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Pet Health: Products & Services

US Industry Study with Forecasts for **2011 & 2016**

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Pet Health: Products & Services

US Industry Study with Forecasts for ***2011 & 2016***

Freedonia

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MARKET ENVIRONMENT

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An important factor in market growth is the increasing humanization of pets, especially as the number of childless households increases and individuals consider pets as family members.

US demand to grow 7.1% annually through 2011

US spending on pet health products and services is projected to increase 7.1 percent per year to $29 billion in 2011. Nearly 70 million households are expected to own pets at that time. At the manufacturer's level, demand for pet health products in the US is forecast to advance 5.6 percent per year to $4.6 billion in 2011. Gains will be promoted by a growing interest in preventative care products, such as dietary supplements, to ensure long-term health of pets. Further fueling gains will be an increase in age-related (e.g., arthritis) and weight-related (e.g., obesity, diabetes, heart disease) conditions among pets, which will provide opportunities for anti-inflammatory agents, insulin, weight loss agents, angiotensin converting enzyme (ACE) inhibitors, and inodilators.

US Pet Health Spending, 2011
($29 billion)

Pet health services to outpace products

Consumer spending on services, such as veterinary care, laboratory testing and pet insurance, will reflect expanding efforts by pet owners to improve the health and lengthen the lifespans of their pets. Technology transfer from human medicine to veterinary care, such as in the case of dialysis, organ transplant and magnetic resonance imaging (MRIs), is partly responsible for increased spending on services. The wider availability of these technologies, as well as future transfers, will boost service revenues. In an effort to curtail potentially staggering veterinary expenses, more owners will also purchase health insurance for their pets, and this will drive double-digit growth in insurance revenues over the next decade.

Drugs, supplements among faster growing products

Consumers are expected to spend over $10 billion on pet health products at the retail level. Veterinary practices, which hold a significant share of the market, will continue to lose share to on-line pharmacies, due to the cost savings these entities provide. Pet supply superstores will experience increased competition from mass merchandisers intent on increasing their presence in the marketplace with more floorspace dedicated to pet products.

Parasiticides accounted for the largest share of demand in the pet health products market in 2006 with 34 percent. Gains will result from increased interest in preventing heartworm and controlling fleas and ticks. The wider availability of parasite control products through retail outlets and the Internet will aid demand. Growth in pharmaceuticals will be fueled by new products intended for largely untapped market segments, such as obesity and anxiety. Dietary supplements will achieve the more rapid gains, as owners look for ways to promote their pet's optimum health.

Sample Text, Table & Chart

TABLE V-6

**ARTHRITIS: PET HEALTH PRODUCT DEMAND
(million dollars)**

Item	1996	2001	2006	2011	2016
Arthritis Conditions (mil)					
$ product/condition					
Arthritis Product Demand					
By Type:					
Pharmaceuticals					
Dietary Supplements					
Other					
By Animal:					
Dog					
Cat & Other					
% arthritis					
Pet Health Product Demand					

SAMPLE TABLE

PRODUCTS

Vaccines

Demand for pet vaccines is projected to advance ...
... 2011. Growth will be driven by ...
...t specific products, the growing ...
...rect-to-consumer advertising a...

SAMPLE TEXT

...arations of weakened or killed b...
...of pathogens or recombinant DN...
of bacterium and viruses. These products are designed ...
antibody production or long-term cellular immunity ag...
disease (or diseases) they cause in active form, but are ...
to cause severe infection. The US Department of Agriculture (USDA) and the government-affiliated Centers for Disease Control and Prevention are sources for viral materials for veterinary vaccines.

Vaccines are an important part of preventing disease in household pets, with schedules recommending vaccinations against key diseases at specific intervals during the first two years of life and then a variety of annual boosters. As a result of the development of improved vaccines and the increasing level of vaccinations, the incidence of infectious diseases has been significantly reduced, especially for distemper and rabies. However, concerns over the increased risk of cancer and other post-vaccination reactions have led to a change in vaccination recommendations, including the elimination of annual boosters in favor of triannual vaccinations. Less frequent vaccinations will likely restrain demand for vaccines to some extent although this should be offset to some degree by increased consumer education targeted at those pet owners who do not already vaccinate their animals. In addition, growth will occur as more dogs utilize daycare or boarding establishments, since vaccination against kennel cough is required prior to admittance.

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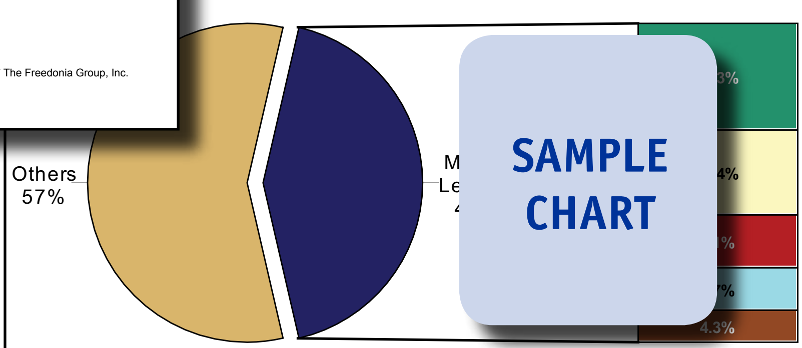
CHART VII-1

**...ET HEALTH PRODUCT MARKET SHARE, 2006
($3.5 billion)**



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-3

SURGERY REVENUES BY TYPE
(million dollars)

Item	1996	2001	2006	2011	2016
Pet Population (million)	[illegible]	[illegible]	[illegible]	[illegible]	223
$ revenue/pet	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].9
Surgery Revenues	2[illegible]	[illegible]	[illegible]	[illegible]	[illegible]80
Growth Removal	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]50
Orthopedic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]00
Gastrointestinal	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]80
Neutering/Spaying	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]60
Declawing & Other Cosmetic:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]05
Declawing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]87
Other Cosmetic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]18
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]85
% surgery	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].1
Veterinary Care Revenues	54[illegible]	[illegible]	[illegible]	[illegible]	21900

SAMPLE TABLE

COMPANY PROFILES

Pethealth Incorporated
710 Dorval Drive, Suite 400
Oakville, Ontario L6K 3V7
Canada
905-842-2615
http://www.pethealthinc.com

Revenues: US$[illegible]
Employment: [illegible]

Key Services: [illegible]

Pethealth i[illegible]nce for dogs and cats in Nor[illegible]tions through two segments: [illegible]

SAMPLE PROFILE

According to the Company, it is the second-largest provider of accident and illness insurance for dogs and cats in North America. Pethealth is primarily active in the US pet health industry through the Insurance segment, which generated 2006 revenues of US$13 million. The Company also sells microchip technology for use in companion animals, as well as web-based PETPOINT management software for animal welfare organizations, via the Non-Insurance segment, which had 2006 revenues of about US$3 million. Via the Insurance segment, Pethealth sells pet insurance programs under the PETCARE, SHELTERCARE and other brand names in Canada and the US through the PetCare Insurance Brokers Limited and PetCare Insurance Agency Limited subsidiaries, which are collectively known as PetCare. In the US, PetCare operates through managing general agency agreements with Lincoln General Insurance Company (York, Pennsylvania), a subsidiary of Kingsway Financial Services Incorporated (Canada); and Praetorian Financial Group (New York, New York). Under the terms of

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"Growth removal revenues are forecast to rise 6.4 percent per year to $1.5 billion in 2011. Gains will be promoted by the aging pet population, as older animals tend to be more likely to have growths. The market will also benefit as more expensive but efficient techniques (e.g., lasers) are used."

--Section III, pg. 45

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Other Studies

Patient Monitoring Systems

The US patient monitoring system industry is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by equipment type (e.g., multi-parameter, cardiac, anesthesia and respiratory, blood pressure and pulse, neurological); accessory (e.g., blood glucose test strips, electrodes, lancets, catheters); and market (e.g., hospitals, home health care, outpatient facilities). The study also considers market environment factors, details market share and profiles major players.

#2323 .... 04/2008..................... $4600

Drug Delivery Systems

The US drug delivery system industry is analyzed in this study. It presents historical (1997, 2002, 2007) demand data and forecasts for 2012 and 2017 for pharmaceuticals and biologicals adapted to drug delivery systems (oral, parenteral, inhalation, topical, implantable); and drug delivery devices (e.g., prefillable syringes, metered dose and dry powder inhalers, IV container systems). The study also considers market environment factors, evaluates company market share and profiles leading producers.

#2294 .... 03/2008..................... $4500

Elder Care Services

US revenues for elder care services will rise 6.6% yearly through 2011, driven largely by demographic changes. Skilled nursing facilities will stay the top segment while home health care services grow the fastest. For-profit institutions will remain the largest provider category and will slightly outpace nonprofit types. This study analyzes the $192 billion US elder care service industry, with forecasts for 2011 and 2016 by type, provider and payment source. It also evaluates market share and profiles major players.

#2292 .... 01/2008..................... $4500

Implantable Medical Devices

US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and defibrillators. Bone cement, tissue and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the $27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

#2255 .... 10/2007..................... $4500

Infection Prevention Products & Services

US demand for infection prevention products and services will grow 4% annually through 2011, driven by efforts to combat healthcare-acquired infections. Services will outpace supplies and equipment. Among products, surgical drapes and gowns will remain dominant while waste disposal and sterilization supplies will lead gains. This study analyzes the $13.8 billion US infection prevention industry, with forecasts for 2011 and 2016 by type and market. It also evaluates market share and profiles major players.

#2234 .... 08/2007..................... $4400

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