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Pet Health: Products & Services

US Industry Study with Forecasts for **2014 & 2019**

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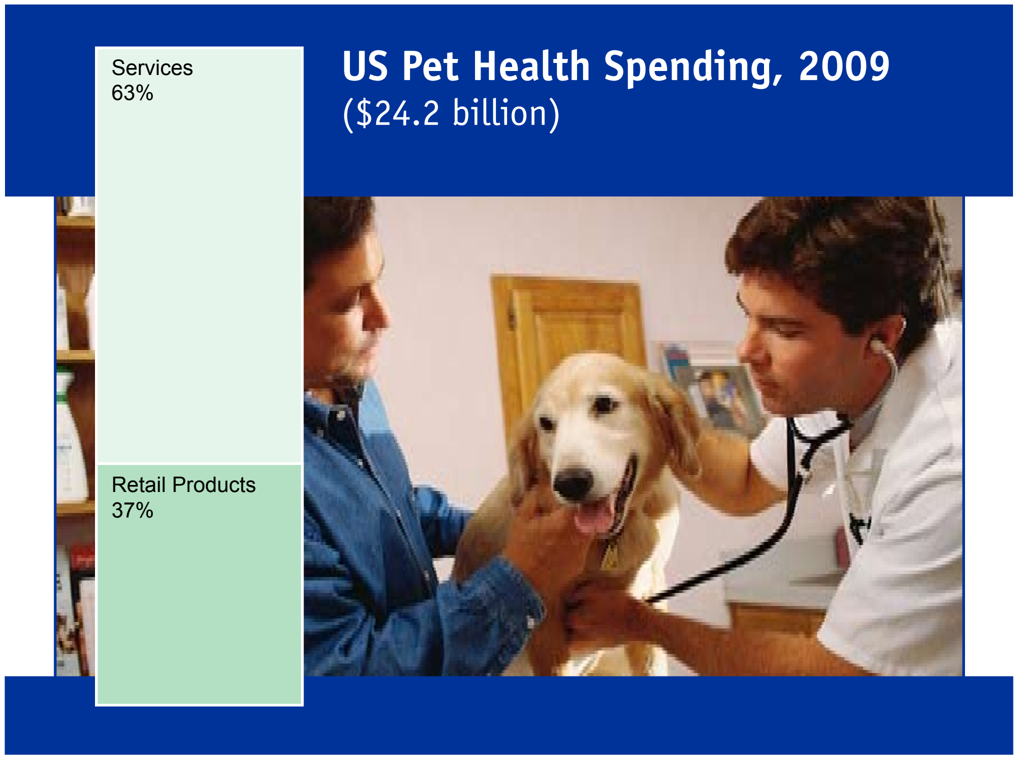
Pets are often considered to be members of the family rather than merely companion animals, and spending on their health care is thus perceived as a necessary expense.

US spending to rise 6.5% annually through 2014

Total US spending on pet health products and services is expected to advance 6.5 percent annually to $33.1 billion in 2014. At that time, there will be over 200 million pets in the US and 62 percent of households will own at least one. Pets are often considered to be members of the family rather than merely companion animals, and spending on their health care is thus perceived as a necessary expense. Also driving growth will be a recovery from the economic recession that began in December 2007, as well as advances in veterinary technology (including human-grade medicine and procedures becoming adapted to pet-specific care).



Pet insurance to be fastest growing service

Pet health services encompass veterinary care, non-veterinary care and pet insurance. Surgical and non-surgical veterinary care will continue to see technology transfer from human medicine, such as in cosmetic surgery, dialysis and organ transplant procedures. Newly available services typically cost significantly more than established procedures, adding to revenue gains. To improve affordability, rising numbers of owners will purchase insurance policies for their pets. Pet insurance will continue to see the fastest demand growth of all pet health products and services, rising nearly 17 percent per year through 2014. While penetration rates will remain low, both the percent of insured pets and overall insurance revenues will double by 2014.

Pharmaceuticals now largest product segment

In 2009, pharmaceuticals overtook parasiticides to account for the largest share of demand in the pet health product market, with 34 percent of the total. Gains for pharmaceuticals will be above the overall average through 2014, driven by new pet-specific formulations to treat conditions such as obesity and mental disorders (e.g., separation anxiety). Faster gains will be held back by rising competition from natural remedies and supplements. Until 2009, parasiticides represented the largest segment of pet health product demand. However, due to wide and established market penetration, gains have been below-average for the last decade or so.

Dietary supplements to be fastest growing product

Fast increases will be seen in dietary supplements, following trends in human markets and benefiting from widening retail availability. Tempering gains to some extent will be the inclusion of vitamin and other nutritional additives in premium and prescription pet food. Other products include vaccines, diagnostics and miscellaneous items such as disinfectants.

Sample Text, Table & Chart

TABLE IV-3

SYSTEMIC AGENTS DEMAND BY TYPE & ANIMAL
(million dollars)

SAMPLE TABLE

Item	1999	2004	2009	2014	2019
Pet Population (million)	1(				0.0
$ systemic agents/pet					5
Systemic Agents Demand					0
By Type:					
Hormones & Insulin					0
Pain Control					0
Anti-Inflammatories					5
Gastrointestinal					0
Respiratory					5
Cardiovascular					0
Other					0
By Animal:					
Dog					5
Cat					0
Other					5
% systemic agents					8
Pharmaceuticals Demand					000

PRODUCTS

SAMPLE TEXT

Gastrointestinal Systemic Agents -- Demand for g
tinal systemic agents used to treat pets is forecast to increase
2014. Gastrointestinal systemic ag
nd anti-ulcer treatments; appetite s
ontrols and stimulants. Virtually all
sorders in pets are pharmaceuticals

agents include mucosal protectants
bents (including activated charcoal, bismuth subsalicylate an
pectin formulations), motility-modifying agents (such as anti
drugs including atropine), antimicrobial therapy, NSAIDs, an
ins. Med-Pharmex's KAO-PECTIN liquid formula and PBI/
PET PECTILLIN are among available anti-diarrheal veterina
Anti-ulcer treatments are largely off-label human products, a
clude antacids and histamine-receptor antagonists. Antacids
ize stomach acid and are based on aluminum, calcium or magnesium
-- most often aluminum hydroxide, calcium carbonate and magnesium oxide/hydroxide. Cimetidine, famotidine and rantidine are the most often employed histamine-receptor antagonists used to block gastric acid secretion in pets to prevent ulcer formation. Appetite stimulants are used to cure anorectic animals, and may include boldenone undecylenate, cyproheptadine, megestrol acetate and prednisone.

Among the drug therapies used as laxatives in pet treatment are
bisacodyl; docusate calcium, docusate potassium and docusa
dium; and lactulose. Magnesium sulfate (Epsom salts) and m
hydroxide (milk of magnesia) also have laxative effects. La
categorized as fecal softeners (surfactants), hydrophilic collo
osmotic cathartics, lubricant laxatives and stimulant catharti
ing stimulation and control therapies are classified as emetic
antiemetic drugs, respectively. Emetic drugs typically are us

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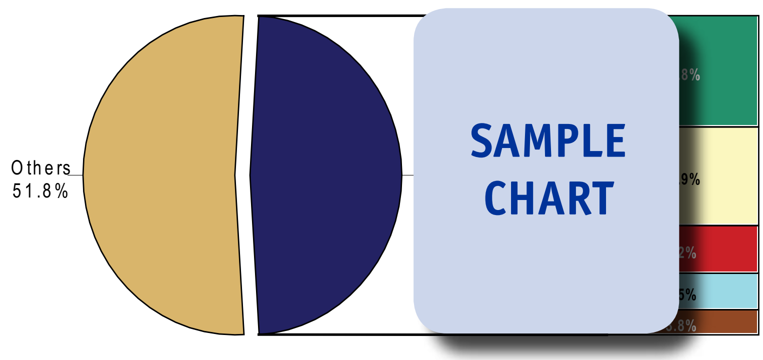
CHART VII-1

PET HEALTH PRODUCT MARKET SHARE BY COMPANY
($4.2 billion, 2009)



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Sample Profile, Table & Forecast

TABLE V-1

PET HEALTH PRODUCT DEMAND BY CONDITION
(million dollars)

Item	1999	2004	2009	2014	2019
Pet Population (million)	16				9.0
$ health product/pet	1				.4
Pet Health Product Demand	2				10
Skin					90
Heart					10
Gastrointestinal					50
Renal					10
Arthritis					50
Diabetes					55
Other					25

SAMPLE TABLE

COMPANY PROFILES

PetAg Incorporated
255 Keyes Avenue
Hampshire, IL
847-683-2288
http://www.pet

Annual Sales:
Employment:

SAMPLE PROFILE

Key Products: lty treats for cats, dogs, bird

PetAg is a manufacturer of health and nutrition products for pets. The Company is privately held.

The Company participates in the US pet health industry through the manufacture of a variety of health and nutrition products for cats, dogs, birds, reptiles and small mammals. Among these products are supplements, other health aids and specialty treats. PetAg operates a 60,000-square-foot plant in Hampshire, Illinois. This facility also includes a quality control laboratory.

PetAg produces a variety of dietary supplements for cats, including the following products: chewable taurine tablets; calcium phosphorus powder and tablet supplements; VISION AID gel, an oral supplement formulated with arginine, methionine, beta-carotene and carnitine to support vision development and ocular maintenance; CATSURE liquid supplements containing antioxidants, omega-3 and omega-6 fatty acids, vitamins and minerals to meet the nutritional needs of senior cats; FORMULA V enteral care liquid supplements made with vitamins, minerals, fatty acids, fiber and other ingredients; MIRRA-COAT liquid supplements designed to reduce shedding, scratching and flaky

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"Demand for products indicated for the treatment of heart conditions in companion animals is expected to rise 5.2 percent per year to $1 billion in 2014. As more pets are diagnosed with heart conditions, partially due to rising obesity rates, sales of products intended to prevent and treat heart disease will continue to rise. Preventive products, principally parasiticides, will experience the largest growth in absolute demand, representing a maturing market for preventives. Prescription food and pharmaceuticals intended to maintain the health of pets diagnosed with chronic heart conditions will see healthy gains from a small base; ..."
--Section V, pg. 129-30

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Other Studies

Vaccines

This study analyzes the US human and veterinary vaccine industry. It presents historical demand data (1999, 2004, 2009) and forecasts to 2014 and 2019 by vaccine type (e.g., pediatric, hepatitis, biodefense, smallpox, anthrax, influenza, Encephalitis, rabies, SARS, meningococcal, BCG, livestock, companion animal). The study also presents macro- and socio-economic demand indicator data, details industry structure, evaluates company market share and profiles industry competitors.

#2667 .... 08/2010..................... $4700

Nanotechnology in Health Care

US demand for nanosized medical products will grow 17.1% yearly though 2014. Cancer and central nervous system disorders will be the fastest growing applications. Nanomedicines will provide the best opportunities, while nanotech medical supplies and devices grow the fastest from a small base. This study analyzes the $34.2 billion US nanotechnology medical product industry, with forecasts for 2014 and 2019 by product and application. It also evaluates company market share and profiles industry participants.

#2622 .... 06/2010..................... $4800

Implantable Medical Devices

US demand for implantable medical devices will increase 8.3% annually through 2014. Gains will be driven by the development of next generation devices based on new technologies and improved materials. Spinal implants, cardiac stents and orthobiologics will be among the fastest growing product categories. This study analyzes the $33 billion US implantable medical device industry, with forecasts for 2014 and 2019 by procedure, material and type. It also evaluates company market share and profiles 36 industry competitors.

#2595 .... 04/2010..................... $4800

World Wound Management Products

Global wound management product demand will rise 4.6% yearly through 2013. Best growth prospects include tissue sealants, foam and alginate wound dressings, growth factors, bioengineered tissue substitutes and anti-adhesion agents. China will be the fastest growing market, while the US remains the largest. This study analyzes the global market for wound management products, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates company market share and profiles industry players.

#2578 .... 02/2010..................... $5800

World Nutraceutical Ingredients

Global nutraceutical ingredient demand will rise 6.2% yearly through 2013. China and India will be the fastest growing markets while the US remains the largest. Best prospects include soy proteins; additives lutein and lycopene; vitamins A and E; minerals calcium and magnesium; and extracts ginkgo biloba and glucosamine. This study analyzes the $16 billion world nutraceutical ingredient industry, with forecasts for 2013 and 2018 by product, world region and for 12 countries. It also details market share and profiles industry players.

#2565 .... 11/2009..................... $5800

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