

Animal Antimicrobials and Antibiotics Market by Products (Tetracyclines, Penicillins, Sulfonamides, Aminoglycosides), Animals (Dog, Poultry, Swine), Mode Of Delivery (Premixes, Oral Powders and Solutions, Injections) - Global Forecasts to 2018

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Abstracts

Antimicrobials and antibiotics form a major share of the animal health market. Animal antimicrobials gained a greater importance in the animal health industry in the past 20 years, mainly due to growing need to preserve the health and welfare of animals. Most of the antimicrobial agents were also used as growth promoters as well. With this, the animal antimicrobials market witnessed a bullish growth from 1990's to 2006.

However, gradually, there were growing concerns about emergence of antibiotic-resistant bacteria which led to worldwide initiatives to minimize the use of antimicrobial agents as a growth promoter in food-producing animals. In Europe, in 2006, a complete ban was imposed on use of antimicrobial agents in food-producing animals, which brought a huge setback to the growing market for antimicrobial and antibiotics in Europe.

At present, the global antimicrobials and antibiotics market is driven by the growing need to preserve animal health owing to rising demand for animal proteins across the globe, and growing demand in the companion animals segment. Growing livestock population, increasing incidences of disease outbreaks and increase in the companion animal ownership are some of the factors driving the growth of this market to a certain extent. Besides the structural market drivers, there are strong geographic drivers for the growth of the animal antimicrobials and antibiotics market. The emerging markets are becoming increasingly attractive. The Asian and Latin American region form one of the most promising animal antimicrobials and antibiotics markets in the world. Developing

countries such as China and India have a relatively high CAGR rate and are expected to witness significant market growth in the forecast period. The growth in these regions is mainly attributed to the rise in demand for animal protein products, along with an increase in the trend of companion animal ownership in these regions.

Today, the animal antimicrobials and antibiotics market showcase a sluggish growth, owing to the regulatory authorities restricting their use, increased usage of in-feed enzymes, competitive exclusion products and probiotics as an alternative to antibiotics and prophylactic use of antibiotics being replaced by good husbandry, environment and hygienic practices.

Tetracyclines dominated the animal antimicrobials and antibiotics product segment in 2013, accounting for around 60% of the market revenue. This was followed by others segment, which accounted for 16% of the global animal antimicrobials and antibiotics product market in 2013. In the global antimicrobials and antibiotics animal market, pigs dominated the market with a share of close to 25%. In the mode of delivery segment of animal antimicrobials and antibiotics market, premix was the major revenue contributor in 2013, with an estimated share of nearly 49%.

North America dominated the animal antimicrobials and antibiotics market in 2013. However, the market share of this region will decrease to 27%, primarily due to the regulatory ban on the use of antibiotics announced in the U.S. At the same time, Asia and Latin America are poised to grow at a CAGR of 6% to 8% in the forecast period; this growth is largely driven by the increased urbanization, rising disposable incomes, increase in the demand for animal products and the increasing trend of pet ownerships in these regions.

The global animal antimicrobials and antibiotics market is consolidated with Zoetis Inc. (U.S.), Elanco Animal Health (U.S.), Merck Animal Health (U.S.), Merial (U.S.), Bayer Animal Health (Germany) holding around 75% of the total market. Other major players in this market are Virbac Animal Health (U.S.), and CEVA Santé Animale (U.S.).

Reasons to Buy the Report:

The report will enrich both established firms as well as new entrants/smaller firms to gauge the pulse of the market, which in turn will help firms in garnering greater market shares. Firms purchasing the report could use any one or a combination of the below mentioned five strategies (market penetration, product development/innovation, market development, market diversification, and competitive assessment) for increasing their

market shares.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on the product portfolios offered by the top players in the animal antimicrobials and antibiotics market. The report analyzes the animal antimicrobials and antibiotics market by animals type, mode of delivery type and by product type across all geographies.

Product Development/Innovation: Detailed insights on the upcoming trends, research and development activities, and new product launches in the animal antimicrobials and antibiotics market.

Market Development: Comprehensive information about the lucrative emerging markets by product, functionality, and geography.

Market Diversification: Exhaustive information about new products, growing geographies, recent developments, and investments in the animal antimicrobials and antibiotics market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, distribution networks, manufacturing capabilities, and SWOT analyses of the leading players in the animal antimicrobials and antibiotics market.

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About

The successful treatment of infectious diseases requires the availability of effective antimicrobials and antibiotics. The global use of these agents has improved the quality and life expectancy for a large number of animal species. The discovery of antimicrobials and antibiotics can be termed as one of the major medical advances of the century.

The global animal antimicrobials and antibiotics market was estimated to be worth \$XX million in 2013 and is expected to reach \$XX million by 2018. The animal antimicrobials and antibiotics market is mainly driven by increasing incidences of disease outbreaks, increasing number of companion animals, increasing demand for food products from animals, rising public awareness about animal diseases, and increasing use of antibiotics for animal husbandry in emerging countries like China.

However, factors such as the regulatory ban on use of antibiotics due to emergence of antibiotic-resistant strains of bacteria, prophylactic use of antibiotics being replaced by good husbandry and hygiene practices which avoids using antibiotics in animals, increased use of in-feed enzymes, competitive exclusion products, or probiotics as alternatives to antibiotics are restraining the growth of the animal antimicrobials and antibiotics market.

In the companion animals segment, market growth is largely driven by rapid growth in the pet health insurance industry, which is driving animal health expenditure by pet owners. In the emerging markets, the growth in demand for animal antimicrobials and antibiotics in companion animals is driven by growing pet adoption and increasing awareness and per capita animal health expenditure on companion animals.

North America was the largest market for animal antimicrobials and antibiotics in 2013, with a share of about XX% of the global animal antimicrobials and antibiotics market, followed by Europe with a share of XX% in 2013. However, countries in the Asia-Pacific and RoW regions represent the fastest-growing markets due to the increasing pet population, rising disposable incomes and growing awareness of animal health.

The top five players in the global animal antimicrobials and antibiotics market are Zoetis Inc. (U.S.), Merck Animal Health (U.S.), Bayer Animal Health (Germany), Virbac SA (France), and Elanco Animal Health (U.S.). These companies accounted for a share of XX% the global antimicrobials and antibiotics market in 2013.

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