

The European animal medicines industry in figures



In a nutshell



COMPETITIVENESS

1/4 of global market



EMPLOYMENT

Over 52,000 jobs



NUMBER OF COMPANIES

Over 260



SMEs

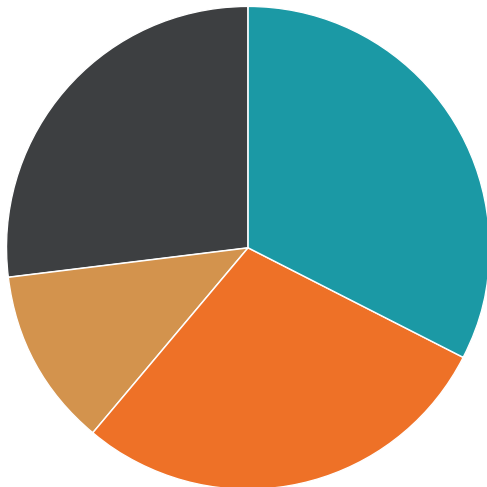
Over 110



R&D EXPENDITURE

8% of turnover

Sales by product category in Europe



 Vaccines, 32.5%

 Parasiticides, 29.2%

 Antimicrobials, 9.5%

 Other, 28.8%

Countries covered include AT, BY, BE, BG, HR, CZ, DK, FI, FR, DE, GR, HU, IE, IL, IT, NL, NO, PL, PT, RO, RU, RS, SK, SI, ES, SE, CH, TR, UA, UK.

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

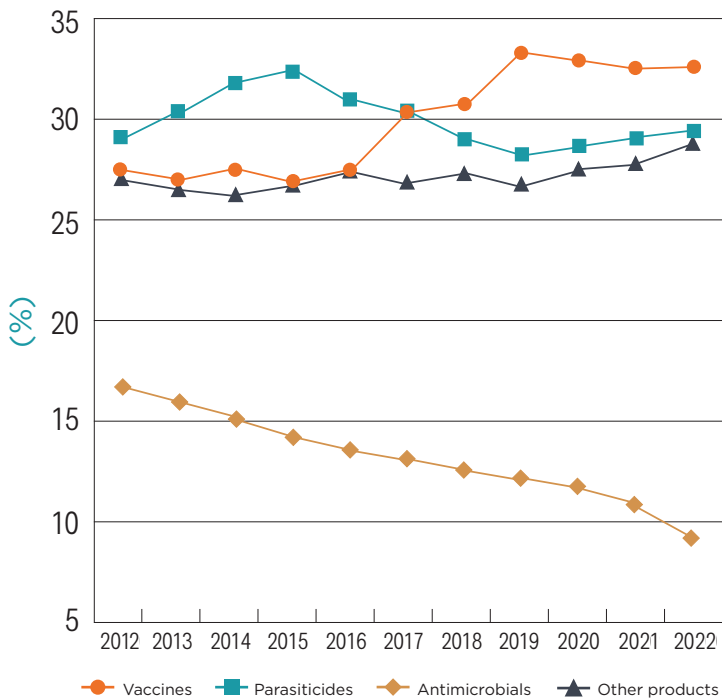
www.ceesa.eu

Total European sales for 2022

€7.9 Billion

Sales by product category in Europe

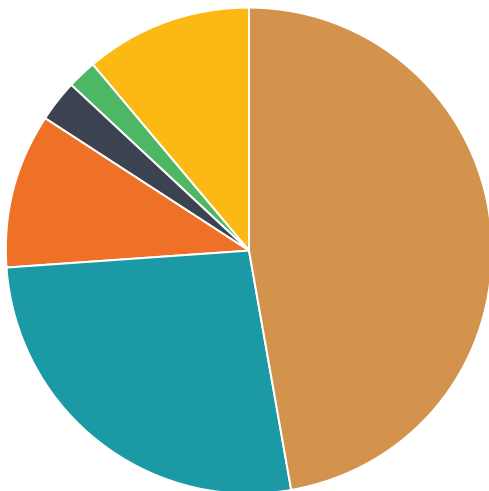
Evolution of sales per product category (%) (2012–2022)




Countries covered include AT, BY, BE, BG, HR, CZ, DK, FI, FR, DE, GR, HU, IE, IL, IT, NL, NO, PL, PT, RO, RU, RS, SK, SI, ES, SE, CH, TR, UA, UK.

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Sales by animal species




 Pets, 47.3%

 Livestock (cattle, pigs, sheep), 26.8%

 Poultry & avian, 10.2%

 Horses, 2.8%

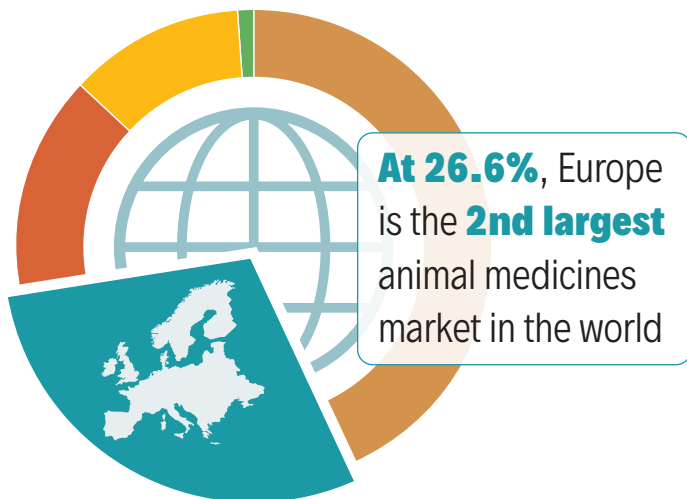
 Aquatics (non-pet), 2%

 Others, 10.9%

Countries covered include AT, BY, BE, BG, HR, CZ, DK, FI, FR, DE, GR, HU, IE, IL, IT, NL, NO, PL, PT, RO, RU, RS, SK, SI, ES, SE, CH, TR, UA, UK.

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Global sales comparison



North America, 43.2%

Europe, 26.6%

Asia-Pacific, 17.2%

Latin America, 11.9%

Middle East-
North Africa, 1.1%

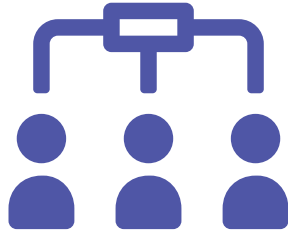
The market value of the European animal medicines industry is **3%** of the European human pharmaceutical industry

Source: CEESA (Executive Animal Health Study Centre www.ceesa.eu)
EFPIA (<https://www.efpia.eu/publications/downloads/efpia/the-pharmaceutical-industry-in-figures-2021/>)

Enabling employment

Direct & indirect jobs

Our industry enables **millions** of jobs across Europe both directly and indirectly



Animal health industry

Around 50,000

Source: AnimalhealthEurope



Veterinarians

Over 300,000

Source: FVE 2022



Livestock farms

Around 3.3 million

Source: Eurostat

Household expenditure on companion animal care products in Europe

Pet food



€27.7 billion

Source: Fediaf 2022

Pet related products and services



€24.5 billion

Source: Fediaf 2022

Animal medicines



€3.7 billion

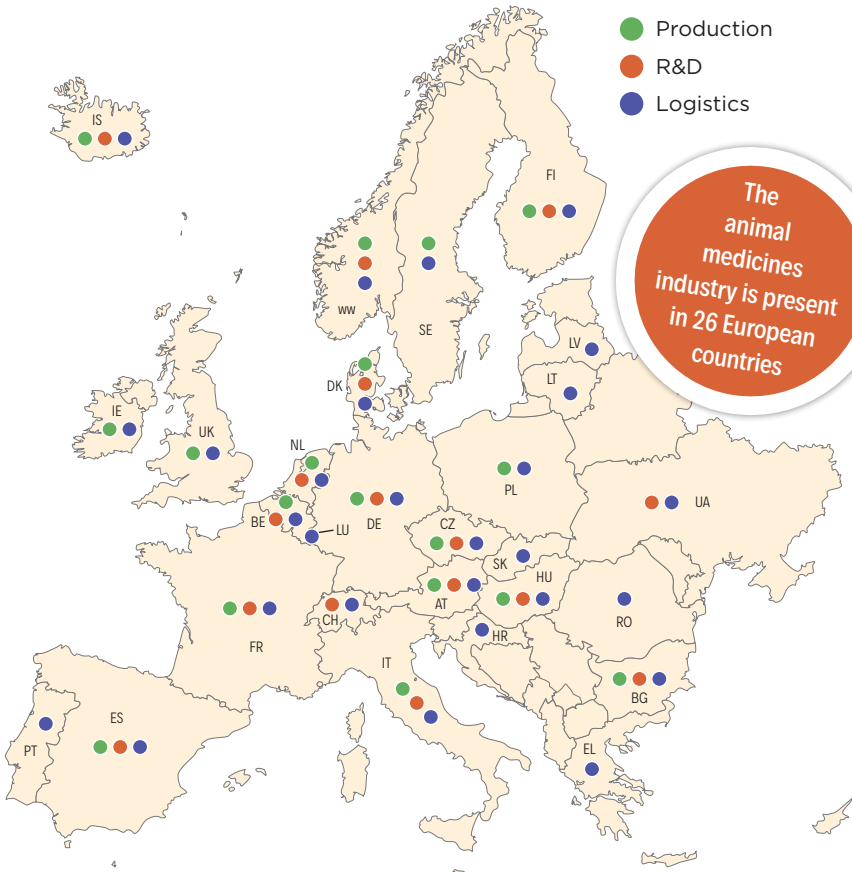
Source: CEESA



Today **91 million** European households own a pet, **46%** of all households

Source: Fediaf 2022

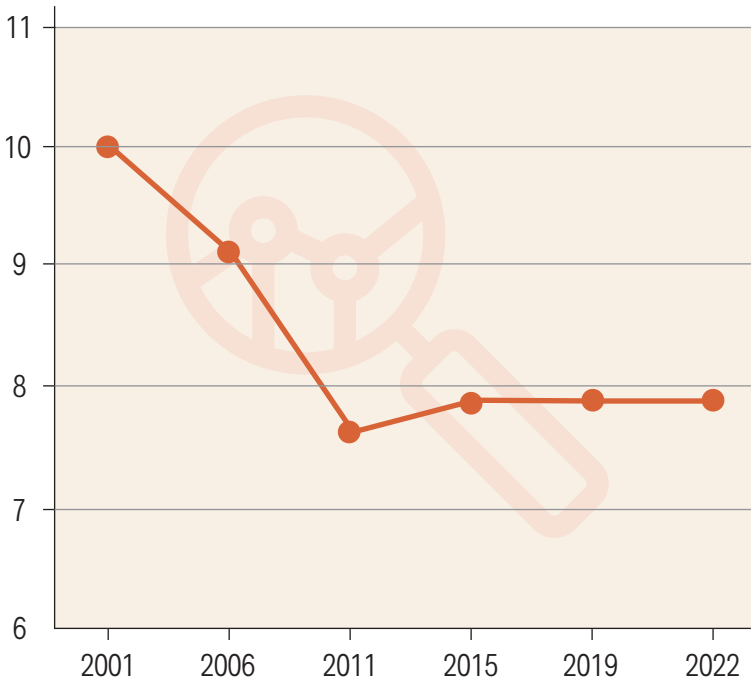
Presence of animal medicines industry across Europe: production, R&D, logistics



Source: AnimalhealthEurope

Investment in R&D

R&D as percentage of turnover



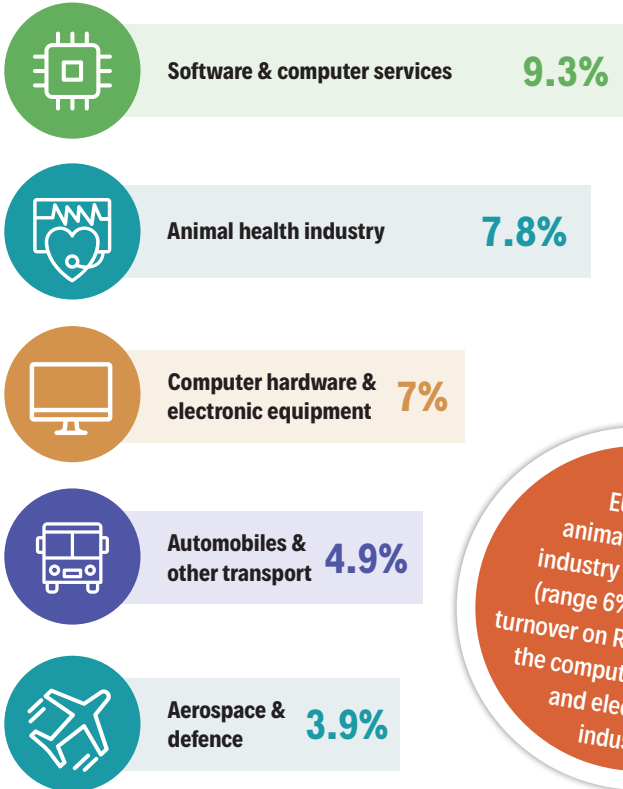
Over
€600
million

European animal medicines
industry R&D spend in 2022

Source: HealthforAnimals Global Benchmarking Report

Investment in R&D

Ranking of industrial sectors by overall sector R&D intensity



The European animal medicines industry spends 7.8% (range 6% to 9.4%) of turnover on R&D on par with the computer hardware and electronics industry

Source: European Commission JRC-B (2022)

https://iri.jrc.ec.europa.eu/sites/default/files/contenttype/scoreboard/2022-12/EU%20RD%20Scoreboard%202022%20FINAL%20online_0.pdf

AnimalHealthEurope

Animal populations in Europe: farm animals



Laying hens

380m



Pigs 134.4m



Goats 94m



Bovines 74.8m



Sheep 59.5m

Animal
medicines
protect the health of
millions of animals –
including bees!

Source: Eurostat, DG AGRI

Animal populations in Europe: pets



Cats

127m



Dogs

104m



Birds

53m



Small mammals 29m



Aquaria 22m



Terraria 11m

*Animal medicines
protect the
health of over 340
million pets*

Source: FEDIAF

New animal health solutions approved by the EMA in 2022

In 2022 the European Medicines Agency approved 10 new animal health products for use



10

Positive opinions

3

New active substances

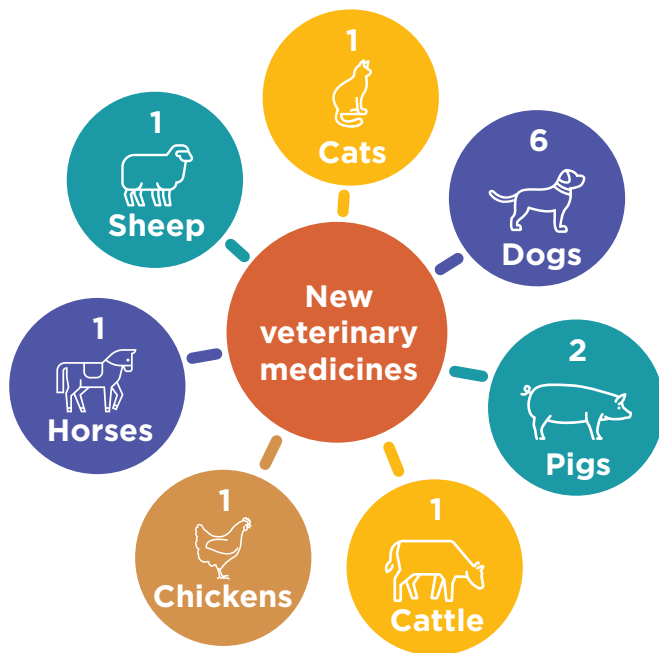


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Vaccines

Animal health authorisations in 2022

Of the 10 approvals by EMA



A further **119** authorisations passed through decentralised procedures for approval

Source: EMA (https://www.ema.europa.eu/en/documents/report/veterinary-medicines-highlights-2022_en.pdf)

CMDV (https://www.hma.eu/fileadmin/dateien/Veterinary_medicines/CMDv_Website/About_CMDv/Planning_and_reporting/Annual_Reports/2022_Annual_report.pdf)

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.

AnimalhealthEurope

168 Av. de Tervueren | Box 8 | 5th floor
1150 Brussels | Belgium

Twitter: @animalhealthEU

Facebook: /animalhealthEU

LinkedIn: /animalhealtheurope/

www.animalhealtheurope.eu

2023