

# **World Veterinary Health Products (Animal Pharmaceuticals, Vaccines, OTC and Performance Enhancers)**

<https://marketpublishers.com/r/W73902DB48CEN.html>

Date: May 2009

Pages: 200

Price: US\$ 3,500.00 (Single User License)

ID: W73902DB48CEN

## **Abstracts**

The multi-billion veterinary health products market, though smaller in opportunity as compared with the human health sector, offers significant return on investment, primarily driven by lower risk and faster product development cycles. The veterinary health products market has remained resilient over the economic downturns of the past 2 decades.

This report, *Veterinary Health Products*, takes a look at veterinary health products for both companion (pet) animals, and production animals (livestock and poultry) and the opportunity for existing players and new entrants in three segments:

### **Pharmaceuticals**

### **Veterinary OTC Products**

### **Performance Enhancers**

### **Vaccines**

For each segment, the report includes demographic information, market forecasts to 2014, major products in the industry, trends affecting revenues, and competitive activity.

The veterinary health industry is engaged in providing antibiotics, vaccines, parasiticides and other medicants for livestock and pet animals, improving animal productivity, production efficiency, and the welfare of livestock and pets.

This report profiles the following key companies in this industry:

**Alpharma Animal Health**

**Adisseo France S.A.S.**

**BASF International**

**Bayer Healthcare**

**Boehringer Ingelheim GmbH**

**DSM Nutritional Products, Inc.**

**Elanco Animal Health**

**Fort Dodge Animal Health**

**Heska Corporation**

**Intervet Schering Plough Animal Health**

**Merial Animal Health Ltd.**

**Novartis Animal Health Inc.**

**Virbac SA**

**Pfizer Animal Health**

This report was constructed with secondary research into annual reports, government health data, trade and medical journals, supplemented with phone and email interviews with executives and experts in the industry. Interviews were used to test assumptions and fix forecasts in the report.

## Contents

### **CHAPTER ONE: VETERINARY HEALTH PRODUCTS MARKET- STRATEGIC PERSPECTIVES**

- 1.1. A Resilient Market, Even in Downturns
- 1.2. Epidemiology
  - Livestock
  - Pets
- 1.3. Veterinary Health Products Industry Structure
  - 1.3.1. Key Factors Affecting the Industry
    - a) Threat of Generics
    - b) Lack of innovation
    - c) Expectations
    - d) High dependence on the product
- 1.4. Market
- 1.5. Market Segments
  - 1.5.1 Companion Animal Products (CAP)
    - a) Pet Insurance Market
  - 1.5.2. Food Animal Products (FAP)
    - a) Leading Growth Drivers
- 1.6. Customer Segments
  - a) Veterinary Hospitals
  - b) Farms
  - c) Pet Owners
- 1.7. Market Size and Growth
- 1.8. Market Segments
  - 1.8.1. Veterinary Pharmaceuticals Market
  - 1.8.2. Veterinary Vaccines Market
  - 1.8.3. Veterinary Performance Enhancers Market
- 1.9. Geography
- 1.10. Species
- 1.11. Competition
- 1.12. Mergers and Acquisitions
- 1.13. Research and Development
  - a) Leading R&D trends in the Animal Health Industry
- 1.14. Future Industry trends for Growth
  - a) Shift from product to market focus
  - b) Enhanced focus on R&D

c) Consolidation and Globalization

## **CHAPTER TWO: VETERINARY PHARMACEUTICAL PRODUCTS MARKET**

### 2.1. Background

- a) Preventative medicines
- b) Therapeutic Medicines
- c) Others

### 2.2. Market Size and Growth

### 2.3. Market Segments

#### 2.3.1. Veterinary Anti-Infective Market

#### 2.3.2. Veterinary Anti-inflammatory Products Market

#### 2.3.3. Veterinary Cardiovascular Products Market

#### 2.3.4. Veterinary Parasitocidal Products Market

#### 2.3.5. Veterinary CNS disorders Products Market

#### 2.3.6. Veterinary Hormonal Products Market

### 2.4. Competition

### 2.5. Leading Market Trends

- a) Generics threat
- b) New technologies and innovations
- c) New geographical market growth

## **CHAPTER THREE: VETERINARY VACCINES MARKET**

### 3.1. Background

### 3.2. Veterinary Diseases & Vaccination

#### 3.2.1. Vaccine Types

- a) Live vaccines
- b) Dead vaccines

#### 3.2.2. Livestock Vaccination

- a) Cattle Vaccines
- b) Sheep Vaccines
- c) Goat Vaccines
- d) Pig Vaccines
- e) Swine Vaccines

#### 3.2.3. Pet vaccines

- a) Background
- b) Current guidelines

#### 3.2.4. Poultry vaccines

### 3.3. Vaccination Advantages

- a) Cost containment
- b) Reduction in antibiotic use
- c) Improvement in human health
- d) Impact on the industry
- e) Good Health, consistent throughput

### 3.4. Disease costs

### 3.5. Vaccine development

- a) Development Process
- b) Equipment

### 3.6. Vaccination Guidelines

### 3.7. Market Size and Growth

### 3.8. Geographical split

### 3.9. Competitive Share

- a) Demand Drivers: Positive Factors
- b) Demand: Negative Factors

### 3.10. Hurdles in Vaccine Development

- a) Biological and technical obstacles
- b) Economic obstacles
- c) Target complexity and diversity

### 3.11. Regulatory Aspects

### 3.12. International Cooperation on Harmonization Guidelines for Vaccines

### 3.13. Procedures for licensing veterinary vaccines

- a) Japan
- b) United States of America
- c) European Union

### 3.14. Future Trends

- a) Emerging diseases
- b) New vaccine technologies

## **CHAPTER FOUR: VETERINARY PERFORMANCE ENHANCERS PRODUCTS MARKET**

### 4.1. Background

### 4.2. Feed Additives

#### 4.2.1. Feed Composition

#### 4.2.2. Nutritional Feed Additives

- a) Amino acids
- b) Vitamins

c) Organic acids

#### 4.2.3. Medicated Feed Additives

a) Enzymes

b) Prebiotics, Probiotics

c) Hormones

#### 4.2.4. Feed Additives: Advantages

a) Improve animal diet.

b) Provide therapeutic benefit and reduce cost.

c) Increase feed conversion efficiency thereby leading to improved profitability.

#### 4.3. Market size and growth

##### 4.3.1. Market Growth Drivers

#### 4.4. Market Segments

##### 4.4.1. Nutritional Feed Additives Market

a) Amino acids

b) Vitamins

c) Organic Acids

##### 4.4.2. Medicated Feed Additives Market

a) Antibiotics

b) Probiotics and Prebiotics

c) Enzymes

d) Anti-protozoal agents

##### 4.4.2.1. Medicated Feed Additives: By Species (Poultry, Pigs, Cattle, Others), 2008

#### 4.5. Geographical Split

#### 4.6. Competition

#### 4.7. Implants and Injections

##### 4.7.1. Market Size and Growth

#### 4.8. Regulatory Framework

a) US

b) Europe

#### 4.9. Safety Issues

## CHAPTER FIVE: VETERINARY OTC PRODUCTS MARKET

### 5.1. Background

### 5.2. Pet population trends

a) Greying human populace

b) Increasing life expectancy of pets

c) Advantages

### 5.3. Market Size and Growth

#### 5.4. Market Segments

#### 5.5. Market Drivers

- a) Rising pet ownership
- b) Consumer behavior
- c) Rx-to-OTC switch
- d) Product quality
- e) Price sensitivity
- f) Improving distribution network
- g) Increasing focus on Wellness

#### 5.6. Product Life-cycle Management

- a) Broad customer group
- b) New formulations
- c) Creative marketing strategies
- d) Distribution Structure

#### 5.7. Regulatory Issues

### **CHAPTER SIX: CORPORATE PROFILES**

#### 6.1. Alpharma Animal Health

Background

Products

Revenues

Business Strategy

#### 6.2. Adisseo France S.A.S.

Background

Products

Business Strategy

Revenues

#### 6.3. BASF International

Background

Products

Revenues

#### 6.4. Bayer Healthcare

Background

Products

Revenues

#### 6.5. Boehringer Ingelheim GmbH

Background

Products

Revenues

6.6. DSM Nutritional Products, Inc.

Background

Products

Revenues

6.7. Elanco Animal Health

Background

Products

Revenues

6.8. Fort Dodge Animal Health

Background

Products

Revenues

6.9. Heska Corporation

Background

Products

Revenue

6.10. Intervet Schering Plough Animal Health

Background

Products

Products

Revenues

6.11. Merial Animal Health Ltd.

Background

Products

Revenues

6.12. Novartis Animal Health Inc.

Background

Products

Farm animal products

Livestock animal products

6.13. Virbac SA

Background

Revenues

Products

6.14. Pfizer Animal Health

Background

Products

Revenues





## List Of Exhibits

### LIST OF EXHIBITS

#### CHAPTER ONE: VETERINARY HEALTH PRODUCTS MARKET STRATEGIC PERSPECTIVES

- Exhibit 1: Worldwide Livestock Population, 2008
- Exhibit 2: Worldwide Pet population, 2008
- Exhibit 3: Market Share: Companion Animal vs. Food Production Animal
- Exhibit 4: Worldwide Companion Animal Prescriptions and Vaccines Market, 2008
- Exhibit 5: US Household Penetration of Pets (%), 2008
- Exhibit 6: Worldwide Veterinary Health Products Market
- Exhibit 7: Worldwide Veterinary Health Products Market: Market Segments (\$ billion) and Growth (%) (2006-14)
- Exhibit 8: Worldwide Veterinary Health Products Market:
- Exhibit 9: Worldwide Veterinary Pharmaceuticals Market:
- Exhibit 10: Worldwide Veterinary Pharmaceutical Products Market, 2006-14
- Exhibit 11: Worldwide Veterinary Vaccines Market:
- Exhibit 12: Veterinary Vaccines Market, 2006-14
- Exhibit 13: Worldwide Veterinary Performance Enhancer Products Market:
- Exhibit 14: Veterinary Performance Enhancers Market, 2006-14
- Exhibit 15: Regional Share Break-up (%), 2008
- Exhibit 16: Worldwide Veterinary Health Products Market:
- Exhibit 17: Worldwide Veterinary Health Products Market by Region:
- Exhibit 18: Veterinary Health Products Market by Species, 2008 (Ruminants, Pigs, Poultry, Companions, Others)
- Exhibit 19: Veterinary Health Products Market: Leading Companies, 2008
- Exhibit 20: Veterinary Health Products Industry: Mergers and Acquisitions Trends

#### CHAPTER TWO: VETERINARY PHARMACEUTICAL PRODUCTS MARKET

- Exhibit 21: Veterinary Pharmaceutical Products Market, 2006-14 (US, Europe, ROW)
- Exhibit 22: Veterinary Pharmaceutical Products Market, 2006-14 (US, Europe, ROW)
- Exhibit 23: Veterinary Pharmaceutical Products Market, 2006-14 (Parasiticides, Anti-infectives, NSAIDS, Cardiovasculars, Hormones, CNS, Others)
- Exhibit 24: Veterinary Pharmaceutical Products Market: Segment Share %, 2008
- Exhibit 25: Generic vs. Branded Products 2008
- Exhibit 26: Veterinary Anti-infective Products Market by Region (US, Europe, ROW),

2006-14

Exhibit 27: Veterinary Anti-inflammatory Products Market by Region (US, Europe, ROW), 2006-14

Exhibit 28: Veterinary Cardiovascular Products Market by Region (US, Europe, ROW), 2006-14

Exhibit 29: Veterinary Parasitocidal Products Market Veterinary Implants Market by Region (US, Europe, ROW), 2008-14

Exhibit 30: Veterinary CNS Disorders Products Market by Region (US, Europe, ROW), 2006-14

Exhibit 31: Veterinary Hormone Products Market by Region (US, Europe, ROW), 2006-14

Exhibit 32: Veterinary Pharmaceutical Products Market Share

### **CHAPTER THREE: VETERINARY VACCINES MARKET**

Exhibit 33: Trade of Livestock in Millions of Tons (Beef, Pork, Poultry) 2001-2014

Exhibit 36: Disease Outbreak: Direct versus Indirect cost comparison

Exhibit 34: Veterinary Vaccines Market by Region (US, Europe, ROW), 2006-14

Exhibit 35: Veterinary Vaccines Market by Region (US, Europe, ROW), 2006-14

Exhibit 36: Veterinary Vaccines Market by Region (USA, Europe, ROW)

Exhibit 37: Veterinary Vaccine Sales by Species (Livestock, Poultry, Other)

Exhibit 38: Veterinary Vaccines, Competitive Share, 2008

### **CHAPTER FOUR: VETERINARY PERFORMANCE ENHANCERS PRODUCTS MARKET**

Exhibit 40: Veterinary Performance Enhancers Market, 2006-14

Exhibit 41: Veterinary Performance Enhancers: Segment Share(Medicated Feed Additives, Nutritional Feed Additives, Implants and Injections), 2008

Exhibit 42: Worldwide Nutritional Feed Additives Market(Amino Acids, Vitamins, Organic Acids), 2006-14

Exhibit 43: Veterinary Nutritional Feed Additives: Segment Share, 2008

Exhibit 44: Worldwide Medicated Feed Additives Market (Antibiotics, Enzymes, Probiotics and Prebiotics, Anti-protozoals), 2006-14

Exhibit 45; Worldwide Medicated Feed Additives: Segment Share, 2008

Exhibit 46: Veterinary Performance Enhancers Market, Competitive Share, 2008

Exhibit 47: Veterinary Feed Additives Market by Geography (US, Europe, ROW), 2008

Exhibit 48: Veterinary Performance Enhancers Market, Competitive Share, 2008

Exhibit 49: Veterinary Implants Market by Region (US, Europe, ROW), 2006-14

Exhibit 50: Veterinary Implants Market by Region (US, Europe, ROW), 2006-14

## **CHAPTER FIVE: VETERINARY OTC PRODUCTS MARKET**

Exhibit 51: Pet Population (Dogs, Cats Rabbits, Horses) by Region (US, Europe, Global) 2008

Exhibit 52: Veterinary OTC Health Products Market, 2006-14

Exhibit 53: Veterinary OTC Health Products Market

Exhibit 54: Veterinary OTC Health Products Market by Segments (Parasiticides, NSAIDS, Vitamins, GI Disorders, Cold and Cough, Others) 2006-14

Exhibit 55: US Household Pet Ownership (Dogs, Cats, Birds, Horses)

## I would like to order

Product name: World Veterinary Health Products (Animal Pharmaceuticals, Vaccines, OTC and Performance Enhancers)

Product link: <https://marketpublishers.com/r/W73902DB48CEN.html>

Price: US\$ 3,500.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/W73902DB48CEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970

