

A close-up, slightly blurred background image of a brown chicken with a prominent red comb and wattle. The chicken is looking towards the left.

# Annual report 2020

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and President

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Members



# Message from the Secretary General and President

I think we can safely say that 2020 has been the most unexpected year ever, for everyone in the world. We started this year thinking our main priorities would be focusing on the various implementing measures of the new EU Regulations on Veterinary Medicines and Medicated Feed, and examining the various strategies due to be published around the EU Green Deal.

Nobody could have predicted how fast our attention would have to turn also to what seems like the simplest of acts: making sure that veterinary medicines would continue to be developed and supplied across Europe. As Secretary General and President of AnimalhealthEurope we invite you to read on through our annual report for the trials and triumphs this past year.

## A year bookended with Brexit

We started the year with the United Kingdom leaving the European Union on 31 January, but our UK member NOAH remains a strong member of AnimalhealthEurope as we continue united in our desire to protect animals, their health, and our food supply across Europe. The year ended with a lack of clarity on the implementation of the Northern Ireland Protocol and a Trade and Cooperation Agreement agreed only on Christmas Eve. We remained firm in our joint call however, together with our Irish member APHA and NOAH, for politicians to ensure mutual recognition in the animal medicines sector, ensure a seamless movement of goods across EU borders with the United Kingdom and with Northern Ireland, and allow for safe transport of companion animals.

## Ensuring continuity in a world turned upside down

Lack of clarity around Brexit was clearly not the main trial this year as the COVID-19 pandemic threw our lives and our business into an unprecedented situation. We were pleased to see the European Commission include veterinary medicines in the so-called Green Lanes that aimed to ensure the availability of goods and essential services. And across Europe we were pleased to see veterinary



**Roxane Feller**  
Secretary General



services recognised as essential by the Member States. Together we are proud to say that not only did our membership manage to continue a seamless supply of animal health products and services, but we also contributed where possible to COVID-19 relief efforts through a myriad of donations, including: hand-sanitiser gels; disinfectants; anti-inflammatory and anaesthetic products; masks; gloves; and other protective equipment; as well as financial donations and supplies for food banks; etc.

## Transitioning to a greener, more digital future

As the world went digital and calls for a green recovery grew in strength, so did our focus on new technological and medical advances coming to the fore in animal health. With the publication of the Farm to Fork and Biodiversity strategies in May 2020, we see a multitude of benefits coming from greater investment into supporting farmers with access to digital monitoring tools, high-tech diagnostics, and new and improved vaccines. These tools offer a holistic approach to optimal animal well-being, along with enhanced resource efficiency, reduced food losses and waste at farm level, as well as greater resilience against economically devastating disease outbreaks.

## Preparing for new legislation

Remaining at the forefront of our work, diligent attention to and follow-up on the 2022 application of the new EU Regulations on Veterinary Medicines and Medicated Feed continued strongly throughout the year. We put forward positions and contributed to consultations on the implementing measures at all stages of the process. We also contributed to a number of consultations on the various strategies of the EU Green Deal, the strategic approach for Pharmaceuticals in the Environment, and many others.

## New Board members, and a word of thanks

In November we welcomed five new Board members to AnimalhealthEurope and took on a new treasurer, following an acquisition and other changes within our company membership. We look forward to this new blood helping to drive our sector through testy Brexit and pandemic-filled waters and into the recovery period, as we continue to bring the latest advances in animal health to market and ensure both continued research and development and supply of solutions to keep Europe's animals in safe hands and protect our food supply. Huge thanks to all of our members and our partners here in Brussels for their work and support during this challenging year. And great recognition goes to our secretariat for continuing to deliver a strong voice for animal health and upholding the high standards we have become accustomed to, despite the various obstacles.



**Wijnand de Bruijn**  
President

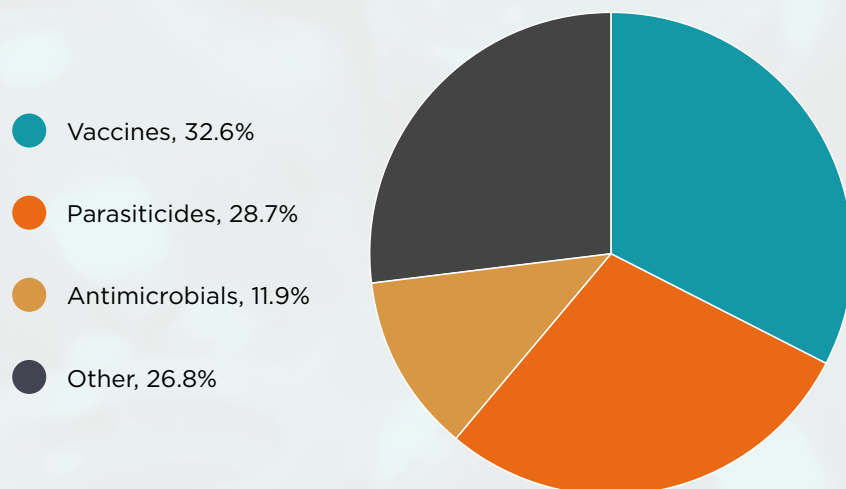


# Key figures 2020

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 over €500 million in research and development every year.

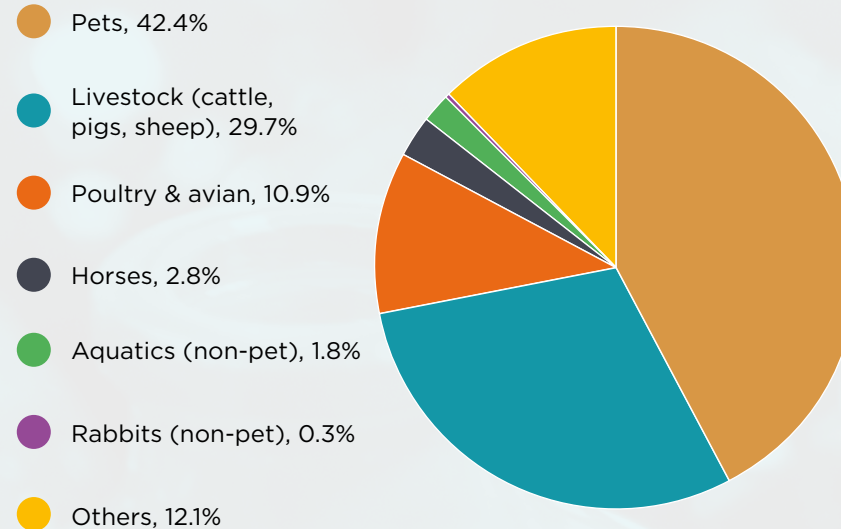
## Sales by product category in Europe



**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](http://www.ceesa.eu)

## Sales by animal species

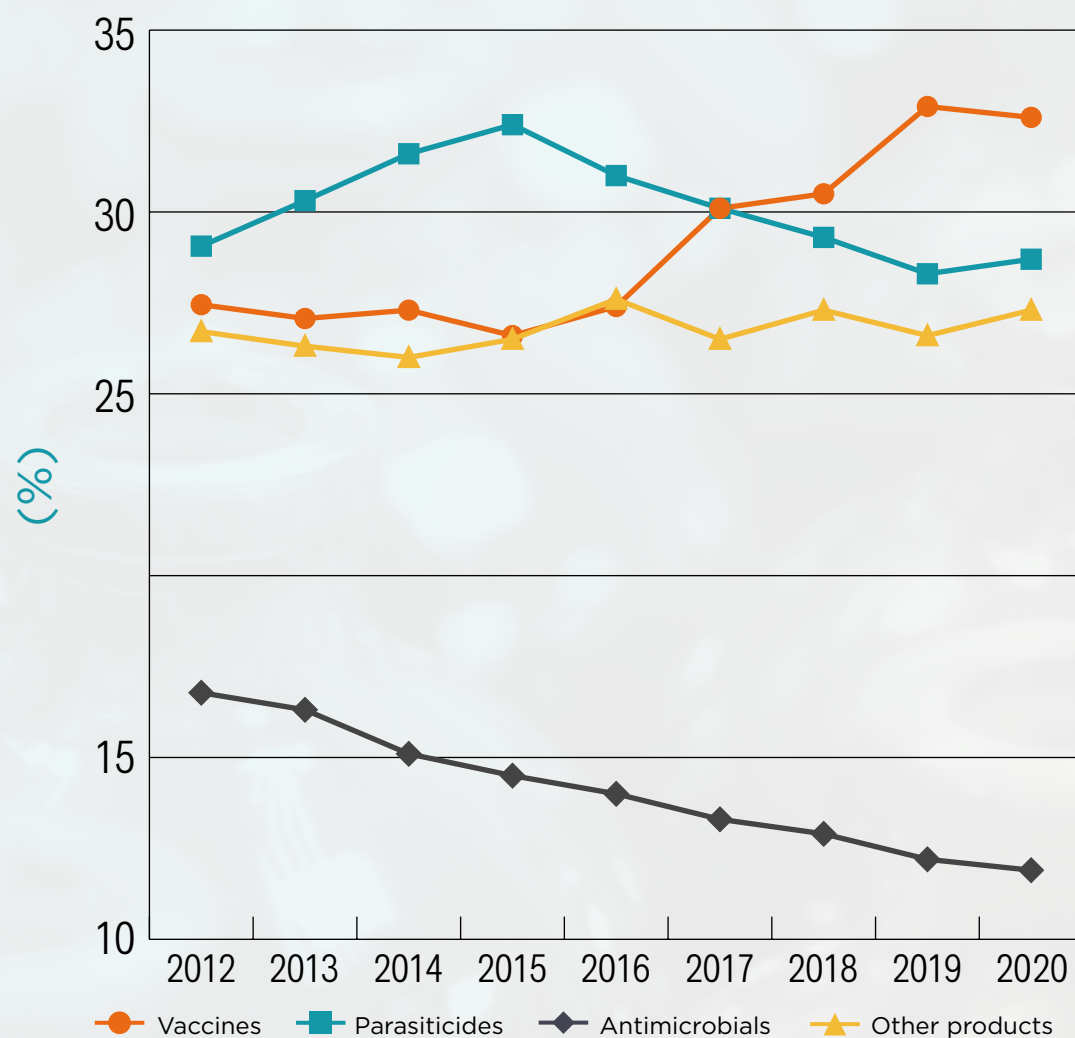


**Countries covered include** AT, BE, CH, CZ, DE, DK, ES, FR, UK, GR, HU, IE, IT, NL, PL, PT, SK.

**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 (%) (2012–2020)



**Total European  
sales for 2020:  
€6.8 Billion**



# A greener, digitally enhanced future for EU livestock farmers



## A greener, digitally enhanced future for EU livestock farmers

Today in Europe every sector is called on to live up to the EU Green Deal. Livestock farmers and the wider agri-food sector are playing their part. And the animal health sector is there to both serve and enhance the livestock sector and support Europe's aims for climate neutrality and a sustainable food system, through a drive for technology-centred innovations.

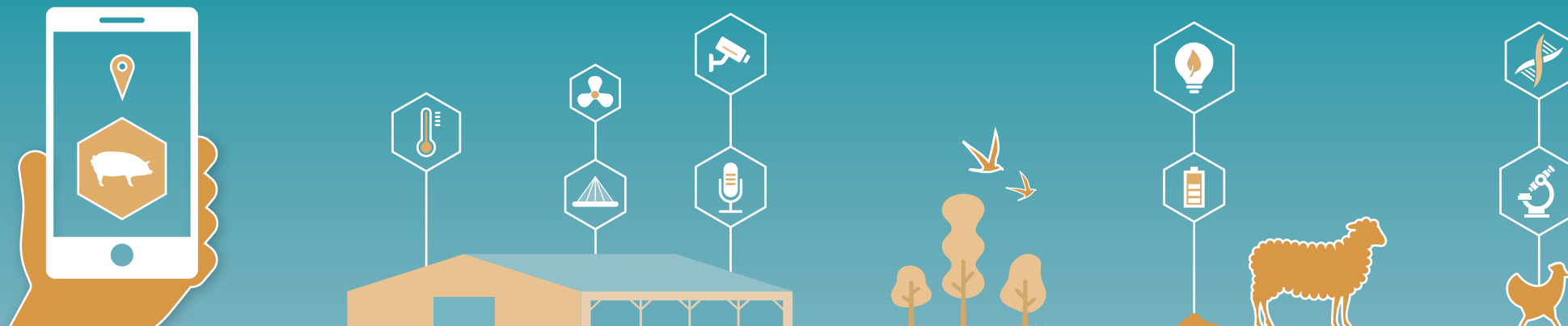
Our industry is currently at the forefront of a technological and digital transformation offering alternative solutions to farmers collectively known as Precision Livestock Farming. Breakthroughs in biotechnology, detection tools and robotics, genomic testing, and advanced vaccines, amongst others, are set to become essential tools for the future of both livestock farming and the veterinary profession. These advances can support farmers in optimising the health of animals to reduce environmental impacts, ensure better traceability, improve animal welfare and support responsible use of medicines, amongst others.

## More precision, less resources

The use of tools such as sound diagnostics, monitoring sensors, or digital body composition scoring is changing the way we farm. By optimising the management of animal health these tools help farmers to reduce environmental impacts through more precise uses of feed and water, and through a more targeted use of therapies. Farms are generally quite noisy places, making it difficult for farmers to detect specific sounds indicating health issues, such as a cough. With sound diagnostics on pig farms for example, farmers and their veterinarians can detect issues up to two weeks earlier than through conventional methods, helping to spot signs of respiratory illness early-on and reducing the number of animals requiring treatment.

Working directly with their smartphones, farmers can also keep a digitalised scoring of their animals' weight, size, etc. as well as their location in extensive farming, which helps to create significant efficiencies in terms of feed intake or aspects of health management such as disease occurrence or vaccination. And when connected to farm management software, this data can easily be shared with the veterinarian to ensure a more consistent and improved care for their animals.





## More prediction, less losses

Genomic predictions and other diagnostic testing tools help farmers with the earlier detection of diseases allowing for better control and management of potential illness and helping to avoid food losses like milk and eggs directly at farm level. Use of genomic testing in breeding programmes can, from the outset, help the sector to favour genetic improvements that harness sustainability traits in animals, such as: fertility; improved feed efficiency; welfare; and resilience against disease in livestock, poultry, and aquaculture.

Enhanced diagnostic tests also make diagnosis much easier as they can be carried out directly on the farm, helping veterinarians in confirming the health status of an animal and allowing for early identification of a disease pathogen. This enables more targeted care and helps the farmer with ensuring that produce gets to market more efficiently.

## More prevention, less illness

Vaccines prevent many illnesses and save numerous animal lives every year. Conventional vaccines will continue to be important in livestock farming as they provide durable protection against a variety of dangerous diseases. Today, new vaccine technologies are coming more and more into the mainstream as their high potency and capacity for rapid development offer potential cost-savings while ensuring safe administration. Modern vaccine administration methods also ensure greater benefits for veterinarians and farmers through ease of use and reliability, as well as for animals in terms of health and welfare.

Ensuring access to such cutting-edge technologies and the knowledge and skills to use these tools will support an innovative, dynamic and modern livestock sector that will positively contribute to the EU Green Deal while helping to attract new talent to Europe's rural areas. A digitally enhanced future will provide a way for livestock farmers to achieve Farm to Fork goals through 'smart' solutions that optimise animal health and welfare.



# 2020 at a glance

## Agri-Food Chain Coalition Networking Reception

17/02/2020

Key event with a brand new European Parliament to encourage dialogue when addressing the challenges of food systems and setting priorities for the evolution of the EU agri-food sector.



## AnimalhealthEurope Welcomes European Parliament Resolution to Protect Companion Animals

13/02/2020


We welcomed the Resolution on the illegal trade in companion animals, supported by an overwhelming majority of members of the European Parliament.




## European Industries Welcome Important Industry Focus from European Commission

11/03/2020

Industry4Europe, a coalition of 154 sector Associations representing the diversity of the EU's industrial base, welcomed the European Commission's New Industrial Strategy for Europe.






*"A unanimous position from almost 150 manufacturing and industrial sectors is as strong a message as it can get. Such a Joint Paper is a clear sign that the EU's job and growth providers are willing to play an active role in building a sustainable industry for future generations in Europe."*

**Roxane Feller, Secretary General**  
**AnimalhealthEurope**

[www.industry4europe.eu](http://www.industry4europe.eu)
[@Industry4Europe](https://twitter.com/Industry4Europe)
[in industry4europe](https://www.linkedin.com/company/industry4europe)

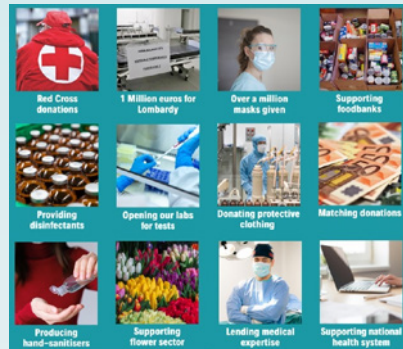




## Contributing to COVID-19 relief efforts

09/04/2020

AnimalhealthEurope and members took action on a number of levels to support the animal health community and our wider European society during the COVID-19 pandemic.



## Promoting Prevention is Better than Cure Together with Vets

20/04/2020

We came together with Fecava and FVE for World Animal Vaccination Day, to highlight the importance of animal vaccination, improved animal health management and a greater One Health implementation.



## EU Farm to Fork Strategy: AnimalhealthEurope Supports an EU Food System Transformation Based On Innovation

20/05/2020

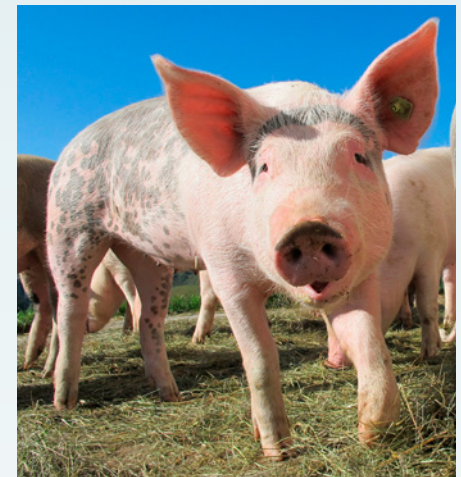
We supported the ambition of the European Commission to move towards a fair, healthy and environmentally friendly food system, with a transformation based on innovative and enabling technologies.



## We join 70+ signatories on Open Letter on the Value of Animal Agriculture

05/06/2020

AnimalhealthEurope joined experts on a call for better recognition of livestock farming, in supporting global nutrition and high standards of food safety and public health during the COVID-19 pandemic.

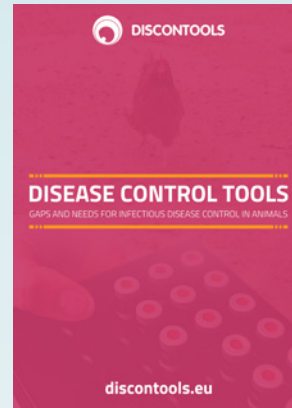




## DISCONTOLS Disease Sheets for Research Programmes

01/09/2020

The DISCONTOLS Disease Sheets offer a comprehensive format to support research programme managers and decision makers in focusing on areas for significant advancement in animal health and societal challenges.



## Livestock Farming in Europe: What Does Sustainability Look Like?

09/09/2020

In an online debate with Commissioner Kyriakides and MEP Norbert Lins, we discussed the EU Farm to Fork strategy and how the European livestock sector can deliver on sustainability demands.



## AnimalhealthEurope Welcomes Parliament's Recognition of Efforts to Ensure Environmental Safety Of Veterinary Pharmaceuticals

17/09/2020

Key aspects of veterinary medicine use and authorisation processes were positively recognised in the EP Resolution on pharmaceuticals in the environment.



## EU Influencers Gather to Discuss #PetPower

01/10/2020

AnimalhealthEurope and FEDIAF came together ahead of World Animal Day to highlight the important role that pets have played during COVID-19 lockdowns and to call for greater attention at EU level for pet-focused policies.



## Brexit position: Protecting Animals, their Health, and our Food Supply Across Europe

01/10/2020

We called for practical solutions in Brexit negotiations to ensure continued, uninterrupted supply of medicines for animals from 1 January 2021.



## TOPRA Veterinary Medicines Symposium

05/10/2020

This annual symposium discussed strategic developments in the EU regulatory network, regulation versus innovation, and practical implementation of the new Veterinary Medicines Regulation.



## African Swine Fever Declaration and Info Page

10/10/2020

AnimalhealthEurope members joined together with HealthforAnimals to publish a Declaration on African Swine Fever. An info page was also created to provide updates on developing situations, vaccine research, etc.



## Global Benchmarking Survey 2020 published

13/10/2020

This survey, conducted every 5 years, measures regulatory systems around the world and their impact on the competitiveness of the animal health industry.



## AnimalhealthEurope Welcomes Council Conclusions on EU Farm to Fork Strategy

19/10/2020

We welcomed the highlighting of the importance of animal health and its key role in the implementation of the EU Farm to Fork Strategy.



## Responsible Use of Veterinary Antibiotics well-established in Europe

21/10/2020

25 European countries register a 34.6% overall decline in sales of antibiotics for animal health purposes, the result of more than a decade of efforts to improve animal health management.



## Greater One Health Dialogue Needed for a Healthier Future

03/11/2020

We encouraged greater exchange between human health, animal health and environmental disciplines, to develop practical collaboration for sustainable food production and a healthier future.



## Taking a global approach to the quality of veterinary medicines

16/11/2020

Every year we participate in a global programme to set international standards for the regulatory oversight of veterinary medicines, helping animal welfare by raising standards around the world.



## Preserving Antibiotics: Animal Health Sector United and Supporting Europe's Farmers In Responsible Use Efforts

18/11/2020

We called for greater recognition of efforts already made in Europe's animal sector to form the basis of both continued awareness-raising and European policy measures.





## The European Animal Medicines Industry in Figures

24/11/2020

We published the latest sales and employment figures, alongside geographical presence, animal populations, and the contributions of animal health products to society.



## Working towards a modernised set of rules for veterinary medicines

Throughout 2020

We've been actively contributing to all the public consultations on the numerous topics covered by the 'secondary' legislation under the new Veterinary Medicines Regulation.

## First-ever European Livestock Voice Debate: Is livestock really destroying the planet?

30/11/2020

Through European Livestock Voice, we organised a first in a series of debates on the topics addressed in our MeattheFacts campaign and covered in the new Farm to Fork strategy.





# 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



### Czech Republic & Slovakia



### Denmark, Norway and Sweden



### France



### Germany



### Greece



### Hungary



### Ireland



### Italy



### Netherlands



### Norway



### Poland



### Portugal



### Spain



### Switzerland



### United Kingdom








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