And

“Assessing the Current and Future Workforce Needs in Veterinary Medicine”

April 19, 2007
The National Academies
Washington DC
Joe Hostetler, DVM
Manager Veterinary Technical Services
Bayer Animal Health
Bayer Overview of Bayer Animal Health
Bayer: The Organization

Business Groups

- Health Care
- Crop Science
- Material Science
Bayer: The Organization

- **Crop Science**
  - Crop Protection - traditional chemical
  - Environmental - consumer and professional
  - Bioscience - biotech plants

- **Material Science**
  - Coating, adhesives, sealants
  - Polycarbonate, polyurethane, thermoplastic
Bayer: The Organization

- Health Care
  - Animal Health
  - Pharmaceuticals
  - Diabetes Care
  - Consumer Care
Animal Health Industry

Overview of Animal Health Pharmaceutical Industry
Animal Health
Market Segments in US

- Wide product portfolio
- New & Innovative Products
- Require Veterinary Positioning/ Rx with the Client

![Pie Chart showing market segments]

- Vaccine: 22%
- Endo: 19%
- Endecto: 3%
- Anti-infective: 23%
- Med Feed: 5%
- Growth: 4%
- Pain: 5%
- Ecto: 19%
What is Bayer’s interest in funding the study?

- **CA growth 6-8% / year; FA 2-3% / year**
  - Pet owner/livestock producer demanding higher level of care and sophistication
  - DVM is conduit of innovation
    - DVM’s needed to interpret and position -> otherwise less technical product(s) will fill the void.

- **Bayer has an equity in the profession and a responsibility to invest in the support of and the viability of the veterinary profession.**
  - Bayer and Veterinary Profession enjoy a “win-win” (symbiotic) relationship with the veterinary profession
What is Bayer’s interest in funding the study?

Corporate responsibility due to how BAH delivers products to the market

Bayer Animal Health relies on DVM profession to deliver the message related to its pharmaceutical products.

- Veterinarian endorsement = value to products
- Regulated by 3 agencies (FDA, EPA and USDA)
- OTC products (today) were introduced by the DVM.

The more sophisticated the product → the more rely on the veterinarian/veterinary profession.

Innovation

- New product technology (ie. cardiac and oncology drugs)
- Even generic innovation
- Require delivery to the pet owner or livestock producer; and we rely on veterinarian to position/deliver to the client/consumer.
What is Bayer’s interest in funding the study?

- Need a “right-sized” profession for a viable profession in future.
  - “Right-size ” with the “right-people ”
    - Attract the “right-people” (caliber)
      - Job/professional satisfaction
      - Compensation
      - Work environment
  - Need an understanding of future manpower needs and place the “right infrastructure“ in place
  - Concern for adequate and/or qualified faculty to train DVMs of the future, as much or more than practicing DVM pool
    - Referral practices pulling faculty away from academia
  - Livestock – an increasing concern for food safety and food image

- What is Bayer’s interest in funding the study?
What is Bayer’s interest in funding the study?

- Bayer must invest in activities to support the profession:
  - National Council on Veterinary Economic Issues (NCVEI)
  - Brakke study
  - Etc.

- Zoonoses and public health

- Role of DVM in small and mid-sized communities
  - Leaders in community
What is Bayer’s interest in funding the study?

Non-Purchasing DVM’s

- DVMs in R&D to discover/develop products
- DVMs to certify research animals and care
- State and Fed regulation/inspection of food chain
  - Require healthy food chain (residues, quality of product)
  - Food Safety Inspection Services and Assoc of Federal Veterinarians
What does Bayer expect from the study?

- Credible report to inform Congress with a futuristic look at the profession.
- Objective evaluation of the profession related to current situation and future needs within the profession and utilize the study information to direct appropriate support to “right size” the profession.