

## WHO WE ARE

We are a global animal health company dedicated to supporting veterinarians and animal producers and their businesses in ever better ways. Building on more than 65 years of experience, we are the world leader in the discovery and delivery of quality veterinary vaccines, medicines and diagnostic products, complemented by genetic tests, biodevices and a range of services.



**10,000**  
EMPLOYEES WORLDWIDE



APPROXIMATELY 1,100 VETERINARY  
R&D SCIENTISTS AND SPECIALISTS



**FINANCIAL STRENGTH** ▶  
PROVEN & SUSTAINABLE FUNDAMENTALS



**CUSTOMER-  
OBSESSED CULTURE**



**100** COUNTRIES WHERE  
PRODUCTS SOLD  
45 COUNTRIES WITH DIRECT PRESENCE

**25** MANUFACTURING SITES  
IN 12 COUNTRIES 



**300** PRODUCT LINES ▶

**6** MAJOR PRODUCT CATEGORIES ▶

**8** ANIMAL SPECIES SUPPORTED ▶ 

## WHY WE DO WHAT WE DO

In advancing animal health, we believe we are making a vital contribution to public health and well-being. After all, a safe, abundant and sustainable supply of meat, poultry, fish, milk and eggs begins with healthy animals. And by helping maintain the health of our pets – a growing source of companionship and emotional support – we are enriching the lives of people all over the world.



**INCREASED URBANIZATION/  
REDUCED FARMLAND =**  
Increased pressure to raise farm animals  
efficiently with limited natural resources ▶



**POPULATION GROWTH +  
PER CAPITA INCOME GROWTH =**  
Increased demand for animal protein/  
companionship/pet wellness ▶

## HOW WE OPERATE

As the global leader in animal health, we are fully dedicated to serving the real-world needs of producers and veterinarians as they raise and care for their animals. In doing so, we are guided by Our Core Beliefs and a successful business model based on three interconnected capabilities.

### CORE CAPABILITIES ▶



Direct customer  
relationships



High quality  
manufacturing



Continuous  
innovation

GUIDED BY OUR CORE BELIEFS ▶

COMMITTED TO 6 AREAS OF  
SOCIAL RESPONSIBILITY ▶

## WHERE WE'RE GOING

Our vision is to have our products, services and people be the most valued by animal health customers around the world. Thanks to a clear strategy and a simplified way of working, we are leading the industry in helping address growing marketplace needs around pet health and improved livestock productivity.

### LEVERAGE OUR CAPABILITIES

- Leverage our local presence and customer relationships
- Invest in innovation to extend our product portfolio
- Provide high-quality products and improve margins

### EXTEND OUR REACH

- Further penetrate emerging markets
- Remain the partner of choice for external development
- Expand complementary businesses

# 300 PRODUCT LINES/ 6 MAJOR PRODUCT CATEGORIES

Our diverse, durable and resilient product portfolio includes approximately 300 product lines across six different product categories, including:

- **Vaccines:** biological preparations that help prevent diseases of the respiratory, gastrointestinal and reproductive tracts, or induce a specific response
- **Other pharmaceutical products:** pain and sedation, oncology, antiemetic, allergy and dermatology, and reproductive products
- **Anti-infectives:** products that prevent, kill or slow the growth of bacteria, fungi or protozoa
- **Parasiticides:** products that prevent or eliminate external and internal parasites such as fleas, ticks and worms
- **Medicated feed additives:** products added to animal feed that provide medicines to livestock
- **Animal health diagnostics:** portable blood and urine analysis systems and point-of-care diagnostic products, including instruments and reagents, rapid immunoassay tests, reference laboratory kits and blood glucose monitors



We also offer complementary products and services, including biodevices, diagnostic products and genetic tests.

# 8 CORE SPECIES



CATS



DOGS



HORSES



CATTLE



FISH



PIGS



POULTRY



SHEEP

# FINANCIAL STRENGTH

Zoetis, an S&P 500 company, has built a reputation and position as the global market leader in the \$34 billion animal health industry. As the industry leader, Zoetis has the capabilities, business model and financial strength to capitalize on market opportunity.



We achieved \$5.8b in annual revenues in 2018 with 54% of sales from the livestock animal segment and 45% from the companion animal segment. We have also grown sales faster than the animal health market for the last six years. Contributing to our growth was the strength of our diverse portfolio, the successful launch of new products, and a deep commitment to our business model based on direct customer relationships, highly productive R&D, and high-quality manufacturing. For more information, read our [2018 CEO Letter to Shareholders](#).

# INCREASED URBANIZATION/ POPULATION GROWTH

The growing animal health industry serves two segments: livestock – such as beef and dairy cattle, pigs, poultry, fish and sheep – and companion animals, including dogs, cats and horses. The powerful trends of human population growth, a rising middle class with increasing per capita income in developed markets, and a steady migration of people from rural communities to urban centers, are driving demand for animal health products in both segments. At the same time, our customers are challenged by increasingly limited natural resources, more frequent emerging infectious diseases, and other constraints. This creates opportunities for innovation that lead to new animal health solutions.



# DIRECT CUSTOMER RELATIONSHIPS

We achieve all that we can by building strong relationships through direct interaction with our customers in approximately 45 countries. Our sales and technical service professionals seek to delight our customers, listening to their needs and concerns and helping them succeed.



# HIGH-QUALITY MANUFACTURING

We know our customers depend on a reliable supply of high-quality products at competitive prices. We have built an efficient global manufacturing and supply network of internal sites and external partners to meet our customers' expectations.



# CONTINUOUS INNOVATION

We are committed to researching and developing ever-better solutions to address our customers' most pressing animal health challenges and deliver real value to their businesses.



# GUIDED BY OUR CORE BELIEFS

Our people drive our success. We have instilled a highly collaborative culture where colleagues have a sense of ownership and derive satisfaction from seeing and measuring the impact of their achievements on the success of the company, our customers and their businesses.



# SIX AREAS OF SOCIAL RESPONSIBILITY

We create value for our business and society by improving the health of animals; enhancing the sustainability of animal agriculture; and enriching the lives of our customers, colleagues and communities around the world. We strive to use our global leadership, resources, expertise and product portfolio to make a difference in these six areas of responsibility:

