

# Animal Health In Focus '10

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

Animal Health in Focus '10 delivers headline data, analysis and comment on the global animal health industry in 2009; companies' 2009 sales and profit performance; and our outlook for 2010 and 2014.



# Animal Health In Focus '10

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

Animal Health in Focus '10 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.

## Review 2009 / Outlook 2010 / Outlook 2014

Provides a review of 2009 industry and market performance followed by 2010 and 2014 market forecasts, including assumptions by:

- Product Group
- Region
- Species

Review 2009 (March 2010), Outlook 2010 (March 2010), Outlook 2014 (June 2010)

## Executive's Guide

Provides a summary of the Top 14 companies' performances in 2009

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

March 2010

## Income Statements

Provides comparable Profit & Loss Accounts for the Top 14 companies in 2009

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

April 2010

# Animal Health In Focus '10

## Review 2009

(published March 2010)

### Executive Summary

#### Review 2009

- Global Review
- Company Review: reported and proforma sales
- Product Review
- Regional Review
- Species Review

## Outlook 2010

(published March 2010)

### Global Outlook 2010

#### Product Outlook 2010

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

#### Region Outlook 2010

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

#### Species Outlook 2010

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

#### Macro-economic Environment 2010

- Currency
- Consumption
- Production
- Policy
- Trade
- Outlook

## Outlook 2014

(published June 2010)

### Global Outlook 2014

#### Product Outlook 2014

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

#### Region Outlook 2014

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

#### Species Outlook 2014

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

#### Macro-economic Environment 2014

- Currency
- Consumption
- Production
- Policy
- Trade
- Outlook

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## Executive's Guide 2010

### Introduction

- Top 14 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
- Novartis
- Pfizer
- Phibro
- Schering-Plough (Intervet/Schering-Plough)
- Vétoquinol
- Virbac
- Wyeth (Fort Dodge)

# Animal Health In Focus '10

## Income Statements

### Executive Summary

#### Companies

Bayer  
 Boehringer Ingelheim  
 CEVA  
 Eli Lilly (Elanco)  
 Johnson & Johnson (Janssen)  
 King (Alpharma)  
 Merial  
 Novartis  
 Pfizer  
 Phibro  
 Schering-Plough (Intervet/Schering-Plough)  
 V  toquinol  
 Virbac  
 Wyeth (Fort Dodge)

USDm	2007	2008	2009
<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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