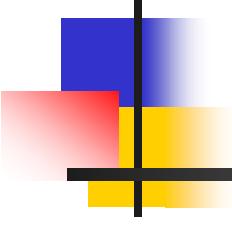




Bayer **HealthCare**
Animal Health Division
And

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

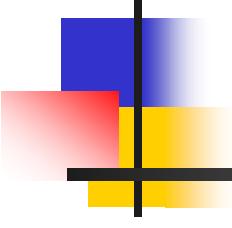
April 19, 2007
The National Academies
Washington DC



Joe Hostetler, DVM

Manager Veterinary Technical Services
Bayer Animal Health

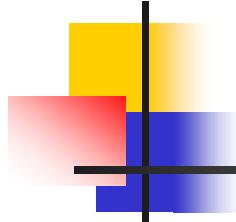




Bayer



Overview of Bayer Animal Health



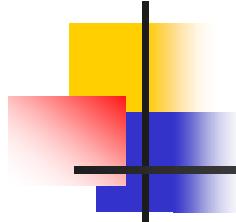
Bayer: The Organization

Business Groups

- Health Care
- Crop Science
- Material Science



Bayer HealthCare



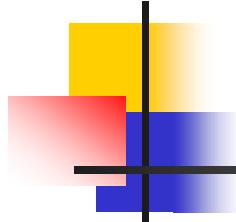
Bayer: The Organization

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

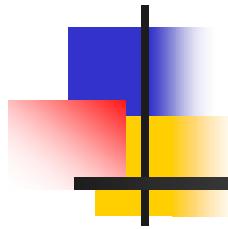
- Health Care
 - Animal Health
 - Pharmaceuticals
 - Diabetes Care
 - Consumer Care



Bayer HealthCare

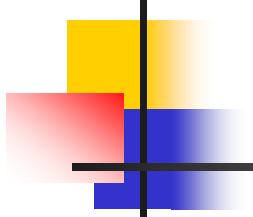


Animal Health Industry



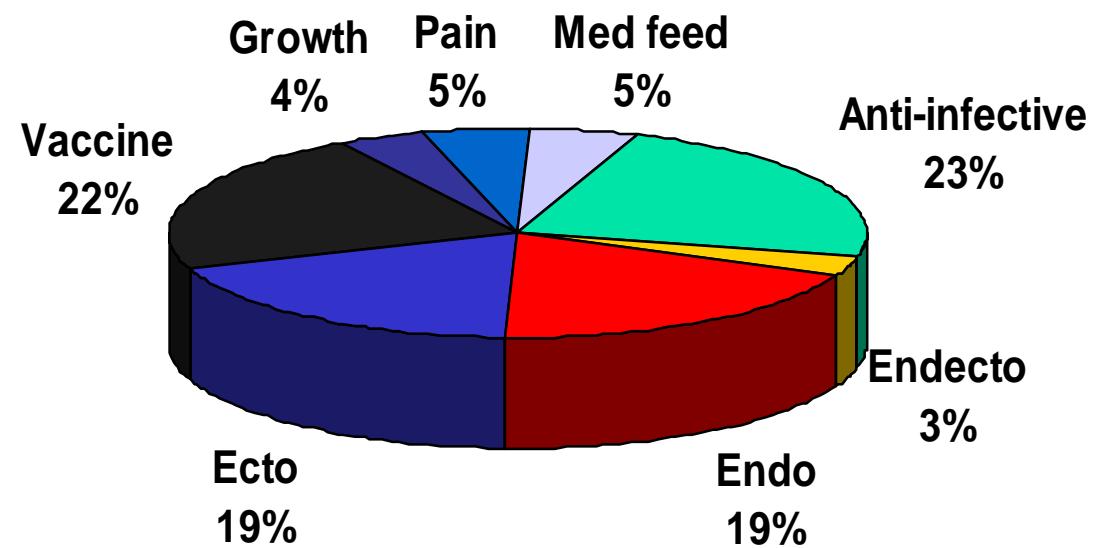
Overview of Animal Health Pharmaceutical Industry





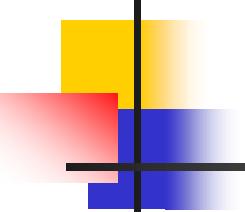
Animal Health Market Segments in US

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



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**

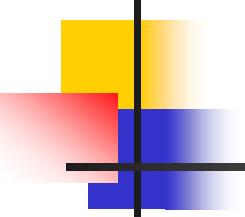


What is Bayer's interest in funding the study?

- 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 è 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.

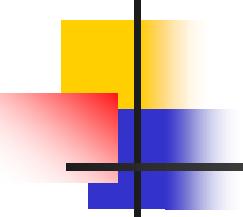


Bayer HealthCare



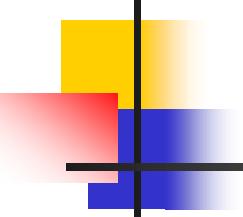
What is Bayer's interest in funding the study?

- 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



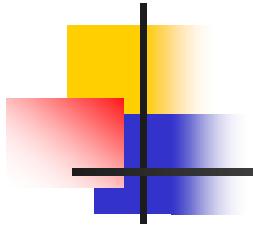
What is Bayer's interest in funding the study?

- 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?

- **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.