

INTRODUCTION	XXII
STUDY GOALS AND OBJECTIVES.....	XXII
REASONS FOR DOING THE STUDY	XXII
INTENDED AUDIENCE.....	XXIII
SCOPE OF REPORT	XXIII
INFORMATION SOURCES.....	XXIII
RELATED BCC RESEARCH REPORT.....	XXIII
ANALYST CREDENTIALS.....	XXIV
BCC RESEARCH ONLINE SERVICES	XXIV
DISCLAIMER	XXIV
 SUMMARY.....	 XXV
<i>SUMMARY TABLE TOTAL ANIMAL THERAPEUTIC AND DIAGNOSTIC MARKET BY MAJOR SEGMENT, THROUGH 2013 (\$ MILLIONS)</i>	 XXV
<i>SUMMARY FIGURE TOTAL ANIMAL THERAPEUTIC AND DIAGNOSTIC MARKET BY MAJOR SEGMENT, 2006-2013 (\$ MILLIONS)</i>	 XXVI
LEADING PRODUCTS AND MANUFACTURERS	XXVI
 INDUSTRY OVERVIEW.....	 1
ANIMAL ANATOMY AND PHYSIOLOGY	1
ANIMAL ANATOMY AND PHYSIOLOGY (CONTINUED).....	2
REPRODUCTIVE SYSTEM	3
<i>TABLE 1 GESTATION PERIODS OF SELECT COMMON SPECIES</i>	4
AVIAN ANATOMY	4
Avian Anatomy (Continued)	5
Avian Anatomy (Continued)	6
ANIMAL POPULATIONS.....	7
COMPANION ANIMALS	7
<i>TABLE 2 ESTIMATED POPULATIONS OF COMPANION ANIMALS FOR 2007, UNITED STATES (THOUSANDS)</i>	 7
FARM ANIMALS	7
<i>TABLE 3 REPORTED 2005 AND ESTIMATED 2006* POPULATION OF FARM ANIMALS, UNITED STATES (MILLIONS)</i>	 8
<i>TABLE 4 LIFESPAN OF COMMON PET AVIAN SPECIES</i>	8
<i>TABLE 4 (CONTINUED)</i>	9
COMPANION ANIMAL DISEASES.....	9
INFECTIOUS DISEASES	9
Viruses	9
Adenovirus	10
Avian Influenza	10
Coronavirus.....	10
Distemper.....	11

Eastern Equine Encephalitis	11
Equine Viral Arteritis	12
Feline Calicivirus and Feline Herpes Virus	12
Feline Immunosuppressive Virus	12
Feline Infectious Peritonitis Virus.....	13
Feline Leukemia Virus	14
Infectious Hepatitis	14
Internal Papillomatosis of Parrots.....	14
Newcastle Disease	14
Pacheco's Disease.....	15
Parainfluenza Virus	16
Paramyxoviruses	16
Parvovirus.....	17
Polyomavirus	17
Poxviruses	18
Psittacine Beak and Feather Disease.....	18
Rabies.....	19
Reovirus	19
West Nile Virus.....	20
Bacteria.....	20
Black Tongue	20
Bordetella.....	20
Brucellosis.....	21
Campylobacteriosis.....	21
Chlamydia.....	21
Leptospirosis	22
Lyme Disease.....	22
Q-Fever.....	23
Respiratory Mycoplasmosis.....	24
Spirochaetaceae	24
Tetanus	24
ALLERGY AND INFLAMMATORY DISEASES.....	25
Allergies	25
Arthritis	25
Asthma	26
Dermatitis	26
Eosinophilic Granuloma Complex	26
Gout.....	27
Inflammatory Bowel Disease	27
METABOLIC DISEASES	28
Cushing's Syndrome	28
Diabetes Mellitus.....	29
Thyroid Disease	30
Pancreatitis.....	30

Metabolic Bone Disease in Birds	31
PARASITIC DISEASES.....	31
Ear Mites	31
Fleas	32
Heartworm	33
Hemobartonellosis	34
Feline Scabies	34
Lice	34
Sarcoptic Mange	35
Worms	35
Urinary Diseases	36
Glomerulonephritis.....	36
Feline Lower Urinary Tract Disease	36
Other Diseases.....	37
Equine Protozoal Myelitis	38
Leptospirosis and Equine Recurrent Uveitis	38
Neoplastic Disease.....	38
Neoplastic Disease (Continued)	39
Heart Disease	40
FOOD ANIMAL DISEASES.....	40
INFECTIOUS DISEASES	40
Viruses and Prions	40
Avian Pneumovirus	41
Bovine Spongiform Encephalopathy	42
Bovine Viral Diarrhea	42
Bovine Viral Diarrhea (Continued).....	43
Classical Swine Fever.....	44
Foot and Mouth Disease	44
Furunculosis.....	44
Infectious Pancreatic Necrosis	44
Marek's Disease	45
Pathogenic Avian Influenza	45
Q-Fever.....	45
Vesicular Stomatitis	46
Bacteria	46
Anthrax	46
Blackleg.....	47
Conjunctivitis	47
Tetanus	47
OTHER DISEASES OF FOOD ANIMALS	48
Heartwater.....	48
Pneumonia	48
Texas Cattle Fever.....	48
ZOONOTIC DISEASES.....	49

ZOONOTIC DISEASES (CONTINUED)	50
<i>TABLE 5 COMMON EXAMPLES OF ZOONOTIC DISEASES</i>	51
ISSUES AFFECTING THE MARKET	52
ANTIBIOTIC USE AND RESISTANCE IN FOOD ANIMALS	52
Therapeutic Use.....	52
<i>TABLE 6 APPROVED ANTIBIOTICS AND SULFONAMIDES USED IN</i> <i>DIARY AND BEEF CATTLE PRODUCTION IN U.S.</i>	53
<i>TABLE 7 APPROVED ANTIBIOTICS USED IN HOG PRODUCTION IN</i> <i>U.S.</i>	54
<i>TABLE 8 APPROVED ANTIBIOTICS USED IN SHEEP PRODUCTION</i> <i>IN U.S.</i>	54
<i>TABLE 9 APPROVED ANTIBIOTICS USED IN CHICKEN AND</i> <i>TURKEY PRODUCTION IN U.S.</i>	55
Resistance	55
Human Side-Effects	56
Microbial Ecology	57
PROBIOTICS	57
LEGAL AND REGULATORY ISSUES	57
Minimally and Highly Regulated Products	57
Animal Drug User Fee Act of 2003	57
ANIMAL HEALTH INSURANCE.....	58
Animal Health Insurance (Continued).....	59
SPRAY-ON DRUGS	60
BIOTECHNOLOGY	60
ANIMAL OBESITY	61
Causes	62
Weight Reduction	62
NEW TRENDS IN AGING DISEASES.....	63
COMPANION PET OWNERSHIP	64
DEMAND IN THE VETERINARY SERVICE INDUSTRY	65
<i>TABLE 10 ESTIMATED NUMBER OF VETERINARIAN PRACTICES IN</i> <i>THE UNITED STATES BY TYPE OF PRACTICE, 2007</i>	66
LIFE CYCLE APPROACH	67
INTERNATIONAL ISSUES AND TRENDS	68
<i>TABLE 11 ESTIMATED POPULATIONS OF COMPANION ANIMALS</i> <i>FOR 2005, JAPAN AND AUSTRALIA (MILLIONS)</i>	69
<i>TABLE 12 ESTIMATED POPULATIONS OF FARM ANIMALS FOR</i> <i>2004, BRAZIL (MILLIONS)</i>	69
ANIMAL VACCINES	70
OVERVIEW.....	70
PRODUCT DESCRIPTION.....	70
ACTIVE IMMUNITY	70
PASSIVE IMMUNITY	71
OTHER TYPES	71

TARGET SPECIES AND PROVIDERS	72
<i>TABLE 13 VACCINES BY TARGET SPECIES AND PROVIDERS</i>	72
<i>TABLE 13 (CONTINUED)</i>	73
<i>TABLE 13 (CONTINUED)</i>	74
<i>TABLE 13 (CONTINUED)</i>	75
<i>TABLE 13 (CONTINUED)</i>	76
<i>TABLE 13 (CONTINUED)</i>	77
COMPANION ANIMAL VACCINES	77
BOEHRINGER INGELHEIM	77
FORT DODGE.....	78
HESKA	78
MERIAL.....	78
NOVARTIS	79
SCHERING-PLOUGH	79
FOOD ANIMAL VACCINES	80
ALPHARMA	80
BAYER.....	80
BOEHRINGER INGELHEIM	80
FORT DODGE.....	81
INTERVET	82
MERIAL.....	82
NOVARTIS	82
PFIZER	83
SCHERING-PLOUGH	83
Poultry.....	83
Poultry (Continued)	84
Poultry (Continued)	85
Poultry (Continued)	86
Cattle and Sheep	87
Swine.....	88
Rabies.....	89
Fish.....	89
MARKET ANALYSIS AND CONCLUSIONS	90
MARKETS BY USE OR APPLICATION	90
<i>TABLE 14 GLOBAL MARKET ANALYSIS FOR ANIMAL VACCINES</i> <i>BY USE, THROUGH 2013 (\$ MILLIONS)</i>	90
<i>FIGURE 1 GLOBAL MARKET ANALYSIS FOR ANIMAL VACCINES BY</i> <i>USE, 2006-2013 (\$ MILLIONS)</i>	91
VACCINE MARKET BY TYPE	91
<i>TABLE 15 ESTIMATED GLOBAL REVENUES FOR ANIMAL</i> <i>VACCINES BY TYPE, THROUGH 2013 (\$ MILLIONS)</i>	92
<i>FIGURE 2 ESTIMATED GLOBAL REVENUES FOR ANIMAL</i> <i>VACCINES BY TYPE, 2006-2013 (\$ MILLIONS)</i>	92
MARKETS BY GEOGRAPHICAL REGION.....	93

<i>TABLE 16 DISTRIBUTION OF REVENUES FOR ANIMAL VACCINES BY WORLD REGION, 2007 (%/\$ MILLIONS)</i>	93
<i>FIGURE 3 DISTRIBUTION OF REVENUES FOR ANIMAL VACCINES BY WORLD REGION, 2007 (%)</i>	93
COMPETITIVE SUMMARY.....	94
Intervet	94
Schering-Plough.....	94
Fort Dodge	94
Other Companies.....	94
<i>TABLE 17 COMPETITIVE SUMMARY FOR ANIMAL VACCINES BY COMPETITOR REVENUE, 2007 (%/\$ MILLIONS)</i>	95
<i>FIGURE 4 COMPETITIVE SUMMARY FOR ANIMAL VACCINES BY COMPETITOR REVENUE, 2007 (%)</i>	95
ANIMAL PHARMACEUTICAL PRODUCTS	96
OVERVIEW.....	96
PRODUCT DESCRIPTION.....	96
ALLERGY AND RESPIRATORY DRUGS.....	96
TARGET SPECIES AND PROVIDERS	97
<i>TABLE 18 ALLERGY AND RESPIRATORY DRUGS BY TARGET SPECIES AND PROVIDERS</i>	97
ANTI-INFECTIVES AND ANTIFUNGALS	97
Bayer	97
Boehringer Ingelheim.....	98
Elanco.....	98
Esteve.....	98
Fort Dodge	98
ECO	99
Novartis.....	99
Pfizer	100
Schering-Plough.....	101
Target Species and Providers.....	102
<i>TABLE 19 ANTI-INFECTIVES BY TARGET SPECIES AND PROVIDERS</i>	102
<i>TABLE 19 (CONTINUED)</i>	103
<i>TABLE 19 (CONTINUED)</i>	104
ANTI-INFLAMMATORIES AND ANALGESICS	104
Bayer	104
Boehringer Ingelheim.....	104
Elanco.....	105
Esteve.....	105
Fort Dodge	105
Bioniche.....	105
Novartis.....	106
Pfizer	106

Schering-Plough.....	106
Luitpold Animal Health	106
Target Species and Providers.....	107
<i>TABLE 20 ANTI-INFLAMMATORIES AND ANALGESICS BY TARGET SPECIES AND PROVIDERS.....</i>	<i>107</i>
METABOLIC DRUGS.....	108
Target Species and Providers.....	108
<i>TABLE 21 METABOLIC DRUGS BY TARGET SPECIES AND PROVIDERS</i>	<i>108</i>
PARASITICIDES	108
Bayer	108
Boehringer-Ingelheim	109
Esteve.....	109
Fort Dodge	110
IDEXX.....	110
ECO.....	110
Merial.....	111
Novartis.....	112
Pfizer	113
Schering-Plough.....	113
Virbac	114
Target Species and Providers.....	115
<i>TABLE 22 PARASITICIDES BY TARGET SPECIES AND PROVIDERS.....</i>	<i>115</i>
<i>TABLE 22 (CONTINUED).....</i>	<i>116</i>
OTHER PHARMACEUTICALS	117
Esteve.....	117
Merial.....	117
Schering-Plough.....	117
Dental.....	118
Virbac	118
Biopure.....	118
Novartis.....	118
Target Species and Providers.....	119
<i>TABLE 23 OTHER PHARMACEUTICALS BY TARGET SPECIES AND PROVIDERS</i>	<i>119</i>
MARKET ANALYSIS AND CONCLUSIONS	119
MARKETS BY USE OR APPLICATION	119
Allergy and Respiratory Market	119
<i>TABLE 24 GLOBAL MARKET ANALYSIS FOR ALLERGY AND RESPIRATORY PRODUCTS BY USE, THROUGH 2013 (\$ MILLIONS).....</i>	<i>120</i>
<i>FIGURE 5 GLOBAL MARKET ANALYSIS FOR ALLERGY AND RESPIRATORY PRODUCTS BY USE, 2006-2013 (\$ MILLIONS).....</i>	<i>120</i>
Anti-Infective Market.....	121

<i>TABLE 25 GLOBAL MARKET ANALYSIS FOR ANTI-INFECTIVES BY USE, THROUGH 2013 (\$ MILLIONS)</i>	121
<i>FIGURE 6 GLOBAL MARKET ANALYSIS FOR ANTI-INFECTIVES BY USE, 2006-2013 (\$ MILLIONS)</i>	122
Anti-Inflammatory Market	122
<i>TABLE 26 GLOBAL MARKET ANALYSIS FOR ANTI-INFLAMMATORIES AND ANALGESICS BY USE, THROUGH 2013 (\$ MILLIONS)</i>	123
<i>FIGURE 7 GLOBAL MARKET ANALYSIS FOR ANTI-INFLAMMATORIES AND ANALGESICS BY USE, 2006-2013 (\$ MILLIONS)</i>	123
Metabolic Drug Market	123
<i>TABLE 27 GLOBAL MARKET ANALYSIS FOR METABOLIC DRUGS BY USE, THROUGH 2013 (\$ MILLIONS)</i>	124
<i>FIGURE 8 GLOBAL MARKET ANALYSIS FOR METABOLIC DRUGS BY USE, 2006-2013 (\$ MILLIONS)</i>	124
Parasiticide Market	125
<i>TABLE 28 GLOBAL MARKET ANALYSIS FOR PARASITICIDES BY USE, THROUGH 2013 (\$ MILLIONS)</i>	125
<i>FIGURE 9 GLOBAL MARKET ANALYSIS FOR PARASITICIDES BY USE, 2006-2013 (\$ MILLIONS)</i>	126
Other Pharmaceuticals.....	126
<i>TABLE 29 GLOBAL MARKET ANALYSIS FOR OTHER PHARMACEUTICALS BY USE, THROUGH 2013 (\$ MILLIONS)</i>	127
<i>FIGURE 10 GLOBAL MARKET ANALYSIS FOR OTHER PHARMACEUTICALS BY USE, 2006-2013 (\$ MILLIONS)</i>	127
TOTAL PHARMACEUTICALS	127
<i>TABLE 30 GLOBAL MARKET ANALYSIS FOR ANIMAL PHARMACEUTICAL PRODUCTS BY USE, THROUGH 2013 (\$ MILLIONS)</i>	128
<i>FIGURE 11 GLOBAL MARKET ANALYSIS FOR ANIMAL PHARMACEUTICAL PRODUCTS BY USE, 2006-2013 (\$ MILLIONS)</i>	128
Summary—Pharmaceutical Markets	129
<i>TABLE 31 GLOBAL MARKET ANALYSIS FOR ANIMAL PHARMACEUTICAL PRODUCTS BY TYPE, THROUGH 2013 (\$ MILLIONS)</i>	130
<i>FIGURE 12 GLOBAL MARKET ANALYSIS FOR ANIMAL PHARMACEUTICAL PRODUCTS BY TYPE, 2006-2013 (\$ MILLIONS)</i>	130
MARKETS BY GEOGRAPHICAL REGION.....	131
<i>TABLE 32 DISTRIBUTION OF REVENUES FOR ANIMAL PHARMACEUTICALS BY WORLD REGION, 2007 (%)</i>	131
<i>FIGURE 13 DISTRIBUTION OF REVENUES FOR ANIMAL PHARMACEUTICALS BY WORLD REGION, 2007 (%)</i>	132

COMPETITIVE SUMMARY.....	132
<i>TABLE 33 COMPETITIVE SUMMARY FOR ANIMAL PHARMACEUTICAL PRODUCTS BY COMPETITOR REVENUES, 2007 (%/\$ MILLIONS).....</i>	<i>133</i>
<i>FIGURE 14 COMPETITIVE SUMMARY FOR ANIMAL PHARMACEUTICAL PRODUCTS BY COMPETITOR REVENUES, 2007 (%).....</i>	<i>134</i>
ANIMAL FEED ADDITIVES.....	135
OVERVIEW.....	135
PRODUCT DESCRIPTION.....	136
AMINO ACIDS.....	136
TARGET SPECIES AND PROVIDERS.....	137
<i>TABLE 34 AMINO ACIDS BY TARGET SPECIES AND PROVIDERS.....</i>	<i>137</i>
MEDICINAL ADDITIVES.....	137
Alpharma.....	138
Elanco.....	138
ECO.....	138
Novartis.....	139
Merial.....	139
Pfizer.....	139
Schering-Plough.....	139
Boehringer Ingelheim.....	140
Target Species and Providers.....	140
<i>TABLE 35 MEDICINAL ADDITIVES BY TARGET SPECIES AND PROVIDERS.....</i>	<i>140</i>
NUTRITIONAL SUPPLEMENTS.....	140
NUTRITIONAL SUPPLEMENTS (CONTINUED).....	141
TARGET SPECIES AND PROVIDERS.....	142
<i>TABLE 36 NUTRITIONAL SUPPLEMENTS BY TARGET SPECIES AND PROVIDERS.....</i>	<i>142</i>
VITAMINS AND MINERALS.....	143
BEAPHAR.....	143
ESTEVE.....	143
ADISSEO.....	144
MOSAIC (FORMERLY IMC GLOBAL).....	144
DSM NUTRITIONAL.....	144
SCHERING-PLOUGH.....	144
CHURCH & DWIGHT CO.....	145
VIRBAC.....	145
TARGET SPECIES AND PROVIDERS.....	145
<i>TABLE 37 VITAMINS AND MINERALS BY TARGET SPECIES AND PROVIDERS.....</i>	<i>145</i>
<i>TABLE 37 (CONTINUED).....</i>	<i>146</i>
MARKET ANALYSIS AND CONCLUSION.....	146

MARKETS BY USE OR APPLICATION	146
Amino Acid Market.....	146
TABLE 38 GLOBAL MARKET ANALYSIS FOR AMINO ACIDS BY USE, THROUGH 2013 (\$ MILLIONS).....	146
FIGURE 15 MARKET ANALYSIS FOR AMINO ACIDS BY USE, 2006- 2013 (\$ MILLIONS).....	147
Medicinal Feed Additive Market	147
TABLE 39 GLOBAL MARKET ANALYSIS FOR MEDICINAL FEED ADDITIVES BY USE, THROUGH 2013 (\$ MILLIONS).....	148
FIGURE 16 GLOBAL MARKET ANALYSIS FOR MEDICINAL FEED ADDITIVES BY USE, 2006-2013 (\$ MILLIONS).....	148
Nutritional Supplement Market	148
TABLE 40 GLOBAL MARKET ANALYSIS FOR NUTRITIONAL SUPPLEMENTS BY USE, THROUGH 2013 (\$ MILLIONS).....	149
FIGURE 17 GLOBAL MARKET ANALYSIS FOR NUTRITIONAL SUPPLEMENTS BY USE, 2006-2013 (\$ MILLIONS)	149
Vitamin and Mineral Market.....	150
TABLE 41 GLOBAL MARKET ANALYSIS FOR VITAMINS AND MINERALS BY USE, THROUGH 2013 (\$ MILLIONS)	150
FIGURE 18 GLOBAL MARKET ANALYSIS FOR VITAMINS AND MINERALS BY USE, 2006-2013 (\$ MILLIONS).....	151
Total Feed Additive Market	151
TABLE 42 GLOBAL MARKET ANALYSIS FOR ANIMAL FEED ADDITIVES BY USE, THROUGH 2013 (\$ MILLIONS).....	151
FIGURE 19 GLOBAL MARKET ANALYSIS FOR ANIMAL FEED ADDITIVES BY USE, 2006-2013 (\$ MILLIONS).....	152
FEED ADDITIVE MARKET BY TYPE.....	152
TABLE 43 GLOBAL MARKET ANALYSIS FOR ANIMAL FEED ADDITIVE PRODUCTS BY TYPE, THROUGH 2013 (\$ MILLIONS)	153
FIGURE 20 GLOBAL MARKET ANALYSIS FOR ANIMAL FEED ADDITIVE PRODUCTS BY TYPE, 2006-2013 (\$ MILLIONS).....	153
MARKETS BY GEOGRAPHICAL REGION.....	154
TABLE 44 DISTRIBUTION OF REVENUES FOR ANIMAL FEED ADDITIVES BY WORLD REGION, 2007 (%/\$ MILLIONS).....	154
FIGURE 21 DISTRIBUTION OF REVENUES FOR ANIMAL FEED ADDITIVES BY WORLD REGION, 2007 (%)	154
COMPETITIVE SUMMARY.....	155
TABLE 45 COMPETITIVE SUMMARY FOR ANIMAL FEED ADDITIVES BY COMPETITOR REVENUES, 2007 (%/\$ MILLIONS)	155
FIGURE 22 COMPETITIVE SUMMARY FOR ANIMAL FEED ADDITIVES BY COMPETITOR REVENUES, 2007 (%).....	156
ANIMAL DIAGNOSTICS.....	157
OVERVIEW.....	157
PRODUCT DESCRIPTION	157

HESKA	157
IDEXX.....	158
SNAP	158
PETCHEK.....	158
DIASYSTEMS.....	158
HERDCHEK	159
FLOCKCHEK	160
Guildhay and Svanovir.....	161
SCHERING-PLOUGH	161
SYNBIOTICS	161
TARGET SPECIES AND PROVIDERS	162
<i>TABLE 46 DIAGNOSTICS BY TARGET SPECIES AND PROVIDERS.....</i>	<i>162</i>
<i>TABLE 46 (CONTINUED).....</i>	<i>163</i>
MARKET ANALYSIS AND CONCLUSION	164
MARKETS BY USE OR APPLICATION	164
<i>TABLE 47 GLOBAL MARKET ANALYSIS FOR ANIMAL</i> <i>DIAGNOSTICS PRODUCTS BY USE, THROUGH 2013</i> <i>(\$ MILLIONS).....</i>	<i>164</i>
<i>FIGURE 23 GLOBAL MARKET ANALYSIS FOR ANIMAL</i> <i>DIAGNOSTICS BY USE, 2006-2013 (\$ MILLIONS).....</i>	<i>165</i>
DIAGNOSTIC MARKET BY TYPE.....	165
<i>TABLE 48 ESTIMATED REVENUES FOR ANIMAL DIAGNOSTICS BY</i> <i>TYPE, THROUGH 2013 (\$ MILLIONS).....</i>	<i>166</i>
<i>FIGURE 24 ESTIMATED REVENUES FOR ANIMAL DIAGNOSTICS</i> <i>BY TYPE, 2006-2013 (\$ MILLIONS).....</i>	<i>166</i>
MARKETS BY GEOGRAPHICAL REGION.....	167
<i>TABLE 49 DISTRIBUTION OF REVENUES FOR ANIMAL</i> <i>DIAGNOSTICS BY WORLD REGION, 2007 (%/\$ MILLIONS)</i>	<i>167</i>
<i>FIGURE 25 DISTRIBUTION OF REVENUES FOR ANIMAL</i> <i>DIAGNOSTICS BY WORLD REGION, 2007 (%).....</i>	<i>167</i>
COMPETITIVE SUMMARY.....	168
<i>TABLE 50 COMPETITIVE SUMMARY FOR ANIMAL DIAGNOSTICS</i> <i>BY COMPETITOR REVENUES, 2007 (%/\$ MILLIONS)</i>	<i>168</i>
<i>FIGURE 26 COMPETITIVE SUMMARY FOR ANIMAL DIAGNOSTICS</i> <i>BY COMPETITOR REVENUES, 2007 (%).....</i>	<i>169</i>
MARKET SUMMARY	170
TOTAL ANIMAL THERAPEUTICS AND DIAGNOSTIC MARKET ANALYSIS	170
<i>TABLE 51 GLOBAL MARKET ANALYSIS FOR ANIMAL</i> <i>THERAPEUTICS AND DIAGNOSTICS BY PRODUCT SEGMENT,</i> <i>THROUGH 2013 (\$ MILLIONS).....</i>	<i>170</i>
<i>FIGURE 27 GLOBAL MARKET ANALYSIS FOR ANIMAL</i> <i>THERAPEUTICS AND DIAGNOSTICS BY TYPE, THROUGH 2013</i> <i>(\$ MILLIONS).....</i>	<i>171</i>

<i>TABLE 52 GLOBAL MARKET ANALYSIS FOR ANIMAL THERAPEUTICS AND DIAGNOSTICS BY ANIMAL TYPE, THROUGH 2013 (\$ MILLIONS)</i>	172
<i>FIGURE 28 GLOBAL MARKET ANALYSIS FOR ANIMAL THERAPEUTICS AND DIAGNOSTICS BY ANIMAL TYPE, 2006-2013 (\$ MILLIONS)</i>	172
INDUSTRY PARTICIPANTS BY TYPE.....	173
<i>TABLE 53 MAJOR INDUSTRY PARTICIPANTS BY ANIMAL PRODUCT TYPE</i>	173
TOTAL COMPETITIVE ANALYSIS.....	174
<i>TABLE 54 TOTAL COMPETITIVE MARKET SHARE FOR ANIMAL THERAPEUTICS AND DIAGNOSTICS BY MANUFACTURER REVENUES, 2007 (%/\$ MILLIONS)</i>	175
<i>FIGURE 29 TOTAL COMPETITIVE SUMMARY FOR ANIMAL THERAPEUTICS AND DIAGNOSTICS BY COMPETITOR REVENUES, 2007 (%)</i>	175
COMPANY PROFILES.....	176
ADISSEO FRANCE S.A.S.....	176
ALPHARMA, INC.....	176
BASF ANIMAL NUTRITION (BASF AG).....	177
BAYER ANIMAL HEALTH.....	177
BOEHRINGER INGELHEIM CORP.....	178
DSM NUTRITIONAL PRODUCTS.....	179
ELANCO ANIMAL HEALTH.....	179
EVONIK INDUSTRIES.....	180
FORT DODGE ANIMAL HEALTH.....	181
HESKA CORP.....	181
IDEXX LABORATORIES, INC.....	182
INTERVET INTERNATIONAL BV.....	182
IVX ANIMAL HEALTH, INC.....	183
MERIAL ANIMAL HEALTH, LTD.....	184
MOSAIC.....	185
NOVARTIS ANIMAL HEALTH, INC.....	185
NOVARTIS AG.....	185
NOVUS INTERNATIONAL, INC.....	186
PFIZER ANIMAL HEALTH.....	187
SCHERING-PLOUGH ANIMAL HEALTH.....	188
SCHERING-PLOUGH CORP.....	188
VIRBAC SA.....	188
VIRBAC SA (CONTINUED).....	189
APPENDIX I: LEADING MANUFACTURES AND AFFILIATED COMPANIES.....	190
ACRUX, LTD.....	190

ADISSEO FRANCE S.A.S.	190
AJINOMOTO CO., LTD.	190
AKZO NOBEL N.V.	190
ALPHARMA, INC.	191
BASF AG	191
BASF ANIMAL NUTRITION.....	191
BAYER AG	191
BAYER HEALTHCARE, LLC	191
BEAPHAR B.V.	191
BEN VENUE LABORATORIES, INC.	192
BOEHRINGER INGELHEIM CHEMICALS, INC.	192
BOEHRINGER INGELHEIM CORP.	192
BOEHRINGER INGELHEIM GMBH	192
BOEHRINGER INGELHEIM VETMEDICA, INC.	192
DSM.....	192
DSM NUTRITIONAL PRODUCTS.....	193
ECO ANIMAL HEALTH	193
ELANCO ANIMAL HEALTH	193
ELI LILLY & CO.....	193
ESTEVE	193
EVONIK DEGUSSA GMBH	193
FORT DODGE ANIMAL HEALTH	194
HESKA CORP.....	194
IDEXX LABORATORIES, INC.	194
INTERVET INTERNATIONAL BV.....	194
LUITPOLD ANIMAL HEALTH.....	194
MOSAIC	194
MERIAL ANIMAL HEALTH, LTD.....	195
NOVARTIS AG	195
NOVARTIS ANIMAL HEALTH, INC.....	195
NOVARTIS ANIMAL VACCINES, INC.	195
NOVUS INTERNATIONAL, INC.	195
PFIZER ANIMAL HEALTH.....	195
PFIZER, INC.....	196
ROXANE LABORATORIES, INC.	196
SCHERING-PLOUGH ANIMAL HEALTH.....	196
SCHERING-PLOUGH CORP.....	196
SYNBIOTICS CORP.....	196
VIRBAC S.A.	196
WYETH	197
APPENDIX II: RELEVANT ASSOCIATIONS AND ORGANIZATIONS.....	198
AMERICAN ASSOCIATION OF FELINE PRACTITIONERS	198
AMERICAN VETERINARY MEDICAL ASSOCIATION	198
CANADIAN VETERINARY MEDICAL ASSOCIATION.....	198

UNITED STATES DEPARTMENT OF AGRICULTURE.....	198
UNITED STATES FOOD AND DRUG ADMINISTRATION	198