

A photograph of several brown and white cows in a stable, looking towards the left. They are wearing yellow ear tags. The floor is covered with wood shavings.

# Annual report 2021

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and President

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Members

# Message from the Secretary General and President

As Secretary General and newly elected President of AnimalhealthEurope (since June 2021) 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 improve animal welfare. Our activities this year also included a look at our functioning and priorities as an association, with the first face-to-face meeting in almost two years. This was a great opportunity for members to reconnect in the physical world and has led to the development of our new strategic direction from 2022 onwards focusing on three priority areas: One Health, sustainability, and innovation.

## Beginning with thanks

We would first start with a word of thanks to all of our members and our partners here in Brussels for all the support and efforts made this year. Secondly, we'd like to thank the EU decision-makers who have kindly taken part in our events and remained open to frank exchanges on animal

health related topics. And thirdly thanks go to the AnimalhealthEurope secretariat for consistently acting as a strong voice for our industry and the animal carers we serve.

## The core of our work – preparing for the new 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 members. We contributed to numerous consultations and provided input when requested on the implementing measures at all stages of the process. With our members we were also very pleased to see the European Medicines Agency organise two Info Days on the latest regulatory developments, to ensure that our membership and the wider animal health sector was up to speed on the changes coming into play. On our side too, we organised two successful webinars for our members on the theme of cross-border sales, with over 800 participants in total.



**Roxane Feller**  
Secretary General

## Moving forward with the Animal Health Law

The new EU Regulation on Transmissible Animal Diseases, also known as the Animal Health Law, became applicable across EU Member States on 21 April 2021, rather aptly following World Animal Vaccination Day (held annually on 20 April). This new law sees a great boost given to the importance of vaccination for prevention and control of animal diseases. Prevention, alongside measures for biosecurity, surveillance, control and eradication, and traceability of animals and animal products are key elements promoted in the law and will be a focus of the advised regular animal health visits moving forward. The Animal Health Law also introduces a new digital system for EU notification and reporting of animal diseases, the so-called Animal Disease Information System (ADIS), with the objective of improving disease surveillance, notification, and control.

## A focus on sustainability and One Health

With various policy developments at EU and global level looking at the sustainability of our food systems and the ever-increasing awareness that everyone has a role to play, we have already strengthened our focus on sustainability and One Health this past year. We surveyed our membership to understand better the efforts of our own industry to ensure responsible business conduct, alongside responsible sourcing, research, manufacturing, and use and disposal of our products. In a brochure published during the EU Green Week, **Our Sustainability Focus**, we outline the One Health nature of animal health products

and services and share examples of actions taken to deliver on all three pillars of sustainability: social, economic, and environmental.

## Looking to new generations of livestock farmers

Our growing focus on new technological and medical advances for more holistic animal health management this past year culminated in a great exchange during our annual event with young farmers and the President of the Executive Board from Wageningen University & Research, Prof.dr.ir. Louise O. Fresco. We see a multitude of benefits in the future coming from greater investment into supporting farmers with access to digital monitoring tools, high-tech diagnostics, and new and improved vaccines. These tools offer the holistic approach to optimal animal well-being we seek, and also support enhanced resource efficiency, reduced food losses and waste at farm level, as well as greater resilience against economically devastating disease outbreaks.

## Pets get their own alliance

A final word on our work on pet health and responsible pet care is needed as we launched our newly formed Pet Alliance Europe with the pet food industry association FEDIAF in September. Together we hope to raise greater awareness on the science behind the great human-animal bond and to share pertinent information on best practices for households that include pets or assistance animals. Many of us at AnimalhealthEurope have companion animals in our families, and we can all safely say that the challenging times we are still facing would have been even more difficult to manage without them!



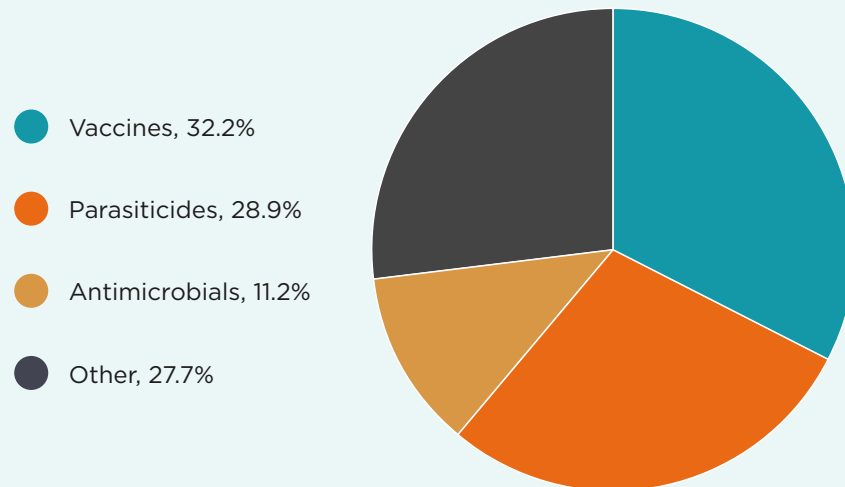
**Hans Dittrich**  
President

# Key figures 2021

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.

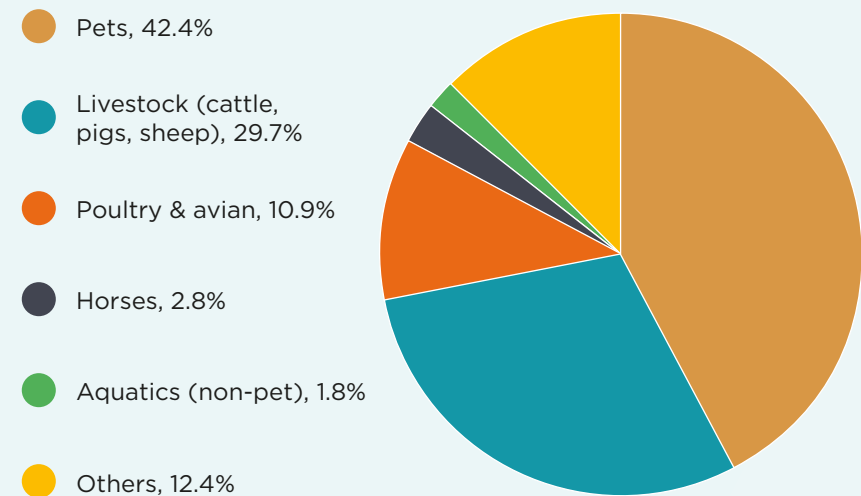
## Sales by product category in Europe



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

**Source:** 10 AnimalhealthEurope and CEESA member companies. 20% added for non-participating companies. CEESA stands for Executive Animal Health Study Centre [www.ceesa.eu](http://www.ceesa.eu)

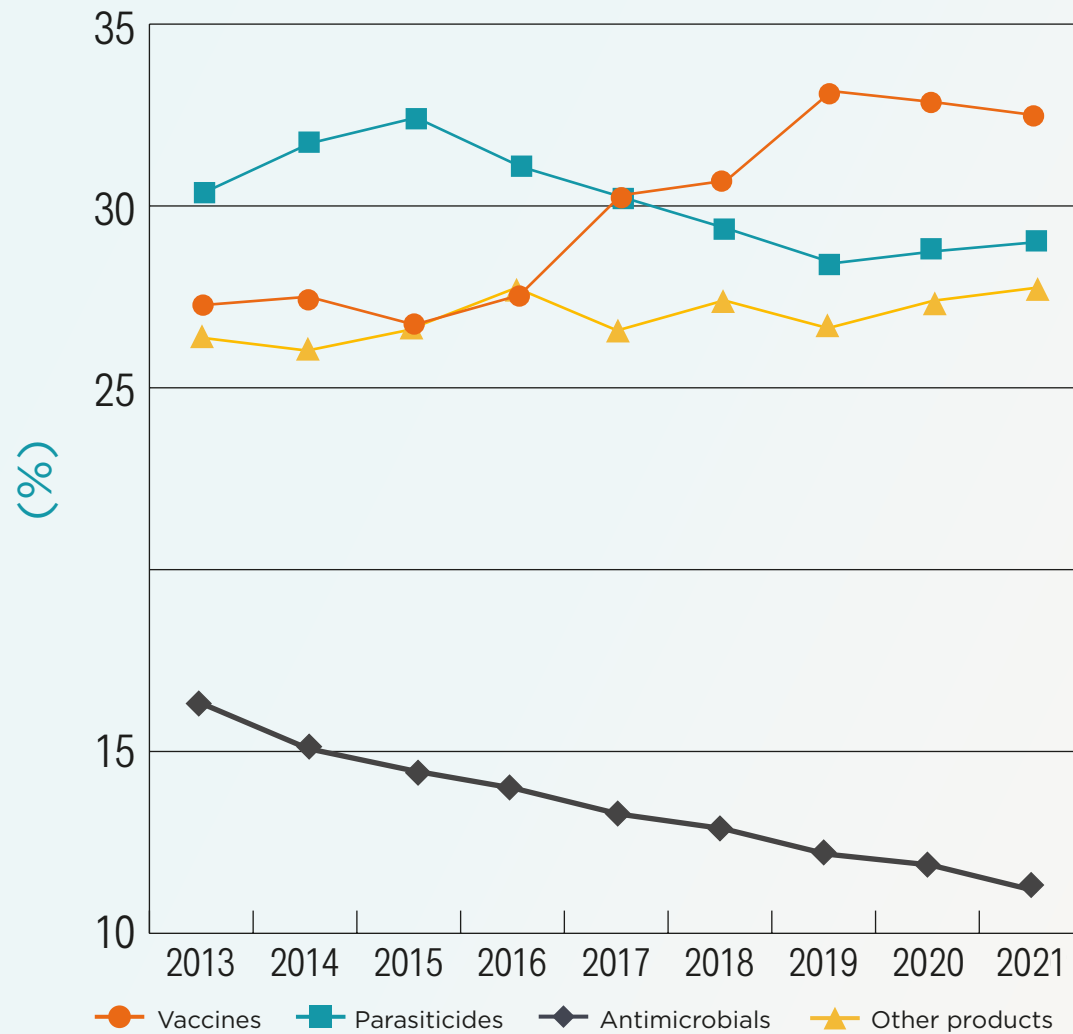
## Sales by animal species



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

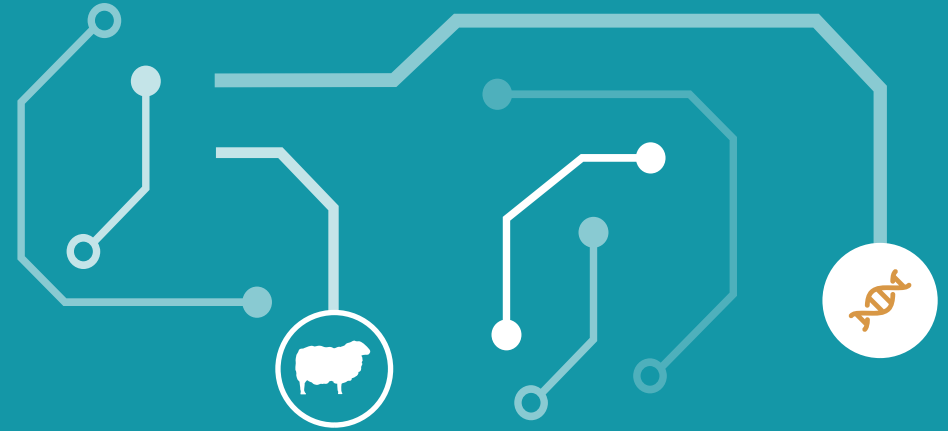
**Source:** 9 AnimalhealthEurope and CEESA member companies. 20% added for non-participating companies. CEESA stands for Executive Animal Health Study Centre [www.ceesa.eu](http://www.ceesa.eu)

## Sales per product category in Europe (%) (2013–2021)



**Total European  
sales for 2021:  
€7.4 Billion**

# Earlier insights, earlier animal care



## Earlier insights, earlier animal care

With around 100 million bovines, over 100 million pigs, around 400 million laying hens, and just under 100 million sheep, Europe's vets have their work cut out to keep an eye on their health and welfare. On top of that we have domestic populations of just over 100 million cats and around 85 million dogs. Practicing veterinarians in Europe however count just over 309,000 individuals.

We know that animal welfare awareness in European society has increased notably in recent decades. And good well-being both for companion and farm animals is expected to be a common societal norm.

## From biology to technology

From the very first biological preparations or vaccines to provide active acquired immunity to infectious diseases like anthrax and rabies, the animal health sector is today looking at a range of smart technologies that can support veterinarians, farmers and other owners to provide good care for animals from the earliest stages of their existence.

Smart technologies in the animal health space are being developed to monitor animal health and welfare parameters in a continuous and automated way, offering the opportunity to detect any issues at a very early stage. The use of big data, the Internet of Things and Artificial Intelligence are driving innovation in many sectors in terms of efficiencies, but these technological advances are also developed with consideration of the living, breathing animal from the very beginning. In this sense animal health and welfare are much more than just an isolated aspect within the whole livestock production process.

## Increased transparency, increased control

Reliable data and measurements on the health and welfare of animals coming from fully automated and continuous image, sound and sensor technologies help to increase both transparency and traceability of livestock farming. Algorithms used to gain more insights into animal welfare require detailed analysis and understanding of the data collected to serve as more than simple early-warning systems.



Further developments in these smart technologies mean they can serve not only to monitor but also to deliver active advice to the farmer on what to do when an issue is signalled. When this data is shared with the veterinarian, a plan of action can be agreed upon and put into play to ensure the good well-being of the animal in question, and to protect the wider group of animals against any potential for disease spread.

Such innovations could also potentially play an important role in the establishment of science-based indicators for an animal welfare labelling system. Such data collection can support a trusted system that works in an easy way to catch appropriate and objective information. This will help consumers to trust the value of animal welfare indicators in the food products they buy.

## Smarter care for pets

Advances in animal health technologies are not reserved purely for ensuring the health and welfare of Europe's livestock, as new technologies are also providing pet parents with the opportunity to ensure our companion animals live longer and healthier lives as we better understand their needs. Pet wearables are growing in popularity as they allow both the guardian and the

veterinarian – when data is shared – to track health metrics in order to monitor and manage things like exercise and weight control, or even chronic illnesses. Again with these earlier insights into the pet's health status, potential issues can be flagged early on and corrective steps can be taken to ensure improved well-being.

## It's all about balance

Maintaining a balance between use of smart technologies and hands-on care and attention in our relationships with animals is important for a sustainable future. These innovative animal health solutions are not just about ensuring production efficiencies and reducing environmental impacts in farming. They play an important role in helping farmers focus on raising animals in an attentive way.

Connected animal health and welfare indicators help to create synergies and link all the aspects of veterinary care to support pet owners in caring for their animals, and to support farmers with more holistic farm management. Consolidating information from many different spheres of the animal's world serves to give a more complete and objective picture of their health and well-being.

# 2021 at a glance

## Talking sustainability through better livestock health & welfare at the GFFA

21/01/2021

Our all-female panel of experts in agro-economics and livestock sustainability from FAO and ILRI discussed data analysis for developing national action plans with DG SANTE Deputy Director General.



**GLOBAL FORUM FOR FOOD & AGRICULTURE**

Advancing the Three Pillars of Sustainability through Better Livestock Health & Welfare: A Data and Evidence Review

THURSDAY  
21 JANUARY 2021  
13:00 – 14:00 (CET)

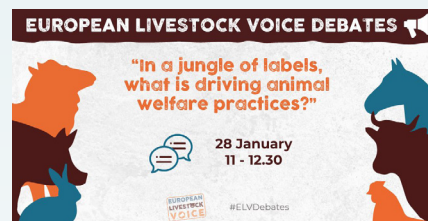
[www.gffa-berlin.de](http://www.gffa-berlin.de)

BfT Health for Animals animalhealth europe

## European Livestock Voice debates: In a jungle of labels, what is driving animal welfare practices?

28/01/2021

A bioethics professor, and policy advisors on animal health and welfare for Denmark and Eurogroup for Animals debated animal welfare in the EU and potential labelling plans alongside DG SANTE Senior Expert on animal welfare.



**EUROPEAN LIVESTOCK VOICE DEBATES**

"In a jungle of labels, what is driving animal welfare practices?"

28 January  
11 - 12.30

EUROPEAN LIVESTOCK VOICE #ELVDebates

## AnimalhealthEurope survey shows growing awareness of the benefits of veterinary medicines

22/03/2021

A survey of 6000 people in Sweden, Norway, Denmark, Germany, the Netherlands, Poland, Spain and the United Kingdom showed some lack of knowledge on how medicines are used in animals but good knowledge of benefits.



61% say regular vaccination can help to reduce the use of veterinary antibiotics in farm animals.

Source: AnimalhealthEurope Dec '20 – Jan '21 Citizens Survey on knowledge and opinions on veterinary medicines and their use

## High attendance at EMA Veterinary Medicines Info Day

25/03/2021

Over 800 participants tuned in to the EMA's info days held in March this year and then again in November focusing on preparedness for compliance with the new EU Regulations on veterinary medicines coming into force on 28th January.



EUROPEAN MEDICINES AGENCY  
SCIENCE MEDICINES HEALTH



## Highlighting the need for animal disease prevention

19/04/2021

In a policy paper AnimalhealthEurope highlighted how the EU can support efforts for greater vaccination of Europe's farm animal population by incentivising research and development and improving vaccine acceptability and uptake.



## World Animal Vaccination Day

20/04/2021

With the Animal Health Law coming into force just prior to World Animal Vaccination Day, the animal health industry strongly supported the boost given to the importance of vaccination for prevention and control of animal diseases.



## Livestock value chain debates future of food and farming in Europe

06/05/21

Italian platform Carni Sostenibili and European Livestock Voice hosted an open dialogue on the future of livestock farming between MEPs, DG SANTE and the livestock value chain following a video appeal highlighting "[9 paradoxes of the Farm to Fork Strategy](#)".



## Highlighting our sustainability focus

31/05/2021

This new publication outlines how animal health products and services contribute to the Green Deal and gives examples of actions taken by our members to deliver on all three pillars of sustainability.



## EMA Stakeholder Forum on Veterinary Big Data

01/06/2021

We supported the EMA initiative to build awareness on the use of innovative digital technologies in the veterinary regulatory environment and shape the development of the European Veterinary Big Data Strategy.



## EU40 and AFCC talk innovation in the food chain

14/06/2021

#EU40Talks session brought together innovation specialists, agrifood industry, the European Commission and MEPs to debate the role of food chain innovations for achieving the SDGs.



## New President for AnimalhealthEurope

16/06/2021

At the association's General Assembly in June Hans Dittrich of MSD Animal Health was elected President for a period of two years.



## Annual Conference: Next Generation Livestock Farming

17/06/2021

Young farmers, vets and policy makers discussed new technologies, methods and tools driving improved animal health and welfare practices amongst the next generation of livestock farmers at our annual event.



**Next generation livestock farming**  
What drivers for improved health and welfare?  
17 June

**Keynote speaker**  
**Prof.dr.ir. Louise O. Fresco**  
President Executive Board,  
Wageningen University & Research

**Panel Debate**  
**Alexander Bernhuber**  
MEP and Young Farmer  
**Kerli Ats**  
Young farmer & CEO of  
the Estonian Farmers'  
Federation  
**Tommy Heffernan**  
Veterinary Consultant  
and Educator  
**Roxane Feller**  
AnimalhealthEurope  
Secretary General

## Webinars for members on cross-border sales within EU

30/06/2021

AnimalhealthEurope organised two well-attended webinars (June and November) for members to discuss the impact and implications of the new EU rules on cross-border sales within the EU, with a Q&A with DG SANTE and HMA representatives.



## TOPRA Veterinary Medicines Symposium 2021

22/09/2021

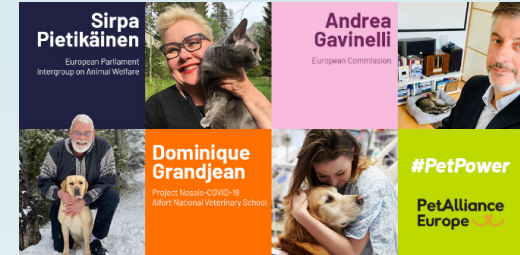
The annual symposium for regulatory affairs looked at how to improve animal health and what strategies could be put in place for working together towards new solutions.



## Newly formed Pet Alliance Europe asks if pets can power health?

29/09/2021

Our online event with Parliament Magazine discussed human-animal bond research, how it can be applied in EU health care policies, and whether Europeans recognise the benefits of pets.



## Key findings from Human- Animal Bond studies in Europe published

01/10/2021

A booklet from the new Pet Alliance Europe highlights findings from peer-reviewed studies on the benefits of pets for physical wellbeing and mental health promotion, early child development, healthy ageing and social inclusion.



## What do studies say about the impacts of Farm to Fork goals?

12/10/2021

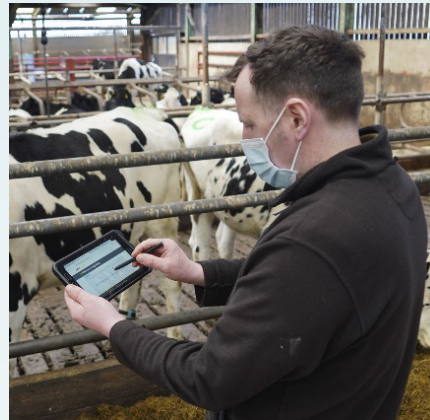
Livestock value chain associations call on European Commission for holistic impact assessment of Farm to Fork goals on the sector following the publication of scientific assessments.



## Support for EU food system transformation based on innovation

20/10/2021

AnimalhealthEurope welcomed European Parliament support for transition to more sustainable food system and is ready to support farmers with innovative tools and best practices for more holistic animal health management.



## Harmonising technical requirements for veterinary medicines registration

15/11/2021

AnimalhealthEurope delegates participated in the 40th meeting of the VICH Steering Committee working on international harmonization of study protocols to avoid repetition and reduce the need for animal studies.



## Our successful approach to reducing the need for antibiotic use

18/11/2021

Efforts made by Europe's animal sector and the reduction in antibiotic use to date are recognised by EU policymakers during European Antibiotic Awareness Day events.



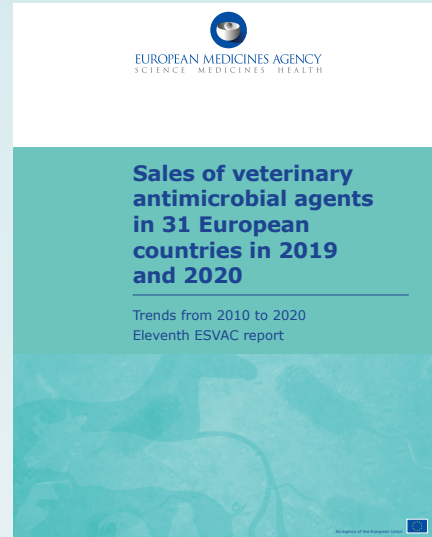
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Ensuring veterinary oversight

## ESVAC report shows good uptake of Responsible Use principles in Europe

23/11/2021

ESVAC report registered an overall decline (since 2011) in sales of antimicrobials for animal health purposes of 43.2%, with continued decreases in sales of veterinary antibiotics regarded as medically important.



## New strategic direction for AnimalhealthEurope

24/11/2021

For the first time in two years AnimalhealthEurope's Board and Committee Chairs met in person to agree on the new strategic direction for the association.



## Meeting with European Commissioner for Agriculture

07/12/2021

Our president Hans-Guenther Dittrich and secretary general Roxane Feller met with Commissioner Wojciechowski to discuss Farm to Fork targets on organic farming and the reduction of use of antibiotics in animals, biodiversity and one health and the industry's new technological advances.



## Dialogue opens with EVP Timmermans on the future of European livestock farming

07/12/2021

Sector associations from European Livestock Voice invited European Commission Vice President Timmermans to visit a beef and dairy farm in Belgium for a roundtable discussion on the sector's commitments on animal welfare, emissions and trade.



# 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

France



Germany

BfT

Greece



Hungary

HAIVPM

Ireland



Italy



Netherlands

Fidin

Norway

LMI  
Legemiddelindustrien

Poland



Portugal



Spain



Switzerland

scienceINDUSTRIES  
SWITZERLAND

United Kingdom



