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Animal Health Market Consolidation: Who Will Not Survive?

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The Global Animal Health Market Dynamics and Trends

- Strategic overview of the worldwide animal health market.
- Five-year forecasts for major market segments and key geographic regions.
- Assessment of major U.S. and international trends with potentially significant impact on the animal health industry during the next five years.
- Pricing, industry consolidation, market globalization, growing R&D cost, and generics.
- Advances in genomics, proteomics, drug screening, tissue engineering, bioinformatics and other technologies.
- Key market segments
- Major geographic areas

Company Profiles

Bayer Animal Health

- Considering selling animal health division
- Plans to invest in Kiel
- Rising demand for collars
- Focusing on parasiticides and anti-infectives
- Strong position in parasiticides
- Animal health R&D
- Worldwide marketing network
- Emerging markets
- Re-registering existing products
- Present structure
- Diverse businesses
- Challenged by animal disease outbreaks
- Europe's premier research organization
- Animal health R&D
- Crop science segment
- Monsanto acquisition
- Chairman Werner Baumann
- Supervisory board

Boehringer Ingelheim

- Sales and growth
- Animal health is one of the major pillars
- Swine vaccine Ingelvac circoflex
- Merial animal health
- U.S. animal health market position
- Promoting Eqvalan line
- Seeking to reinforce position in livestock market
- Strategies supported by collaborations
- Merial R&D programs
- Collaborative efforts
- Porcine Reproductive and Respiratory Syndrome (PRRS)
- Decentralized R&D

Ceva

- Sales, growth and R&D investment
- Biomune, Phylaxia and French sites
- 2016 acquisitions
- Hatcher automation and in-ovo vaccination
- India acquisition
- Brazil--important strategic market
- Merial swine vaccines acquisition

Elanco Animal Health

- Strong technological base
- Fermentation and chemical synthesis
- Strong base in antibiotics and anticoccidials
- Expiration of patents caused restructuring
- US marketing
- Lilly Japan
- Focused marketing strategies
- Well-established relationship with customers
- Multi-disciplinary business with diverse product portfolio
- In the midst of strategic decisions
- Stepping up efforts to curtail time to market
- Could divest animal health
- Changed product mix
- Strategic collaborations
- Broadening portfolio of companion animal medicines
- Hard look at bottom line
- CEO Dave Ricks

Merck Animal Health

- Sales and growth
- Higher sales of Bravecto
- Vallée acquisition
- Extensive know-how in animal health
- Sphereon technology
- Expanding worldwide poultry business
- Poultry biological research laboratories
- Segmented poultry-product line
- Mitigated generic competition
- R&D productivity improving
- Patents, economies of scale, and powerful intellectual base
- Keytruda key to future

Phibro Animal Health

- Sales and growth
- Extensive portfolio of antibiotics and antibacterials
- Sales force, sales offices and distribution network
- Animal health R&D facilities
- Biotay acquisition

Virbac

- Sales and growth
- Eli Lilly dog parasitocides acquisition
- Product portfolio
- Formulation know-how
- Waltham nutrition products
- Reorganized European distribution
- Decentralized approach for food-producing animals
- Benefitting from new companion animal products
- Focusing on niche markets
- Seeking expansion in the U.S.

Zoetis

- Majority of revenue from production animals
- Largest market share in the industry
- Poultry and swine revenue declining
- Scale allows to use own sales force in emerging markets
- Management continues cost-cutting efforts
- Reassessing manufacturing infrastructure
- CEO Juan Ramon Alaix

- Market-leading position in emerging markets
- Leading share in Asia-Pacific, Canada and Latin America
- Fragmented customer base
- Leading position in fastest-growing markets