



Bayer HealthCare  
Animal Health Division

And

*"Assessing the Current and Future  
Workforce Needs in Veterinary  
Medicine"*

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# Bayer

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## Overview of Bayer Animal Health



# Bayer: The Organization

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## Business Groups

- n Health Care
- n Crop Science
- n Material Science





# Bayer: The Organization

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## **n Crop Science**

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

## **n Material Science**

- n** Coating, adhesives, sealants
- n** Polycarbonate, polyurethane, thermoplastic

# Bayer: The Organization

- n Health Care
  - n **Animal Health**
  - n Pharmaceuticals
  - n Diabetes Care
  - n Consumer Care





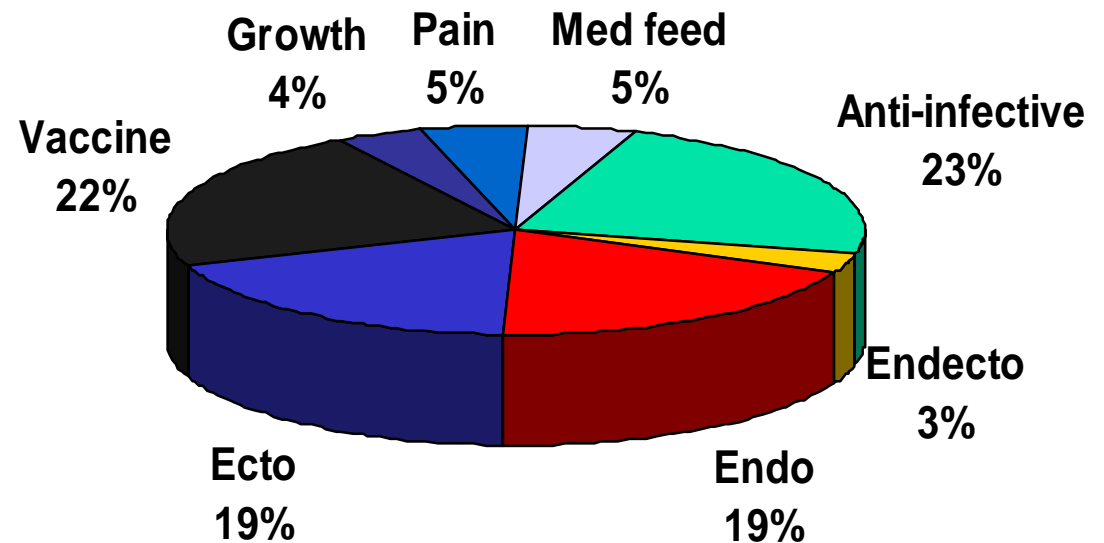
# Animal Health Industry

## Overview of Animal Health Pharmaceutical Industry



# Animal Health Market Segments in US

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







# What is Bayer's interest in funding the study?

- n CA growth 6-8%/year; FA 2-3%/year
  - n Pet owner/livestock producer demanding higher level of care and sophistication
  - n DVM is conduit of innovation
    - n DVM's needed to interpret and position -> otherwise less technical product(s) will fill the void.
- n Bayer has an equity in the profession and a responsibility to invest in the support of and the viability of the veterinary profession.
  - n Bayer and Veterinary Profession enjoy a "win-win" (symbiotic) relationship with the veterinary profession



# What is Bayer's interest in funding the study?

- n Corporate responsibility due to how BAH delivers products to the market
  - n Bayer Animal Health relies on DVM profession to deliver the message related to its pharmaceutical products.
    - n Veterinarian endorsement = value to products
    - n Regulated by 3 agencies (FDA, EPA and USDA)
    - n OTC products (today) were introduced by the DVM.
  - n The more sophisticated the product è the more rely on the veterinarian/veterinary profession.
    - n Innovation
      - n New product technology (ie. cardiac and oncology drugs)
      - n Even generic innovation
      - n Require delivery to the pet owner or livestock producer; and we rely on veterinarian to position/deliver to the client/consumer.



Bayer HealthCare



# What is Bayer's interest in funding the study?

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



# What is Bayer's interest in funding the study?

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- n **Bayer must invest in activities to support the profession:**
  - n National Council on Veterinary Economic Issues (NCVEI)
  - n Brakke study
  - n Etc.
- n **Zoonoses and public health**
- n **Role of DVM in small and mid-sized communities**
  - n Leaders in community



# What is Bayer's interest in funding the study?

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- n **Non-Purchasing DVM's**
  - n DVMs in R&D to discover/develop products
  - n DVMs to certify research animals and care
  - n State and Fed regulation/inspection of food chain
    - n Require healthy food chain (residues, quality of product)
    - n Food Safety Inspection Services and Assoc of Federal Veterinarians



# What does Bayer expect from the study?

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- n Credible report to inform Congress with a futuristic look at the profession.
- n 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.