Feed Acidifiers - Global Strategic Business Report

Description: This report analyzes the worldwide markets for Feed Acidifiers in US$Thousand by the following Product Segments: Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid, and Others. The report provides separate comprehensive analytics for the US, Canada, Japan, Europe, Asia-Pacific, Latin America, and Rest of World. Annual estimates and forecasts are provided for the period 2013 through 2020. Also, a seven-year historic analysis is provided for these markets. Market data and analytics are derived from primary and secondary research. Company profiles are primarily based on public domain information including company URLs. The report profiles 56 companies including many key and niche players.

Contents:

I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS
   Study Reliability and Reporting Limitations
   Disclaimers
   Data Interpretation & Reporting Level
   Quantitative Techniques & Analytics
   Product Definitions and Scope of Study
   Formic Acid
   Lactic Acid
   Fumaric Acid
   Propionic Acid
   Other Acids

II. EXECUTIVE SUMMARY

1. INDUSTRY OVERVIEW
   Prelude
   Segment Analysis
   Feed Acidifier Demand Dynamics in Developed & Developing Markets
   Increasing Demand for Pork & Poultry to Fan Growth in the Feed Acidifiers Market
   Worldwide Meat Market: A Review
   Table 1: Global Meat Production (2013) - Percentage Share Breakdown of Volume Production by Type (includes corresponding Graph/Chart)
   Table 2: World Market for Fresh Meat by Type (2012): Percentage Breakdown of Volume Sales for Pork, Lamb & Goat, Beef & Veal, and Poultry (includes corresponding Graph/Chart)
   Table 3: Global Meat Production (2013) - Percentage Share Breakdown of Volume Production by Geographic Region (includes corresponding Graph/Chart)
   Table 4: Top Ten Meat Producing Nations Worldwide (2013)
   Percentage Share Breakdown of Volume Production by Country (includes corresponding Graph/Chart)
   Pork: Largest Consumed Meat Category Worldwide
   Table 5: Per Capita Consumption of Pork in Select Markets (in Kilograms per Person per Year): 2013 (includes corresponding Graph/Chart)
   Table 6: Global Pork Production (2013) - Breakdown of Volume Production in Thousand Metric Tons (Carcass Weight Equivalent) by Select Countries (includes corresponding Graph/Chart)
   Table 7: Top Ten Countries Worldwide in Terms of Pig Population (in Millions): 2013 (includes corresponding Graph/Chart)
   Rising Demand for Poultry
   Table 8: Per Capita Consumption of Broilers in Select Markets (in Kilograms per Person per Year): 2013 (includes corresponding Graph/Chart)
   Beef Production Witness Steady Growth
   Table 9: Global Beef and Veal Production (2013) - Breakdown of Volume Production in Thousand Metric Tons (Carcass Weight Equivalent) by Select Countries (includes corresponding Graph/Chart)
   Growing Interest in Blends of Organic Acids in Animal Diets
   Disease Outbreak Concerns Stimulate Demand for Feed Acidifiers
   Encapsulated Acidifiers: Promising Opportunities in Store
   Table 10: Feed Efficiency Displayed in Piglets Treated with Oral Acidifier and Coated Oral Acidifier (feed Kg/ liveweight Kg) (includes corresponding Graph/Chart)
   Innovation and Improvisation of Product Efficacy - The Key to Success
Table 11: Comparative Analysis of Body Weight, Average Daily Weight Gain, and Feed Conversion Ratio between the Control Group and the Biotronic Top3-treated Group (includes corresponding Graph/Chart)
Competitive Scenario
Select Formulated Brands of Feed Acidifiers

2. MARKET DYNAMICS
Formic Acid: Rise in Meat Consumption Boosts Growth
Table 12: World Formic Acid Market (2013): Percentage Share Breakdown of Consumption (Volume) by Geographic Region (includes corresponding Graph/Chart)
Table 13: Global Formic Acid Market (2013): Percentage Share Breakdown of Consumption by End-Use Sector (includes corresponding Graph/Chart)
Table 14: Global Formic Acid Market (2013): Percentage Share Breakdown of Production Capacity by Geographic Region (includes corresponding Graph/Chart)
Table 15: Leading Players in the Global Formic Acid Market (2013): Ranked by Production Capacity (in '000 Tons per Annum) (includes corresponding Graph/Chart)
Strong Antimicrobial Features Favor Usage
Table 16: Antimicrobial Effect of Formic Acid against Select Bacteria - A Comparative Glance at Minimal Inhibitory Concentrations (MIC) (includes corresponding Graph/Chart)
Table 17: Comparing Antimicrobial Effect of Formic Acid with Propionic Acid and Lactic Acid against Different Bacteria (in MIC %)
Lactic Acid Market: Improving Gut Health
Table 18: Global Lactic Acid Market (2014 & 2020): Percentage Share Breakdown of Consumption by Region/Country (includes corresponding Graph/Chart)
EU Permit for Lactic Acid Decontaminant in Bovine Carcasses Opens Doors for US Meat Exporters
Propionic Acid: Increasing Livestock Farming Augurs Well for Market Growth
Table 19: Global Propionic Acid Market (2013): Percentage Share Breakdown of Consumption by Geographic Region (includes corresponding Graph/Chart)
Table 20: World Propionic Acid Market (2013): Percentage Share Breakdown of Consumption by End-Use Sector (includes corresponding Graph/Chart)
Butyric Acid: Improving Gut Health in Swine
Potassium Diformate - A Crucial Feed Ingredient
Potassium Diformate Aids Growth & Survival of Pangasius
Acidification of Calf Diet - Rekindled Interest
Poultry Feed Acidification: Indispensable to Prevent Salmonellosis
Water Acidification for Poultry
Acidifiers Improve Health of Weaning Piglets
Feed Acidifiers for Gut Health Management in Aquaculture Industry
Table 21: World Aquaculture Market (2012): Breakdown of Production Volume by Region (in '000 Tonnes) (includes corresponding Graph/Chart)
Table 22: Global Aquaculture Market (2013): Percentage Share Breakdown of Production Volume by Fish Type (includes corresponding Graph/Chart)
Rising Animal Feed Prices: A Boon for Acidifiers
Optimized Capacity Utilization: Essential for Production Efficiency & Cost Management
Low Consumer Awareness - A Major Challenge to Reckon With

3. FEED ACIDIFIERS MARKET IN LIGHT OF BAN ON ANTIBIOTICS
Antibiotics Ban: Feed Acidifiers Emerge as Ideal Replacements
Propionic, Formic, Fumaric & Phosphoric Acids: Prospective Growth Promoters
An Overview of Factors Contributing to Ban on Antibiotics
Health bodies Clamping Down on Antibiotics in Animal Husbandry
Impact of the Ban
Rise in Demand for Alternatives to Antibiotics
Assessing New Feed Additives

4. AN INSIGHT INTO THE GLOBAL FEED ADDITIVES MARKET
Animal Feed Industry: A Primer
Table 23: Worldwide Animal Feed Production by Region/Country (2013): Percentage Breakdown of Volumes for US, EU-27, China, Brazil, Mexico, Japan, and Rest of World (includes corresponding Graph/Chart)
Animal Feed Additives Market: An Overview
Table 24: Global Animal Feed Additives Market (2013): Percentage Share Breakdown of Revenues by Product Segment
Amino Acids, Antibiotics, Antioxidants, Feed Acidifiers, Feed Enzymes, Vitamins, and Others (includes corresponding Graph/Chart)
Table 25: Global Animal Feed Additives Market (2013): Percentage Share Breakdown of Revenues by Livestock - Swine, Poultry, Cattle, Aquaculture, and Others (includes corresponding Graph/Chart)
Swine Feed Additives: The Largest Category
Table 26: Global Swine Feed Market (2013): Percentage Share Breakdown of Consumption (Volume) by Geographic Region (includes corresponding Graph/Chart)
Table 27: Global Swine Feed Additive Market (2013): Percentage Share Breakdown of Consumption (Volume) by Geographic Region (includes corresponding Graph/Chart)
Cattle Feed Additives Market: An Overview

5. FEED ADDITIVES - A BRIEF PROFILE
Introduction
A Major Sub-Sector of Animal Health & Nutrition Market
Classification of Feed Additives
Antibiotics
Antibacterials
Nutritional Feed Additives
Vitamins
Vitamin E - A Key Ingredient for High Quality Meat
Minerals
Amino Acids
Pre-Mixes
Enzymes
Other Animal Feed Additives
Non-Nutritive Feed Additives
Melengesterol Acetate (MGA)
Feed Supplements
Select Food Additives Permitted in Feed and Drinking Water of Animals

6. PRODUCT OVERVIEW
What are Feed Acidifiers?
Action of Feed Acidifiers
Functionalities of Acidifiers
Application of Feed Acidifiers
Feed Acidifier Groups Based on Mechanism
Acidifiers Having Positive Effect on Feed Efficiency
Acidifiers Having Bacteriostatic Effect
Acidifiers Fighting Against Mould and Yeast
Classification of Feed Acidifiers
Organic Acids
Formic Acid
Use of Formic Acid as Preservative in Animal Nutrition
Lactic Acid
Acetic Acid
Propionic Acid
Butyric Acid
Sorbic Acid
Fumaric Acid
Malic Acid
Tartaric Acid
Citric Acid
Benzoic Acid
Physio Chemical Properties of Benzoic Acid
Application in Animal Feed
Activity of Benzoic Acid on Select Bacteria, Moulds, and Yeasts
Inorganic Acids
Phosphoric Acid
Feed Phosphate
Mode of Usage of Feed Acidifiers
Acidifiers Used On Large Scale

7. ACIDIFIERS MARKET BY ANIMAL TYPE
Swine and Piglets
Raising Swine Without Antibiotic Use - A Challenging Task
Increasing Weaning Age
Dysentery in Swine - An Economically Significant Disease
Acidification of Swine Feed
Some of the Organic Acids Used as Dietary Acidifiers in Swine Feed
Table 28: Piglet Performance - Role of Feed Acidifiers (includes corresponding Graph/Chart)
Benefits Associated with Acidification
Acidification of Starter Diets
DDGS - A New Valued Livestock Feed
Poultry
Importance of Nutrition & Health in Poultry
Role of Growth-Promoters in Poultry
Broiler Performance
Alternatives to Antibiotics in Poultry Animal Feed
Cattle
Use of Diet Acidification on Rise
Types of Acidified Diets
Acidification of Diet in Calves - Advantages and Benefits
Usage of Organic Acid as Feed Acidifier
Aquaculture
Factors Translating to Better Economic Returns
Feed Conversion Ratio
High Daily Weight Gains

8. PRODUCT COMPETITION
Probiotics
Enzymes
Microflora Enhancers
Immunomodulators
Carotenoids
Herbal Products (Herbs, Spices and Essential Oils)
Metabolic Peptides
β-agonists

9. FOCUS AT CUSTOMER LEVEL
Profitability Levels
Market, Structure & Developments in Animal Feed Value Chain
Veto on Antibiotics Impacts Cost Of Meat - A Critical Review
Impact of Withdrawal of Growth Promoters
Irradiation of Meat not an Option for Problems Related to Antibiotic Resistance

10. REGULATORY & ENVIRONMENTAL ANALYSIS
Regulatory Environment
Registration of Additives
Public Authorities on Feed Additives
Regulatory Bodies Governing Feed Additives Market in Europe
The European Food Safety Authority - EFSA
FEDESA - The European Federation of Animal Health
IFAH-Europe
Regulatory Bodies Governing Feed Additives Market in the US
Association of American Feed Control Officials (AAFCO)
Role of the FDA in Monitoring Animal Feed Practices in the US
Alliance for the Prudent Use of Antibiotics (APUA)
Factors Considered While Selecting Growth Promotants
Entry Barriers
Infrastructural Requirements for the Use of Organic Acids
Intensive Research
Acidulants - Hazard Classification
Acidulant Solutions - Comparison of pH Values
Profitability as Large-Volume Acidifiers Evolve into Commodity Products

11. PRODUCT INTRODUCTIONS/INNOVATIONS
Selko and Trouw Introduce Fysal
Kemin Launches Piglet Feed Acidifier at VIV Europe Show
Bayer and Dr. Eckel to Introduce Latibon® in Indonesia
Novus Introduces AVIMATRIX
Perstorp Introduces ProPhorce SR
Kemin Launches BactoCEASE
Perstorp Introduces ProSid MI 700
Novus Introduces Next Enhance

12. RECENT INDUSTRY ACTIVITY
Eastman Chemical to Acquire Taminco
Taminco Completes Acquisition of Kemira's Formic Acid Business
Taminco Collaborates with Balchem to Build Choline Chloride Plant
NWF Acquires SC Feeds
BASF to Acquire Verenium
Nutreco Enters JV with Ukraine Partners
Cargill Collaborates with Purac
Nutreco Acquires Hendrix Misr
Lallemand Animal Nutrition Acquires Microbial developments
Kemira Divests Acetate Business
Biomin Acquires Micro-Plus
BASF to Construct Formic Acid Plant
Jungbunzlauer Begins Production of Lactic Acid and Salts

13. FOCUS ON SELECT PLAYERS
Addcon Group GmbH (Germany)
BASF SE (Germany)
Biomin GmbH (Austria)
Corbion nv (Netherlands)
Impextraco Belgium (Belgium)
Jefo Nutrition, Inc. (Canada)
Jefo Europe S.A. (France)
Kemin Industries, Inc. (US)
Novus International, Inc. (US)
Perstorp AB (Sweden)
Taminco nv (Belgium)
Trouw Nutrition International B.V (The Netherlands)
Selko Feed Additives (The Netherlands)
Yara International ASA (Norway)

14. GLOBAL MARKET PERSPECTIVE
Table 29: World Recent Past, Current & Future Analysis for Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 30: World Historic Review for Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 31: World 15-Year Perspective for Feed Acidifiers by Geographic Region - Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
Feed Acidifiers Market by Product Segment
Table 32: World Recent Past, Current & Future Analysis for Formic Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 33: World Historic Review for Formic Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 34: World 15-Year Perspective for Formic Acid Consumption in Feed Acidifiers by Geographic Region Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
Table 35: World Recent Past, Current & Future Analysis for Lactic Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 36: World Historic Review for Lactic Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 37: World 15-Year Perspective for Lactic Acid Consumption in Feed Acidifiers by Geographic Region Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

Table 38: World Recent Past, Current & Future Analysis for Fumaric Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 39: World Historic Review for Fumaric Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 40: World 15-Year Perspective for Fumaric Acid Consumption in Feed Acidifiers by Geographic Region Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

Table 41: World Recent Past, Current & Future Analysis for Propionic Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 42: World Historic Review for Propionic Acid Consumption in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 43: World 15-Year Perspective for Propionic Acid Consumption in Feed Acidifiers by Geographic Region - Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

Table 44: World Recent Past, Current & Future Analysis for Consumption of Other Acids in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 45: World Historic Review for Consumption of Other Acids in Feed Acidifiers by Geographic Region - US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 46: World 15-Year Perspective for Consumption of Other Acids in Feed Acidifiers by Geographic Region - Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

Table 47: World Recent Past, Current & Future Analysis for Consumption of Feed Acidifiers by Category - Poultry, Swine, Cattle & Other Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 48: World Historic Review for Consumption of Feed Acidifiers by Category - Poultry, Swine, Cattle & Other Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 49: World 15-Year Perspective for Consumption of Feed Acidifiers by Category - Percentage Breakdown of Dollar Sales for Poultry, Swine, Cattle & Other Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

III. MARKET

1. THE UNITED STATES

A. Market Analysis

Outlook
Animal Feed Additives Market to Show Steady Growth
Rising Meat Consumption Drives Demand for Feed Acidifiers
Table 50: US Cattle Population (Million Head): 2013 (includes corresponding Graph/Chart)
Table 51: US Meat Production (2013) - Percentage Share Breakdown of Volume Production by Meat Type (includes corresponding Graph/Chart)
Antibiotic Restrictions Propel Use of Alternatives
Dangers of Antibiotics - A Major Cause for Concern
Impact of Antibiotics Ban on Swine
Propionic Acid Market - An Overview
Table 52: US Propionic Acid Market (2013): Percentage Share Breakdown of Consumption by End-Use Sector
### Regulatory Environment

**Role of FDA in Monitoring Animal Feed Practices in the US**

- FDA Restricts Fluoroquinolones in Poultry
- Alliance for the Prudent Use of Antibiotics (APUA)

### Trade Statistics

- **Table 53:** US Market for Benzoic Acid, Benzoic Acid Salts and Esters (2012 & 2013): Percentage Share Breakdown of Export Value by Destination Country
- **Table 54:** US Market for Benzoic Acid, Benzoic Acid Salts and Esters (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin

- **Table 55:** US Formic Acid Market (2012 & 2013): Percentage Share Breakdown of Export Value by Destination Country
- **Table 56:** US Formic Acid Market (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin

- **Table 57:** US Lactic Acid, Lactic Acid Salts and Esters Market (2012 & 2013): Percentage Share Breakdown of Export Value by Destination Country
- **Table 58:** US Lactic Acid, Lactic Acid Salts and Esters Market (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin

- **Table 59:** US Market for Propionic Acid, Propionic Acid Salts and Esters (2012 & 2013): Percentage Share Breakdown of Export Value by Destination Country
- **Table 60:** US Market for Propionic Acid, Propionic Acid Salts and Esters (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin

### Product Launches

### Strategic Corporate Developments

### Key Players

#### B. Market Analytics

- **Table 61:** US Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020
- **Table 62:** US Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012
- **Table 63:** US 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020

#### 2. CANADA

##### A. Market Analysis

- **Outlook**
- **Canadian Agricultural and Livestock Market**
- **Table 64:** Number of Farms Breeding Pigs in Canada (2013) Breakdown by Select Provinces
- **Ensuring Ban on Antibiotics**

- **Export-Import Statistics**

- **Table 65:** Canadian Benzoic Acid, Benzoic Acid Salts and Esters Market (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin
- **Table 66:** Canadian Formic Acid Market (2012 & 2013): Percentage Share Breakdown of Export Value by Destination Country
- **Table 67:** Canadian Formic Acid Market (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin
- **Table 68:** Canadian Lactic Acid, Lactic Acid Salts and Esters Market (2012 & 2013): Percentage Share Breakdown of Export Value by Destination Country
- **Table 69:** Canadian Lactic Acid, Lactic Acid Salts and Esters Market (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin
- **Table 70:** Canadian Propionic Acid, Propionic Acid Salts and Esters Market (2012 & 2013): Percentage Share Breakdown of Import Value by Country of Origin

- **Jefo Nutrition, Inc. - A Key Player**

##### B. Market Analytics

- **Table 71:** Canadian Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020
- **Table 72:** Canadian Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$
3. JAPAN
A. Market Analysis
Outlook
An Overview of the Japanese Meat Industry
Animal Feed Market in Japan
Table 74: Japanese Compound & Mixed Feed Production (2012): Percentage Share Breakdown of Production by Type - Poultry Feed, Swine Feed, Cattle Feed, Mixed Feed and Other Feed (includes corresponding Graph/Chart)
B. Market Analytics
Table 75: Japanese Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 76: Japanese Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 77: Japanese 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

4. EUROPE
A. Market Analysis
Market Overview
European Animal Feed Market - A Brief Overview
Alternative Growth Promoters: On an Upward Trend
Organic Acids Set to Displace Antibiotics
Meat Consumption and Production in the EU - A Review
Table 78: EU27 Beef and Veal Production (2013) - Breakdown of Volume Production in '000 Tons of Carcass Weight Equivalent by Top Five Producing Countries (includes corresponding Graph/Chart)
Table 79: EU27 Pork Production (2013) - Breakdown of Volume Production in '000 Tons of Carcass Weight Equivalent by Top Five Producing Countries (includes corresponding Graph/Chart)
Table 80: Per Capita Consumption of Pork in Select EU Countries (2013) (includes corresponding Graph/Chart)
Table 81: EU27 Poultry Meat Production (2013) - Breakdown of Volume Production in '000 Tons of Carcass Weight Equivalent by Top Five Producing Countries (includes corresponding Graph/Chart)
Regulatory Environment
EC Bans Antibiotic Growth Promotants
EU Steps up Safety Measures on Food and Feed Additives
Emergence of the European Food Safety Authority
IFAH Europe
FEFANA
Establishment of Maximum Residue Limits (MRLs)
Legislations on Animal Feed in Europe
EU Regulation 183/2005
EU Regulation 882/2004
EU Regulation 152/2009
B. Market Analytics
Table 82: European Recent Past, Current & Future Analysis for Feed Acidifiers by Geographic Region - France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 83: European Historic Review for Feed Acidifiers by Geographic Region - France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 84: European 15-Year Perspective for Feed Acidifiers by Geographic Region - Percentage Breakdown of Dollar Sales for France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
Table 85: European Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 86: European Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 87: European 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

4a. FRANCE
A. Market Analysis
Outlook
An Overview of the French Meat Market
Strategic Corporate Development
Jefo Europe S.A. - A Key Player
B. Market Analytics

Table 88: French Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 89: French Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 90: French 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

4b. GERMANY
A. Market Analysis
Outlook
An Overview of the German Meat Market

Table 91: German Commercial Meat Production (2013)
Percentage Share Breakdown of Volume Production (Tons) by Livestock Type (includes corresponding Graph/Chart)

Key Players
B. Market Analytics

Table 92: German Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 93: German Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 94: German 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

4c. ITALY
A. Market Analysis
Outlook
Beef and Pork Market Reports Declining Trend
B. Market Analytics

Table 95: Italian Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 96: Italian Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 97: Italian 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

4d. THE UNITED KINGDOM
A. Market Analysis
Outlook
A Review of the Meat Industry in the UK
Poultry Market
Mutton and Lamb
Beef Market
Strategic Corporate Development
B. Market Analytics
Table 98: UK Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 99: UK Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 100: UK 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
4e. SPAIN
Market Analysis
Table 101: Spanish Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 102: Spanish Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 103: Spanish 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
4f. RUSSIA
A. Market Analysis
Outlook
Overview of Meat Industry
B. Market Analytics
Table 104: Russian Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 105: Russian Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 106: Russian 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
4g. REST OF EUROPE
A. Market Analysis
Outlook
Sweden: Ban on Use of Antibiotics on Livestock
Product Launches
Strategic Corporate Developments
Key Players
B. Market Analytics
Table 107: Rest of European Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 108: Rest of European Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 109: Rest of European 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
5. ASIA-PACIFIC
A. Market Analysis
Market Overview
Asia-Pacific: Largest and Fastest Growing Market for Beef & Veal
Feed Additives Market in Southeast Asia: An Overview
B. Market Analytics
Table 110: Asia-Pacific Recent Past, Current & Future Analysis for Feed Acidifiers by Geographic Region - China, India, and Rest of Asia-Pacific Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 111: Asia-Pacific Historic Review for Feed Acidifiers by Geographic Region - China, India, and Rest of Asia-Pacific Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006
through 2012 (includes corresponding Graph/Chart)
Table 112: Asia-Pacific 15-Year Perspective for Feed Acidifiers by Geographic Region - Percentage Breakdown of Dollar Sales for China, India, and Rest of Asia-Pacific Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
Table 113: Asia-Pacific Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 114: Asia-Pacific Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 115: Asia-Pacific 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
5a. CHINA
A. Market Analysis
Market Overview
Feed Production Rises Substantially
Meat Market in China: An Overview
Growing Appetite for Beef among Chinese
An Insight into Broiler Chicken Market
An Analysis of the Chinese Swine Industry
Regulatory Overview
Ban on Select Feed Additives
Government Bans Ractopamine Manufacture and Distribution
B. Market Analytics
Table 116: Chinese Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 117: Chinese Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 118: Chinese 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
5b. INDIA
A. Market Analysis
Outlook
Market Overview
B. Market Analytics
Table 119: Indian Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 120: Indian Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 121: Indian 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)
5c. REST OF ASIA-PACIFIC
A. Market Analysis
Outlook
Australia
An Insight into Feed Additives Market
Meat Consumption Trends in Australia
Use of Antibiotics for Animal Health in Australia - A Review
Malaysia
New Zealand
South Korea
Product Launch
B. Market Analytics
Table 122: Rest of Asia-Pacific Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 123: Rest of Asia-Pacific Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 124: Rest of Asia-Pacific 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

6. LATIN AMERICA
A. Market Analysis
Outlook
Meat Market in Latin America - An Overview

B. Market Analytics
Table 125: Latin American Recent Past, Current & Future Analysis for Feed Acidifiers by Geographic Region - Brazil and Rest of Latin American Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 126: Latin American Historic Review for Feed Acidifiers by Geographic Region - Brazil and Rest of Latin American Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 127: Latin American 15-Year Perspective for Feed Acidifiers by Geographic Region - Percentage Breakdown of Dollar Sales for Brazil and Rest of Latin American Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

Table 128: Latin American Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 129: Latin American Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 130: Latin American 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

6a. BRAZIL
A. Market Analysis
Outlook
Burgeoning Animal Feed and Meat Export Markets Spur Feed Additives Demand

Table 131: Brazilian Animal Feed Market (2014E): Percentage Share Breakdown of Production Volume by Segment (includes corresponding Graph/Chart)

B. Market Analytics
Table 132: Brazilian Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 133: Brazilian Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 134: Brazilian 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

6b. REST OF LATIN AMERICA
Market Analysis

Table 135: Rest of Latin American Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

Table 136: Rest of Latin American Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)

Table 137: Rest of Latin American 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

7. REST OF WORLD
Market Analysis

Table 138: Rest of World Recent Past, Current & Future Analysis for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with...
Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 139: Rest of World Historic Review for Feed Acidifiers by Product Segment - Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2006 through 2012 (includes corresponding Graph/Chart)
Table 140: Rest of World 15-Year Perspective for Feed Acidifiers by Product Segment - Percentage Breakdown of Dollar Sales for Formic Acid, Lactic Acid, Fumaric Acid, Propionic Acid and Other Acids Markets for Years 2006, 2014 & 2020 (includes corresponding Graph/Chart)

IV. COMPETITIVE LANDSCAPE
Total Companies Profiled: 56 (including Divisions/Subsidiaries - 65)
The United States (17)  
Canada (4)  
Japan (1)  
Europe (32)  
- France (2)  
- Germany (5)  
- The United Kingdom (2)  
- Italy (1)  
- Spain (5)  
- Rest of Europe (17)  
Asia-Pacific (Excluding Japan) (8)  
Latin America (3)

Ordering:  
Order Online - http://www.researchandmarkets.com/reports/338918/  
Order by Fax - using the form below  
Order by Post - print the order form below and send to  
Research and Markets,  
Guinness Centre,  
Taylors Lane,  
Dublin 8,  
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit
http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

| Product Name: | Feed Acidifiers - Global Strategic Business Report |
| Web Address:  | http://www.researchandmarkets.com/reports/338918/ |
| Office Code:  | SCBRQZXZ |

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td>USD 4950</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 5 Users:</td>
<td>USD 6930</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 10 Users:</td>
<td>USD 9405</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 15 Users:</td>
<td>USD 11880</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

<table>
<thead>
<tr>
<th>Title:</th>
<th>Mr</th>
<th>Mrs</th>
<th>Dr</th>
<th>Miss</th>
<th>Ms</th>
<th>Prof</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Address: *</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisation:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal / Zip Code:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax Number:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ______________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World