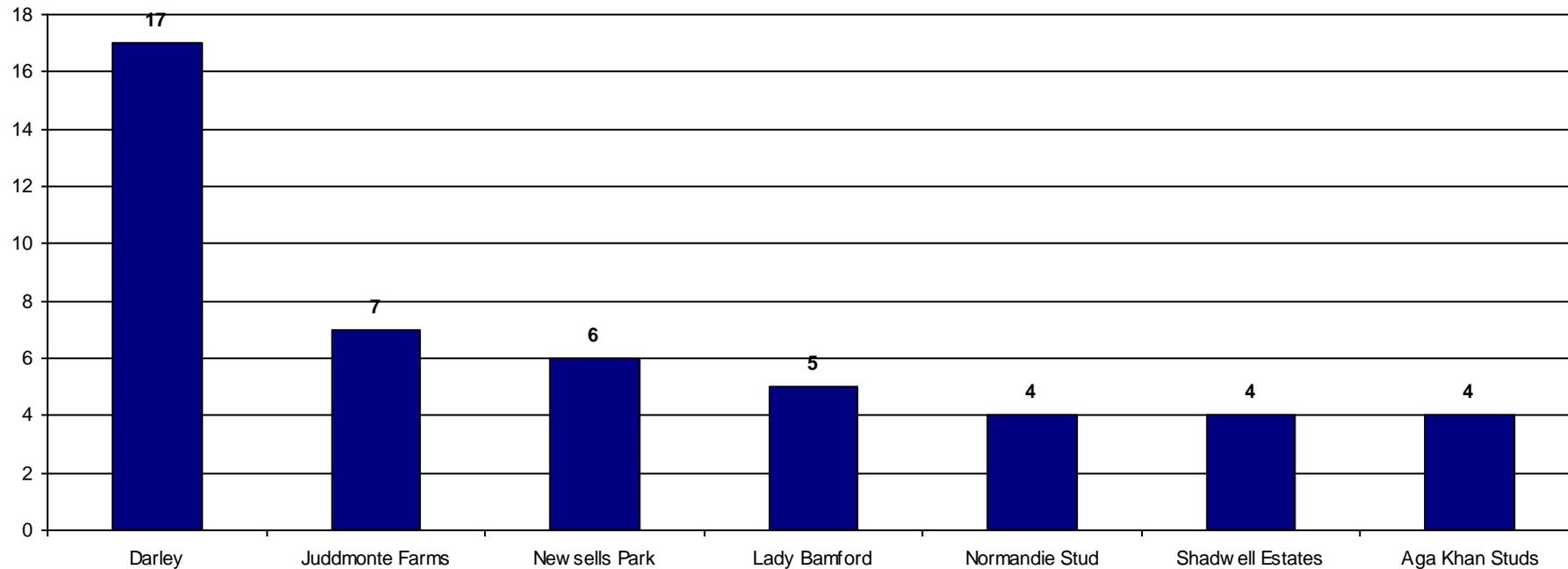
THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



Breeders

Appendix VI

LEADING BREEDERS OF INDIVIDUAL STAKES WINNERS 2004 - 2014

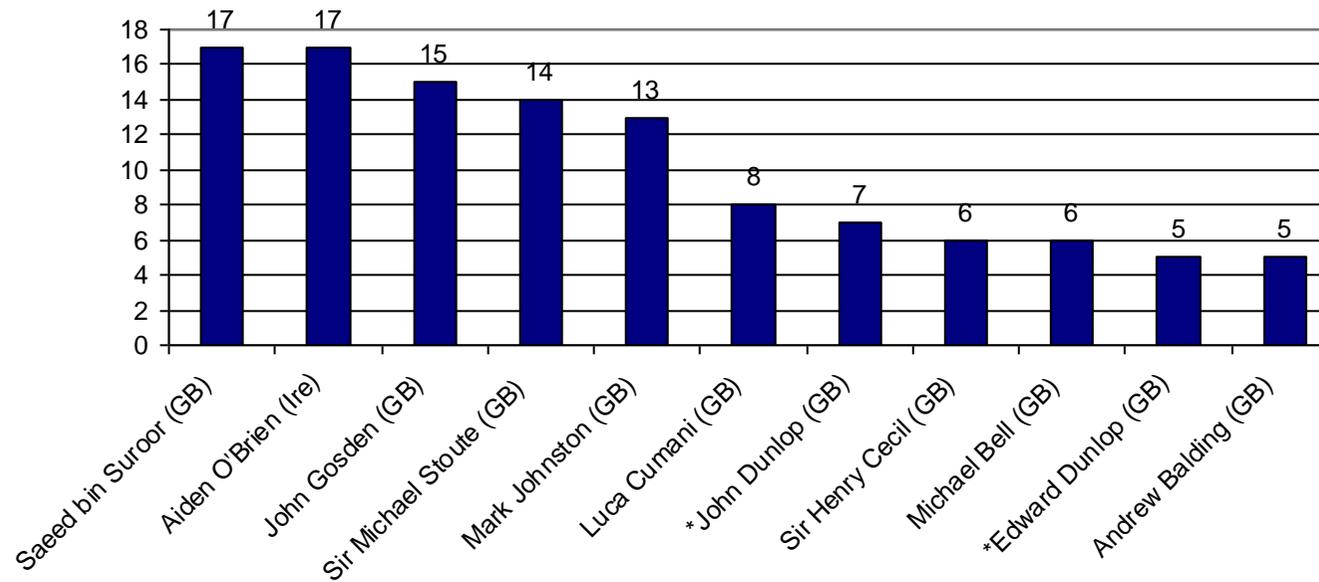


The list of leading breeders of British staying stakes winners between 2004 and 2014 has been dominated by either the large stallion/breeding operations or owner-breeders. Darley Stud Management is the leading breeder of staying stakes winners in Britain with 17 individual stakes winners, of which ten were by its own sires. The British-based Juddmonte Farms have bred seven stakes winners, all of which were raced by Khalid Abdullah. Newsells Park, which operates as a commercial operation, has bred six stakes winners, of which two were retained and four were sold. British-based owner-breeder Philippa Cooper (Normandie Stud) has produced four stakes winners in recent seasons and Lady Bamford has bred five staying stakes winners.



## Trainers

### LEADING TRAINERS OF INDIVIDUAL STAKES WINNERS 2004 - 2014



Although Aidan O'Brien trained 17 individual staying stakes winners between 2004 and 2014, the remaining leading trainers of British staying stakes races are based in Britain.



## Sales and Exports

### Bloodstock Auctions

Tattersalls Autumn Horses in Training Sale has long been a source for Flat racehorses to be traded into a strong second-hand market. With British and Irish racing having strong and thriving National Hunt sectors, this has proved to be a vibrant marketplace to obtain high-class horses to run under rules. However, this has also led foreign countries such as America, Australia, Hong Kong, as well as the Middle East, to obtain proven horses.

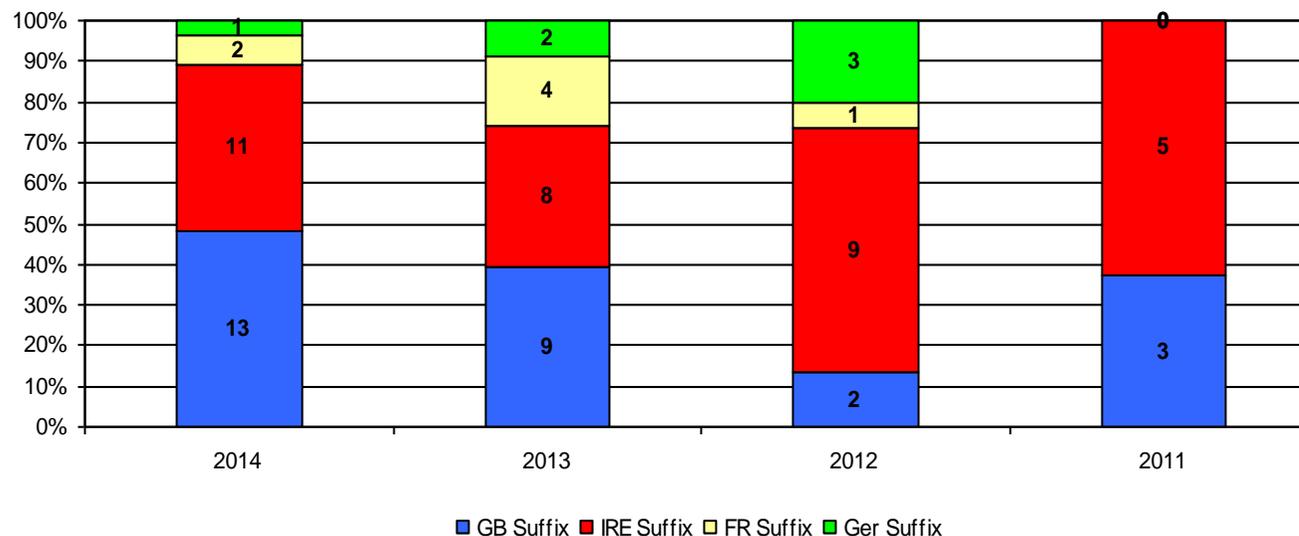
Therefore, the Tattersalls Autumn Horses in Training Sale can offer investors an opportunity to obtain proven and potential stayers either to race under National Hunt rules or abroad. With the Australian breeding industry unable to produce high-class stayers to support its valuable staying programme, this led to Australian investors spending more than 2,500,000 guineas at the 2013 sale and does not include many of the horses bought privately.



## Australia Imports

### ORIGIN OF EUROPEAN 9F PLUS AUSTRALIAN STAKES WINNERS

(w inners trained by Australian based trainers)



These increasing Australian investments, both at auction and privately, have led to an increase in European-bred horses winning 9-furlong-plus Australian stakes races, with 23 individual stakes winners over 9-furlong-plus in 2013. In 2014 there were 15 stakes winners in Australia over 9 furlongs or more. There have been 59 individual stakes winners bred in Europe over 9 furlongs or more for Australian-based trainers, with 18 accounting for 24 Gr 1 races. These included two recent Melbourne Cups - three if you include 2011 winner Dunaden, trained by Mikel Delzanges in France. Australia's second 16-furlong Group 1, the Sydney Cup, was also won in 2014 and 2013 won by European-breds - The Offer, a graduate of Tattersalls Autumn Horses in Training Sale, and Mourayan respectively. German-trained Protectionist, the fourth Euro bred Melbourne Cup winner in as many years; also other Euro trained Gr 1 winners include 2013 L.K.S. Mackinnon Stakes winner Side Glance and the Aiden O'Brien-trained Cox Plate winner Adelaide.



Kayf Tara, Yorkshire Cup, York, 2011

# Appendix VII

National Hunt Industry



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION



## National Hunt Industry

## Appendix VII

The stayer and middle-distance performer has a vital relationship with National Hunt racing, particularly in relation to its breeding operation and source of stallions. The majority of leading National Hunt stallions have been high-class middle-distance/staying performers, as demonstrated by the list below of the 2012-13 leading National Hunt sires who were stakes winners over 12 furlongs or more. It is crucial for National Hunt industry that a high-class staying programme is maintained.

Sire	Sire's Sire	Best Result
King's Theatre	Sadler's Wells	12f Gr 1 1st
Oscar	Sadler's Wells	12f Gr 1 2nd
Milan	Sadler's Wells	<b>14 1/2f Gr 1 1st</b>
Beneficial	Top Ville	12f Gr 2 1st
Presenting	Mtoto	<b>13 1/2f Gr 2 1st</b>
Flemensfirth	Alleged	11f Gr 1 1st
Old Vic	Sadler's Wells	12f Gr 1 1st
Kayf Tara	Sadler's Wells	<b>20f Gr 1 1st</b>
Westerner	Danehill	<b>20f Gr 1 1st</b>
Dom Alco	Dom Pasquini	17f hurdle 1st
Bob Back	Roberto	12f Gr 1 1st
Midnight Legend	Night Shift	<b>14f L 1st/17f Gr 2 hurdle 1st</b>
Anshan	Persian Bold	7f Gr 3 1st
Gold Well	Sadler's Wells	Unraced
Shantou	Alleged	12f Gr 1 1st
Dr Massini	Sadler's Wells	10f L 1st
Alflora	Niniski	8f Gr 2 1st
My Risk	Take Risks	8f Gr 3 1st
Definite Article	Indian Ridge	10f Gr 2 1st
Winged Love	In The Wings	12f Gr 1 1st

These stallions include the St Leger (Gr 1) winner Milan and Gold Cup (Gr 1) winners Kayf Tara and Westerner. Of the leading 20 sires, eight stem from the Sadler's Wells sire-line, which remains dominant in Europe.



The following won a staying stakes race over 12½ furlongs-plus in Britain between 2004 and 2014 and have been retired to stud.

Sire	Sire's Sire	Best GB Staying Win	To Stud	Country
Arctic Cosmos	North Light	St Leger Stakes (Gr 1)	2013	Ireland
Ask	Sadler's Wells	Coronation Cup (Gr 1)	2011	Ireland
Conduit	Dalakhani	St Leger Stakes (Gr 1)	2010	Japan
Day Flight	Sadler's Wells	Ormonde Stakes (Gr 3)	2010	France
Debussy	Halling	Stand Cup (L)	2013	GB
Fame And Glory	Montjeu	Gold Cup (Gr 1)	2013	Ireland
Feel Like Dancing	Galileo	Bahrain Trophy (Gr 3)	2014	France
Franklins Gardens	Halling	Yorkshire Cup (Gr 2)	2007	GB
Harbinger	Dansili	King George VI And Queen Elizabeth Stakes (Gr 1)	2011	Japan
Honolulu	Montjeu	Queen's Vase (Gr 3)	2010	France
Leading Light	Montjeu	Gold Cup (Gr 1)	2015	Ireland
Lochbuie	Definite Article	Geoffrey Freer Stakes (Gr 3)	2010	Ireland
Lucarno	Dynaformer	St Leger Stakes (Gr 1)	2009	GB
Mahler	Galileo	Queen's Vase (Gr 3)	2009	Ireland
Millenary	Rainbow Quest	St Leger Stakes (Gr 1)	2006	Ireland
Mr Vegas	Montjeu	Bahrain Trophy (Gr 3)	2008	Italy
Papal Bull	Montjeu	Geoffrey Freer Stakes (Gr 3)	2009	Ireland
Papineau	Singspiel	Gold Cup (Gr 1)	2008	France
Risk Seeker	Elmaamul	Sagaro Stakes (Gr 3)	2008	France
Rule Of Law	Kingmambo	St Leger Stakes (Gr 1)	2007	Japan - now Ireland
Sans Frontieres	Galileo	Geoffrey Freer Stakes (Gr 3)	2013	Ireland
Schiaparelli	Monsun	Goodwood Cup (Gr 2)	2011	GB
Scorpion	Montjeu	Coronation Cup (Gr 1)	2008	Ireland
Septimus	Sadler's Wells	Doncaster Cup (Gr 2)	2010	Ireland
Shantaram	Galileo	Bahrain Trophy (Gr 3)	2014	Ireland
Sixties Icon	Galileo	St Leger Stakes (Gr 1)	2009	GB
Soapy Danger	Danzig	Queen's Vase (Gr 3)	2009	GB
Soldier Of Fortune	Galileo	Coronation Cup (Gr 1)	2010	2010
Systematic	Rainbow Quest	Ormonde Stakes (Gr 3)	2005	GB
Treasure Beach	Galileo	Chester Vase (Gr 3)	2014	USA
Westerner	Danehill	Gold Cup (Gr 1)	2007	Ireland
Wolfe Tone	Sadler's Wells	Aston Park Stakes (L)	2009	Ireland
Yeats	Sadler's Wells	Gold Cup (Gr 1)	2010	Ireland
Yellowstone	Rock Of Gibraltar	Silver Cup Stakes (L)	2012	France
Youmzain	Sinndar	Bahrain Trophy (Gr 3)	2011	France



While some of the above names are no longer at stud, the majority of the 35 sires listed were retired as dual-purpose or National Hunt sires. Only seven (20%) retired to stud in Britain, while 15 (43%) stand in Ireland. As one would expect, the Sadler's Wells sire-line dominates, with 19 sires (54%).

Although this list includes such as Conduit and Harbinger, who are currently standing as top sires in Japan, the majority of these very high-class performers have been marketed to the National Hunt market and have strong prospects of becoming successful sires within this sector.

### **National Hunt-Trained Runners**

The majority of staying race runners are Flat-bred and Flat-trained, but high-class National Hunt-trained horses have run with credit in Flat staying stakes races in Britain. These are mostly horses who have run on the Flat previously, therefore becoming dual-purpose performers and are by Flat sires. Examples include the Yorkshire Cup (Gr 2) winner Percussionist (by Sadler's Wells), Kasthari (by Vettori), who won the Doncaster Cup (Gr 2), and Caracciola (by Lando), who won the Grand Cup (L), and who all raced on the Flat before becoming dual-purpose performers.

Ireland's Qualified Rider (QR) races are run over 12 furlongs plus, and provide an opportunity for both Flat- and National Hunt-bred horses to compete against each other. Often staged at the end of a Flat meeting, these races vary from maidens to conditions events. Although restricted to amateur jockeys and for three-year-olds plus, they offer National Hunt-bred and trained horses a chance to compete on the Flat against Flat-bred horses. Example of horses who have graduated from QR races include the Group 3-winning hurdler Missunited, winner of the Lillie Langtry Stakes (Gr 3), and the Listed-placed stayer El Salvador.

---

Protecting a heritage, representing a future

01638 661321 | [thetba.co.uk](http://thetba.co.uk)



THE  
THOROUGHBRED  
BREEDERS'  
ASSOCIATION