

# The European animal medicines industry in figures



# European animal medicines industry in a nutshell

TURNOVER

**€5.99 billion**

Europe is 2nd largest market in the world

COMPETITIVENESS

**1/3 of global market**

EMPLOYMENT

**50,000 jobs**

NUMBER OF COMPANIES

**292**

SMEs

**112**

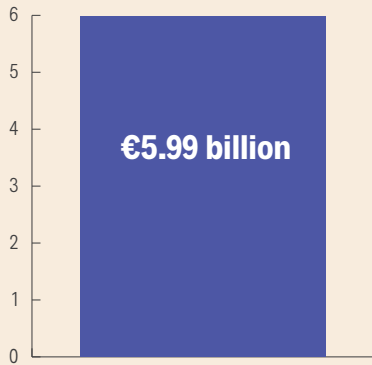
R&D EXPENDITURE

More than

**€400 million/year**

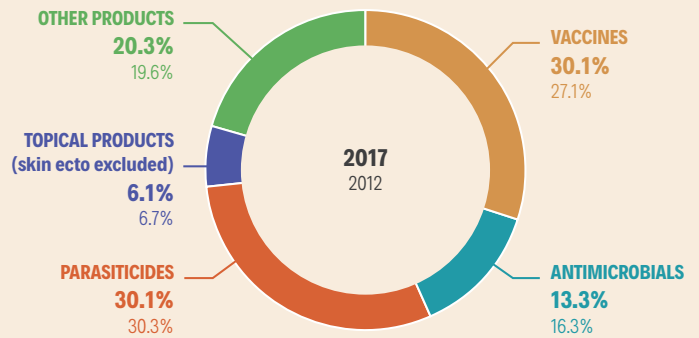
# European animal medicines market

Total European sales (2017)



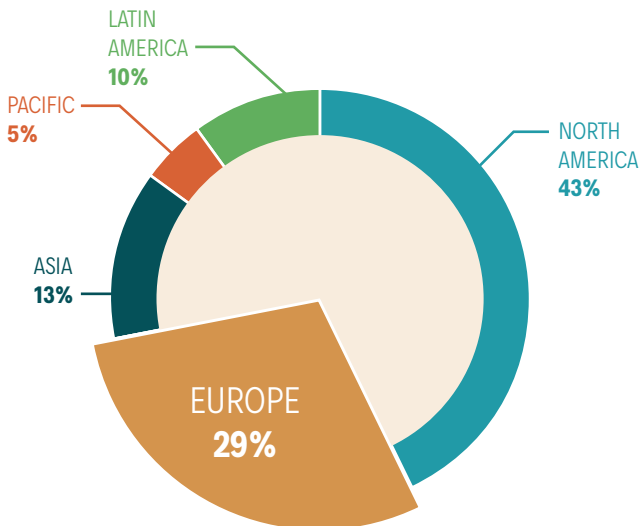
- €5.99 billion in sales in 2017
- 60% of sales are parasiticides and vaccines
- 13% of sales in 2017 are antimicrobials, 3% less than in 2012

Europe sales by products (2012–2017)



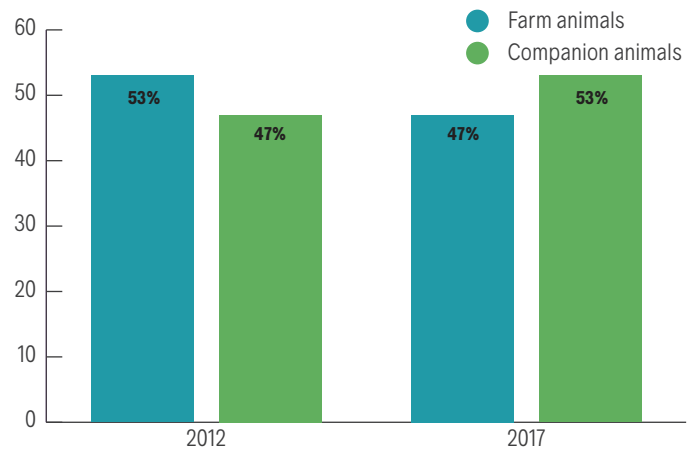
Source: CEESA

Global sales comparison (2017)



Source: CEESA

Evolution of product sales by animal type



- 53% of sales are for companion animal medicines
- Companion animals sales have increased by 6 percentage points from 2012 to 2017

Source: Extrapolated from CEESA data

- Europe is the **2nd largest animal medicines market** in the world
- Europe represents around **1/3 of the global market**
- The market value of the European animal medicines industry in 2017 was **3% of the European human pharmaceutical industry**
- While the human medicines sector deals with only one species, the veterinary sector deals with **multiple species**



Market value equivalent to **3%** of the human health industry in Europe

Source: EFPIA 2017

# Enabling employment

## Direct & indirect jobs

Animal medicines industry  
50,000



Veterinarians  
243,000

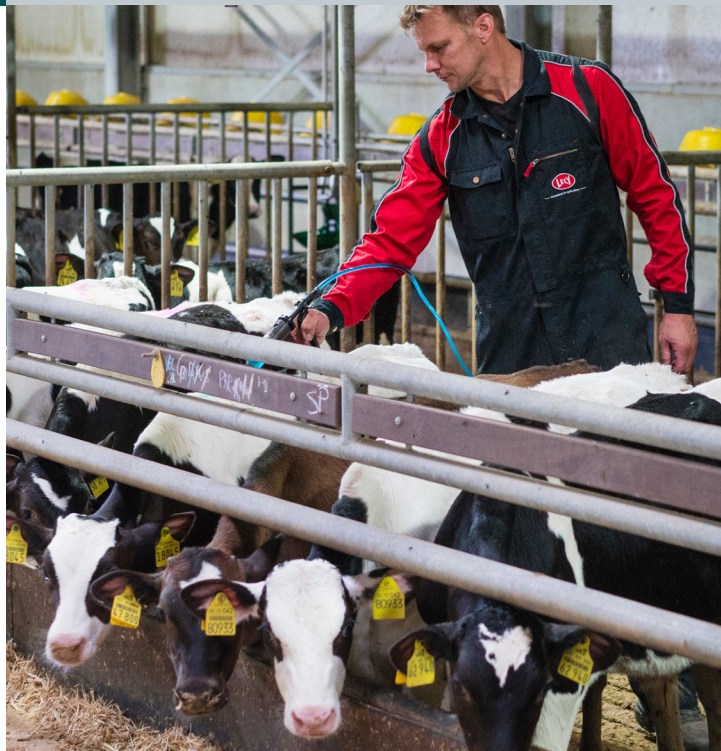


Farmers  
More than 9,400,000



Source: AnimalhealthEurope survey 2017, FVE, Eurostat

- Our industry enables nearly **10 million jobs** across Europe both directly and indirectly



# Household expenditure on companion animal care products in Europe

- Today **80 million European households** own a pet, more than one in three households (Source: Fediaf 2016)
- Europeans spend over **€38 billion per year** on care for their pets

## Pet food



€19.5 billion

## Pet related products and services



€16 billion

## Animal medicines



€3 billion

Source: Fediaf 2016, CEESA



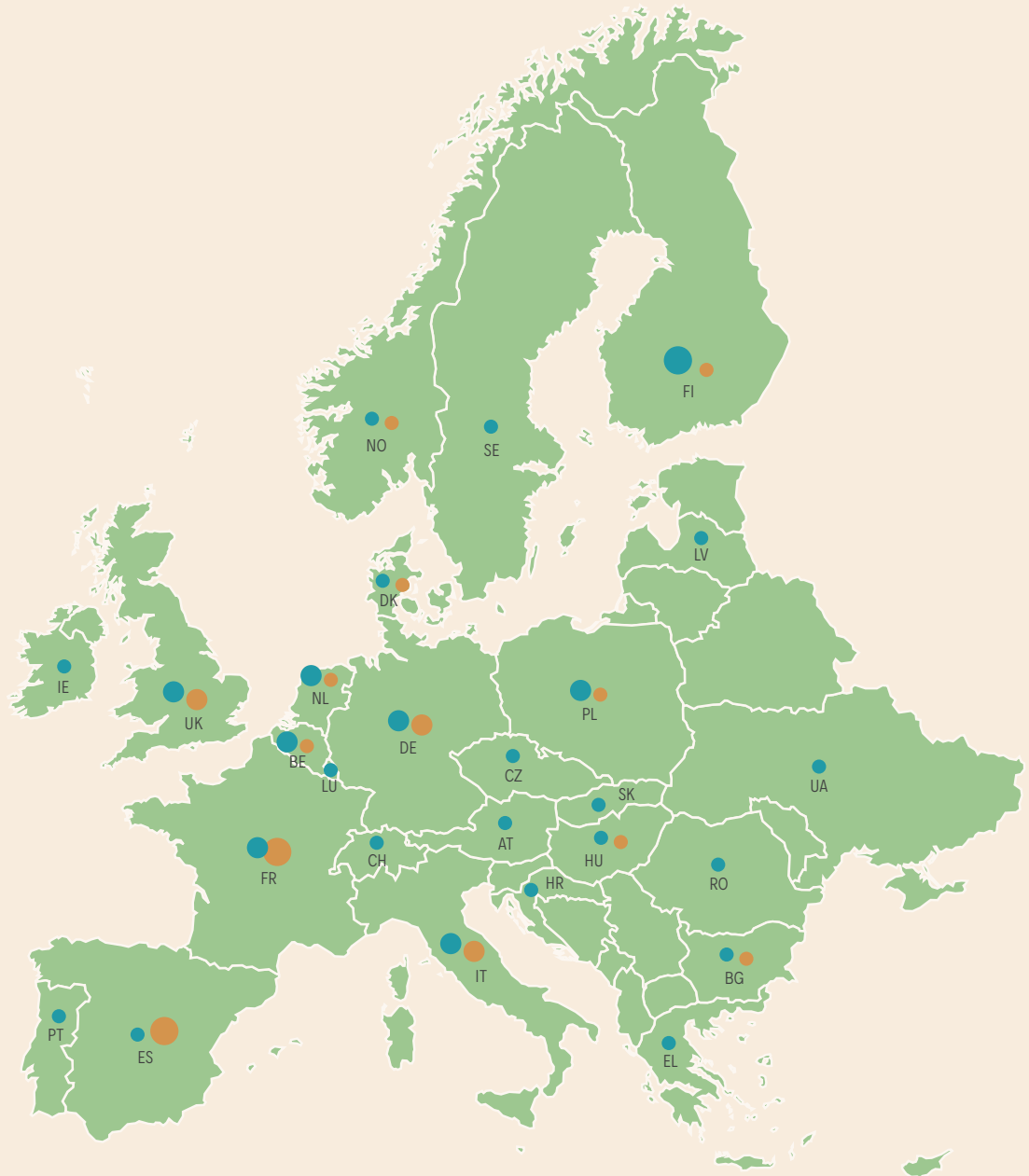
# Presence of animal medicines industry across Europe: Logistics & Production

## Type of sites

- Logistics
- Production

## Number of sites

- < 5
- 5–10
- > 10
- < 5
- 5–10
- > 10




Source: AnimalhealthEurope survey 2017

- The animal medicines industry is present in almost all 28 Member States
- 13 countries have both production and logistics facilities
- 10 countries ensure production for the whole of Europe

# Presence of animal medicines industry across Europe: R&D

## Type of sites

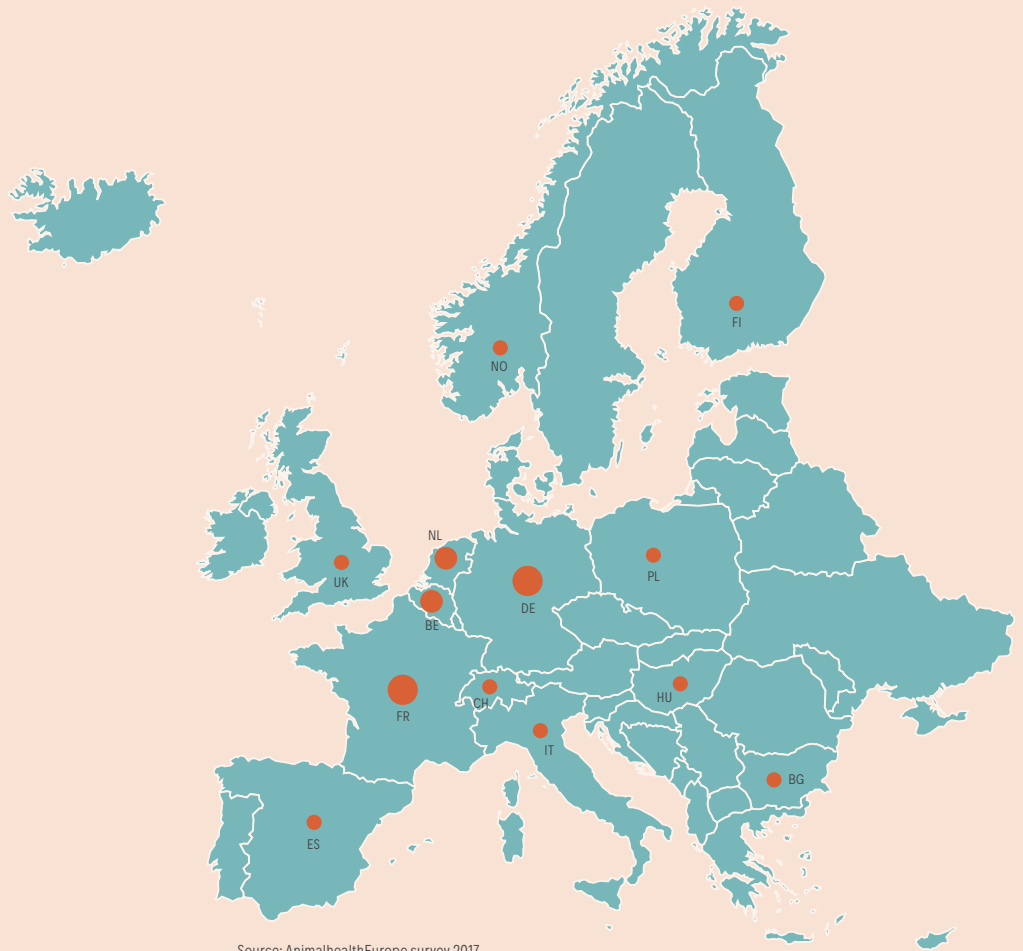
 R&D facilities

## Number of sites

 < 3

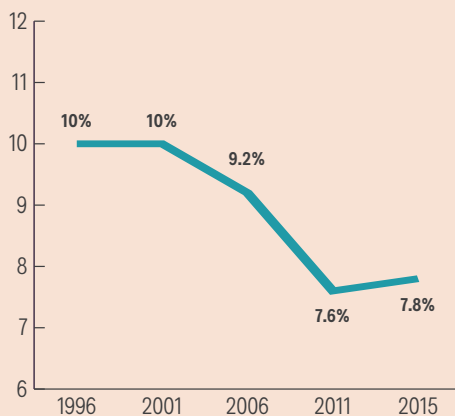
 3-6

 > 6



Source: AnimalhealthEurope survey 2017

## R&D as percentage of turnover



Source: Benchmarking the Competitiveness of the Global Animal Health Industry 2015 Survey

## Ranking of industrial sectors by overall sector R&D intensity

Software and computer services



10.6%

Leisure goods



5.9%

Technology hardware and equipment



8.4%

Aerospace and defence



4.3%

Animal health industry



8%

Automobile and parts



4.2%

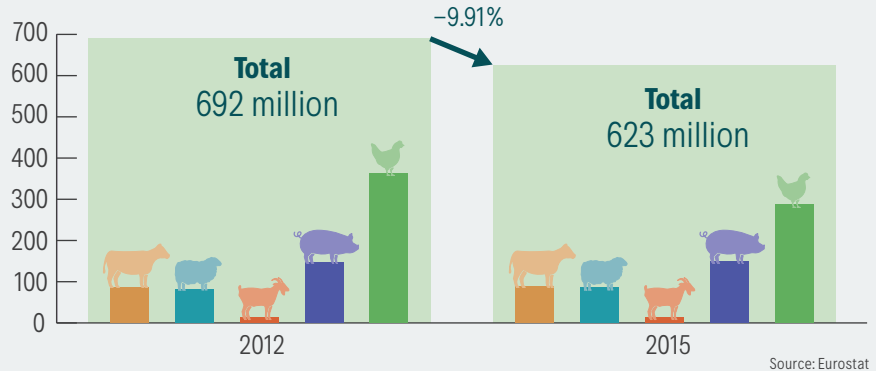
Source: The 2016 EU Industrial R&D investment scoreboard, European Commission JRC, DG RTD

- The European animal medicines industry spends **8% of turnover on R&D** on par with the technology hardware and equipment industry
- R&D spend represents investment of almost **€450 million** in 2016
- Over the past ten years, R&D investment has decreased from 10% to 8%

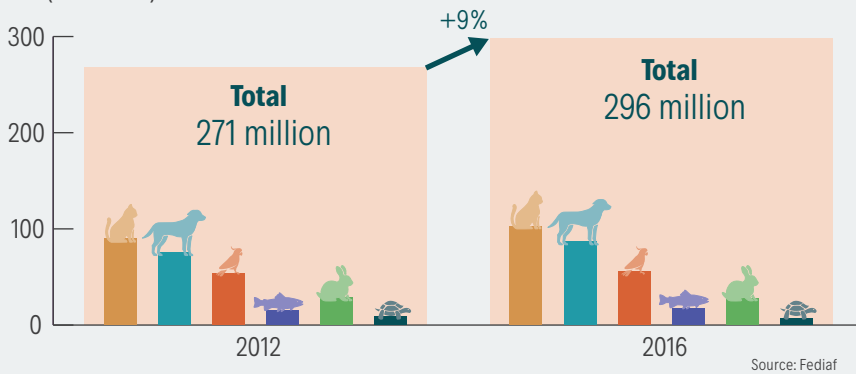
# Evolution of animal populations in Europe

- Animal medicines protect the health of **over a billion animals** (including bees)
- Number of farm animals has decreased by **9.91%** in three years (2012–2015)

Farm animals (in millions)

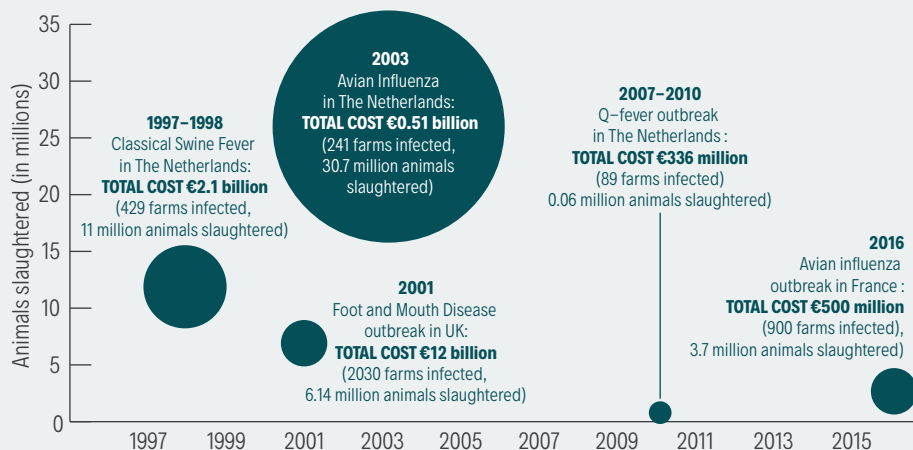


Pets (in millions)



- Animal medicines protect the health of almost **300 million pets**
- Number of pets increased by **9%** in four years (2012 to 2016)

# Impact of farm animal diseases



- 20% of global food production is lost due to animal disease

Source: OIE

- Total number of animals culled due to 5 farm animal disease outbreaks: +/- 52 million
- Total economic losses from 5 farm animal disease outbreaks: +/- €15 billion
- Q-fever infected more than 4,000 people, with 24 fatalities

Sources: Conference on material and immaterial costs of animal disease control, 2004. Cifog. Eurosurveillance. Ministère de l'Agriculture (France). National Institute for Public Health and Environment (Netherlands).



AnimalhealthEurope represents companies that research, develop and manufacture animal medicines in Europe.

It represents innovators and generics alike, as well as large, medium-sized and small companies.

AnimalhealthEurope's membership covers 90% of the European market for animal health products.

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