Animal Health In Focus '23

Animal Health in Focus '23 is a unique source of data and analysis on the global animal health sector.

Animal Health in Focus '23 is designed for financial services and professional services firms, smaller animal health companies and other interested parties that do not require the extensive Content within our Animal Health Service subscription.

Animal Health in Focus '23 is a suite of key reports with Standard or Premium options.

Please read on for more information and a Table of Contents.





Animal Health In Focus '23

Animal Health in Focus '23 is a unique source of data and analysis on the global animal health sector.

Animal Health in Focus '23 is a suite of key reports: Review 2021, Executive's Guide and Income Statements with an option to add Outlook 2022, & Outlook 2022-26 (Premium).

Review 2022			
Delivers 2022 market data by:			
□ Product Group □ Region □ Species			
Published April (preliminary)/July (final) 2023			
Outlook 2023 (Premium only)	Outlook 2023-27 (Premium only)		
Delivers one-year market forecasts, including detailed drivers and assumptions by:	Delivers five-year market forecasts, including detailed drivers and assumptions by:		
□ Product Group□ Region□ Species	□ Product Group□ Region□ Species		
Published July 2023	Published July 2023		
Executive's Guide			
Delivers unique data and insight on the Top 10 animal health companies' performances in 2022 in reported and <i>pro forma</i> terms.			
 Corporate Sales Animal Health 10-year Sales History Key Strategic Initiatives Sales and Growth by Product Group in reported and pro forma terms Sales and Growth by Region in reported and pro forma terms Sales and Growth by Species in reported and pro forma terms 			
Published April 2023			
Income Statements			
Delivers comparable Profit & Loss Accounts for the Top 10 animal health companies 2020-22.			



Published April 2023

Vetnosis Limited

Edinburgh Quay 133 Fountainbridge Edinburgh EH3 9BA United Kingdom **Contact Details**

D: +44 (0)131 357 0345 E: info@vetnosis.com

Registered Office:

Edinburgh Quay, 133 Fountainbridge, Edinburgh, EH3 9BA, Uk

Registered Number:

SC335371 (Scotland)



Section	Description	Page
1	Executive Summary	1
1.1	Market Evolution	1
1.2	Growth by Product Group	1
1.3	Growth by Region	1
1.4	Growth by Species	1
2	Review 2022	2
2.1	Animal Health Market Review	2
2.2	Animal Health Market Evolution	2
2.3	Product Group Review	3
2.3.1	Sales Table	3
2.3.2	Market Share	3
2.3.3	Evolution	3
2.3.4	Key Factors	4
2.4	Region Review	6
2.4.1	Sales Table	6
2.4.2	Market Share	6
2.4.3	Evolution	6
2.4.4	Key Factors	7
2.5	Species Review	9
2.5.1	Sales Table	9
2.5.2	Market Share	9
2.5.3	Evolution	9
2.5.4	Key Factors	10
2.6	Macro Environment	12
2.6.1	Economic Environment	12
2.6.2	Inflation	14
2.6.3	Foreign Exchange Rates	15
2.6.4	Animal Diseases	16
2.6.5	Climatic/Natural Events	16
Appendix	US Dollar Average Year Exchange Rates	17



Section	Description	Page
1	Introduction	1
1.1	Summary	1
1.2	Company Reported Sales (incl. Non-AH)	2
1.3	Company Reported Sales (excl. Non-AH)	3
1.4	Company Proforma Sales (excl. Non-AH)	4
1.5	Growth	5
1.6	Reported Sales by Product Group	6
1.7	Reported Sales by Region	7
1.8	Reported Sales by Species	8
1.9	Proforma Sales by Product Group	9
1.10	Proforma Sales by Region	10
1.11	Proforma Sales by Species	11
1.12	Leading Company Transactions	12
1.13	Currency Exchange Rates	13
2	Companies	14
	Boehringer Ingelheim	14
	Ceva	16
	Dechra	18
	Elanco	21
	HIPRA	24
	Huvepharma	26
	Merck	28
	Phibro	31
	Vétoquinol	33
	Virbac	36
	Zoetis	39



Section	Description	Page
1	Introduction	1
1.1	Methodology	1
1.2	Exchange Rates	1
1.3	Summary	2
2	Companies	3
	Boehringer Ingelheim	3
	Ceva	4
	Dechra	5
	Elanco	6
	HIPRA	7
	Huvepharma	8
	Merck	9
	Phibro	10
	Vétoquinol	11
	Virbac	12
	Zoetis	13



Section	Description	Page
1	Executive Summary	1
1.1	Market CAGR 2022/23F	1
1.2	Product Group CAGR 2022/23F	1
1.3	Region CAGR 2022/23F	1
1.4	Species CAGR 2022/23F	1
2	Outlook 2023	2
2.1	Animal Health Market Outlook	2
2.2	Animal Health Market Evolution	2
2.3	Product Group Outlook	3
2.3.1	Sales Table	3
2.3.2	Market Share	3
2.3.3	Evolution	3
2.3.4	Medicinal Feed Additives	4
2.3.5	Biologicals	6
2.3.6	Anti-infectives	8
2.3.7	Parasiticides	10
2.3.8	Other Pharmaceuticals	12
2.4	Region Outlook	14
2.4.1	Sales Table	14
2.4.2	Market Share	14
2.4.3	Evolution	14
2.4.4	North America	15
2.4.5	Latin America	17
2.4.6	West Europe	19
2.4.7	East Europe	21
2.4.8	Far East	23
2.4.9	Rest of World	25
2.5	Species Outlook	27
2.5.1	Sales Table	27
2.5.2	Market Share	27
2.5.3	Evolution	27
2.5.4 2.5.5	Cattle Sheep	28 30
2.5.6	·	32
2.5.7	Pigs Poultry	34
2.5.8	Companion Animal/Other	36
2.5.6	Macro Environment	38
2.6.1	Economic Environment	38
2.6.2	Inflation	39
2.6.3	Foreign Exchange Rates	40
2.6.4	Animal Protein Consumption	41
2.6.5	Animal Protein Production	41
2.6.6	Animal Protein Production Input Costs	42
2.6.7	Animal Protein Trade	42
Appendix	US Dollar Average Year Exchange Rate Forecasts	43



Outlook: 2022-27F

Section	Description	Page
1	Executive Summary	1
1.1	Market Evolution 2022-27F	1
1.2	Product Group 2022-27F	1
1.3	Region 2022-27F	1
1.4	Species 2022-27F	1
2	Outlook: 2022-27F	2
2.1	Animal Health Market Outlook	2
2.2	Animal Health Market Evolution	2
2.3	Key Factors 2022-27F	2
2.4	Product Group Outlook	3
2.4.1	Sales Table	3
2.4.2	Nominal, FXN and Real Forecast Growth	3
2.4.3	Evolution	3
2.4.4	Medicinal Feed Additives	4
2.4.5	Biologicals	5
2.4.6	Anti-infectives	6
2.4.7	Parasiticides	7
2.4.8	Other Pharmaceuticals	8
2.5	Region Outlook	g
2.5.1	Sales Table	g
2.5.2	Nominal, FXN and Real Forecast Growth	g
2.5.3	Evolution	g
2.5.4	North America	10
2.5.5	Latin America	11
2.5.6	West Europe	12
2.5.7	East Europe	13
2.5.8	Far East	14
2.5.9	Rest of World	15
2.6	Species Outlook	16
2.6.1	Sales Table	16
2.6.2	Nominal, FXN and Real Forecast Growth	16
2.6.3	Evolution	16
2.6.4	Cattle	17
2.6.5	Sheep	18
2.6.6	Pigs	19
2.6.7	Poultry	20
268	Companion Animal/Other	21

