

# Animal Health In Focus '09

**Vetnosis's unique research reports deliver accurate, relevant and timely analysis and insight on the global animal health sector.**

**Animal Health in Focus '09 delivers headline data, analysis and comment on the global animal health industry in 2008; companies' 2008 sales and profit performance; and our outlook for 2009 and 2013.**



# Animal Health In Focus '09

Executives can rely on Vetnosis's animal health research products to deliver high-quality intelligence and insight.

Animal Health in Focus '09 is a popular suite of research reports for companies that do not require the in-depth Content within a subscription to the Animal Health Service but still need up to date, accurate headline company and market information.

## Outlook 2009 / Outlook 2013

Provides a summary of 2008 industry and market performance followed by 2009 and 2013 market forecasts, including assumptions by:

- Product Group
- Region
- Species

Outlook 2009, 65 page report March 2009; Outlook 2013, 40 page report June 2009

## Executive's Guide

Provides a summary of the Top 15 companies' performances in 2008

- Financial Analysis
- Key Strategic Initiatives
- Sales and Growth by Product Group
- Sales and Growth by Region
- Sales and Growth by Species

55 page report, March 2009

## Income Statements

Provides comparable Profit & Loss Accounts for the Top 15 companies in 2008

- Sales
- Cost of Goods
- Selling, General and Administrative Expenses
- Research and Development
- EBIT
- EBITDA

18 page report, April 2009

# Animal Health In Focus '09

**Outlook 2009**  
(published March 2009)

**Outlook 2013**  
(published June 2009)

## Contents & Structure

### Executive Summary

#### Review

- Global Review
- Company Review
- Product Review
- Regional Review
- Species Review

#### Outlook 2009

#### Outlook 2013

##### Global Outlook 2009

##### Global Outlook 2013

##### Product Outlook 2009

- Medicinal Feed Additives
- Biologicals
- Anti-infectives
- Parasiticides
- Other Pharmaceuticals

##### Product Outlook 2013

- Medicinal Feed Additives
- Biologicals
- Anti-infectives
- Parasiticides
- Other Pharmaceuticals

##### Region Outlook 2009

- North America
- Latin America
- West Europe
- East Europe
- Far East
- Rest of World

##### Region Outlook 2013

- North America
- Latin America
- West Europe
- East Europe
- Far East
- Rest of World

##### Species Outlook 2009

- Cattle
- Sheep
- Pigs
- Poultry
- Companion Animal/Other

##### Species Outlook 2013

- Cattle
- Sheep
- Pigs
- Poultry
- Companion Animal/Other

##### Macro-economic Environment 2009

- Currency
- Consumption
- Production
- Animal Feed
- Policy
- Trade
- Outlook

##### Macro-economic Environment 2013

- Currency
- Consumption
- Production
- Animal Feed
- Policy
- Trade
- Outlook

# Animal Health In Focus '09

## Executive's Guide 2009

### Contents & Structure

#### Introduction

- Top 15 Company Reported and Proforma Sales
- Company Growth
- Reported Company Sales by Product Group
- Reported Company Sales by Region
- Reported Company Sales by Species
- Proforma Company Sales by Product Group
- Proforma Company Sales by Region
- Proforma Company Sales by Species

#### Companies

- Bayer
- Boehringer Ingelheim
- CEVA
- Eli Lilly (Elanco)
- Johnson & Johnson (Janssen)
- King (Alpharma)
- Merial
- Monsanto
- Novartis
- Pfizer
- Phibro Animal Health
- Schering-Plough (Intervet/Schering-Plough)
- Vétoquinol
- Virbac
- Wyeth (Fort Dodge)

# Animal Health In Focus '09

## Income Statements

### Contents & Structure

#### Summary

#### Companies

Bayer  
 Boehringer Ingelheim  
 CEVA  
 Eli Lilly (Elanco)  
 Johnson & Johnson (Janssen)  
 King (Alpharma)  
 Merial  
 Monsanto  
 Novartis  
 Pfizer  
 Phibro Animal Health  
 Schering-Plough (Intervet/Schering-Plough)  
 Vétoquinol  
 Virbac  
 Wyeth (Fort Dodge)

USDm	2006	2007	2008
<b>Net Sales</b>			
COGS <sup>(1)</sup>			
Gross Profit			
SGA <sup>(2)</sup>			
R&D <sup>(3)</sup>			
<b>Operating Profit</b>			
D&A <sup>(4)</sup>			
<b>EBIT<sup>(5)</sup></b>			
Gross Profit (%)			
SGA <sup>(2)</sup> (%)			
R&D <sup>(3)</sup> (%)			
Operating Profit (%)			
EBIT <sup>(5)</sup> (%)			
Key:			
<sup>(1)</sup> COGS = cost of goods sold			
<sup>(2)</sup> SGA = selling, general & administrative costs			
<sup>(3)</sup> R&D = research & development costs			
<sup>(4)</sup> D&A = depreciation & amortisation			
<sup>(5)</sup> EBIT = earnings before interest & tax			

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