



ANIMAL HEALTH PRODUCTS
ANTIBACTERIALS MARKETS
(SAMPLE COPY, NOT FOR RESALE)

Trends, Industry Participants, Product Overviews and Market Drivers

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1 Report Overview

1.1 Objectives of Report

Veterinary anti-bacterials—antiseptics which only act against bacteria—comprise some of the most important pharmaceutical products in the animal health market. Yet despite a difficult regulatory environment, driven by concerns over the development of anti-bacterial resistance in consumers of livestock products, new products are still being launched. This has resulted in significant changes to the animal health products market. This study offers a detailed examination of the global animal health products market and makes predictions for the next several years regarding the anti-bacterials market by analyzing both the livestock and companion animal markets. Emphasis will be on:

- Animal health products market.
- Antibacterial market.
- Regulatory overview of the veterinary health market.
- Business trends in the industry.

1.2 Scope of Report

This report analyzes all the major commercial issues affecting the animal health products market and will provide:

- Information on market sizes and breakdowns for the leading national markets.
- A detailed analysis of the market drivers which are predicted to influence the development of the sector over the next five to ten years.
- Profiles of the leading antibiotics producers including product portfolios and analysis of products' strengths and weaknesses in the sector.
- Details of the most important infections including analysis of their commercial significance and the antibiotics used to combat them.

1.3 Methodology

This study is based upon interviews with sales and marketing professionals from companies in the animal health products market regarding the anti-bacterials market. The professionals were asked about their companies' products and marketing strategies, as well as their overall attitudes towards the industry segment. Chief executive officers and vice presidents of several of the companies discussed in the report were also interviewed.

Sources of information for the study include Trade Association publications and meetings, product brochures, product catalogs and company literature. Where the companies under discussion were publicly held, an examination of the annual reports, 10k filings and financial reports were used as the basis of the data reported. Important data sources include the European health for all database from the World Health Organization, data published by the Statistical Office of the European Communities (Eurostat), as well as various health data from the United Nations and the Organization for Economic Co-operation and Development. Where possible and practicable, the most recent data available have been used. Some e-information has been obtained from national government institutions and economic forecasts have been predicted using the most recently-published data by the International Monetary Fund.

The author of this report has a Ph.D. in biochemistry, as well as many decades of experience in science writing and medical industry analysis. The senior editor has many years of experience in animal clinical science, as well as extensive experience in senior level positions in biotech, pharma and medical service companies.

Some of the statistical information for this report was also taken from databases provided by Biotechnology Associates (a global information and consulting company specializing in analysis of biotechnology and medical information) and from TriMark's personal database. The information set forth in this study has been obtained from sources which are believed to be reliable. However, we do not guarantee the accuracy, adequacy or completeness of the information used, nor of the results obtained by such information.

Primary Data Sources: TriMark collects information from hundreds of databases and many comprehensive multi-client research projects and Sector Snapshots, which are published annually. The relevant data is extracted from TriMark's research from the past three years. Qualified data feeds from questionnaire responses and primary research responses for this compilation are also extracted.

Secondary Data Sources: TriMark uses research publications, journals, magazines, newspapers, newsletters, industry reports, investment research reports, trade and industry association reports, government-affiliated trade releases and other published information as part of our secondary research materials.

The information from these sources is then analyzed and translated by the industry research professionals at TriMark into a TriMark study. The editorial group then reviews the completed study which should contain product and market forecasts, critical industry trends, threats and opportunities, competitive strategies and market share determinations. Conclusions of the report are substantiated by results of intensive interviews with members of top-ranked companies in the industry.

TriMark Publications Report Research and Data Acquisition Structure

The general sequence of research and analysis activity prior to the publication of every report includes the following items:

- Completing an extensive secondary research effort on an important market sector, including gathering all relevant information from corporate reporting, publicly-available databases, proprietary databases, direct meetings and personal interviews with key personnel.
- Formulating a study outline with the assigned writer, including the following important items:
 - Market and product segment grouping and evaluation of their relative significance.
 - Key competitor evaluations including their relative positions in the business and other relevant facts to prioritize diligence levels and assist in designing a primary research strategy.
 - End-user research to evaluate analytical significance in market estimation.
 - Supply chain research and analysis to identify any factors affecting the market.
 - New technology platforms and cutting edge applications.
- Identifying key trends which affect the market and assessing the significance of each product and market segment for emphasis on further research.
- Providing an array of primary research to qualified and experienced senior executives worldwide.
- Completing a confirmatory primary research assessment of the report's findings with the assistance of expert panel partners from the industry being analyzed.

1.4 Executive Summary

Spending on products used to treat and prevent disease in companion and farm animals reached \$ [REDACTED] in the U.S. in [REDACTED]. Companion animal products accounted for an increasing share of overall sales, reaching [REDACTED] % of the total in [REDACTED] and the companion animal health products reached a total market size of \$ [REDACTED] in the U.S., while commercial animal health products reached \$ [REDACTED]. Demand for animal health products used to treat and prevent disease in the U.S. has been predicted to increase by [REDACTED] % per year to total more than \$ [REDACTED] in [REDACTED].

Global sales of animal health antibiotics are forecast to reach \$ [REDACTED] by [REDACTED], with a projected compound annual growth rate of [REDACTED] % to [REDACTED] %. In [REDACTED], total sales of antibiotics in the U.S. reached \$ [REDACTED] and by [REDACTED] is forecast to reach \$ [REDACTED]. Ionophores and arsenicals account for [REDACTED] % of all antibiotic sales. Pfizer's Naxcel™/Excenel™ brand is a market leader along with Bayer's Baytril®. Since the beginning of this decade, fluoroquinolones have shown enormous growth in the anti-bacterials market.