



Brakke Consulting's US Flea Control and Heartworm Markets December 2018

Table of Contents

Methodology	1
Executive Summary	3
Section I: Flea Control Products	9
Flea Control Products: Products and Pricing	11
Tick-only Products	33
Generic Fipronil, Nitenpyram & Imidacloprid Products	34
Veterinary Generic Fipronil & Imidacloprid Products.....	48
The Traditional OTC Market	53
Flea Products Sales Volume	57
New and Developing Products	63
Section II: Heartworm Preventatives	65
Heartworm Preventatives: Products and Pricing	67
Heartworm Preventatives Sales Volume	79
New and Developing Products	82
Section III: Multiparasite Products	85
Multiparasite Products: Products and Pricing	87
Multiparasite Products Sales Volume	94
New and Developing Products	96
Section V: Surveys	99
2018 Veterinary Survey	101
2018 Pet Owner Survey	131
Appendices	147
Appendix A: 2018 Veterinarian Questionnaire	
Appendix B: 2018 Pet Owner Questionnaire	
Appendix C: Historical Pricing Trends	
Appendix D: Advantus Product Insert	
Appendix E: Credelio Product information	
Appendix F: Centragard product information	
Appendix G: Coraxis Product Information	
Appendix H: Broadline EU Package Insert	
Appendix I: Revolution Plus product information	
Appendix J: Bravecto Plus EU product information	
Appendix K: Nexgard Spectra Australian product information	
Appendix L: Veterinarian Open Comments to Manufacturers	