

Food and Companionship Enriching Life-Partnering with the Animal Health Industry

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*Food and Companionship:
Enriching Life-Partnering with the
Animal Health Industry*

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Food and Companionship Enriching Life-Partnering with the Animal Health Industry

Elanco

This presentation provides a global perspective of Elanco and may not be reflective of our business in individual geographies.

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It all starts with animals and the people who care for them

We're a focused animal health company, working to provide those who raise and care for animals with the products and knowledge services that empower them to address global challenges.



Our Vision:

**Food and companionship
enriching life.**

Our vision advances the well-being of
animals, people and our planet.



Who We Are



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Global and Growing

We empower **veterinarians, farmers, and pet owners** with the tools needed to help animals live healthy lives. Our products and knowledge services help prevent and treat disease in food animals and pets in more than 90 countries.



FOUNDED IN
1954



HEADQUARTERED IN
GREENFIELD, INDIANA, USA



5,800
EMPLOYEES



12 MANUFACTURING
FACILITIES

\$3.1B
IN REVENUE
2018

125
BRANDS



PRODUCTS SOLD IN
90 COUNTRIES

12

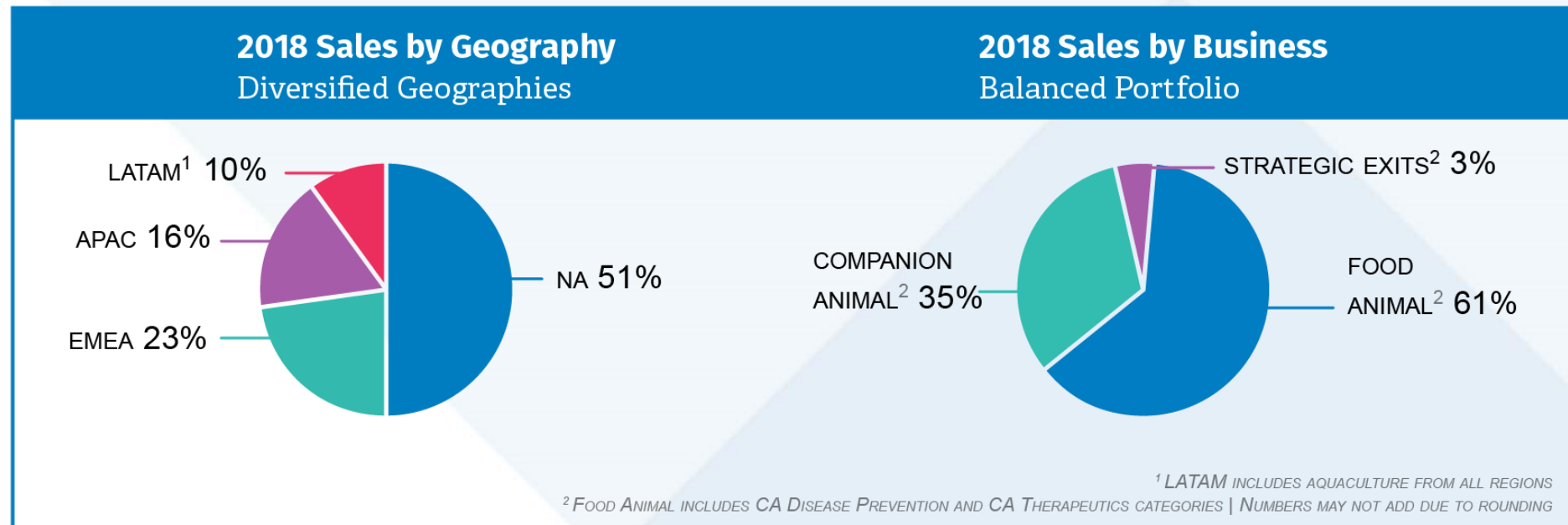
MAJOR PRODUCT
APPROVALS | LAUNCHES
SINCE 2015

TOP 4
IN ALL MAJOR
MARKETS

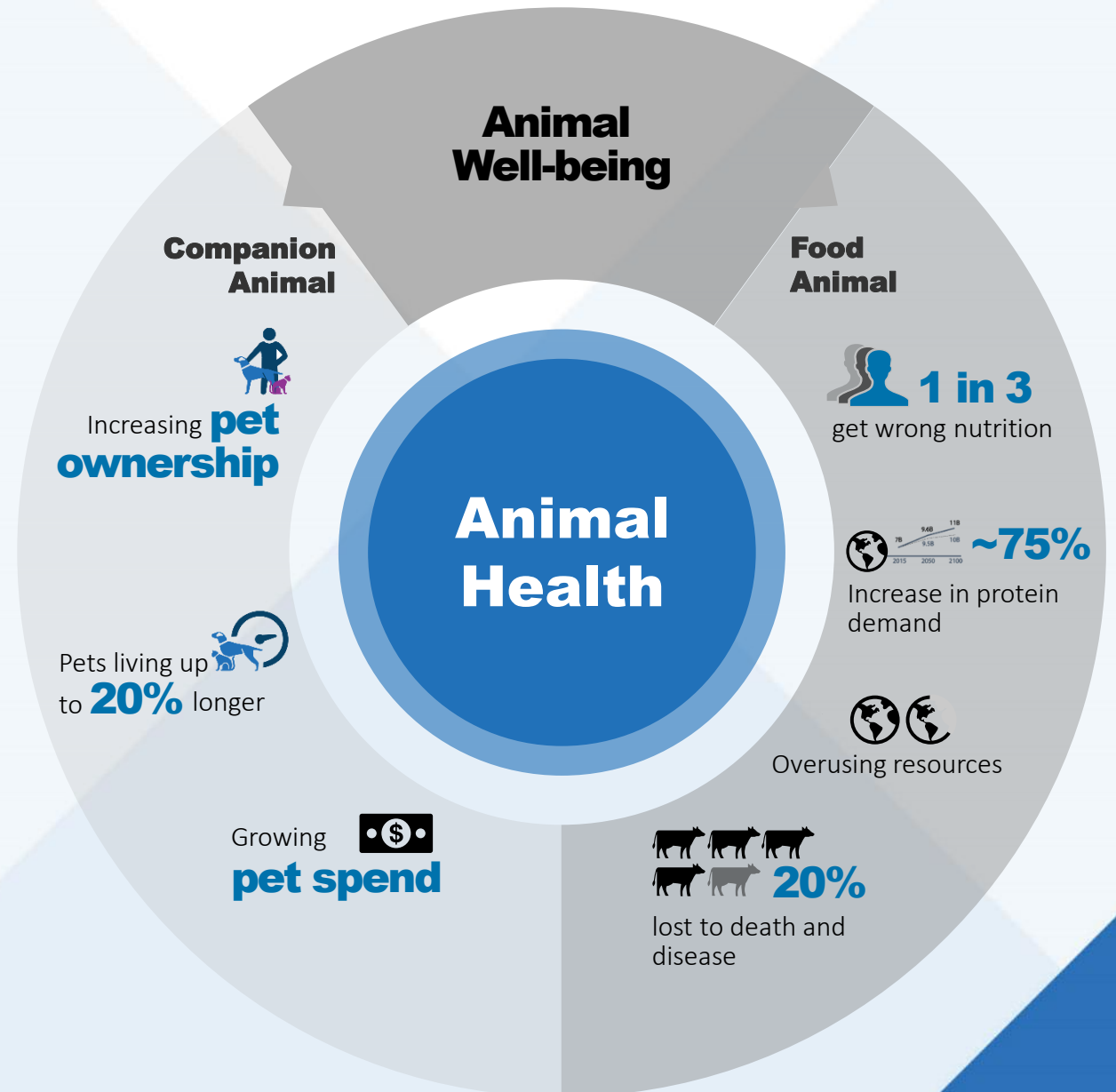
- #1** MEDICATED FEED ADDITIVES
- #2** POULTRY
- #3** CATTLE

A Premier Company with Size and Scale to Operate Independently

Over the past decade, Elanco has diversified our business, expanding our global foot print from largely US and Food Animal focused to evenly split between US and International, while building a pet business that now accounts for a third of the business globally.



... in an attractive Industry with strong growth drivers



¹ *The State of Food Security and Nutrition In the World. UN Food and Agriculture Organization. 2018*

² *Obesity and overweight. World Health Organization.*

³ *Earth Overshoot Day 2017 is August 2. WWF.*

What We Do



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Food and Companionship Enriching Life

Driven by our vision of food and companionship enriching life, our products:

- Improve animal disease management and production efficiency
- Help pets live longer and healthier lives, enhance animal well-being
- Reduce the environmental impact of livestock production



Product Areas of Focus

We are an established leader with flagship brands and a global presence. We're focused on investing and innovating in the animal health priorities that mean the most to our customers and the animals in their care.

COMPANION ANIMAL



**Companion
Animal Disease
Prevention**



**Companion Animal
Therapeutics**

FOOD ANIMAL



**Food Animal
Future Protein
& Health**



**Ruminants
& Swine**

Companion Animal Disease Prevention

Our portfolio of vaccines and parasiticides protect pets from diseases, harmful worms, fleas and ticks.



PARASITICIDES

One of the broadest portfolios offering protection at the earliest age

VACCINES

Leading portfolio in U.S. market



Companion Animal Therapeutics

Chronic disease becomes a significant challenge as pets live longer. We focus on managing pet pain and the increasingly common ailment of osteoarthritis.



CHRONIC DISEASE

Emerging leadership in osteoarthritis and pain

Additional portfolio solutions for cardiovascular and dermatology indications, including otitis (ear infection) treatment



Future Protein and Health

Fast-growing proteins – poultry and fish – create opportunity to provide greater access to nutritionally important protein, while nutritional health products help address market demand for alternatives to medically important antibiotic alternatives.



NUTRITIONAL HEALTH

Probiotics, prebiotics and enzymes, addressing demand for alternatives to medically important antibiotics

POULTRY & AQUA

Solutions addressing pancreatic disease and sea lice in aqua, coccidiosis and salmonella in poultry



Ruminants and Swine

Cattle and swine remain the foundation of our business with a strong global brand presence.



CATTLE

Top 3 player globally

SWINE

Flagship brands deliver value across the production cycle

ANTIBIOTIC STEWARDSHIP

Industry leader with our 8-Point Antibiotic Stewardship Plan tracking our commitment



Corporate Responsibility



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Food Security

We're focused on:

- Ensuring nutritious meat, milk and eggs are accessible and affordable to everyone
- Broadening perspectives on how to make accessibility and affordability a reality in sustainable ways.



Human-Animal Bond

We celebrate the bond between humans and pets in our daily lives through increased interactions with companion animals, better access to veterinary care, and global programs that support the human-animal bond.

Our Human-Animal Bond efforts focus on:

- Supporting the bond between people and animals, focusing on pet therapy and assistance dogs
- Advocating for the benefits pets bring to people, supporting research that demonstrates pets' value to society



Partnering in Animal Health



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External Innovation

Elanco's partnership engine providing rapid evaluation of external opportunities for both Companion and Food Animals.

Benefits of partnering with Elanco:

- Global presence in food animal and companion animal markets
- Cross species disease research
- Significant sales and marketing capabilities in health and nutrition
- Extensive R&D capabilities with an innovative pipeline and approach
- Create alternative revenue streams and discover unrealized commercial value

Animal Health Licensing

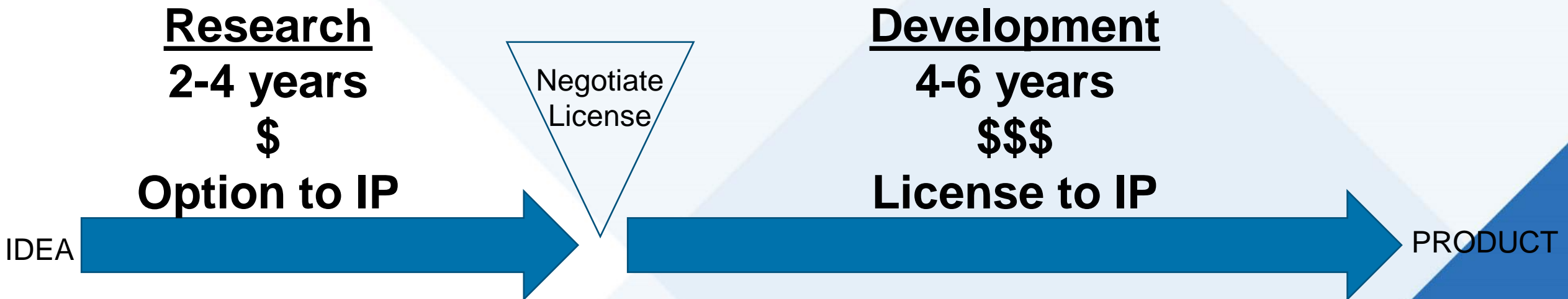
- Potentially faster route to market/income to support additional development efforts
- Rapid proof of concept in the target species
- Opportunities that fail in human health may become successful animal health products through re-purposing and may provide extended patent life

Food and Companionship Enriching Life Focused R&D Efforts

Platform	Large Molecules	Vaccines	Small Molecules	Nutritional Health
Species	Food Animal Cattle Swine Poultry Fish			Companion Animal Dogs Cats
Unmet Needs	Respiratory Enteric/Gut Health Mastitis Metabolic Parasiticide			Parasiticide Dermatology Pain/Osteoarthritis Cardiovascular Diabetes
Ancillary Areas of Focus	Reproduction Milk Production			Oncology CKD IBD

Academic Partnerships

- Multiple examples of agreements
 - Confidentiality/non-disclosure
 - Academic discovery research agreements with or without options to IP from findings
 - Option agreements
 - Fee for service
 - Strategic Alliances
 - Licensing





ElancoTM

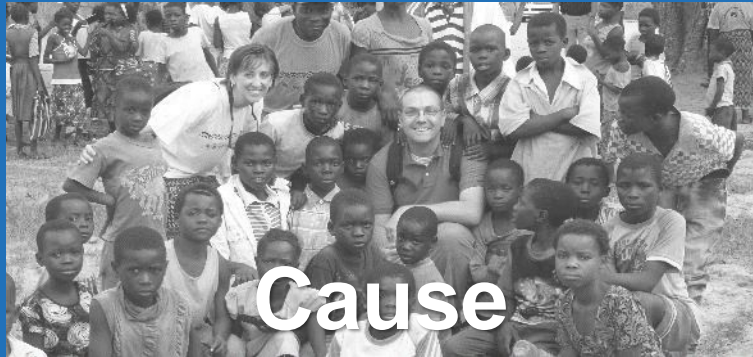
Food and Companionship **Enriching Life**



Customer



Culture



Cause

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Strengthening
University-Industry
Partnerships

Member
Webinar

WEDNESDAY,

APRIL 8, 2020

12 to 1 p.m. EDT



Jim Bray
Northwestern
University
Moderator

How Companies Approach Academic Research Engagement in these Disruptive Times

[Join us](#) to learn how our industry members, in diverse sectors, are evaluating and reframing their current approaches to academic collaborations.

Panelists



Gaylene Anderson
Boehringer Ingelheim
Pharmaceuticals, Inc



Kent Foster
Microsoft



Austin Kozman
PepsiCo