

# The Connected Horse Ecosystem



Transforming Equine  
Transport, Barns & Wellness  
Through IoT, Sensors, and AI



# The Equine World Is Changing

- Rising expectations for welfare and transparency
- Higher-value sport and performance horses
- Transport and barn environments remain digitally blind
- Insurance and liability pressures growing
- No unified ecosystem for data, safety, and wellness



# The Problem

- Horse transport and barn conditions (including A-List Horse Hospitals) remain largely unmonitored.
- Real-time vitals, environment, and safety data are not captured and available in real-time.
- This exposes horses, owners, vets, and haulers to preventable risk.



# Market Realities

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## **Horse Movement (Haulers):**

- 2–4 million transport events per year
- 3,000–8,000 haulers active daily

## **Trailers/Haulers/AirTransport:**

- 1.2–1.8 million horse trailers
- 80,000–140,000 in daily use

## **Barns:**

- 7.2 million U.S. horses
- 1.2–1.5 million barns
- 275k–325k competitive/recreational barns



# The Opportunity

- Integrate with proven partners including Reseller/RadianIoT and installers
- Millions of transport events. Over a million barns.
- No unified safety, welfare, or data platform exists.
- Current tools are fragmented point solutions for Haulers/Transport, Barns, A-List Equine Hospitals and .
- The equine sector is where trucking was before telematics.



# Why Now

- AI + IoT adoption accelerating
- Horse values increasing across sport and breeding
- Insurers beginning to require monitoring
- A-List Equine Hospitals, Barns and haulers demand transparency
- Real-time data reduces risk and improves welfare



# Competitive Landscape

**Existing solutions are fragmented:**

- Wearables (Horsepal, Equimetrics, Garmin, Wiliot)
- Basic trailer monitors (Trott)
- Generic barn sensors (ag-tech)
- NONE provide an integrated Hauler + Trailer + Barn + Vet + AI platform.
- CONO is first to unify the real-time ecosystem.



# CONO Vision

Build the Connected Vet Ecosystem:

- A seamless, sensor-driven network that protects, monitors, and optimizes every horse—from barn to trailer to competition and back.
- Continuous data flow
- Health Records and Vet Centric Activation
- A-List Partners



# Connected Hauler

- Trailer sensors (Subscription Based)
- Real-time vitals (Ala-cart Offerings)
- Motion + stress detection (Ala-cart)
- Environmental alerts
- AI-based transport scoring (Phased Growth)
- Notifications for owners and veterinarians



# Connected Stall

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- Leverage sensors and IoT from Hauler (Phase 1)
- Temperature, humidity, ammonia, airflow
- Feed/water intake + stall activity (AI as developed)
- Video + motion AI
- Central dashboard for barn managers and vets



# Connected Vet

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- Unified digital health record for ease of state line transfer
- Remote monitoring
- AI-driven risk scoring
- Rehab + performance tracking
- Integrates with therapies like FES 310



# The Ecosystem Flywheel

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- More horses → More data  
→ Better AI → Higher value  
→ Faster adoption →  
Industry standardization →  
Regulatory integration



# Business Model

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- Hardware (retrofit + OEM)
- Monthly SaaS subscription
- Premium analytics
- Veterinary enterprise tools
- Insurance + compliance integrations



# Go-To-Market Strategy

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- Phase 1: A-List Equine Hospitals, Pro haulers & OEM and Barns (OEM)
- Phase 2: Expand Pilot
- Phase 3: Insurance + regulatory adoption
- Phase 4: Global expansion



# Why CONO Will Win

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- Domain expertise in transport telematics
- Extensive relationships, products & wellness legacy
- First-mover advantage in AI-driven equine safety
- Modular, scalable architecture
- Clear ROI for barns, haulers, vets, and insurers



# Closing

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- Proven Partners & Experts
- The future of horse safety and wellness is connected.
- CONO | Connected Horse Ecosystem
- “Every heartbeat. Every mile. Every moment.”



## TAM / SAM / SOM

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### TAM:

- 7.2M horses
- 1.2–1.8M trailers
- 1.2–1.5M barns

### SAM (5-year):

- 250k–350k competitive barns
- 100k–150k high-value trailers
- 10k–20k frequent haulers

### SOM (3-year):

- 15k–30k system installs
- SaaS ARPU: \$30–\$65/mo

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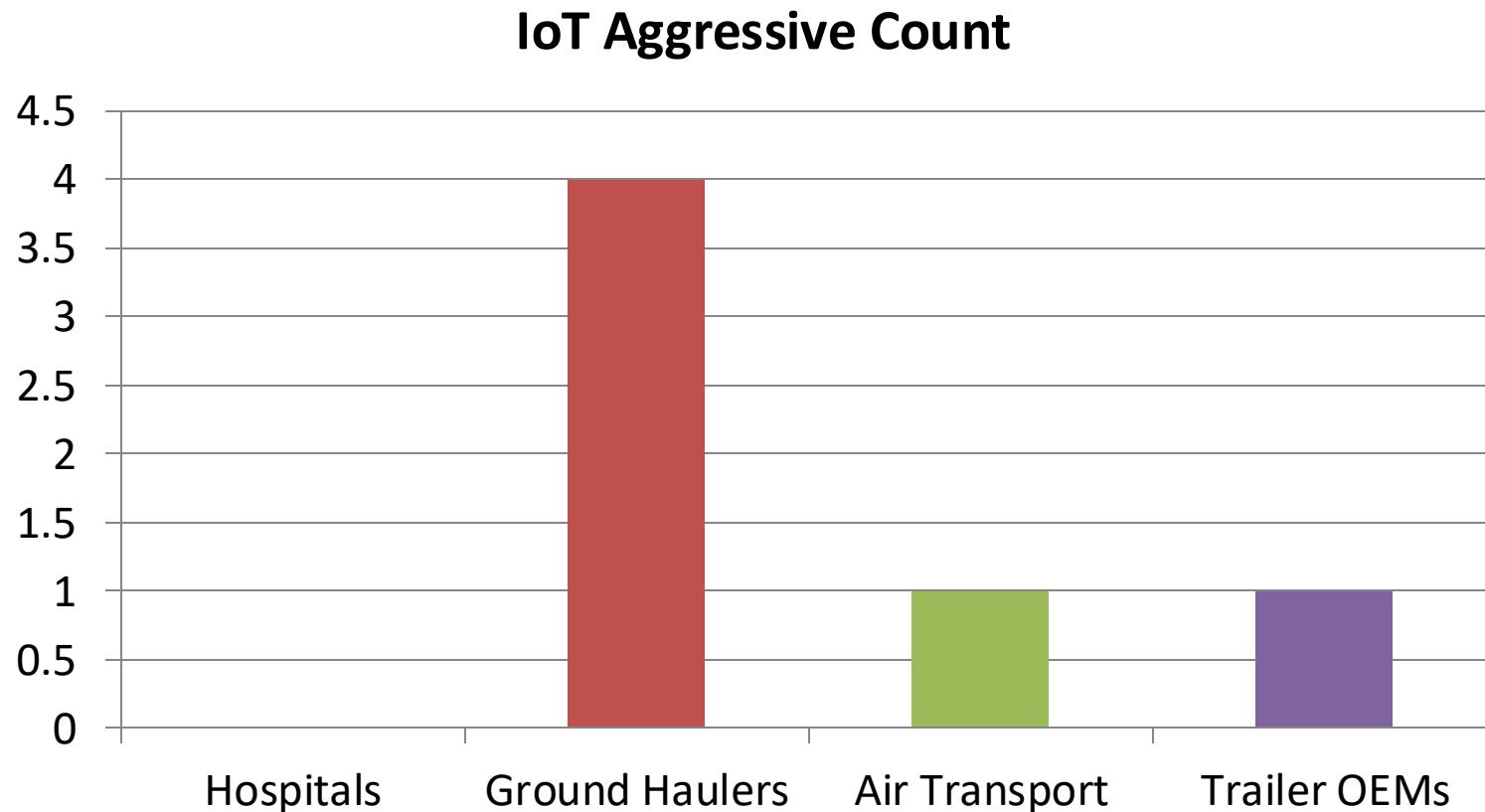


# Exhibits

- See examples of assorted opportunities. Cono has outlined customers and models on the following pages.



# IoT Aggressiveness by Category (Count of High/Medium)



Relative IoT aggressiveness by category is derived from cross-industry patterns in deployment velocity, spend concentration, and operational reliance, as reported by McKinsey, Gartner, IDC, PwC, and Deloitte.

# Equine Hospitals – IoT Scorecard

Hospital	IoT Aggressiveness
Rood & Riddle	Low
Hagyard	Low
Palm Beach Equine Clinic	Low
New Bolton Center (Penn Vet)	Low
UC Davis Large Animal	Low

# What the Specialty Hospital Receives

Capability	Purpose
Transport Intake Report	Context for intake decisions
Pre-Arrival Alerts (optional)	Preparedness, not diagnosis
Referral Sharing	Care continuity
Secure Records	Documentation & reputation protection

# Ground Equine Haulers – IoT Scorecard

Hauler	IoT Aggressiveness
Equine Express	High
Bob Hubbard Horse Transportation	High
Johnson Horse Transportation	High
Elite Horse Transport	Medium
Brook Ledge	Low

# Model Assumptions & Why We Win

Metric	Value
Haulers on platform	100
Avg hauls per hauler / week	10
Annual hauls	52,000
Revenue split	50% Hauler / 50% Platform

Haulers keep the customer relationship. Owners gain confidence and proof of care.  
Data creates switching costs. Natural expansion into insurance, vets, OEMs, air transport.  
Data is gold for insurance companies, breeders, trainers, etc.

# Customer Pricing & Adoption

Package	Price	Penetration
Basic Peace-of-Mind	\$79 / haul	30%
Performance Horse	\$299 / haul	15%
Elite Subscription	\$69 / month	5%

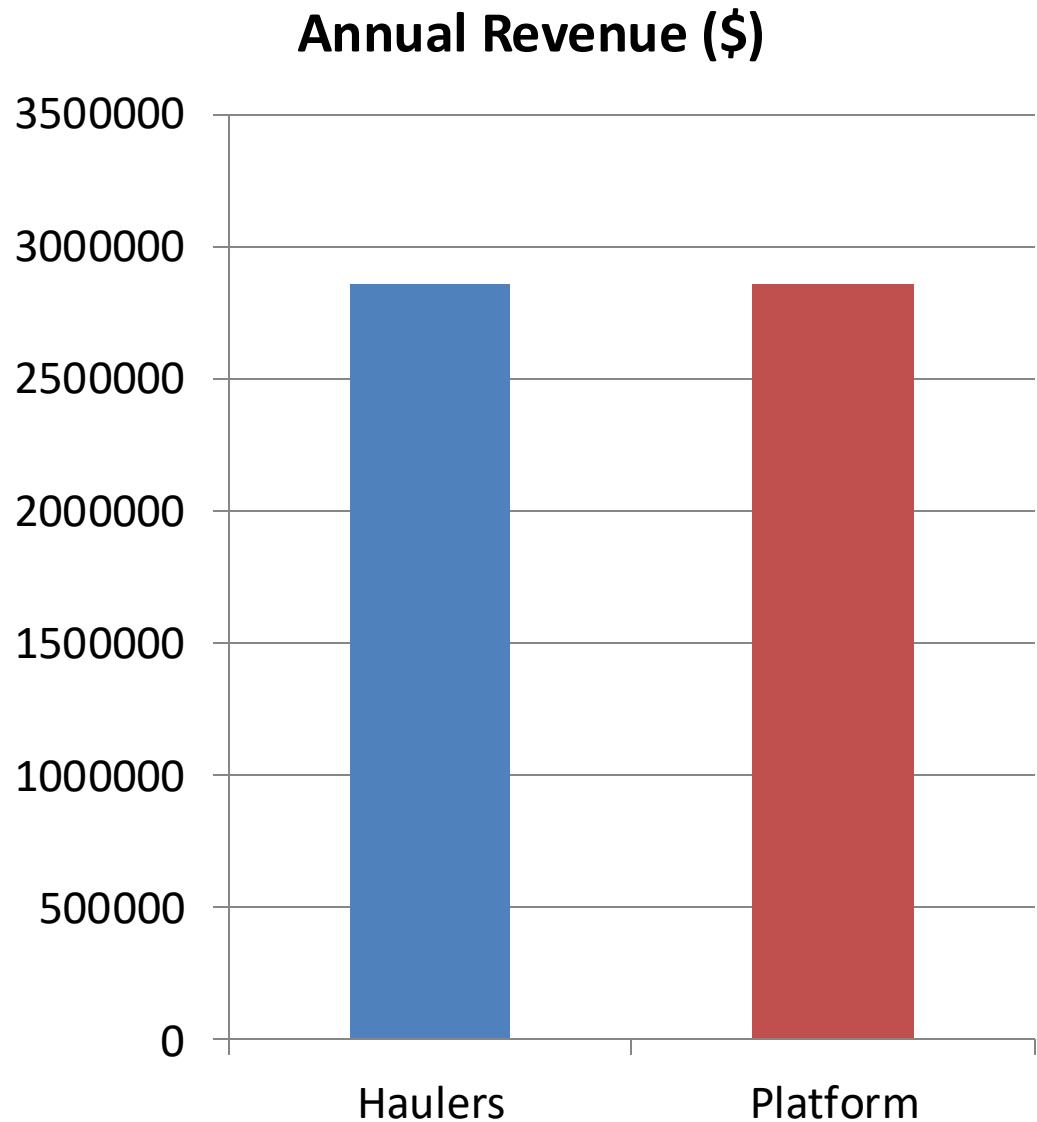
# Gross Customer Revenue (Annual)

Tier	Revenue
Basic Tier	\$1,232,400
Performance Tier	\$2,332,200
Elite Subscription Tier	\$2,152,800
<b>TOTAL</b>	<b>\$5,717,400</b>

# Revenue Split @ 50 / 50

Recipient	Annual Revenue	Per-Hauler Avg
Haulers (50%)	\$2,858,700	\$28,587
ConnectedHauler Platform (50%)	\$2,858,700	N/A

Revenue  
Distribution  
(50 / 50  
Split)



# Recommended Tiered Path to 50/50

Stage	Revenue Split
Pilot (0–90 days)	75% Hauler / 25% Platform
Standard Adoption	70% / 30%
High-Volume / Enterprise	60% / 40%
Full Platform + Hardware	50% / 50%

# OEM Horse Trailer Manufacturers IoT Scorecard

OEM	IoT Aggressiveness
Sundowner	Medium
4-Star Trailers	Low
Featherlite	Low
Lakota	Low
Cimarron	Low

# Connected OEM Trailer™

Tier	Capabilities
Standard	Trailer GPS, door events, temp & humidity, trip logs
Premium	Stall motion sensing, alerts, transport reports, vet handoff

# Revenue Streams

Stream	Details
Hardware (One-Time)	\$495–\$895 MSRP, dealer installed
Subscription (Recurring)	\$12–\$29/month, avg \$19
Future Upside	Insurance, resale certification, transport data

# Equine Air Transport – IoT Scorecard

Company	IoT Aggressiveness
Tex Sutton	Medium
Apollo Equine	Low
EquiJet	Low
Equiflight	Low
HFR International	Low

# ConnectedAir™ Capabilities

Stage	Data Captured
Pre-flight	Crate condition, environment baseline
In-flight	Temperature, pressure, motion
Post-flight	Arrival condition documentation

# ConnectedCow™ Use Cases

Use Case	Value
Trailer environment	Reduce heat stress & shrink
Trip documentation	Audit-ready transport records
Arrival condition reports	Dispute & loss reduction

Other: Breeding Stock & Genetic Transport: Bulls, studs, embryo recipients  
Stress impacts fertility outcomes. Protects buyers and sellers. Zoo & Exotic .

# Incremental Data Revenue Opportunity (Equine-Only)

Product	Annual Revenue
Transport risk scoring	\$3.0M
Claims validation	\$5.0M
Hospital analytics	\$2.0M
Pharma & nutrition data	\$2.0M
OEM intelligence	\$1.5M
Benchmarking subscriptions	\$4.8M
<b>TOTAL</b>	<b>\$18.3M</b>