



Annual report 2019

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2019 at a glance

#MorethanMedicine

Members

Message from the Secretary General and President

2019 has been a great year full of new directions for AnimalhealthEurope. New directions as to how animal medicines will be regulated and used moving forward, a new direction for the EU with the changeover in leadership, and a new direction for how we present our industry in Europe, to mention just a few.

As Secretary General and President of AnimalhealthEurope we remain constant and together we grabbed these changes in direction with both hands. Read on through our annual report for the highlights from this past year.



New EU rules – a changing landscape for veterinary medicines

Published in the EU Official Journal in January, the new EU Regulations on Veterinary Medicines and Medicated Feed are set in motion for application in all EU Member States in early 2022. This was the topic of our conference in the first half of the year as industry and regulators exchanged on the implementation phase of the new Regulations. With a high number of Implementing Acts and Delegated Acts to be prepared, agreed and published, and new electronic portals along with three new EU databases, covering products, manufacturing and pharmacovigilance to be built, the behind-the-scenes work this year has been tremendous.

Some pathways are yet to be defined, but the work continues and we remain an active stakeholder providing input to the many consultations where and when needed.

New EU leadership – uncharted waters in Brussels

The European Parliament elections in May and the ensuing changes at the European Commission has shone a light on a burning desire for Europe to become climate-neutral, with the European Green



Roxane Feller
Secretary General

Deal pitted to become Europe's flagship policy. The animal health industry is keen to support progress and changes where they are needed, while ensuring that Europe aims for true sustainability at a pace which will engage Europe's wider farming community rather than pursuing absolute reduction figures. This while supporting further research and development into as many tools and innovative solutions as necessary to protect Europe's animals.

A new story – delving into the deeper veterinary toolbox

#MorethanMedicine

Drawing attention to the host of opportunities that advances such digital monitoring, high-tech diagnostics, and new and improved vaccines can offer, we also broadened our story-telling to highlight the importance of deploying the wider veterinary toolbox. Focusing on the 'prevention is better than cure' approach, the industry believes that with the full spectrum of animal health solutions available to animal owners across Europe, many benefits can be brought in terms of improving animal health and producing food in a more sustainable manner.

Not only does better animal health mean a reduced need for antibiotics to be used in animal care, but it also means: optimal animal well-being; increased food safety and security; resilience against economically devastating crises; enhanced resource efficiency; and a drastic reduction of food losses and waste.

New members, and a word of thanks

AnimalhealthEurope was very pleased this year to welcome two new company members to our European association. Spain-based Syva and Northern Ireland-based Norbrook joining our ranks means that we can continue to be a strong, and more united voice for the animal medicines industry in Europe. We look forward to working with them as we strive to stimulate a regulatory environment that encourages the bringing to market of the latest scientific advancement in veterinary medicines, providing availability of animal health solutions in all markets, for all species.

And so we say thanks to all of our members and our partners here in Brussels, and a big thanks also to our secretariat for working so diligently to ensure that ours is the voice of the animal medicines industry in Europe.



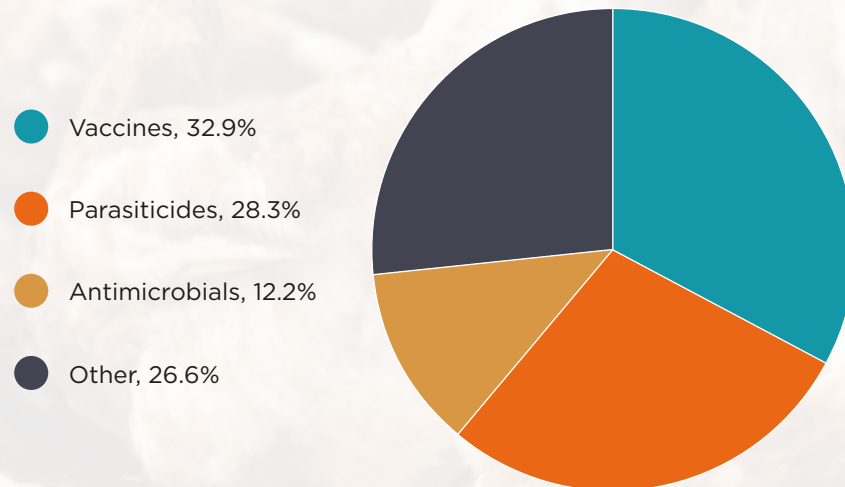
Wijnand de Bruijn
President

Key figures 2019

AnimalhealthEurope represents 13 of Europe's leading manufacturers of animal medicines and 17 national associations in 19 countries.

Covering 90% of the European market, our member companies invest over €450 million in research and development every year.

Sales by product category in Europe

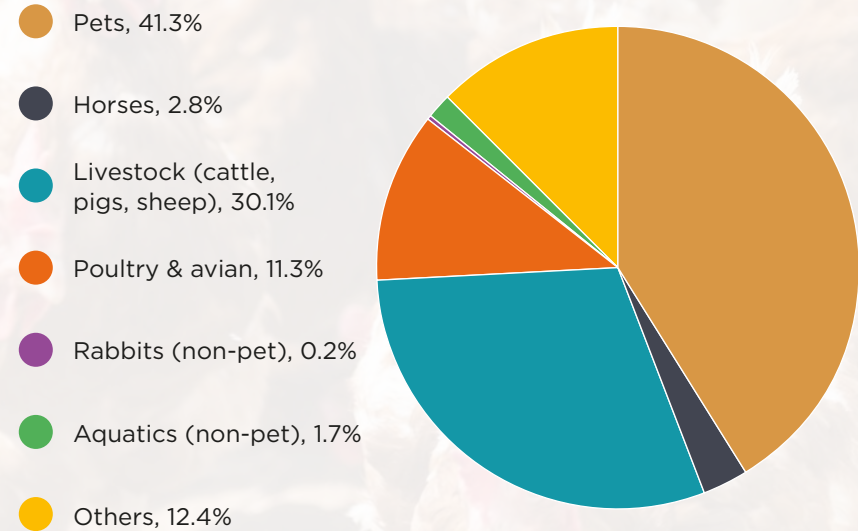


Countries covered include AT, BE, CH, CZ, DE, DK, ES, FR, UK, GR, HU, IE, IT, NL, PL, PT, SK.

Source: 10 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

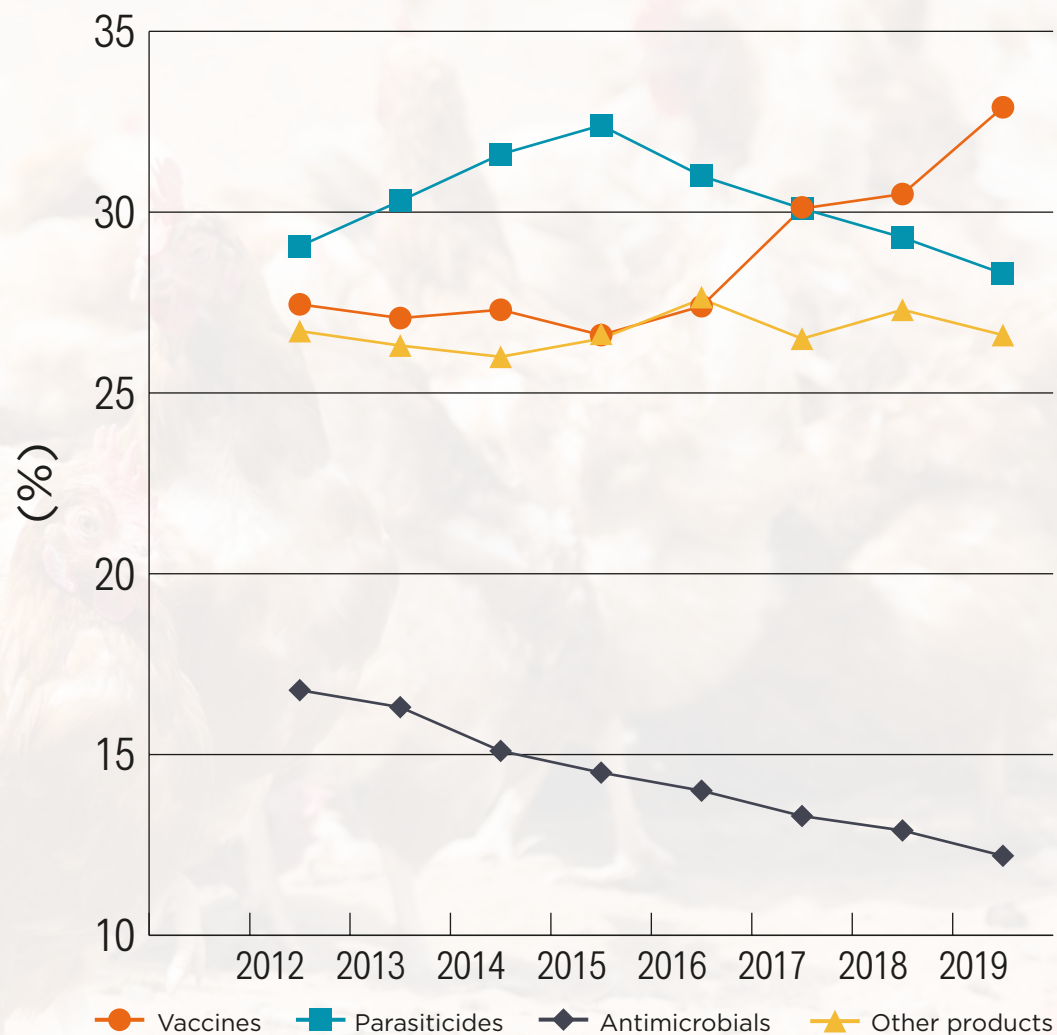


Countries covered include AT, BE, CH, CZ, DE, DK, ES, FR, UK, GR, HU, IE, IT, NL, PL, PT, SK.

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 (%) (2012–2019)



Total European sales for 2019: €6.6 Billion



Preventing animal diseases in Europe

Having to deal with the impacts of climate change, while mitigating impact on the environment. Facing never-before-seen animal diseases in Europe like Lumpy Skin Disease and African Swine Fever. Responding to increased demands for sustainable livestock farming and better animal welfare. Addressing the rise of bacterial resistance to antibiotics and preserving the efficacy of treatment options for future generations. All these challenges mean one thing: we must do more to prevent diseases in animals from the outset.

Responsible treatment of illness in animals will always be necessary, that has to be clear. But as we look at challenges, the focus for the animal medicines industry is increasingly shifting to disease prevention and animal resilience as well as smart monitoring and earlier diagnosis to facilitate better interventions to improve animal health.

The value of vaccination

Vaccination has profoundly influenced and improved world health, and will continue to be a fundamental tool to meet future

health challenges. Vaccines have helped to eliminate rinderpest in animals and smallpox in people, and the continued use of vaccines can help to control many other health scourges.

When farmers take preventive measures such as vaccination, this makes for good farm management ensuring healthier herds and helping to make food production more efficient and sustainable while reducing food losses at source. Protecting animals from disease through vaccination also prevents transmission and slows further spread. Working together, industry and authorities can respond rapidly to halt or slow transmission of existing and newly emerging diseases, such as Lumpy Skin Disease in cattle which was recently halted in south-east Europe, largely thanks to a regional vaccination programme.

From a One Health perspective animal vaccination plays a role in wider public health. Successful animal vaccination programmes and the EU pet passport system for example mean that today the vast majority of EU member states are recorded as rabies-free. Vaccinating dogs protects the dog from getting rabies and also blocks the major route of transmission between wildlife and people.

And medical advances over the years have meant that one single vaccine injection can incorporate more than one disease or disease strain to provide combined protection against several strains of micro-organisms or several diseases. Use of modern technologies also make it easier to control and eradicate disease without having to slaughter healthy animals, by making it possible to differentiate vaccinated animals from infected animals.

Boosting biosecurity

Alongside vaccination, efficient biosecurity is an important measure to prevent animal illness. Some simple steps involved in biosecurity can often be misunderstood by the general public and so it is important to raise awareness on the many benefits for animal welfare brought by such elements as indoor housing. In fact, biosecurity is a holistic concept with direct relevance not only to the sustainability of livestock farming, but also to wide-ranging aspects of public health, such as food safety, and protection of the environment, including bio-diversity.

Biosecurity refers to practices used to prevent both the introduction of and the spread of diseases within a farm. Disease can enter farms either directly via infected animals or indirectly through contaminated equipment or footwear. As such, farmers can include a number of different elements in their farm management plans, ranging from: hygiene measures and regular housing disinfection; quarantine periods for new animals and vaccination for specific diseases; disinfection of farm visitors and provision of protective clothing and footwear; keeping other domestic and wildlife animals away from feed bins, pasture and water sources; as well as an annual review of biosecurity plans with the veterinarian.

Bringing prevention into the digital age

Vaccination and biosecurity are key elements of good animal husbandry that go hand-in-hand with good nutrition and health care. In today's digital age the animal medicines industry is investing in data-driven solutions to provide a higher level of insights into the health of both livestock and companion animals.

From the livestock perspective in particular, farmers, companies and even national governments can use big data to manage millions of animals in Europe and around the world. By putting actionable disease data into the hands of international organisations such as the World Organisation for Animal Health (OIE) or the EU institutions, outbreaks can be controlled and contained where possible in a more timely manner. And putting actionable animal management information into the farmer's hands, means they can act rapidly together with their vets to safeguard their animals' health and wellbeing, while achieving optimal production outcomes for a healthy and sustainable food supply.

Vets, farmers and all animal owners should look to the future with prevention top of mind, using the full range of tools available, such as vaccines, diagnostics, digital monitoring, etc. to protect our planet, and safeguard both its animal and human populations, for the next generations to come.



2019 at a glance

Debate: High-level panel on Digitalisation for Improved Animal Health at GFFA

17 January 2019

Together with [BfT](#) and [HealthforAnimals](#), we hosted a debate on the multiple benefits of digitisation in improving ability to protect against animal disease, advance well-being and support livestock production worldwide. Taking place during the Global Forum for Food and Agriculture in Berlin, [OIE](#) Deputy Director General Jean-Philippe Dop announced plans for the organisation's new WAHIS disease data collection and alert portal.



The Marketing Authorisation process for animal medicines in Europe

1 February 2019

With the new EU Regulation on Veterinary Medicines due for application in early 2022, AnimalhealthEurope published a brochure outlining the new procedures companies will have to adhere to in order to obtain a marketing authorisation for animal health products in the EU.



Industry and regulators review changing landscape for veterinary medicines in Europe

1 February 2019

AnimalhealthEurope together with Klifovet organised a conference to examine in-depth the new EU Regulation on

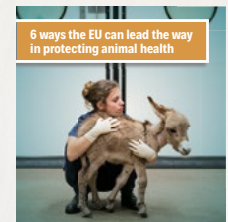


Veterinary Medicines and review the changes. Ivo Claassen, Head of Veterinary Medicines at the [EMA](#) provided top-level plans for preparing scientific advice on the implementing measures.

Manifesto: 6 ways the EU can protect animal health

4 March 2019

Ahead of the European Parliament elections in May, we published our Manifesto, with 16 translations, setting out our vision for animal health, welfare and sustainability in the years ahead, and identifying six ways the EU can lead the way in protecting animal health.



AnimalhealthEurope
Manifesto 2019



Awareness-raising on the importance of animal vaccination

20 April 2019

In the run-up to World Animal Vaccination Day, we joined forces with European veterinary associations **FECAVA** and **FVE** to raise awareness amongst pet owners on the importance of vaccination, in the face of a fall in vaccination rates and potential spillover from the human anti-vax movement.



AnimalhealthEurope Officers re- appointed for another term

05 June 2019

AnimalhealthEurope membership unanimously re-elected Wijnand de Bruijn from Dopharma as President of AnimalhealthEurope for a third term, alongside Dominique Dervaux from Vetoquinol as Treasurer and Hans Dittrich from MSD and Santiago de Andrés from the Spanish national association Veterindustria as Vice-presidents.



AnimalhealthEurope signs up to EU Code of Conduct on agricultural data sharing

24 April 2019

Alongside a string of food chain partners, AnimalhealthEurope signed up to the EU Code of Conduct on Agricultural Data Sharing, promoting the important role of current and emerging smart technology to improve our ability to spot and treat animal illness before it becomes a full-blown outbreak.



Food and Farming: well-fed or fed up?

6 June 2019

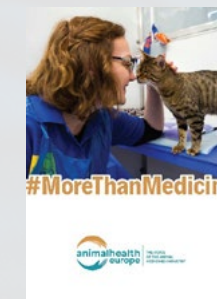
Our annual event took on the topic of addressing the disconnect between public perception and the sustainable production of fish, meat, eggs and milk. With social media nutrition guru **Frédéric Leroy** and Henning Steinfeld from the **FAO** as keynote speakers, participants exchanged views on why, how and what to do with our current food system.



#MorethanMedicine – Our story

01 July 2019

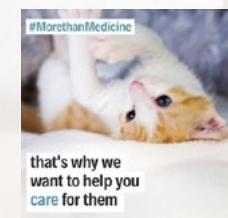
Taking a new direction in how we talk about animal health solutions, we developed a new campaign: **#MorethanMedicine**, to share the stories of our corporate Board members and why animal health matters to them.



How our solutions offer #MorethanMedicine

02 July 2019

Treating sick animals is just one part of our story. Our new campaign launched in July, aims to showcase our wider contribution to society through sustainable and safe food production, disease prevention, and ensuring the human-animal bond with our pets.



Call for MEPs to sustain EU progress in fight against Antibiotic Resistance

12 September 2019

Along with 17 organisations active in human and animal health, we addressed an open letter to MEPs, urging them to bring Antibiotic Resistance to the forefront of EU interinstitutional discussions and support concerted action across all sectors.



Joint call for ambitious Horizon Europe programme

16 September 2019

We joined over 90 European associations calling on EU institutions to give priority to RD&I in the Multiannual Financial Framework 2021-2027, as Horizon Europe aims to boost Europe's growth, employment and competitiveness, and develop and scale up technologies that will power our continent in the 21st century.



Launch of #MeattheFacts campaign

25 September 2019

With a coalition of like-minded partners along the livestock food chain, we helped to form European Livestock Voice and launched a myth-busting campaign and new website - #MeattheFacts - at the European Parliament during an event supported by MEPs Alexander Bernhuber (AT), Jérémy Decerle (FR) and Clara Aguilera (ES).



New members for AnimalHealthEurope

26 September 2019

Increasing our voice for innovation in animal health in Europe, we were pleased to welcome two new member companies, Syva, based in Spain, and Norbrook, based in Northern Ireland, to our association.



Celebrating 10 years of DISCONTTOOLS

26 September 2019

Launched 10 years ago under EU FP7 Research and Innovation funding, the DISCONTTOOLS project has gone from strength to strength creating a strong network of expertise to identify gaps in knowledge to speed up the development of new DISEase CONTROL TOOLS (diagnostics, vaccines and pharmaceuticals) for 52 priority animal diseases.



Highlight on innovation at TOPRA veterinary symposium

30 September 2019

Focusing on the implementation and impact of the new Regulation on Veterinary Medicines, our Technical Director Rick Clayton led a panel exchange for industry partners and regulators to share updates and to discuss what life after Brexit may mean for animal health.



Roadmap to Reducing the Need for Antibiotics

14 November 2019

AnimalhealthEurope members joined a multi-billion Euro pledge for 25 Global Actions by 2025 as part of a global Roadmap to Reducing the Need for Antibiotics initiated by HealthforAnimals.



Preventing animal diseases in Europe

19 November 2019

New MEPs Martin Hlaváček (CZ) and Simone Schmiebtbauer (AT) hosted our event in the European Parliament to discuss the fundamental role of vaccines in the prevention of animal diseases in Europe.



Agri-Food Chain Coalition announces priorities for EU Institutions

02 December 2019

With our partners in the Agri-Food Chain Coalition we developed a manifesto for 2019-2024 highlighting some of the key challenges facing the agri-food chain in Europe and outlining our contributions in priority areas: combating climate change; achieving sustainable development goals; and providing access to innovation and smart farming.



Flash action #MeattheFacts

11 December 2019

European Livestock voice was joined by the Wallonian Farmers Association and supported by four MEPS: A. Bernhuber (AT), J. Decerle (FR), M. Aguilar (ES), and J. Zoido (ES), in a #MeattheFacts flash action held in front of the Commission building on the first day of the EU Agri Outlook Conference.



#MorethanMedicine

Our company members drive advances in animal health and well-being. Without them, it would be simply impossible to raise healthy livestock or look after our pets. But this is only part of our story.

Animal health care is constantly evolving and we work with our stakeholders to develop solutions that go beyond the traditional medicines which will always remain necessary in the vet's toolbox. Animal health is our top priority but we also help deliver on One Health needs such as:

- Ensuring a safe supply of nutritious milk, meat, fish & eggs
- Protecting people from illnesses that can pass from animals to people
- Supporting sustainable and resource-efficient livestock farming

Essentially, we aim to offer **#MorethanMedicine**.

We delved into the back-stories of animal medicines companies in Europe to find out about the future outlook of our industry and the solutions that can respond to today's needs in a changing Europe, by interviewing our corporate Board members.

Read all about this as well as the more personal stories – Who are the dog people or the cat people? Who is the poultry profesionado? – in our MorethanMedicine stories on <https://medium.com/@animalhealthEU> or look out for our booklets with the full stories of our Board members.



Dopharma



Elanco



HUIVEPHARMA



MSD
Animal Health



ORION



VETOQUINOL
ACHIEVE MORE TOGETHER



Virbac



zoetis



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

pharma.be
ALGEMENE VERENIGING VAN DE GENEESMIDDELENINDUSTRIE

Czech Republic & Slovakia



Denmark, Norway
and Sweden

VINORDIC
VETERINARY
INDUSTRY
NORDIC

Finland

FVPA

France



Germany

BfT

Greece



Hungary

HAIVPM

Ireland



Italy



Netherlands

Fidin

Norway

LMI
Legemiddelindustrien

Poland



Portugal



Spain



Switzerland

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