

2024-2029 Animal Health Market Analysis, Competitive Landscape and Global Forecasts: Accelerated Rate of Change and Regulatory Uncertainty--Performance, Capabilities, Goals and Strategies of Leading Suppliers

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Abstracts

Will the industry consolidate, decentralize, or undergo a bimodal transformation?

How will the current trends affect the major market segments?

Which companies will enter the market and which will not survive?

This new report analyzes strategies, marketing tactics and technological know-how of the world's leading animal health companies, including:

Five-year forecasts for:

Major market segments

- Key geographic regions

Assessment of major U.S. and international trends with potentially significant impact on the animal health industry during the next five years, including discussion of such issues as pricing, industry consolidation, market globalization, growing R&D cost, generics, as well as advances in genomics, proteomics, drug screening, tissue engineering, bioinformatics and other technologies.

Company Profiles

Bayer

Rising demand for collars

- Focusing on parasiticides and anti-infectives
- Strong position in parasiticides
- Animal health R&D
- Worldwide marketing network
- Emerging markets
- Re-registering existing products

- Present structure

- Diverse businesses
- Challenged by animal disease outbreaks
- Europe's premier research organization
- Animal health R&D
- Crop science segment
- Monsanto acquisition
- Supervisory board

Boehringer Ingelheim

Sales and growth

- Animal health is one of the major pillars
- Swine vaccine Ingelvac circoflex
- Merial animal health
- U.S. animal health market position
- Promoting Eqvalan line
- Seeking to reinforce position in livestock market
- Strategies supported by collaborations
- Merial R&D programs
- Collaborative efforts
- Porcine Reproductive and Respiratory Syndrome (PRRS)
- Decentralized R&D

Ceva

Sales, growth and R&D investment

- Biomune, Phylaxia and French sites
- Hatcher automation and in-ovo vaccination
- India acquisition
- Brazil--important strategic market
- Merial swine vaccines acquisition

Elanco

Strong technological base

- Fermentation and chemical synthesis
- Strong base in antibiotics and anticoccidials
- Expiration of patents caused restructuring
- US marketing
- Lilly Japan
- Focused marketing strategies
- Well-established relationship with customers
- Multi-disciplinary business with diverse product portfolio
- In the midst of strategic decisions

- Stepping up efforts to curtail time to market
- Could divest animal health
- Changed product mix
- Strategic collaborations
- Broadening portfolio of companion animal medicines
- Hard look at bottom line

Merck

Sales and growth

- Extensive know-how in animal health
- Sphereon technology
- Expanding worldwide poultry business
- Poultry biological research laboratories
- Segmented poultry-product line
- Mitigated generic competition
- R&D productivity improving
- Patents, economies of scale, and powerful intellectual base

Phibro

Sales and growth

- Extensive portfolio of antibiotics and antibacterials
- Sales force, sales offices and distribution network
- Animal health R&D facilities

Virbac

Sales and growth

- Eli Lilly dog parasiticide acquisition
- Product portfolio
- Formulation know-how
- Waltham nutrition products
- Reorganized European distribution
- Decentralized approach for food-producing animals
- Benefitting from new companion animal products
- Focusing on niche markets
- Seeking expansion in the U.S.

Zoetis

Majority of revenue from production animals

- Largest market share in the industry
- Poultry and swine revenue declining
- Scale allows to use own sales force in emerging markets
- Management continues cost-cutting efforts
- Reassessing manufacturing infrastructure

- Market-leading position in emerging markets
- Leading share in Asia-Pacific, Canada and Latin America
- Fragmented customer base
- Leading position in fastest-growing markets

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