



Innovating Services for a World that Depends on Animals

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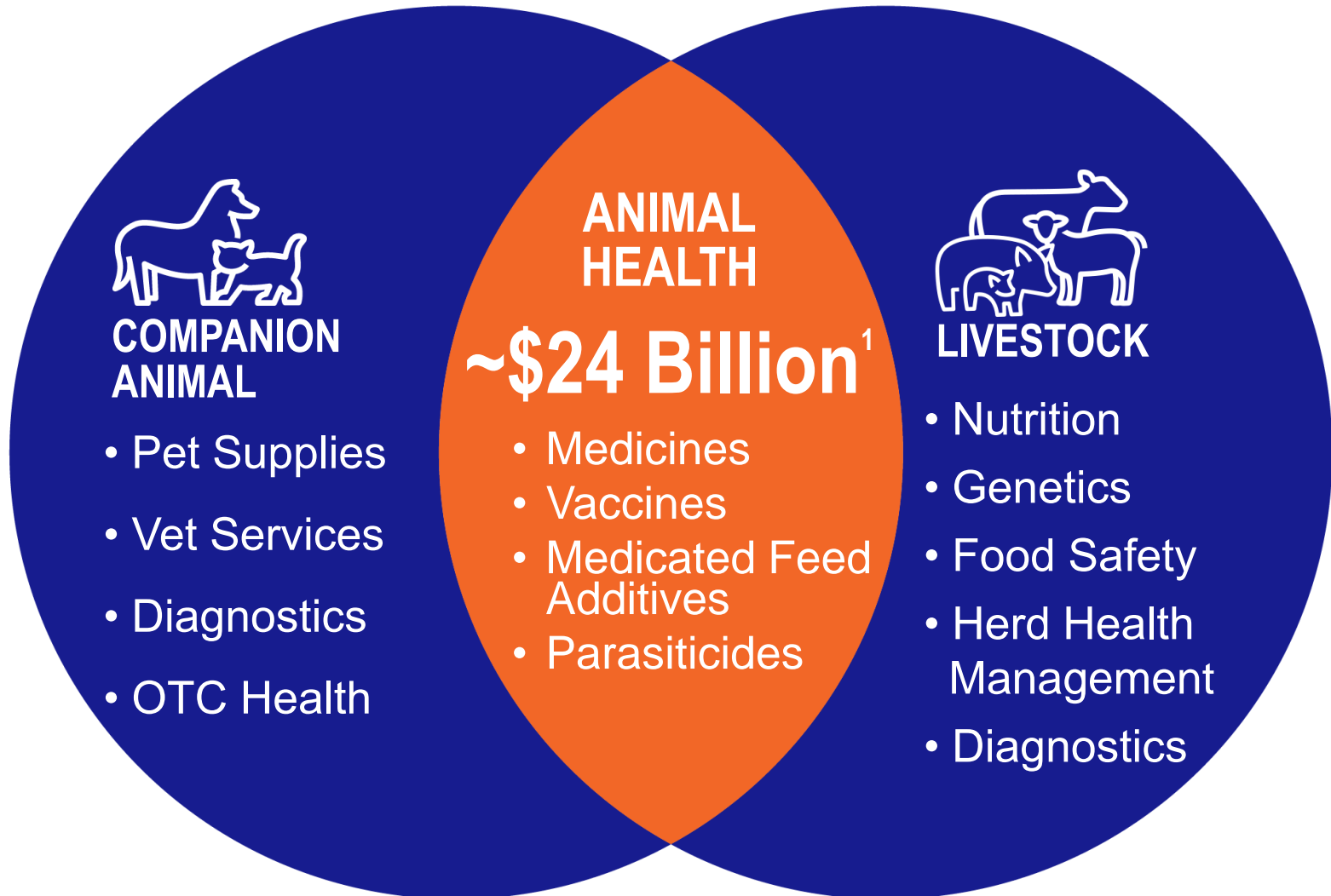
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The lives of humans and animals are made better by our mutual bond.

AT THE CORE OF A \$100+ BILLION INDUSTRY

~\$24B GLOBAL ANIMAL HEALTH MARKET EXPECTED TO EXCEED \$33B BY 2020²



¹ Vetnosis Review 2014

² Vetnosis STORM FORECASTS: 2014-2023

POWERFUL TRENDS CREATING DEMAND

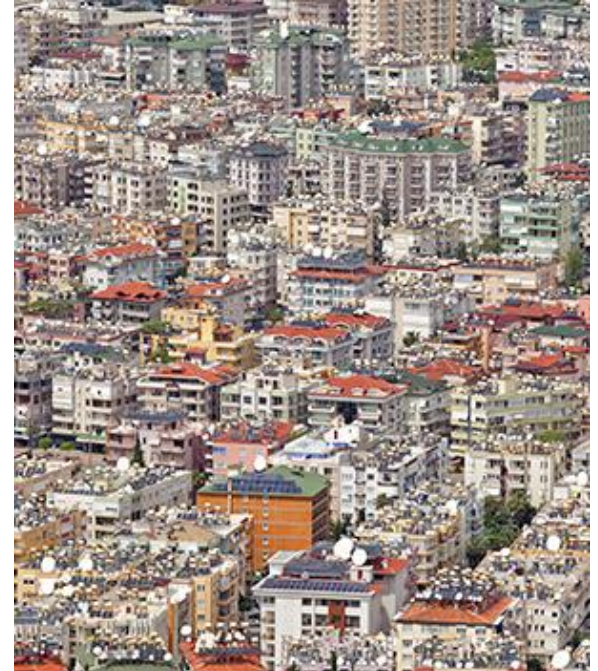
PREDICTABLE, SUSTAINABLE AND FUNDAMENTAL ECONOMIC DRIVERS



**POPULATION
GROWTH**



**A GROWING
MIDDLE CLASS**



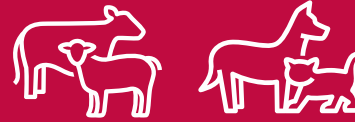
**INCREASING
URBANIZATION**

27

MANUFACTURING SITES

8

CORE ANIMAL SPECIES



\$4.8 BILLION

ANNUAL REVENUE



R&D COLLEAGUES

1,100+

300+ PRODUCT LINES

5 MAJOR PRODUCT CATEGORIES

WE PROVIDE

MEDICINES
VACCINES
DIAGNOSTICS
GENETIC TESTS
SERVICES



60+ YEARS OF EXPERIENCE

OUR FOCUS

34%¹
COMPANION ANIMAL HEALTH



65%¹
LIVESTOCK HEALTH

MARKET PRESENCE IN

120+ COUNTRIES

3,600+ MEMBER ZOETIS FIELD FORCE

Note: 2014 facts and figures shown

5 ¹Excludes revenue associated with Client Supply Services, which represented 1% of total 2014 revenue.



MAXIMIZING CUSTOMER EXPERIENCE

LIVESTOCK
HEALTH



DISEASE
PREVENTION &
TREATMENT



ECONOMICS &
PRODUCTIVITY



PET
HEALTH



ONE HEALTH



SERVICES EVOLUTION: FROM CLINICAL TO DIGITAL



DELIVERING A BETTER EXPERIENCE FOR BETTER OUTCOMES

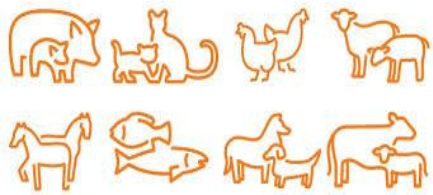
VETSUPPORT+: DIGITAL ECOSYSTEM

1. DATA COLLECTION

2. DATA ANALYTICS

3. DATA DRIVEN DECISION MAKING

4. IMPROVED MEDICAL OUTCOMES, ANIMAL PRODUCTIVITY & WELFARE



VETSUPPORT+

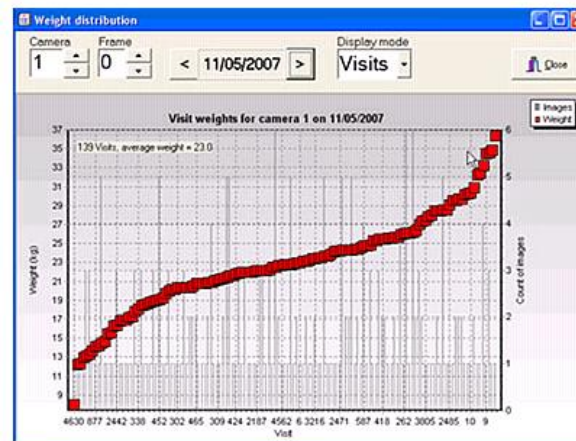
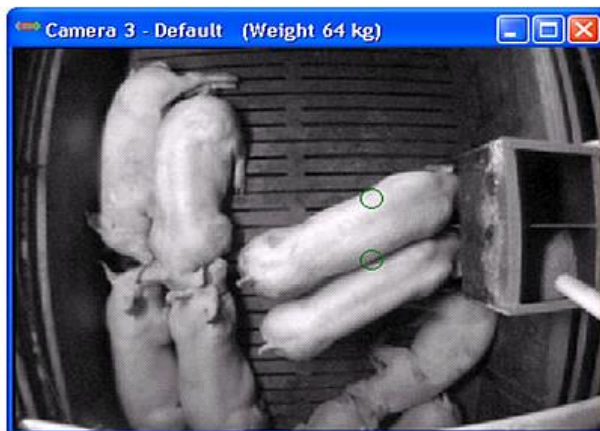


PET DIALOG™



QUALITATIVE DATA

QUANTITATIVE DATA



HELPING FARMERS BE EVEN BETTER

INNOVATIVE PARTNERSHIPS: EXPANDING THE ANIMAL HEALTH ECOSYSTEM





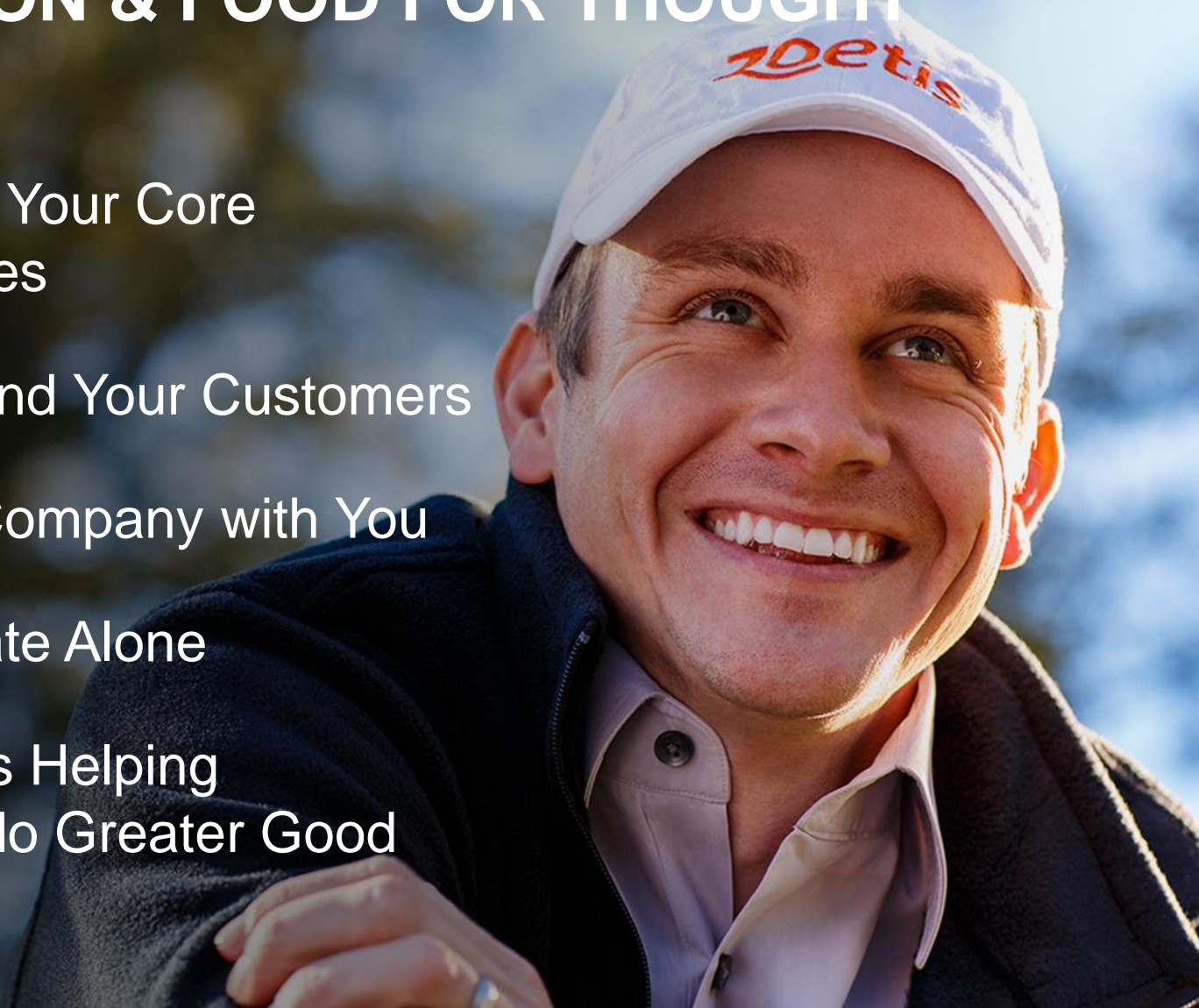
OUR VISION

OUR VISION GUIDES OUR ASPIRATIONS

Our products, services and people will be the most valued by animal health customers around the world.

CONCLUSION & FOOD FOR THOUGHT

- Stay True to Your Core Competencies
- Reach Beyond Your Customers
- Bring Your Company with You
- Don't Innovate Alone
- True Value is Helping Customers do Greater Good



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