

The European animal medicines industry in figures



In a nutshell



COMPETITIVENESS

1/3 of global market



EMPLOYMENT

Around 50,000 jobs



NUMBER OF COMPANIES

Over 260



of which **SMEs**

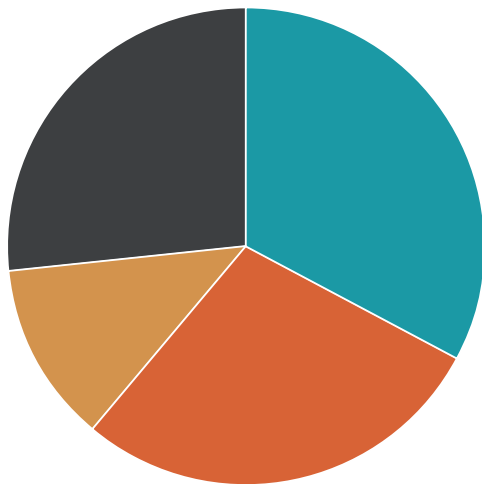
Over 110



R&D EXPENDITURE

More than €500 million/year
in research and development

Sales by product category in Europe



Vaccines, 32.9%

Parasiticides, 28.3%

Antimicrobials, 12.2%

Other, 26.6%

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

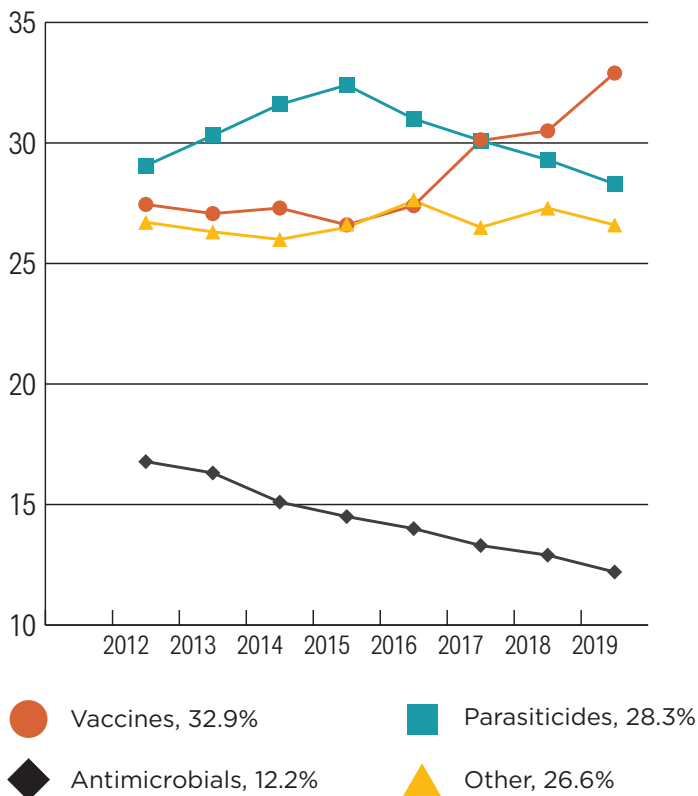
Source: 10 AnimalhealthEurope and CEESA member companies. 20% added for non-participating companies. CEESA stands for Executive Animal Health Study Centre www.ceesa.eu

**Total European
sales for 2019**

€6.6 Billion

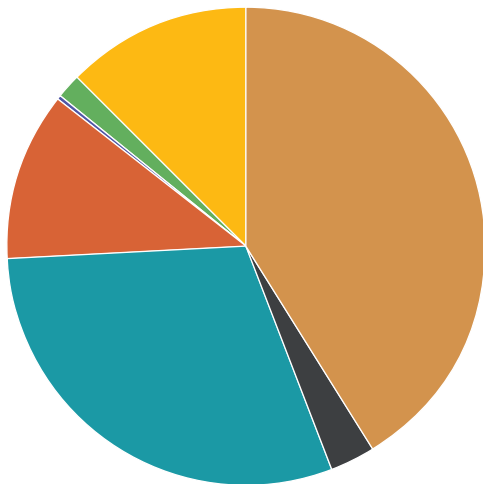
Sales by product category in Europe








Evolution of sales per product category (%) (2012–2019)



Source: CEESA (Executive Animal Health Study Centre www.ceesa.eu)

Sales by animal species

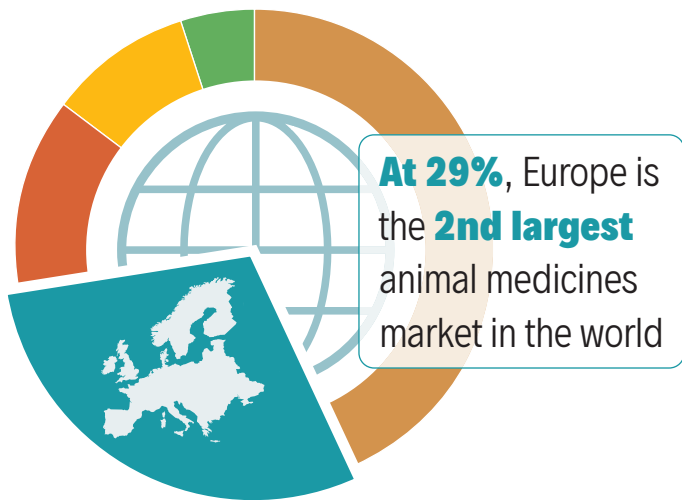


-  Pets, 41.3%
-  Horses, 2.8%
-  Livestock (cattle, pigs, sheep), 30.1%
-  Poultry & avian, 11.3%
-  Rabbits (non-pet), 0.2%
-  Aquatics (non-pet), 1.7%
-  Others, 12.4%

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

Global sales comparison (2019)



North America, 43.2%

Europe, 29.3%

Asia, 12.9%

Latin America, 9.8%

Pacific, 4.8%

The market value of the European animal medicines industry is **3%** of the European human pharmaceutical industry

Source: CEESA (Executive Animal Health Study Centre www.ceesa.eu)

Enabling employment

Direct & indirect jobs

Our industry enables over **6 million** jobs across Europe both directly and indirectly



50,000

Source: AnimalhealthEurope



Veterinarians

309,144

Source: FVE 2018



Livestock farms

5.7 million

Source: Eurostat

Household expenditure on companion animal care products in Europe

Pet food



€21 billion

Source: Fediaf 2018

Pet related products and services



€18.5 billion

Source: Fediaf 2018

Animal medicines



€2.7 billion

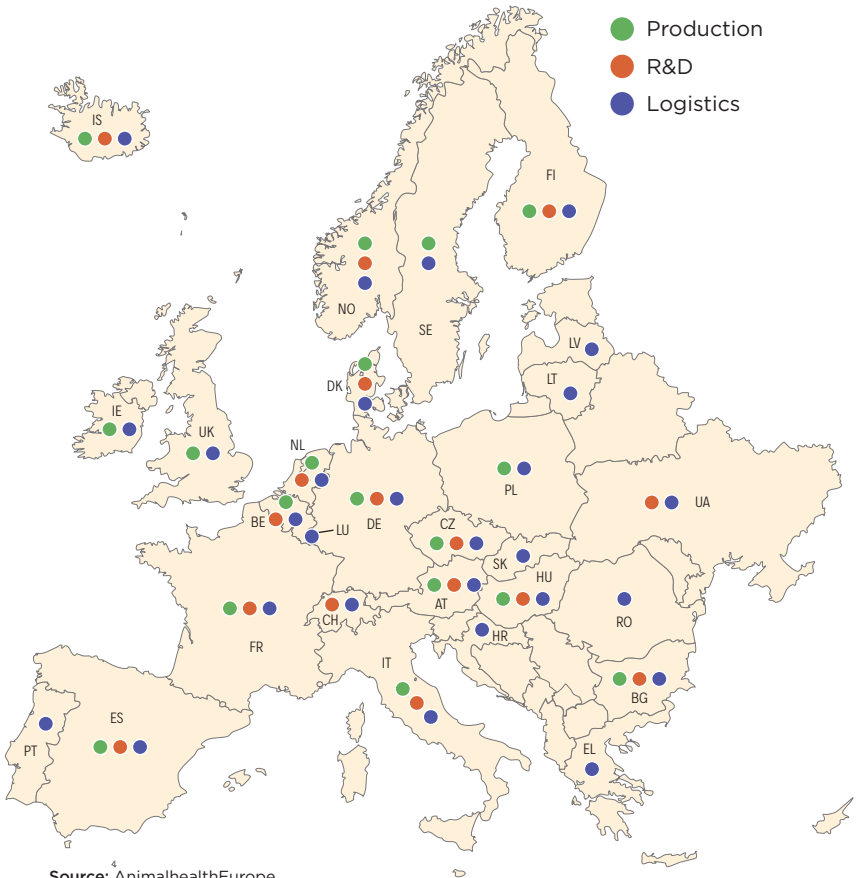
Source: CEESA

85 million

European households own a pet, more than one in three households

Source: Fediaf 2018

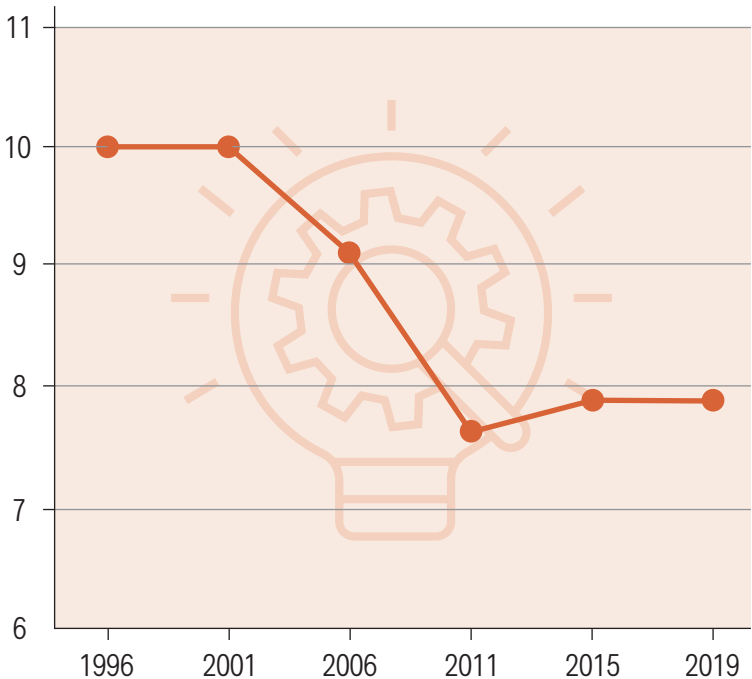
Presence of animal medicines industry across Europe: production, R&D, logistics



Source: AnimalhealthEurope

Investment in R&D

R&D as percentage of turnover



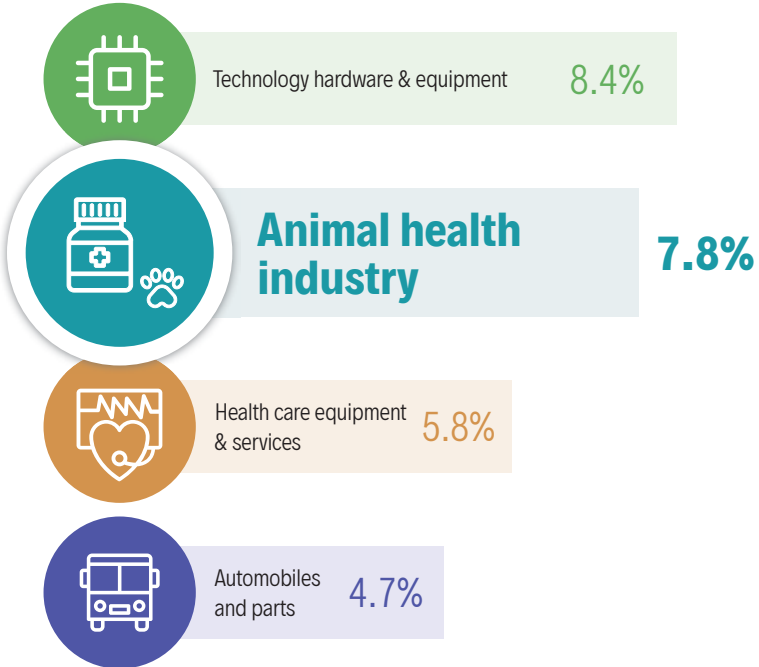
Over
€500
million

European animal medicines
industry R&D spend

Source: HealthforAnimals Global Benchmarking Report 2020

Investment in R&D

Ranking of industrial sectors by overall sector R&D intensity



The European animal medicines industry spends 7.8% of turnover on R&D, on par with the technology hardware and equipment industry

Source: 2019 EU Industrial R&D Investment Scoreboard

Animal populations in Europe: farm animals



Laying hens

400m



Pigs 103.1m



Bovines 99.5m



Sheep 97.8m



Goats 94m

The number of farm animals has decreased by **9.91%** in six years (2012–2018)

Source: Eurostat (except laying hens: European Parliamentary Research Service - The EU poultry meat and egg sector)

Animal populations in Europe: pets



Cats

103m



Dogs

85m



Birds

50m



Small mammals 26m



Fish 15m



Reptiles 7.8m

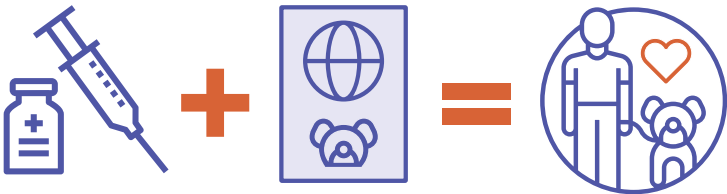
The number of pets has increased by **9%** in six years (2012–2018) to a total of 289 million

Source: FEDIAF 2018

Contribution of animal health solutions



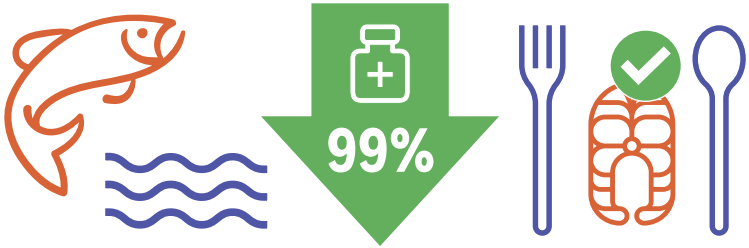
Thanks to **comprehensive EU control measures** and **poultry vaccination**, human salmonella cases in the EU have **fallen by almost 50% since 2004**. Source: EFSA



Successful animal **vaccination programmes** and the **EU pet passport system** mean that today the vast majority of EU member states are **now rabies-free**.

Source: ECDC

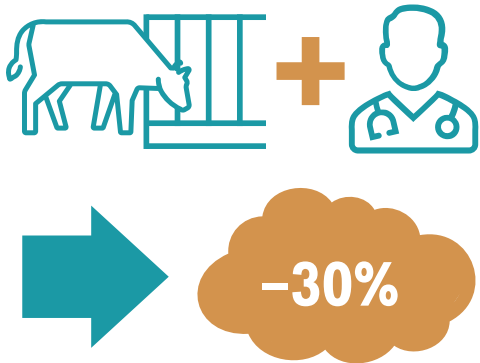
Contribution of animal health solutions



The introduction of **vaccines** against furunculosis in **salmon farming** has **reduced** the need to use **antibiotics** in Norwegian aquaculture by **99%**. Source: WHO

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Better **herd management**, including **animal health and feed practices** can help reduce livestock emissions up to **30%**.



Source: European Commission Study on Future of EU livestock

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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