



Innovation Insight:

a unique global analysis and benchmarking study of veterinary pharmaceutical innovation since 2000

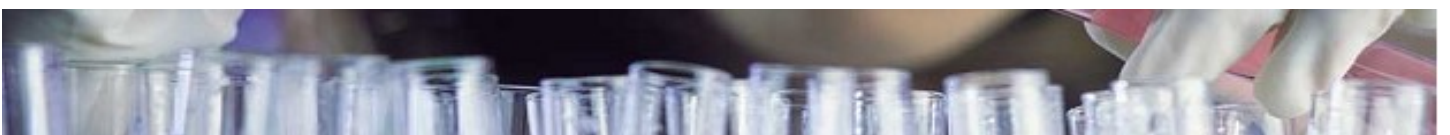
Innovation, a key driver of profitable growth and success, also represents one of the Animal Health industry's largest costs and greatest risks. In an increasingly challenging research and development environment, the costs and risks associated with veterinary pharmaceutical innovation are rising.

An in-depth, comprehensive analysis of recent pharmaceutical innovation is critical business intelligence for any innovation-led organization that wants to understand its position and benchmark itself against its peers.

Innovation Insight, the first independent global analysis and benchmarking study of veterinary pharmaceutical innovation, focuses on the current Top 10 companies' innovations since 2000.

Innovation Insight will deliver insight on:

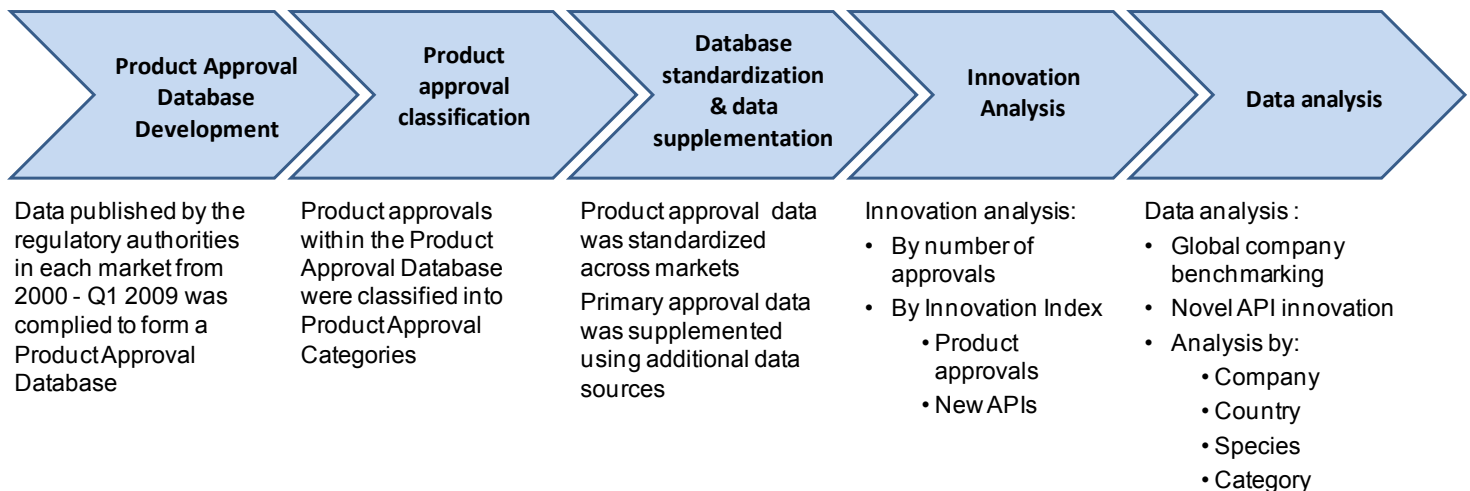
- **“Innovation Index”**
 - by Product Approvals
 - by New Active Pharmaceutical Ingredient (API)
 - for unique analysis and benchmarking by:
 - Company
 - Country
 - Species
 - Category
 - Year
- **Database of key innovations**
- **Key innovations**
 - New APIs
 - Novel presentations
- **Analysis of company innovation strategy / direction**
- **Origin and development of innovations**
 - In-house
 - In-licensed
 - Parent company
- **R&D investments by:**
 - Company
 - Total Industry



Scope

- Markets: US, Canada, UK, France, Germany, Italy, Spain, Australia
- Companies: Bayer; Boehringer Ingelheim; CEVA; Elanco; Intervet / Schering-Plough; Merial; Novartis; Pfizer / Fort Dodge; Vétoquinol, Virbac and all legacy companies acquired since 2000
- Timescale: since 2000
- Pharmaceutical innovations:
 - Parasiticides
 - Anti-infectives
 - Other pharmaceuticals
- Species coverage:
 - Companion animals: dogs, cats, horses, rabbits
 - Production animals: poultry, pigs, cattle, sheep, goats, deer, aquaculture sp.
- Innovation Index:
 - by Product Approvals
 - by New Active Pharmaceutical Ingredient (API)

Methodology

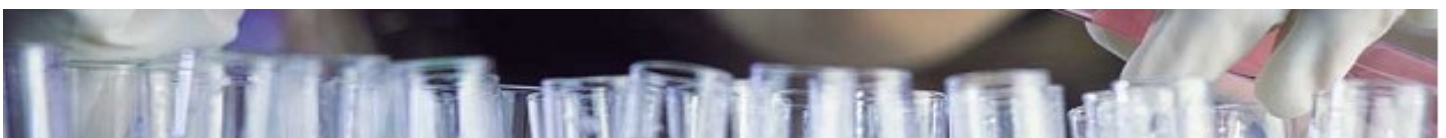


Deliverables

Innovation Insight will be delivered as a written report in electronic PDF format via vetnosis.com.

Timing

Innovation Insight will be published on 14th September 2009.



Contents

Scope

Methodology

Executive Summary

Innovation by Company

- Overview & benchmarking
- Bayer
- Boehringer Ingelheim
- CEVA
- Elanco
- Intervet/Schering-Plough
- Merial
- Novartis
- Pfizer / Fort Dodge
- Vétoquinol
- Virbac

Innovation by Country

- Overview & benchmarking
- Australia
- Canada
- France
- Germany
- Italy
- Spain
- UK
- US

Innovation by Species

- Overview & benchmarking
- Companion animal
- Production Animal

Innovation by Category

- Overview & benchmarking
- Parasiticides
- Anti-infectives
- Other Pharmaceuticals

Innovation of Novel APIs

Innovation Insights

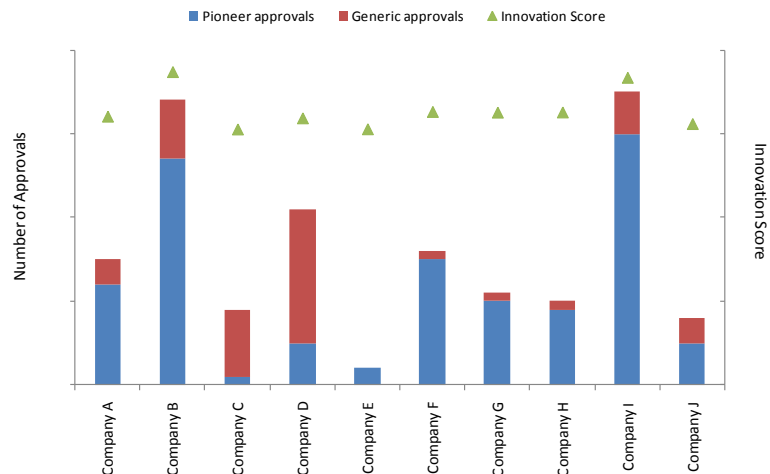
- Analysis of key trends in global innovation
- R&D investment analysis
- Analysis of company innovation strategy / direction

Appendix

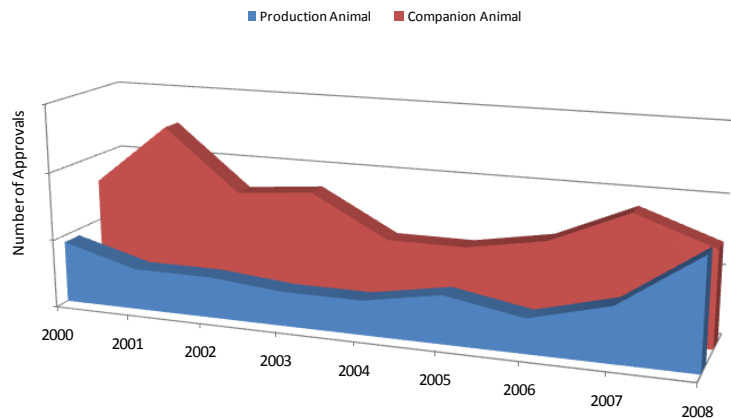
- Database of Key Innovations

Innovation Insight: Example Analyses

Veterinary Pharmaceutical approvals since 2000 in Market X



Veterinary Pharmaceutical approvals by species since 2000 in Market X



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