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**VetTrak Republic of Ireland Medicines Review**  
APHA Conference October 2016

*Denise Roche, Kynotec*

Kynotec employees are currently present in 20 countries and we are conducting research in more than 70 countries globally.

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**Countries Researched**



**Global Reach & Local Presence**

- Conducting research in more than 70 countries
- Employees present in 20 major agriculture & animal health countries

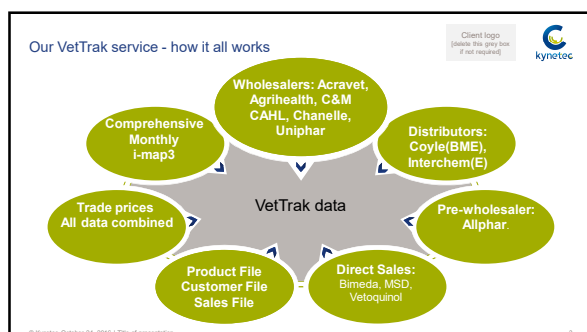
**More Than 500 Talented Professionals**

- 230 research professionals
- 270 skilled interviewers
- and >80 research partners

**Employees Locations**



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What the VetTrak service gives you

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- Market sizes, values and opportunities
- Recognise emergent and declining market segments
- Monitor own company plus competitor brands market shares
- Manufacturers and Products positions in individual segments
- Groups and segments existing markets
- Identifies niches and future directions
- Monitors the effectiveness of activities taken



Next.....

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The total market performance

Elements of Growth

New Introductions – brands, line extensions, packs, promo

Farm v Companion animal

Outlets and Manufacturers

Markets/Vaccines and Antimicrobials

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Now..

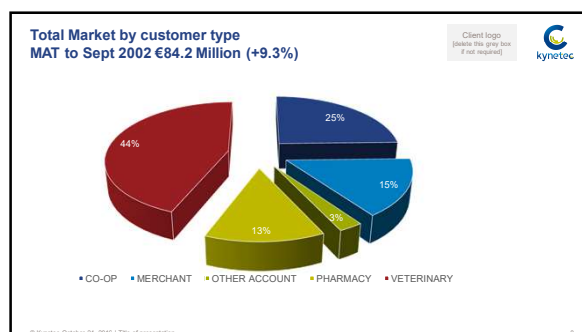
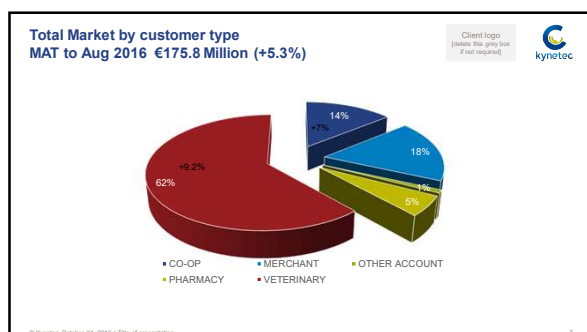
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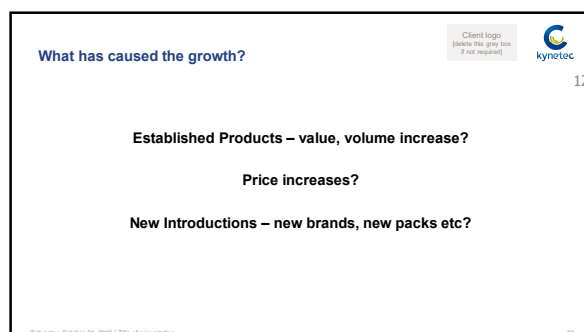
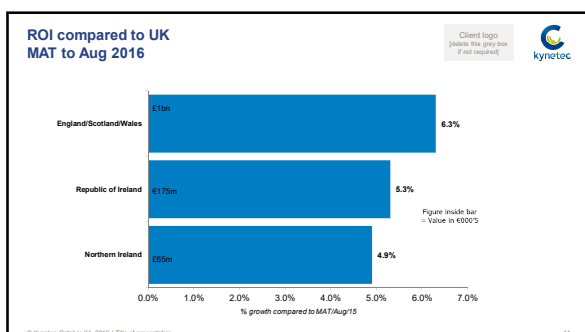
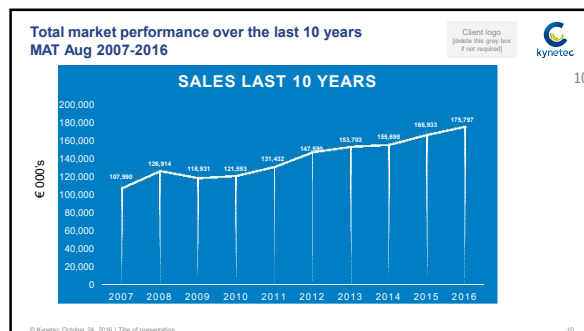
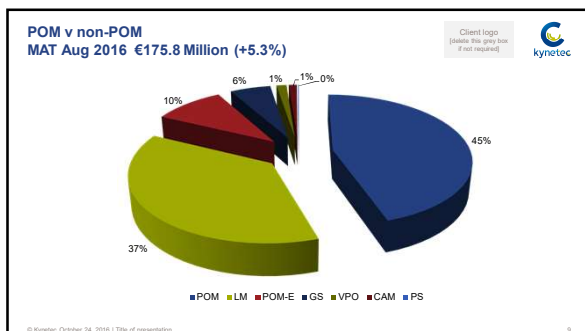
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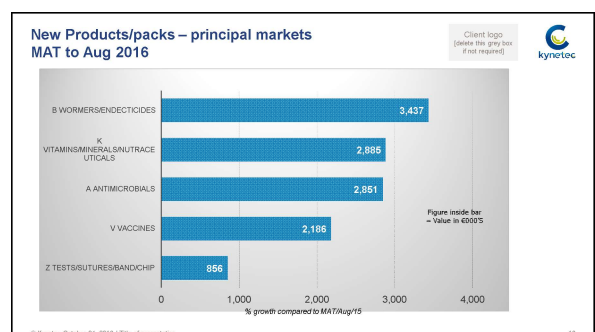
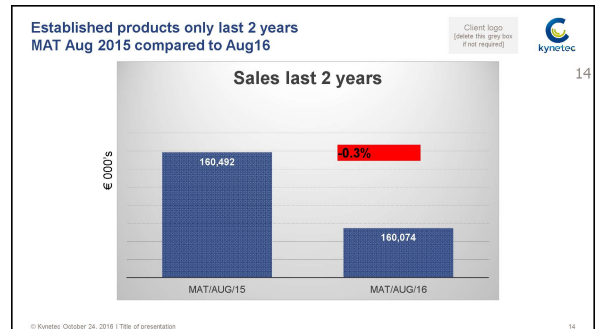
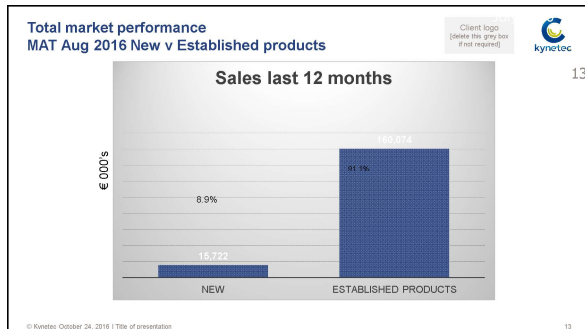
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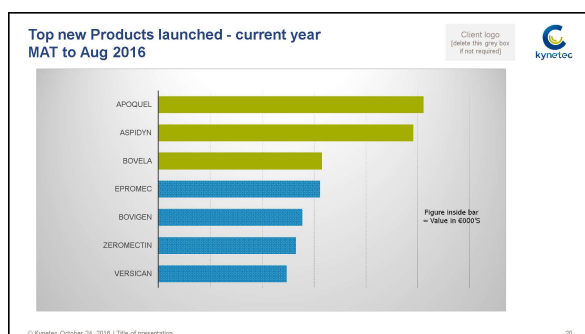
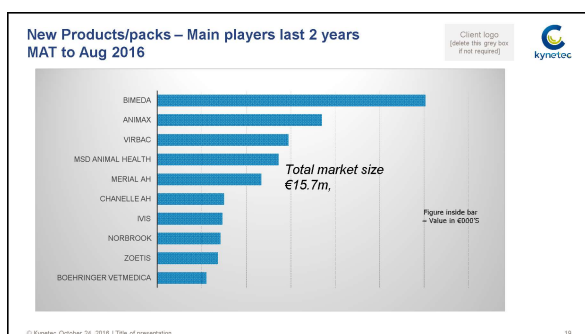
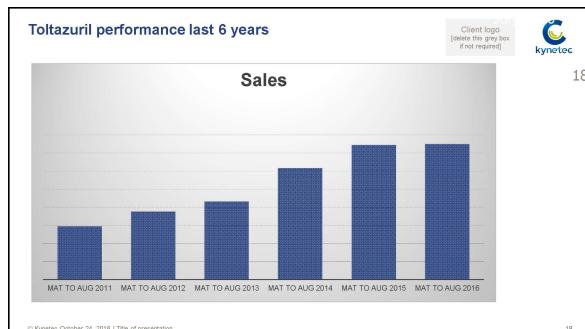
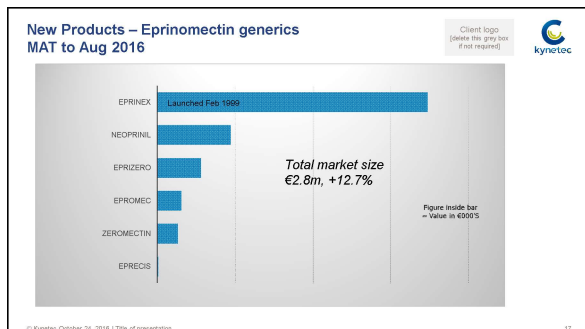
The total market performance

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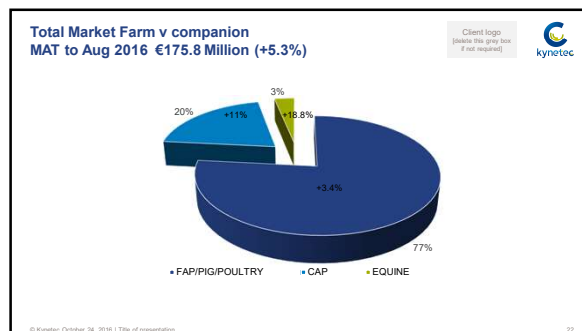
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### Farm v Companion Animal Products



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### Outlets and Manufacturers

Where is the business coming from?

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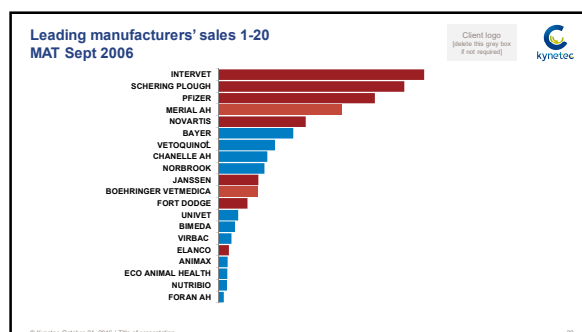
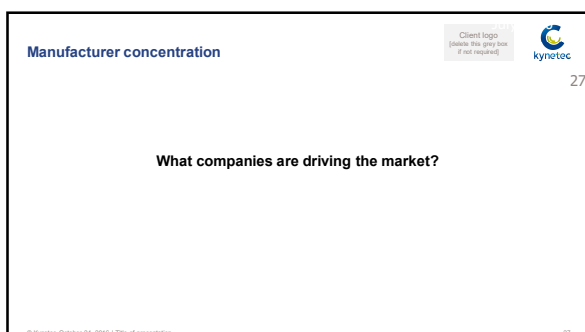
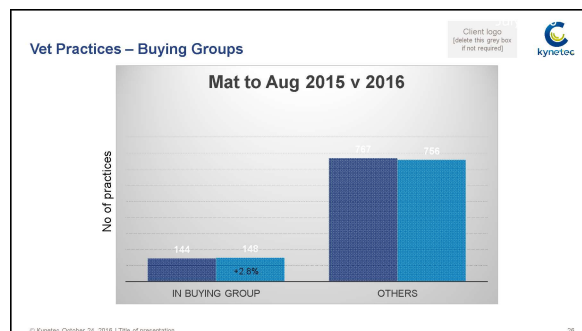
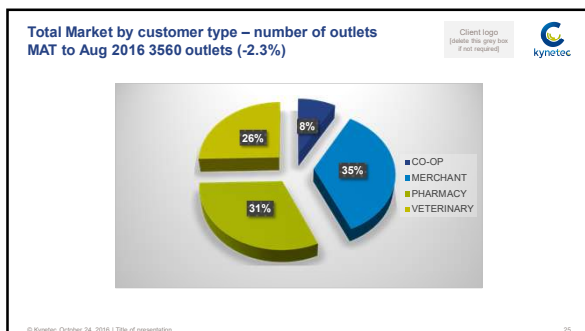
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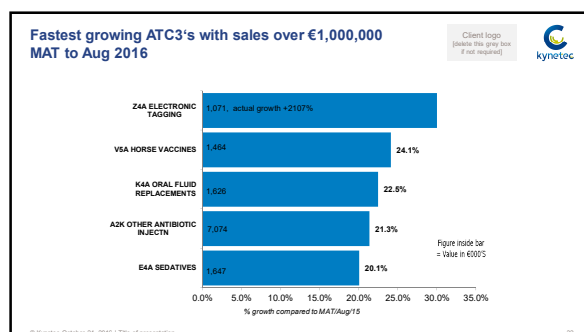
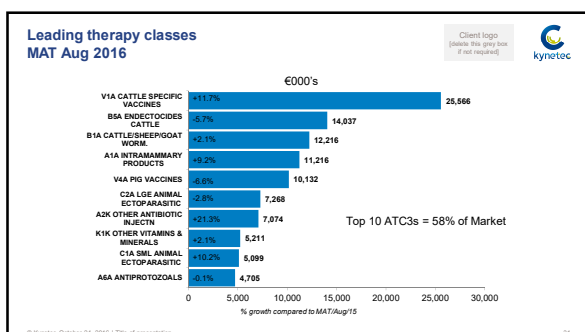
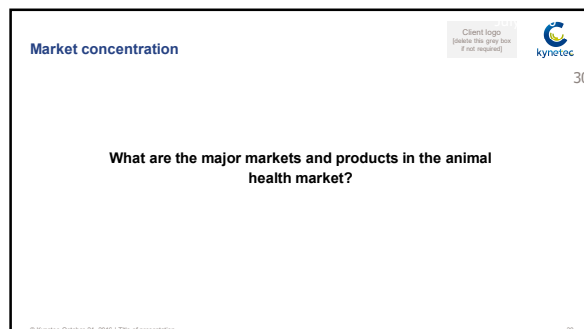
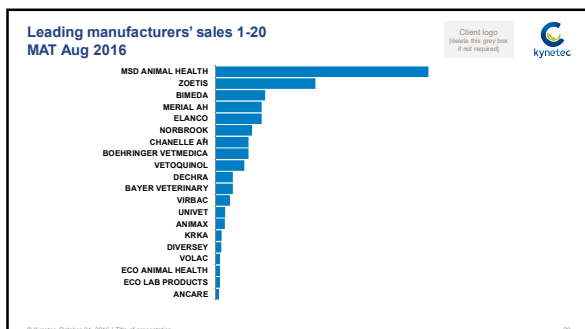
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### Outlets

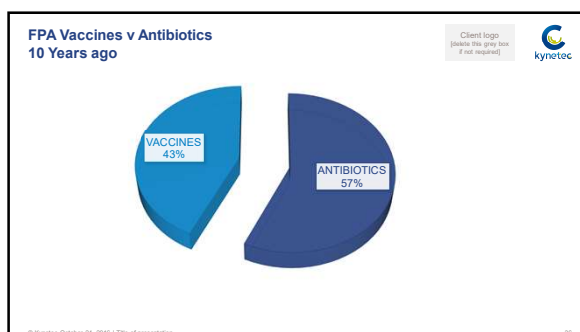
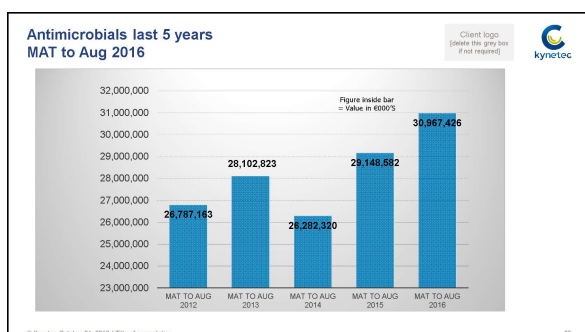
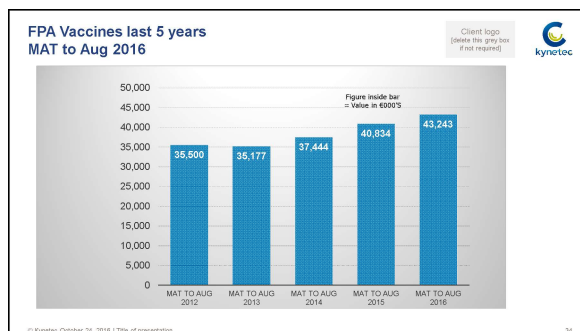
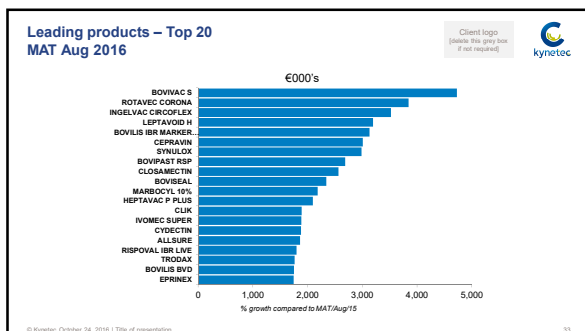
**Circa 3500 outlets!**  
**Made up of co-op branches, merchants, pharmacies and of course vet practices. Many of those with merchant licences are small players.**

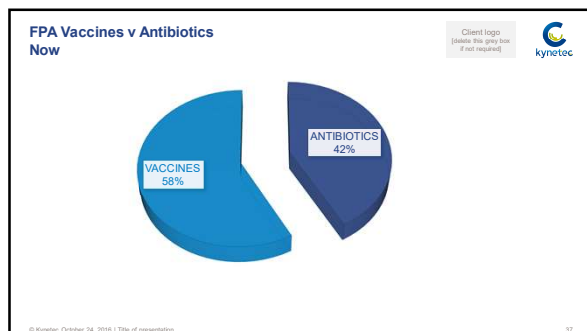
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**Conclusion**

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The animal health market worth circa €176m , with Pet foods/diets €195m.  
Over 77% of the market is farm animal, 20% companion and 3% Equine.  
Growth 5.3% mainly due to new introductions – line extensions, packs and new product launches.  
The established products have been fairly static in the last couple of years.  
We see the emergence of more generics in the market and likely more of these.  
There are over 3500 outlets – co-op branches, vets, pharmacies and merchants. In terms of sheer numbers a big percentage of what we pick up goes in to merchants though the majority of sales (62%) are to vets.  
We also see the emergence of buying groups and corporates. About 17% of vets have joined a buying group, their combined sales values of BG members is circa 33% of the market.  
The top 20 manufacturers account for 92% of the market sales. The list of manufacturers has changed in the last 10 years with half of them being involved in takeovers and mergers.  
Preventative vaccines have grown steadily over few years but there is also some growth in antibiotics. However we can see that vaccines now have the lions share!

Thank-you all for listening.

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Thank you

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