

OVERVIEW

Kansas is home to a large concentration of public and private entities in the animal health and nutrition sectors including research and production of therapeutics, diagnostics, biologics, and nutrition and feed products. Kansas sits within the KC Animal Health Corridor, a region which houses more than 300 animal health companies that account for 56 percent of total worldwide animal health, diagnostics and pet food sales.

Several established research facilities and organizations can be found in northeast Kansas, including the Biosecurity Research Institute, and the decision to construct the National Bio and Agro- Defense Facility (NBAF) in Manhattan, Kansas, is a significant advantage for the region.

Livestock production in Kansas is the largest contributor to the agriculture industry, representing a wide breadth of farmers, ranchers and agribusinesses across the state, and requires substantial preparation and planning for potential animal health emergencies. The presence of strong agriculture educational resources and an expansive transportation network together create a sound foundation for animal health success in Kansas.

Identifying the barriers and challenges that exist in the animal health sector will be key to future growth in Kansas. Policy issues on the state and federal level will have a significant impact at all levels of animal health, from the use of antibiotics in food-producing animals to animal disease vaccines. Developing facilities and the workforce to expand research and development in animal health will continue to be a challenge.

In addition, in order to continue growing animal agriculture in Kansas, there is an increasing need for mixed and large animal veterinarians willing to work in rural America.

Amid these challenges, the industry also faces increased pressure from consumers which is often influenced by misleading information.

Although Kansas is well established as a leader within the KC Animal Health Corridor, continuing this growth will require collaborative efforts from private and public stakeholders to develop strategies to overcome these challenges facing the industry.

Expanding educational opportunities and

developing partnerships between animal health companies and research facilities will enhance growth of existing businesses as well as attract new enterprises.

Finally, it will be critical to maintain communication with policy makers to ensure they remain focused on protecting animal health as well as public health and the global food supply while encouraging economic development within the animal health industry.

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FACTS AND RESEARCH

Kansas is not only among the nation's top states for raising livestock, it is also home to a large concentration of public and private entities in the animal health and nutrition sectors including research and production of therapeutics, diagnostics, biologics, and nutrition and feed products to support the industry.

In fact, Kansas is located within the KC Animal Health Corridor, which is home to more than 300 animal health companies that account for 56 percent of total worldwide animal health, diagnostics and pet food sales. According to the Biotechnology Industry Organization (BIO), the Kansas bioscience industry employs more than 14,000 people across approximately 836 establishments, with a heavy concentration of agricultural feedstock and chemicals, and in research, testing and medical labs.

Kansas was also selected to be home for the National Bio and Agro-Defense Facility (NBAF), a state-of-the-art, biocontainment laboratory for the study of diseases that threaten both America's animal agricultural industry and public health. NBAF, which is being constructed adjacent to K-State's campus in Manhattan, will strengthen the nation's ability to conduct research, develop vaccines, diagnose emerging diseases and train veterinarians.

The decision to locate NBAF in Kansas is further confirmation that Kansas not only has a strong foundation and presence in the current animal health and bioscience sectors, but that the state's prominence in this critical sector of animal and human health will continue into the future.

Though significantly smaller than the human health care market, animal health products are required to undergo similar testing and adhere to strict regulatory protocols. According to the Animal Health Institute, on average the world spends about one-fortieth of the amount on animal

medicines as it devotes to human medicines. This investment covers the world's 24 billion chickens, more than 1 billion cattle and sheep, 750 million pigs and goats, 500 million dogs and 400 million cats. The construction of NBAF in Manhattan combined with the existing concentration of animal health entities in the Corridor and the proximity to research farms and livestock at K-State

present an opportunity for Kansas to be a leader in the development of animal health products necessary to raise healthy livestock and protect the food supply in the United States and around the globe.

Unlike many sectors of the U.S. economy that experienced significant struggles in the past decade, the bioscience-based economy weathered the challenging economic times better than most industries. Though the prospects for continued growth in this sector remain strong, there are specific criteria necessary to sustain a growing animal health and bioscience industry. In addition to challenges related to reduced funding resources, according to a report by Battelle and BIO, there are also threats from international competition in this sector from both first-world and developing nations.

The report highlights several factors which are critical in order for the U.S., and specific states within the U.S., to remain competitive:

1. Research funding
2. Science-based regulatory systems
3. Strong intellectual property protections
4. Government trade actions that sustain and improve the openness of international markets for U.S. bioscience goods and services
5. Federal and state tax policies and incentive systems that sustain industry competitiveness
6. Education and workforce development programs providing a skilled workforce

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SUCCESS STORIES

Due to the combination of a strong animal health presence in private industry, universities and other educational institutions and strong support from state government, the animal health industry in Kansas has experienced growth in recent years.

- The KC Animal Health Corridor is home to more than 300 animal health companies, representing the largest concentration in the world. Since 2006 when the Corridor was officially launched, 31 animal health companies have located in the Corridor. Companies with a business location within the Corridor represent 75 percent of the worldwide sales of animal health products and diagnostics, which represents just over \$19 billion.
- KDA, in coordination with industry and academic partners, continues putting a strong focus on continuous improvement of emergency preparedness efforts throughout the state in order to be the best prepared state in the nation when it comes to foreign animal disease preparedness through leadership within the development and implementation of the Secure Beef Supply plan, coordinating with industry to assist feedlots in updating and adopting biosecurity plans, hosting annual multi-day functional foreign animal disease exercises and more.

- After a three-year site selection process, the U.S. Department of Homeland Security selected Manhattan, Kansas, to be the home for NBAF, which will strengthen the nation’s ability to conduct research, develop vaccines, diagnose emerging diseases and train veterinarians.
- A significant number of well-respected public and private education and research centers are already located in northeast Kansas.
- Millions of dollars have been invested in Kansas by private animal health and bioscience companies that have chosen to locate or expand operations.

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