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Animal Health Products

US Industry Study with Forecasts for **2016 & 2021**

Study #2990 | February 2013 | \$5100 | 303 pages



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Preventive care will remain a driving factor in sales as owners of commercial and companion animals alike recognize the need to maintain good health conditions for their animals.

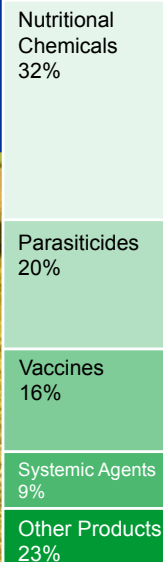
US demand to rise 3.5% annually through 2016

Demand for animal health products in the US is forecast to increase 3.5 percent annually to \$12.7 billion in 2016. Animal health care is a relatively recession-resistant industry, as health care is regarded as a necessary expense of animal ownership or husbandry. Preventive care will remain a driving factor in sales of animal health products as owners of commercial and companion animals alike recognize the need to maintain good health conditions for their animals. Commercial animals, including livestock and poultry, are largely intended to enter the human food chain, making prevention and eradication of disease a vital ongoing concern for both animal and human health. Furthermore, as pet owners increasingly treat their companion animals as members of the family, pets' lifespans will continue to lengthen, driving strong sales of health products.

Nutritional chemicals to remain key segment

The large nutritional chemical segment will account for over one-quarter of the growth seen during the forecast period, as these products -- which include amino acids, vitamins, minerals, enzymes, and other products -- remain vital as feed additives and dietary supplements. Consumer interest in natural products

US Animal Health Product Demand, 2016 (\$12.7 billion)



will continue to favorably impact the nutritional chemical segment as products such as acidifiers, amino acids, carotenoids, enzymes, herbs, probiotics, and other ingredients with a more "natural" profile are used to replace more controversial additives, such as antibiotics and meat and bone meal, in animal feed. For companion animals, quality of life concerns will continue to support demand for nutritional chemicals used in pet food and in supplements.

Vaccines, diagnostics to be fastest growing types

The importance of preventive health care will support growth in parasiticides and

vaccines. Parasiticides will remain a prominent feature in the care of pets and livestock, as prevention of and treatment for existing fleas, ticks, and other pests will help reduce occurrences of pest-related health disorders. Furthermore, fears about antibiotic resistance are leading to increased use of diagnostics to treat only animals requiring care, rather than medicating entire herds or flocks, driving above average gains in this product segment. Systemic agents will also see solid advances in demand, particularly among companion animals, driven by the increasing perception of pets as members of the family, with medical treatment often mirroring trends in human health care.

Sample Text, Table & Chart

END USERS

Animal Food Manufacturers

Animal food manufacturers typically account for around 60 percent of demand for animal health products, and are projected to maintain approximately that share through the foreseeable future. Animal food manufacturers' demand for animal health products is forecasted to reach \$1.2 billion in 2016. While this growth is driven by the demand for animal health products, it is also driven by the increase in the domestic animal population and the increasing demand for food per animal. Advances in feed technology and introduction of specialty

Animal feed -- which generally refers to food for livestock and poultry -- will continue to account for the majority of health product demand in the animal food category through 2016. Feed manufacturers will benefit from a tightening regulatory environment and the needs of farmers to enhance production quality through the use of nutritionally enriched feed. The convenience of administering animal health products through feed will also contribute positively to gains, as will a rebound in the cattle population.

Animal food producers use a number of animal health products in the manufacture of feed and pet food, including nutritional chemicals, growth promotants, antibiotics, and parasiticides. Nutritional chemicals dominate the segment, accounting for over 90 percent of demand in 2011. These products will benefit from a tightening regulatory environment regarding animal waste, antibiotic use, and animal health product use. They find significant use in food for both livestock and companion animals; healthy livestock are vital to the safety of the food that these animals are largely intended for human consumption, and companion animals are increasingly valued as members of the family and their health care is prioritized accordingly.

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TABLE III-2

NUTRITIONAL CHEMICAL DEMAND BY TYPE & ANIMAL
(million dollars)

Item	2001	2006	2011	2016	2021
Domestic Animal Population (mil)	100	105	110	115	120
\$ nutritional chemicals/animal	10	12	15	18	22
Nutritional Chemical Demand	10	12	15	18	22
By Type:					
Amino Acids	2	2.5	3	3.5	4
Vitamins	1	1.2	1.5	1.8	2.2
Minerals	1	1.2	1.5	1.8	2.2
Enzymes	0.5	0.6	0.75	0.9	1.1
Other Nutritional Chemicals	0.5	0.6	0.75	0.9	1.1
By Animal:					
Livestock & Poultry	8	9.6	12	14.4	17.6
Companion Animals	1	1.2	1.5	1.8	2.2
Other Animals	1	1.2	1.5	1.8	2.2
% nutritional chemicals	70	72	75	77	80
Animal Health Product Demand	14	17	22	28	35

SAMPLE
TABLE

CHART VI-1

US ANIMAL HEALTH PRODUCT MARKET SHARE
(\$10.7 billion, 2011)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-6

SHEEP & LAMBS DEMAND FOR ANIMAL HEALTH PRODUCTS
(million dollars)

Item	2001	2006	2011	2016	2021
Sheep & Lambs Population (mil)					
\$ health products/animal					
Sheep & Lambs Health Products					
Nutritional Chemicals					
Vaccines					
Parasiticides					
Growth Promotants					
Other Products					
% sheep & lambs					
Livestock & Poultry Health Products	4				15

SAMPLE
PROFILE

SAMPLE
TABLE

COMPANY PROFILES

IDEXX Laboratories Incorporated

1 IDEXX Drive
 Westbrook, ME 04092
 207-556-0300
<http://www.id>

Revenues: \$
 US Revenues
 Employment:

Key Products
 dogs, horses, diseases in cats,

IDEXX develops and manufactures products for the veterinary testing, and food and water testing markets. It also provides related services. IDEXX operates through four segments: Companion Animal Group (CAG), Livestock and Poultry Diagnostics, Water, and Other.

IDEXX competes in the US animal health product industry via the CAG segment and the Livestock and Poultry Diagnostics segment. These segments produce and market testing kits that detect a wide range of diseases in cats, dogs, horses, cows, swine, and poultry.

CAG Segment -- In 2011, IDEXX's CAG segment had revenues of \$1 billion. The segment's products include testing kits used to detect a variety of diseases and health conditions in cats, dogs, and horses. In 2011, instruments and consumables accounted for \$395 million of the segment's sales, while rapid assay products represented \$154 million. Testing kits include single use varieties that incorporate immunoassay technology based on antibody antigen reactions. Cat-specific SNAP kits include SNAP FELINE TRIPLE kits that can be used to test for feline leukemia virus, feline heartworm, and feline immunodeficiency

"Demand for animal health products for the sheep and lamb market is expected to increase 3.7 percent per year to \$168 million in 2016, as more intensive management systems replace range-based programs and as concerns about prion-type diseases such as scrapie grow more serious. Products that may benefit from current trends include growth promotants, vaccines, and parasiticides. However, sales opportunities will be somewhat limited by ..."
 --Section V, pg. 173

OTHER STUDIES

World Infection Prevention

This study analyzes the world infection control industry. It presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by product (e.g., infection prevention apparel and textiles, safety-enhanced medical devices, disinfectants, sterilization products, infectious waste disposal products), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2997 March 2013..... \$6100

World Aquaculture: Feed, Equipment & Chemicals

This study analyzes the world aquaculture supplies and equipment industry. It presents historical demand data for the years 2002, 2007 and 2012 with forecasts for 2017 and 2022 by product (e.g., feed, equipment, water treatment products, feed additives, fertilizers, pharmaceuticals), species (e.g., carp, tilapia, salmon and trout, catfish, oysters, clams, shrimp and prawns), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2999 March 2013..... \$6100

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products will rise 6.1 percent annually to \$24.7 billion in 2016. Molecular diagnostic products will grow the fastest due to their advantages in the detection of infectious diseases, tumors and genetic disorders. Hospital labs will continue to comprise the largest and most diverse market. This study analyzes the \$18.4 billion US IVD products industry, with forecasts for 2016 and 2021 by type, application and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2923 July 2012..... \$5100

Pet Health: Products & Services

US consumer spending on pet health products and services will reach \$30.9 billion in 2016, driven by the increasing treatment of companion animals as family members. Pet insurance will continue to see the fastest gains in the dominant service segment. Pharmaceuticals and parasiticides will remain the largest product segments. This study analyzes the \$24.6 billion US pet health industry, with forecasts for 2016 and 2021 by service, product, condition type and animal. The study also evaluates company market share and profiles industry players.

#2913 July 2012..... \$5100

World Enzymes

World enzyme demand will rise 6.8 percent annually to \$8.0 billion in 2015. Growth will be led by enzymes used in the diagnostic, research and biotechnology, animal feed, and food and beverage markets. The fastest regional growth will be in the smaller markets of Central and South America and the Africa/Mideast region. This study analyzes the \$5.8 billion world enzyme industry, with forecasts for 2015 and 2020 by product, market, world region and for 16 major countries. The study also evaluates company market share and profiles industry players.

#2824 December 2011 \$6100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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