



## Beef Outlook

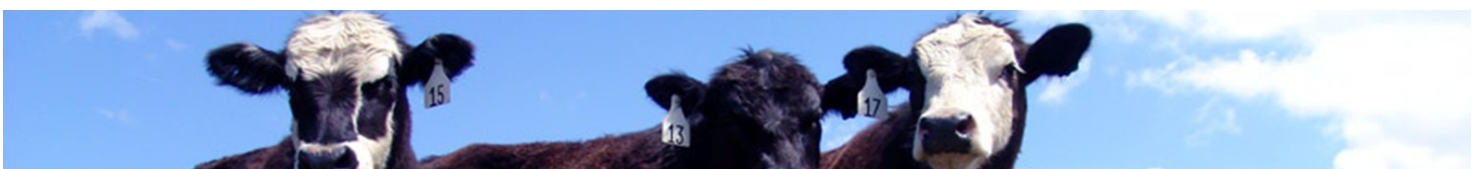
Beef is the world's second most valuable animal protein production sector and global consumption is growing as a result of changing dietary preferences, increasing household income and population growth.

The beef cattle healthcare market is the second largest species sector and is critical to most animal health companies. Beef Outlook examines the impact of growing beef consumption on beef production, trade and the beef cattle healthcare market and presents 10-year forecasts by key country, region and world.

Beef Outlook is the first global study to deliver:

- Beef consumption, production and trade forecasts
- Beef cattle healthcare market forecasts
- Profiles of the beef sector and beef cattle healthcare market in nine key countries: Argentina, Australia, Brazil, Canada, China, France, Russia, Spain and USA
- Profiles of 10 leading animal health companies' beef cattle healthcare businesses

Beef Outlook delivers unique insight, which has important implications for the global beef cattle healthcare market and the companies that compete in the sector.



## Methodology

Vetnosis combined its proprietary market simulation tool (STORM ) with extensive secondary research to generate unique insights and intelligence on the beef sector and beef cattle healthcare market.

We forecast beef consumption by country and simulated beef production, productivity and trade, which is a growing factor in balancing regional asymmetry between beef supply and demand.

Our beef cattle healthcare market model simulated two critical drivers: 1) the number of beef cattle with access to healthcare in each country and; 2) healthcare investment per animal.

## Deliverable

Beef Outlook is a 220-slide Report delivered as a written report in electronic PDF format and was published in December 2010.

## Section Headings

- Executive Summary
- Beef Sector Benchmarking
- Beef Products Supply & Demand
- Beef Cattle Disease Issues & Trends
- Beef Cattle Healthcare Market Forecasts
- Key Beef Cattle Healthcare Markets
- Beef Sector Opportunities, Challenges & Risks
- Competitor Analysis

## Who Will Benefit from Beef Outlook

Any company competing in the beef cattle healthcare market will benefit from Beef Outlook. If you are involved in beef cattle healthcare globally, regionally or within one of the nine countries we profile, you will find Beef Outlook and invaluable source of beef sector and beef cattle healthcare market data, analysis and comment.

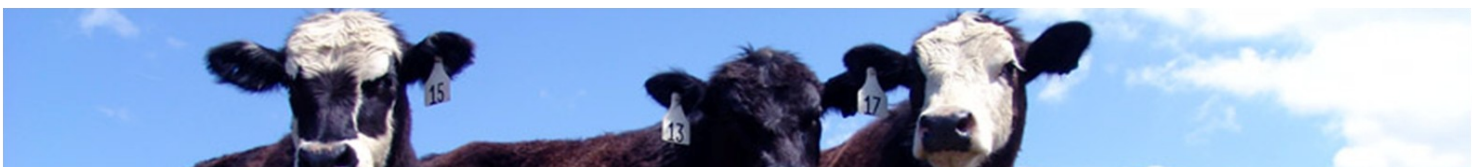
## For further information please contact:

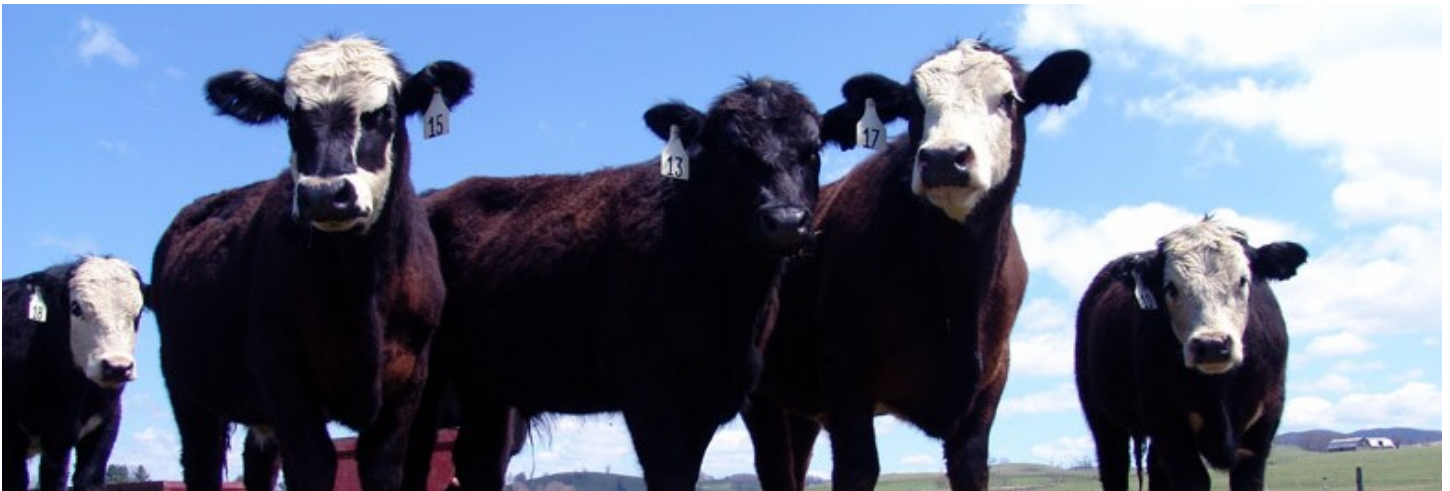
Tim Evans

Managing Director

T: +44 (0)131 718 0772

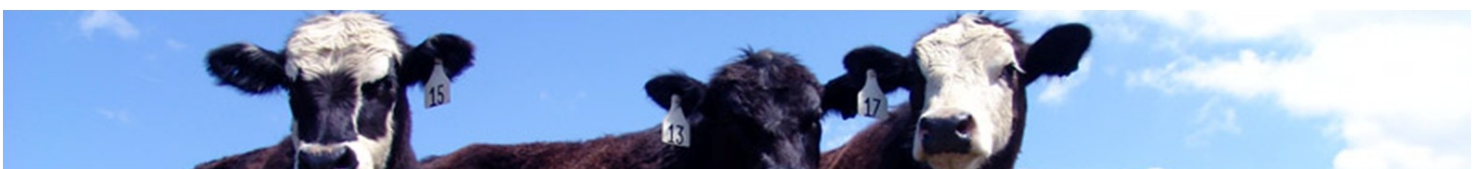
E: [tim.evans@vetnosis.com](mailto:tim.evans@vetnosis.com)



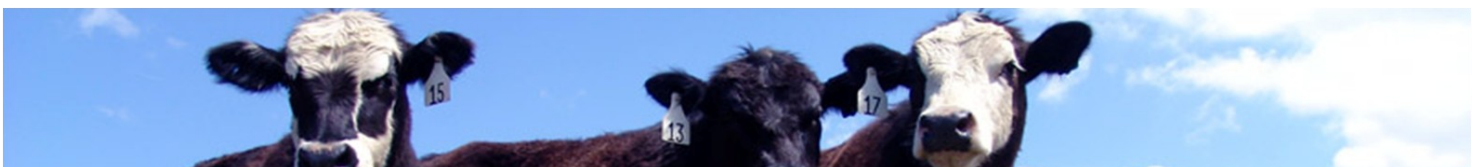


# Beef Outlook

	Slide
<b>Section 1: Contents</b>	3
Methodology	7
Executive Summary	8
<b>Section 2: Beef Sector Supply &amp; Demand</b>	16
Beef Sector Benchmarking	17
Beef Demand Sensitivity	23
Beef Consumption	25
Beef Trade	30
Beef Production	33
Beef Cattle Populations	38
<b>Section 3: Beef Cattle Disease Issues &amp; Trends</b>	42
Parastic disease	43
Respiratory disease	44
Foot and Mouth disease	45
Enteric disease	46
Reproductive disorders	47
Footrot/Lameness	48
Food safety/zoonoses	49
<b>Section 4: Beef Cattle Healthcare Market Forecasts</b>	50
Beef Cattle healthcare spend per medicalized treatment unit forecasts by region 2009-19	52
Beef Cattle medicalized treatment unit forecasts by region 2009-19	52
<b>Beef Cattle Healthcare Market by Region in Real Terms</b>	53
North America	54
Latin America	55
West Europe	56
East Europe	57
Far East	58
Rest of World	59



<b>Section 4: Beef Cattle Healthcare Market Forecasts (cont.)</b>	<b>Slide</b>
<b>Beef Cattle Healthcare Market by Product Category in Real Terms</b>	<b>60</b>
All Products	61
Medicinal Feed Additives	61
Biologicals	62
Parasiticides	62
Anti-infectives	63
Other Pharmaceuticals	63
<b>Beef Cattle Healthcare Market by Region in Nominal Terms</b>	<b>64</b>
North America	65
Latin America	66
West Europe	67
East Europe	68
Far East	69
Rest of World	70
<b>Beef Cattle Healthcare Market by Product Category in Nominal Terms</b>	<b>71</b>
All Products	72
Medicinal Feed Additives	72
Biologicals	73
Parasiticides	73
Anti-infectives	74
Other Pharmaceuticals	74
<b>Beef Cattle Healthcare Market by Region in FX Neutral Terms</b>	<b>75</b>
North America	76
Latin America	77
West Europe	78
East Europe	79
Far East	80
Rest of World	81
<b>Beef Cattle Healthcare Market by Product Category in FX Neutral Terms</b>	<b>82</b>
All Products	83
Medicinal Feed Additives	83
Biologicals	84
Parasiticides	84
Anti-infectives	85
Other Pharmaceuticals	85
<b>Section 5: Key Beef Cattle Healthcare Markets</b>	<b>86</b>
Argentina	87
Australia	95
Canada	103
France	111
China	119
France	127
Russia	135
Spain	143
USA	151



	Slide
<b>Section 6: Beef Sector Opportunities, Challenges and Risks</b>	<b>159</b>
<b>Beef Sector Opportunities</b>	<b>160</b>
<b>Beef Sector Challenges &amp; Risks</b>	<b>180</b>
<b>Section 7: Competitor Analysis</b>	<b>183</b>
Global beef cattle healthcare market competitive position of top 10 leading companies	<b>184</b>
<b>Competitor Analysis by Product Category</b>	<b>187</b>
Overview of global beef cattle healthcare market by category	<b>188</b>
Beef Cattle Medicinal Feed Additives competitive position	<b>189</b>
Beef Cattle Biologicals competitive position	<b>191</b>
Beef Cattle Anti-infectives competitive position	<b>193</b>
Beef Cattle Parasiticides competitive position	<b>195</b>
Beef Cattle Other Pharmaceuticals competitive position	<b>197</b>
<b>Competitor Profiles</b>	<b>199</b>
Pfizer	<b>200</b>
Intervet/Schering-Plough	<b>202</b>
Elanco	<b>204</b>
Merial	<b>206</b>
Bayer	<b>208</b>
Boehringer Ingelheim	<b>210</b>
Novartis	<b>212</b>
Vetoquinol	<b>214</b>
Alpharma	<b>216</b>
Virbac	<b>218</b>

**For further information please contact:**

Tim Evans

Managing Director

T: +44 (0)131 718 0772

E: [tim.evans@vetnosis.com](mailto:tim.evans@vetnosis.com)

