

# Multi-Client Study: Tier 4 Company Profiles (Ranked 21-50)

## *Prospectus*

*1<sup>st</sup> September 2015*

# Introduction, Methodology & Timelines

- Our next multi-client study profiles 30 Tier 4 animal health companies ranked 21-50 extending our company coverage beyond 90% of the industry
- Recent consolidation within Tier 1-3 companies (Ranked 1-20) has resulted in industry concentration of concern to regulators, potentially discouraging further intra-peer group M&A activity
- While acquisition remains a key growth strategy for Tier 1-3 companies the focus has shifted to Tier 4 companies, which are smaller but offer interesting geographic or other capabilities
- Consolidation within the Tier 4 peer group has accelerated in recent years and is expected to remain a key feature of the industry in the near future
- Vetnosis has analysed animal health companies ranked 21-50 using public domain (statutory filings, company publications, other media sources), nonpublic domain information, our proprietary veterinary Portfolio Analysis Tool (vPAT-Online) and in-house data repository dating back to 1986
- Our Tier 4 Company Profiles (Ranked 21-50) will be published in **October 2015**

# Vetnosis Tier 4 Animal Health Companies\* (Ranked 21-50)

*published in a **new** Multi-Client Study*

Headquartered	Number of Companies Profiled
North America	2
Latin America	2
West Europe	11
East Europe	2
Far East	13
Total	30

\*final list may change

# Tier 4 Company Profiles (Ranked 21-50): Table of Contents

- Executive Summary (2 pages)
  - Corporate Sales
    - Ownership
  - Animal Health Sales Evolution
  - Key Strategic Initiatives
  - Sales
    - Product Group
    - Region
    - Species
- Corporate Overview (1-2 pages)
  - Introduction
  - History
- Animal Health (4-6 pages)
  - Introduction
  - History
  - Infrastructure
  - Product Group Analysis
    - Medicinal Feed Additives
    - Biologicals
    - Anti-infectives
    - Parasiticides
    - Other Pharmaceuticals
  - Region Analysis
    - North America
    - Latin America
    - West Europe
    - East Europe
    - Far East
    - Rest of World
  - Species Analysis
    - Cattle
    - Sheep
    - Pigs
    - Poultry
    - Companion Animal/Other

For further information please contact:

Tim Evans  
Managing Director  
tim.evans@vetnosis.com

**Vetnosis Limited**

Abbey House  
83 Princes Street  
Edinburgh EH2 2ER  
United Kingdom

**Contact Details**

O: +44 (0)131 718 0770  
F: +44 (0)131 718 0771  
E: info@vetnosis.com

**Registered Office:** Abbey House, 83 Princes Street, Edinburgh, EH2 2ER, United Kingdom

**Registered Number:** SC335371 (Scotland)