



Annual report 2022

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health for better
animal welfare

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Members

Message from the Secretary General and President

As Secretary General and new President of AnimalhealthEurope (since June 2022) we invite you to browse through our annual report to learn more about our efforts to raise awareness on why animal health matters, and how our members are prioritising the development of innovative solutions to ensure holistic animal care and sustainable food systems during this time of geopolitical crisis and instability.

Our core focus: Application of the new EU rules on veterinary medicines

Remaining at the forefront of our work throughout this past year, the January 2022 application of the new EU Regulations on Veterinary Medicines and Medicated Feed was a priority for us and our entire membership. It is safe to say both our national associations and company members have been fully occupied with implementing the various changes coming with the Regulations, and it hasn't always been smooth sailing. Despite the intended objective of reducing administrative burden for industry to ensure wider availability of medicines across Europe, significant delays and technical

hiccups with the new databases and processes have so far created additional work. We hope to see the challenges resolved as we move forward into 2023.

Our priority focus areas: One Health

With One Health as one of our priority focus areas, we have been working this year to draw attention to the need for the great impetus created around the One Health concept to now be put into action. We were very pleased to have the Director General of the World Organisation for Animal Health Monique Eloit speak at our annual conference on the Quadripartite's One Health Action Plan that was later published in October.

Created in 2021 in the aftermath of the COVID-19 pandemic to prevent, detect, and rapidly respond to health emergencies, we joined the EU's Health Emergency Preparedness and Response (HERA) Joint Industrial Cooperation Forum in 2022 to serve as the voice of the animal health industry. We were also pleased to see our request



Roxane Feller
Secretary General

for a One Health stakeholder platform answered when we were invited to join the existing EU AMR One Health Network. These actions were complemented by the creation of a new One Health Directorate within the DG SANTE structure at the European Commission, a step in the right direction for concrete action.

Our priority focus areas: Sustainability

As ever, sustainability remains a priority focus with a raft of new policies coming from the EU institutions looking at the sustainability of our food systems amongst others. We joined the Commission's newly created Advisory Group on Sustainability of Food Systems to promote the central role animal health plays in efficient and sustainable food production. To ensure better understanding of the importance of continued veterinary medicines availability, and their role in sustainable farming, we were also active in the Domestic Advisory Group on the UK-EU Trade and Cooperation Agreement to ensure continued supply of animal health products both in Great Britain and Northern Ireland.

Our priority focus areas: Innovation

AnimalhealthEurope officially moved into the areas of in vitro diagnostics, digitalisation and Big Data in 2022, with the formation of dedicated working groups. Work in this area supports the general move over the past years to focusing on earlier detection of disease for more holistic animal health care.

Our work continued throughout 2022 within the Secretariat for the International Research Consortium on Animal Health, and some of our company members have been active in projects to respond to vaccine development requests, particularly for African Swine Fever. In-depth analysis of disease control tools gaps was published by our DISCONTTOOLS project manager in the second half of the year with a call to focus on five research priorities for animal health over the next years to help deliver a sustainable and healthy planet. Priority areas for innovations are vaccinology, antimicrobial resistance, climate mitigation and adaptation, digital health, and epidemic preparedness.

A final word of thanks

None of what we have achieved this year would have been possible without the support of our members and also our partners in the Brussels sphere, our thanks is well-deserved. We'd also like to thank the EU decision-makers who have kindly taken part in our events, invited us to speak at important events, and generally remained open throughout the year for exchanges on animal health related topics. We cannot close without a word of thanks also to our AnimalhealthEurope secretariat for consistently acting as a strong voice for our industry and the animal carers we serve.



Rob Kelly

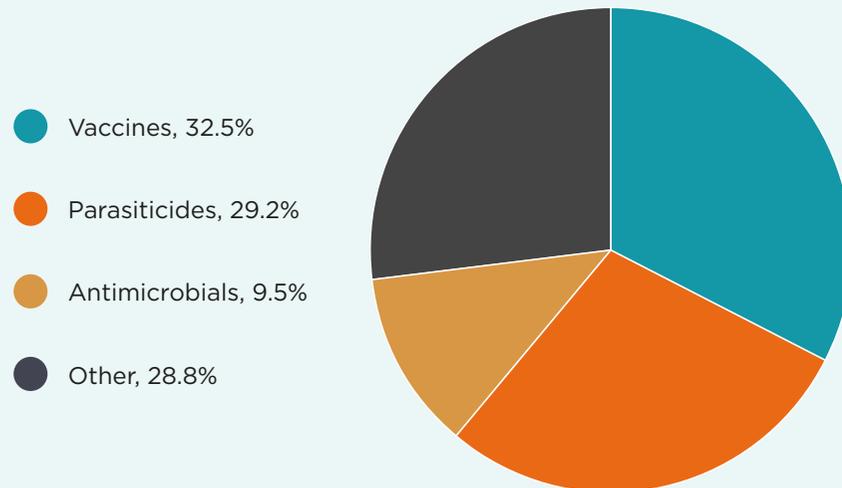
Rob Kelly
President

Key figures 2022

AnimalhealthEurope represents 12 of Europe's leading manufacturers of animal medicines and 16 national associations in 19 countries.

Covering 90% of the European market, our member companies invest around 8% of turnover in research and development every year.

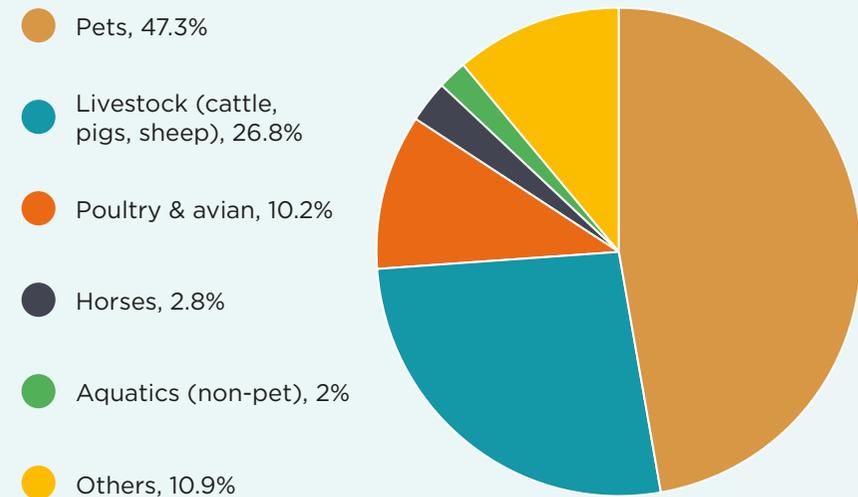
Sales by product category in Europe



Countries covered include AT, BE, CH, CZ, DE, DK, ES, FR, UK, GR, HU, IE, IT, NL, PL, PT, SK.

Source: 9 AnimalhealthEurope and CEESA member companies. 20% added for non-participating companies. CEESA stands for Executive Animal Health Study Centre www.ceesa.eu

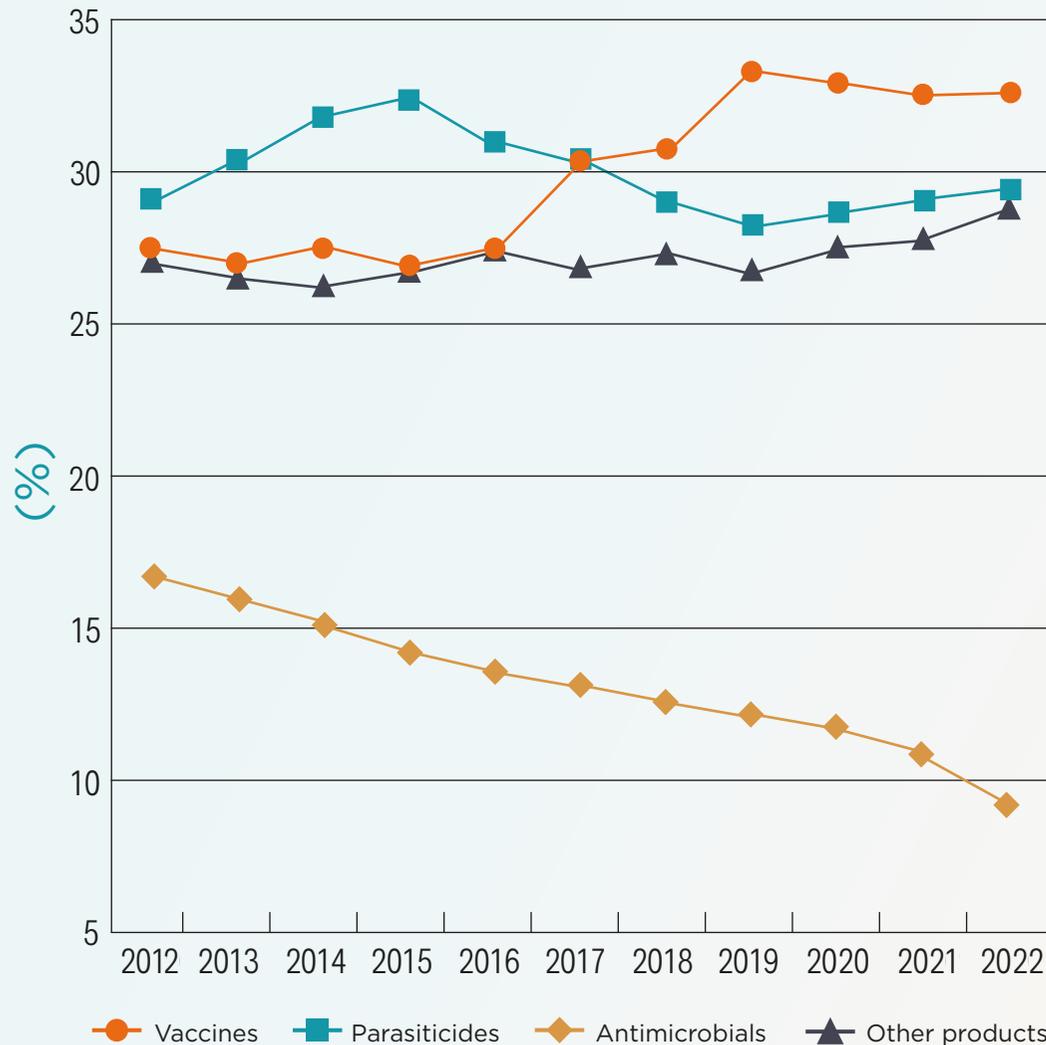
Sales by animal species



Countries covered include AT, BE, CH, CZ, DE, DK, ES, FR, UK, GR, HU, IE, IT, NL, PL, PT, SK.

Source: 9 AnimalhealthEurope and CEESA member companies. 20% added for non-participating companies. CEESA stands for Executive Animal Health Study Centre www.ceesa.eu

Sales per product category in Europe (%) (2012–2022)



**Total European
sales for 2022:
€7.9 Billion**



Better animal health for better animal welfare

Animal welfare a priority for Europe

A whopping 94% of survey respondents in the 2016 Eurobarometer on Animal Welfare believe it is important to protect the welfare of farmed animals. Whatever elements of animal welfare this view is based on, it's clear that animal welfare awareness when it comes to food production has increased notably in recent decades in Europe.

People hold a similar view when it comes to the welfare of companion animals, in fact, 74% of those surveyed believe the welfare of companion animals should be better protected than it is currently.

With that in mind the European Commission has been reviewing the fitness of current EU legislation with the objective of revising it and updating it with the latest scientific information and also societal demand.

Animal health, a prerequisite for animal welfare

Animal health products play an important role in maintaining high standards of animal welfare. Vaccines and parasiticides provide the means to prevent disease spreading amongst livestock, as well as among pets. Where bacterial infections occur, antibiotics can help to control them. And diagnostic tools are also helping to ensure that the right diagnosis is given early on so that the appropriate treatment options can be given to quickly remedy illness.

Animal health is recognised as being essential for animal welfare in the EU Regulation on Transmissible Animal Diseases, also known as the Animal Health Law, and it is also indirectly referenced in the internationally recognised principles of animal welfare known as the 'Five Freedoms'.

Five Freedoms



**Free from hunger
and thirst**



Free from discomfort



**Free from pain, injury
and disease**



**Free to express
normal behaviour**



**Free from fear
and distress**

The science is also developing in this area, and many scientists and animal welfare academics now talk about the Five Domains of animal welfare, which essentially include these same five elements, but with a greater focus on the mental state of the animal.

Animal welfare and disease

Our concern for animal welfare is, in a first instance, centred around disease prevention, control and treatment, but we recognise that ill-health can be the result of a complex combination of factors. Some are intrinsic, such as genetic make-up; some are external, such as living conditions, food, or contact with wildlife; some are environmental, including weather or the presence of air or water-borne diseases. No matter the circumstances however, animals just like people can get sick and in the instance of illness, it is important that veterinary care is given so that the appropriate treatment can be advised to avoid animal suffering.

The right conditions can of course help minimise the risk of disease, but they can never prevent it completely. This is why animal welfare requires good animal husbandry practices, responsible pet care, access to veterinary support, and animal vaccines, medicines and other healthcare means.

A better life for pets

Today, advances in animal healthcare are supporting a better life for our pets. With pets living longer and often being treated as part of the family, there are growing occurrences of lifestyle-related diseases such as obesity, diabetes, arthritis, and cancer. Developments over the past years have brought a range of therapeutic options to address these concerns, ensuring a better life for pets.



Better welfare for farm animals

Increasingly, consumers wish to know that the food they consume has come from animals that have enjoyed a healthy life and therefore a high standard of animal welfare. Farmers have a duty of care towards these animals, making sure they are safe, fed, happy and healthy. New animal health monitoring tools for farms are helping farmers to keep a closer eye out for signs of ill health or discomfort, so that care can be given before illness strikes, or to help stop it spreading further.

Contributing to the review of EU animal welfare legislation

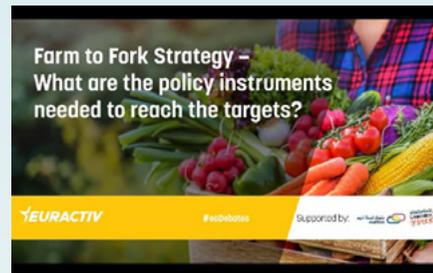
With the review of EU legislation on animal welfare, the European Commission is expected to publish a package of four proposals on welfare during transport, at the time of slaughter, on keeping and breeding, as well as on an animal welfare label by the end of 2023. And for the first time, the legislation will also cover aspects of pet welfare. AnimalhealthEurope will continue to play an active role in the review as member of the EU Platform for Animal Welfare, highlighting areas where animal health solutions can contribute. With today's expanding toolkit for veterinarians, farmers and other animal guardians, our industry offers connected health care for better welfare and more holistic animal management.

2022 at a glance

Debate on the Farm to Fork Strategy: how to reach the targets?

27/01/2022

In a [Euractiv event](#) co-organised by the Agri-Food Chain Coalition and European Livestock Voice we debated Farm to Fork target with policymakers, young farmers and environment stakeholders. [Watch the recording](#)



New EU Regulation on veterinary medicines starts to apply

28/01/2022

Application of the new EU Regulations on Veterinary Medicines and Medicated Feed now apply across the 27 EU Member States, with some delegated and implementing acts still being drafted.



World Animal Vaccination Day: Realising the potential of vaccination for better animal welfare

20/04/2022

Together with FVE and FECAVA we focused on highlighting the benefits of vaccination for better animal welfare for World Animal Vaccination Day.



EMA Info Day on Veterinary Medicines

12/05/22

The European Medicines Agency held a 2-day online event with industry and stakeholders discussing the latest updates in the new EU rules on veterinary medicines and the secondary legislation.



DG SANTE celebrates new Veterinary Medicines Regulation

20/06/22

The Commission organised a half-day event to celebrate the achievements of the new veterinary medicines legislation and its key role in the EU's fight against antimicrobial resistance as a tool to achieve the Farm to Fork targets.



Rob Kelly of MSD Animal Health elected President of AnimalHealthEurope

15/06/2022

As Hans Dittrich of MSD Animal Health announced his retirement summer of 2022, the AnimalHealthEurope Board and General Assembly elected his successor Rob Kelly to complete the two-year term started in June 2021.



Annual Conference on One Health

16/06/2022

AnimalHealthEurope hosted its first-ever hybrid event to address the topic of One Health, discussing the growing awareness and debating where we are now in terms of applying the concept in policy.



European Livestock Voice Farm Visit for MEPs

07/09/22

A delegation of MEPs and assistants of MEPs visited two family farms in Belgium to hear directly from farmers about the implications of the proposed Industrial Emissions Directive.



High-level Ministerial Meeting on African Swine Fever

27/09/2022

Our Secretary General presented the latest updates from industry at the High-level Ministerial Meeting on African Swine Fever organised by the European Commission and the Czech Presidency of the Council of the European Union.



Pet Alliance Europe highlights need for harmonised standards for assistance animals

27/09/22

MEPs joined animal welfare organisations, assistance animal associations, pet parents and their pets at the first live event where Dogs for Good CEO called for the development of clear European standards for assistance dogs training.



New research identifies lack of appropriate control tools for major infectious diseases of animals

06/10/2022

New research led by our DISCONTTOOLS project manager and published in *The Lancet Planetary Health* has identified a lack of appropriate control tools for many infectious diseases of animals that can impact on the UN SDGs.



AnimalhealthEurope at Congress of European Farmers

12-14/10/22

Our Secretary General spoke to the panel discussion on balancing food security and sustainability in the EU during this key event on resilient European agriculture.



New chair and new partner for EPRUMA

12/10/22

EPRUMA elected Cat McLaughlin, member of the Copa Cogeca Working Party on Animal Health and Welfare, Chief Adviser for Animal Health and Welfare for the England and Wales NFU, as its new chair.



TOPRA Veterinary Medicines Symposium

17–18/10/22

Our Regulatory team, authorities and the wider industry discussed how we can improve animal health in the future with veterinary medicines, considering strategies for working together.



Report published: Trends in Animal Antibiotic Use – Europe

28/10/2022

This new paper analyses key data over a decade to understand how efforts are progressing in Europe, and how we can better understand and tackle AMR in a One Health manner.



Responsible Use of Antibiotics in Europe: putting our best foot forward for One Health

08/11/22

Co-hosted by MEPs Emma Wiesner and Alexander Bernhuber, EPRUMA organised an event in the European Parliament to discuss One Health best practices with human health counterparts to address AMR.



Developing international regulatory standards for veterinary medicine

15/11/22

During the 41st VICH steering Committee in Washington, AnimalhealthEurope contributed to international standard making to avoid the repetition of animal studies and facilitate access to veterinary medicines.



Presenting industry action at European Antibiotic Awareness Day launch event

17/11/22

With the theme “Preventing Antimicrobial Resistance Together”, AnimalhealthEurope was invited to present actions to address AMR alongside human health and environment associations.



Second Veterinary Big Data stakeholder forum

23/11/22

EMA organised a second annual forum on big data to foster collaboration and engage stakeholders. The second edition continued the discussion on Big Data in veterinary medicines regulation by presenting progress made since the first forum in June 2021.



Strengthening food systems resilience and autonomy in times of crisis

28/11/22

Hosted by MEP Marlene Mortler, our Agri-Food Chain Coalition organised an event in the European Parliament to highlight the role of food chain innovations to support resilience, with FAO Brussels Director, Raschad Al-Khafaji as guest speaker.



Members

AnimalhealthEurope's membership covers 90% of the European market for animal health products. Our membership includes both animal health companies and national associations, representing both innovators and generics alike, as well as large, medium-sized and small companies.

Our corporate members



Our national association members

Belgium



Czech Republic & Slovakia



Denmark, Norway and Sweden



France



Germany



Greece



Hungary



Ireland



Italy



Netherlands



Poland



Portugal



Spain



Switzerland



United Kingdom



Ukraine





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