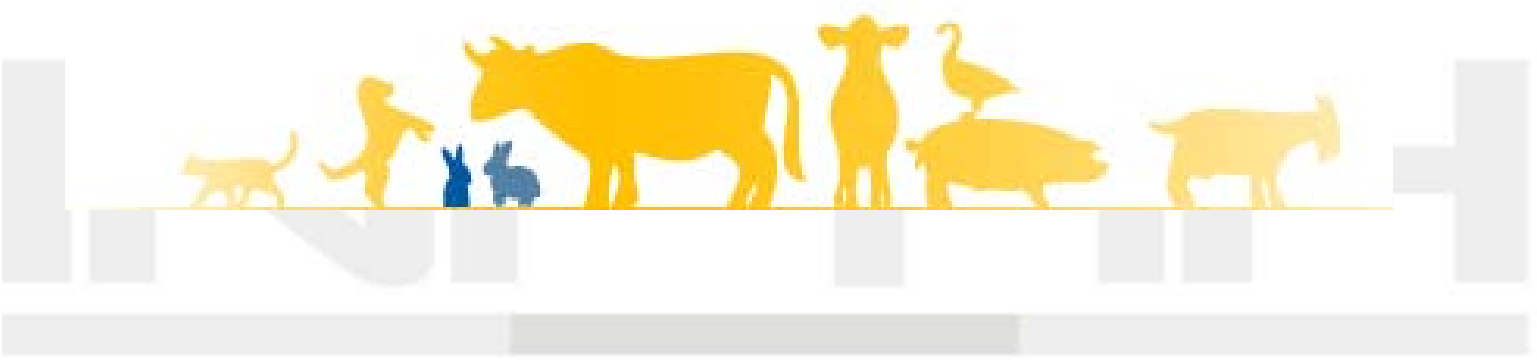




Indian Animal Health Industry

No More Imponderable

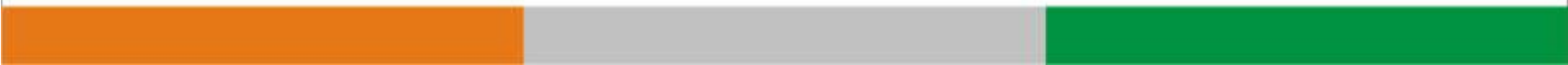




Indian Federation of Animal Health Companies

**INFAH Joins Hands with CEESA
to develop an organised market data for Indian
Animal Health Industry**

CEESA
Sales Survey





About CEESA

- CEESA is a European animal health study centre
- Its a Brussels-based international non-profit project driven organisation
- CISS-CEESA - extensive and detailed global sales survey for the member companies
- Undertakes projects on behalf of the sponsoring companies
- Currently Boehringer, Bayer, Ceva, Elanco, Merck, Merial, Novartis, Pfizer, Vetoquinol, Virbac are already a part of the CEESA study. All projects are funded by the participating companies. CEESA CISS provides Global quarterly web based reporting in 35 countries worldwide representing approximately 85% of the Animal Health business.



CEESA Members and Supporters

- Bayer
- Boehringer
- Ceva
- Elanco
- MSD
- Merial
- Novartis
- Pfizer
- Vetoquinol
- Virbac





CEESA Coverage

- Global quarterly web based reporting in 35 countries worldwide
- Representing approximately 85% of the Animal Health business

North America	2
Europe	17
International:	16
LA	Brazil
	Mexico
Asia	Australia
	China+HK
	India
	Indonesia
	Japan
	Malaysia
	New Zealand
	Pakistan
	Philippines
	Sinapore
	South Korea
	Taiwan
	Thailand
	Vietnam



Key Principles of CEESA.....

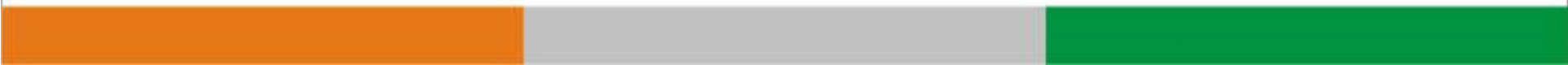
- Full confidentiality (3-company-rule):
if there is not at least 3 companies in a category, this category is not disclosed but collapsed into a bigger category, no clear product
- Processed by an independent professional service provider (CIP France), *nobody in CEESA gets access to the data!*
- High quality output
- 2 Validation processes: in house reporting, quality validation by validation groups.
Significant low level of error





Key Principles of CEESA

- Permanent feedback from the group
- Reports represent quarterly data
- All member's licensed AH products
- Ex-manufacturer net-net product sales
- Commitment to a Code of Conduct





CISS Reporting System

- CISS web based system went live in 2008 - data submission & online reporting
- CISS classification is hierarchical allowing slicing and dicing numbers
- CISS reports based on the following indicators:
 - turnover, relative & absolute growth
 - market share & percentage growth
 - rankings & weightings
- Across 17 main & 1300 sub-classes
- With/without currency effects





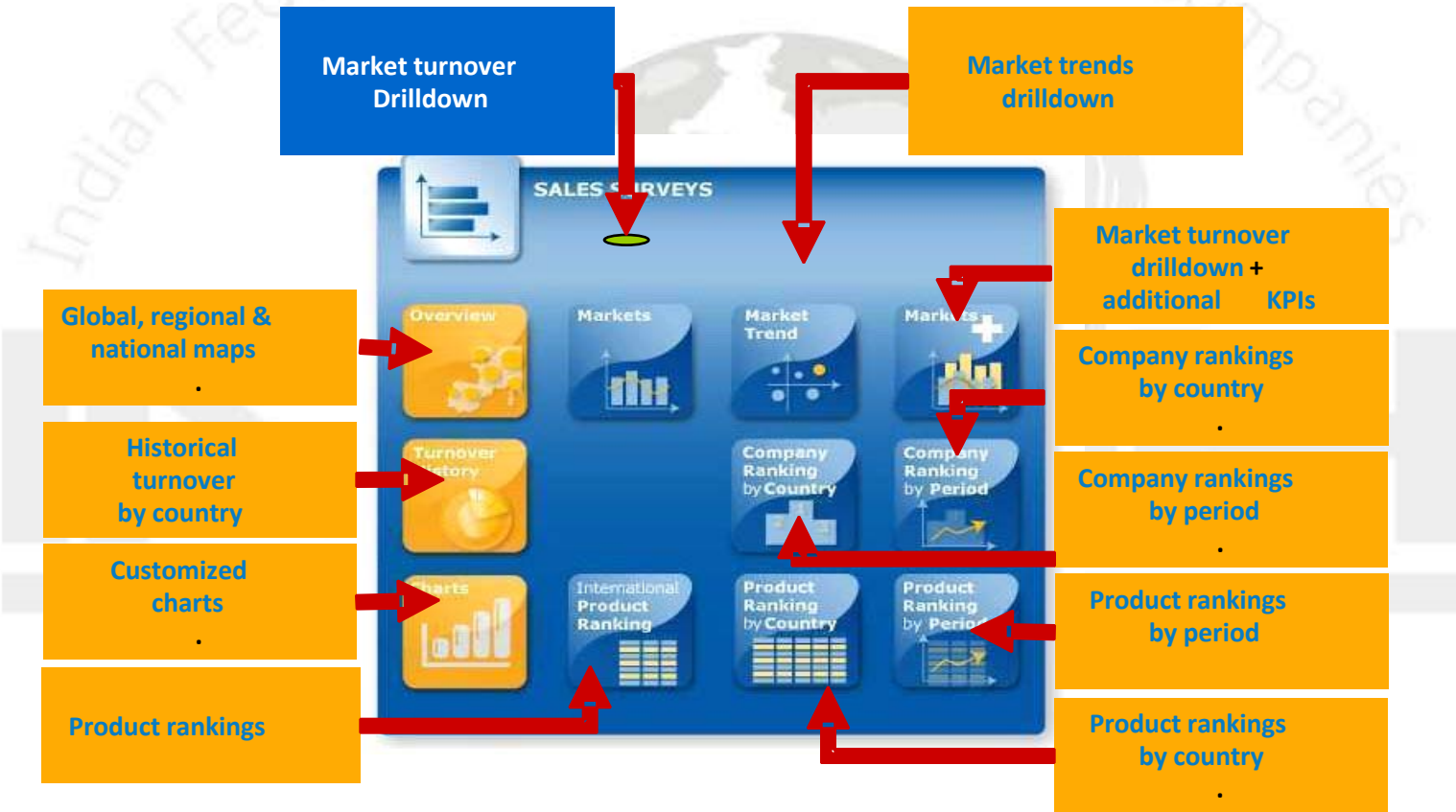
CISS Reporting System

The screenshot displays the CISS (CEESA International Sales Survey) web application interface. The header includes the CISS logo and navigation links: Home, Data Submission, Product Database, Data Management, and Information. The main content area is divided into several sections:

- SALES SURVEYS:** A grid of icons for various survey types: Market Share, Market Trend, Market Growth, Company Ranking by Country, and Product Ranking by Country.
- CISS NEWS:** A section with a blue header containing news items, such as "14 Jan 2008 - Data submission for 2007Q4 is closed to enable..." and "27 Nov 2007 - European Survey for 2007Q2 - Unreported Sales data are extrapolated from 2007Q3".
- DATA SUBMISSION PLANNING:** A section with a blue header containing links for "Download submission model file", "Manage your data", "Submission status of all companies submission", and "Survey publication dates".
- MY QUERIES:** A section with a blue header showing "Last Queries" and "My Folder" with a list of folders: "- All - (Link)", "- Test CIP 1745 - (Link)", "- Test CIP 1746 - (Link)", and "- All - (Link)".
- PRODUCT DATABASE:** A section with a yellow header containing a search box for "Search CISS products" and a "Quick Search" dropdown menu.



Access to 11 Reporting Formats via web and data warehouse technology





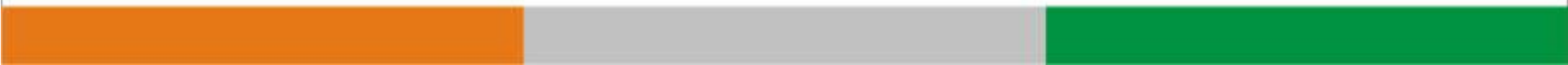
Features of CISS- CEESA

- CISS classifies products by therapeutic class and species
- Regional analysis
 - Quarterly ranking and category history
- Country level analysis
 - Quarterly ranking and category history
- Category History File
 - Quarterly reports
 - 5 years history by category for your company and the market
 - Historical growth and CAGR



Addresses Major Questions

- What are the most important category, sub-category
- How big are they?
- Who are the main players?
- What products are in it?





Global Industry Product Reference

Global Product Master File

General information

- Company
- Local product code
- Local name
- Licensee
- International code
- International name

Reference lists

- Country
- CISS classification
- Species
- % species
- Active ingredients
- Pharmacological class
- Pharmaceutical form
- Route of administration
- Medical segment
- Legal status (UK only)

When available

- SKU
- Concentration
- Packaging
- Registration number
- Launch date
- Cancellation date
- GTIN



Unique Market Intelligence System

Helpful for:

- Management
- Marketing
- Business development
- Long Term Planning
- Business Intelligence (KPI)





Progress So Far

- Meeting held with CEESA
- Shared the list of member companies
- Requirements specific to Indian market conveyed
- 2nd round of discussion will be held shortly

INFAH



Indian Federation of Animal Health Companies

Thank You

