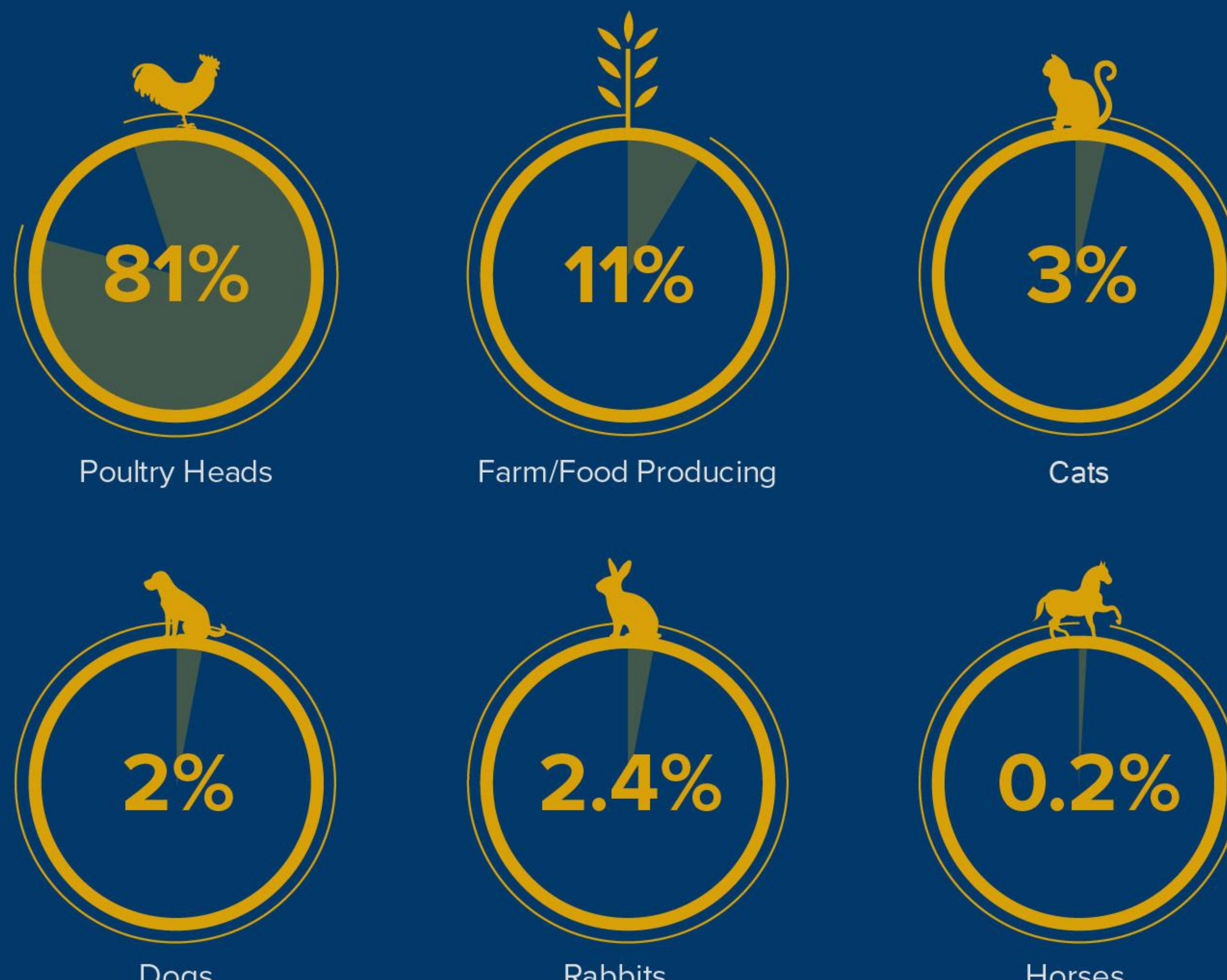


THE FRENCH ANIMAL HEALTHCARE MARKET

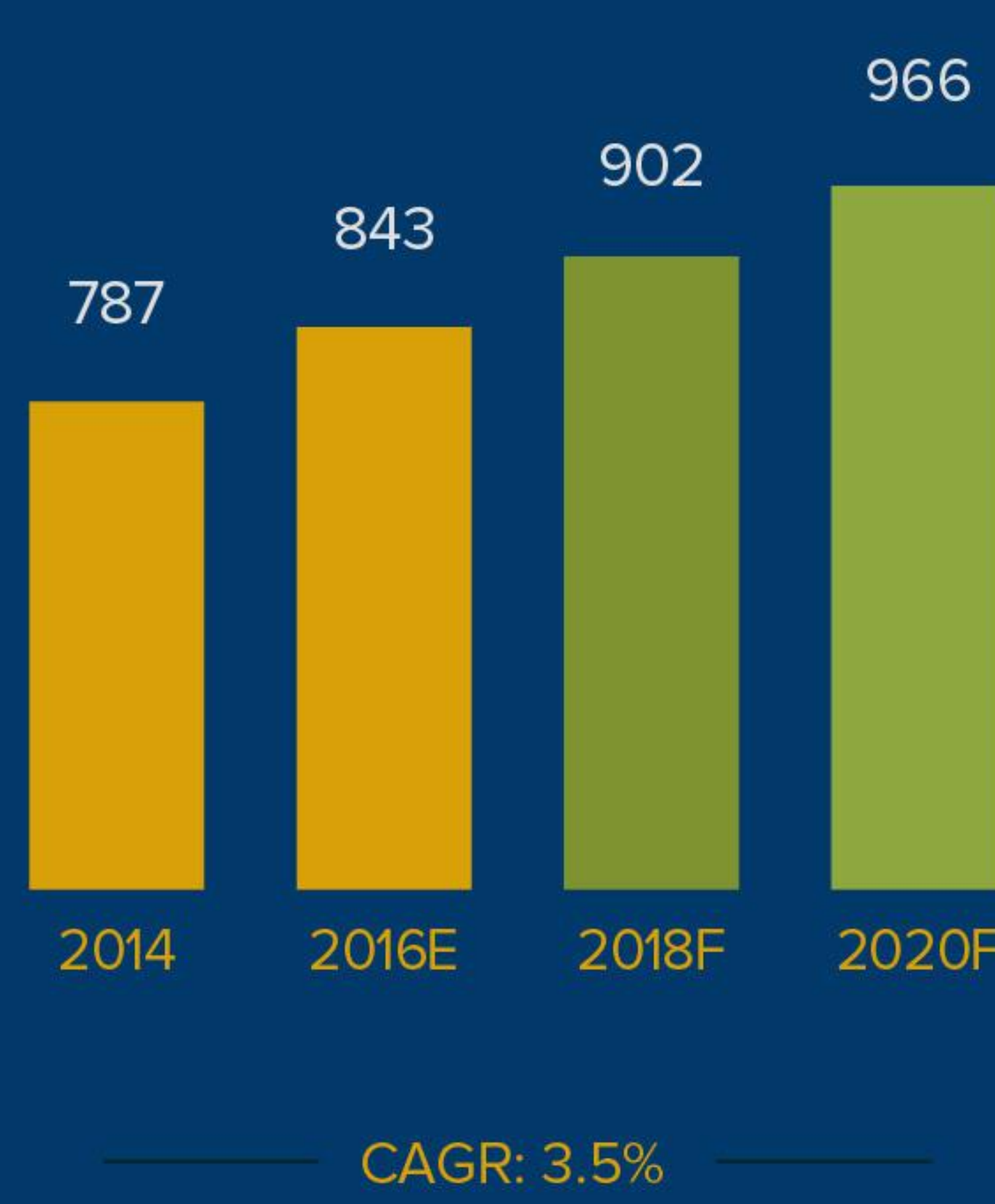
The French animal healthcare market will continue to gain momentum.

MARKET OVERVIEW (2014)



Number of Animals (Total = 371 Mn)

ANIMAL HEALTHCARE MARKET



2014–20 | Sales Figures in USD Mn

The French animal healthcare market is expected to be worth USD 966 Mn by 2020. Rising incidences of zoonotic and other diseases, continuous innovations in animal health products, and increasing consumer focus on animal health and safety are likely to be the drivers.

SEGMENTATION BY ANIMAL TYPE



2014 | Figures in Percentage (%)

Farm animals (such as pigs, poultry, cattle, sheep and fish) account for over half of the sales. The healthcare market for companion animals (dogs, cats and horses) has grown as well, due to increasing adoption of pet animals and awareness about animal health.

SEGMENTATION BY PRODUCT CATEGORY



2014 | Figures in Percentage (%)

Vaccines is the highest selling product category in the market. Under this category, porcine vaccine (vaccine for pigs) is the top selling drug, and canine vaccine is the fastest growing drug.

KEY STATISTICS



is spent annually on dogs and related services such as cafés and ambulances.



households own a pet in France.



France, home to the first veterinary school in the world, boasts four world-class veterinary schools.

The market for vaccines in France is expected to expand at a CAGR of ~10% over 2015–20. It is likely to be led by rising incidences of various forms of cancer in animals.

KEY PLAYERS



Source: SIMV (French Animal Health Industry Association); IFAH (European Animal Health Industry)

ARANCA VIEW

With disposable incomes on the rise in France, more people are interested in owning companion animals. This is expected to further drive the domestic animal healthcare market, which has witnessed substantial growth owing to increasing occurrences of cancer, continuous innovations in animal health products, rising awareness about animal health, and other factors.

France is an attractive market for animal healthcare owing to a low number of regulatory approvals and favorable government policies that encourage the use of advanced technologies. A low pet health insurance penetration of 5% and a growing pet population in France provide an excellent opportunity to existing animal health insurance players to innovate and expand their product portfolios. These players include Mutuelle Animaux, Animaux Santé, ECA-Calina and SantéVet. Moreover, it offers an opportunity to new companies to enter the market.