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# Pet Health: Products & Services

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

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Study #2660 | August 2010 | \$4800 | 285 pages

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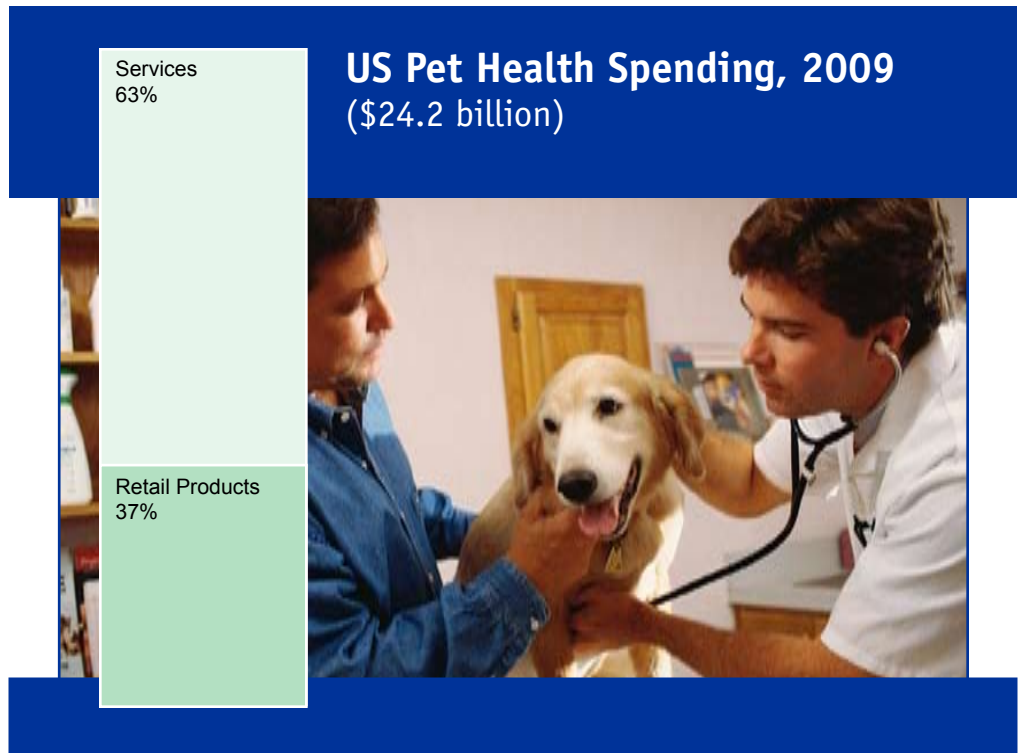
*Pets are often considered to be members of the family rather than merely companion animals, and spending on their health care is thus perceived as a necessary expense.*

## 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.

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## Sample Text, Table & Chart

### PRODUCTS

**Gastrointestinal Systemic Agents** -- Demand for final systemic agents used to treat pets is forecast to increase in 2014. Gastrointestinal systemic agents include anti-ulcer treatments; appetite stimulants and anti-diarrheal treatments. Virtually all disorders in pets are pharmaceuticals

**SAMPLE TEXT**

Agents include mucosal protectants (including activated charcoal, bismuth subsalicylate and pectin formulations), motility-modifying agents (such as anti-cholinergics including atropine), antimicrobial therapy, NSAIDs, and analgesics. Med-Pharmex's KAO-PECTIN liquid formula and PBI/PET PECTILLIN are among available anti-diarrheal veterinary products. Anti-ulcer treatments are largely off-label human products, and include antacids and histamine-receptor antagonists. Antacids neutralize stomach acid and are based on aluminum, calcium or magnesium hydroxide. Most often aluminum hydroxide, calcium carbonate and magnesium hydroxide. Cimetidine, famotidine and ranitidine 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 docusate sodium; and lactulose. Magnesium sulfate (Epsom salts) and magnesium hydroxide (milk of magnesia) also have laxative effects. Laxatives are categorized as fecal softeners (surfactants), hydrophilic colloid osmotic cathartics, lubricant laxatives and stimulant cathartics. Laxative stimulation and control therapies are classified as emetic and antiemetic drugs, respectively. Emetic drugs typically are used

84

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TABLE IV-3

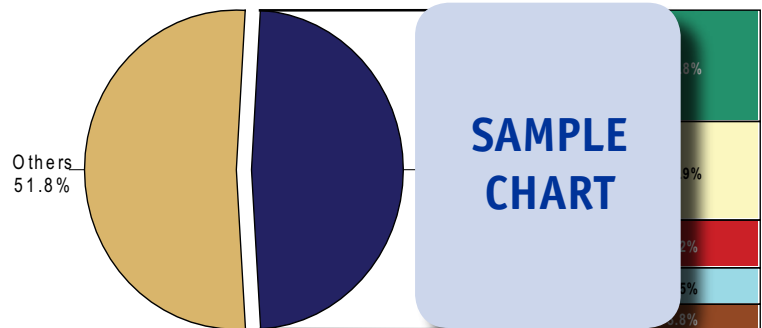
SYSTEMIC AGENTS DEMAND BY TYPE & ANIMAL  
(million dollars)

Item	1999	2004	2009	2014	2019
Pet Population (million)	160.0	165.0	170.0	175.0	180.0
\$ systemic agents/pet	15.0	15.5	16.0	16.5	17.0
Systemic Agents Demand	2400.0	2550.0	2700.0	2850.0	3000.0
By Type:					
Hormones & Insulin	100.0	105.0	110.0	115.0	120.0
Pain Control	200.0	210.0	220.0	230.0	240.0
Anti-Inflammatories	300.0	315.0	330.0	345.0	360.0
Gastrointestinal	400.0	420.0	440.0	460.0	480.0
Respiratory	500.0	525.0	550.0	575.0	600.0
Cardiovascular	600.0	630.0	660.0	690.0	720.0
Other	700.0	735.0	770.0	805.0	840.0
By Animal:					
Dog	150.0	157.5	165.0	172.5	180.0
Cat	100.0	105.0	110.0	115.0	120.0
Other	50.0	52.5	55.0	57.5	60.0
% systemic agents	15.0	15.5	16.0	16.5	17.0
Pharmaceuticals Demand	1800.0	1900.0	2000.0	2100.0	2200.0

**SAMPLE TABLE**

CHART VII-1

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



**SAMPLE CHART**

**Sample Profile,  
 Table & Forecast**

**TABLE V-1**

**PET HEALTH PRODUCT DEMAND BY CONDITION**  
 (million dollars)

Item	1999	2004	2009	2014	2019
Pet Population (million)	160	165	170	175	180
\$ health product/pet	10	12	14	16	18
Pet Health Product Demand	20	22	24	26	28
Skin	10	11	12	13	14
Heart	5	6	7	8	9
Gastrointestinal	3	4	5	6	7
Renal	2	2	3	3	4
Arthritis	1	1	2	2	3
Diabetes	1	1	1	2	2
Other	1	1	1	1	1

**SAMPLE  
 TABLE**

**COMPANY PROFILES**

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

Annual Sales: \$1.2 billion  
 Employment: 1,000

Key Products: Prescription diets, specialty diets, and specialty treats for cats, dogs, birds, and reptiles.

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

**SAMPLE  
 PROFILE**

“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 through 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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