

# 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

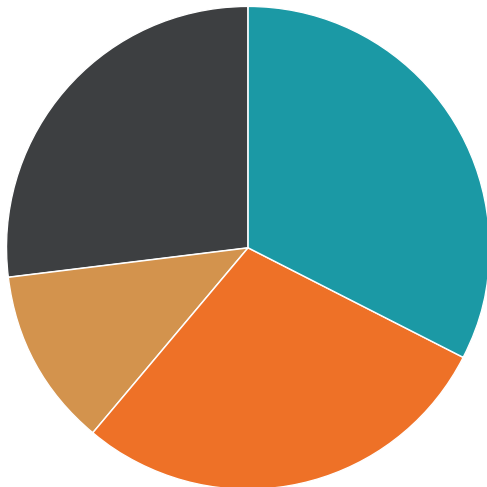
Over 110



## 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

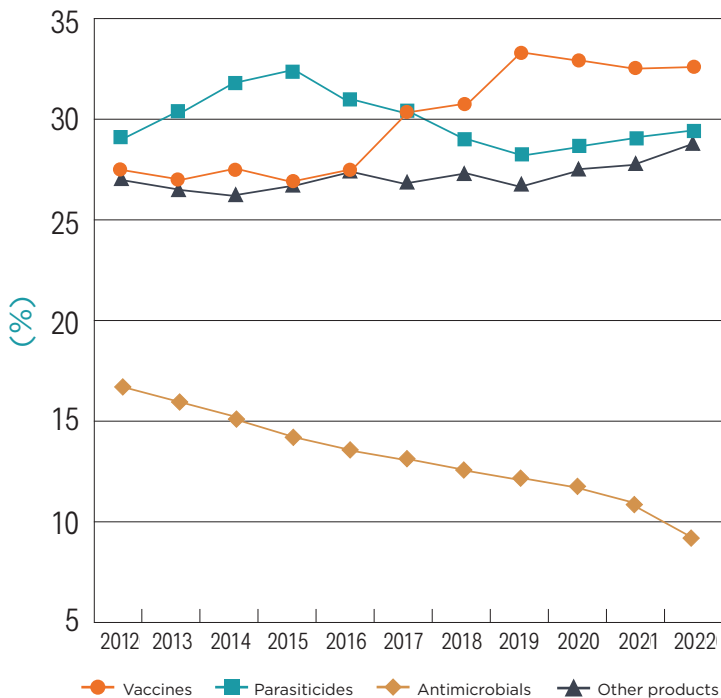
[www.ceesa.eu](http://www.ceesa.eu)

**Total European  
sales for 2022**

**€7.9 Billion**

# Sales by product category in Europe

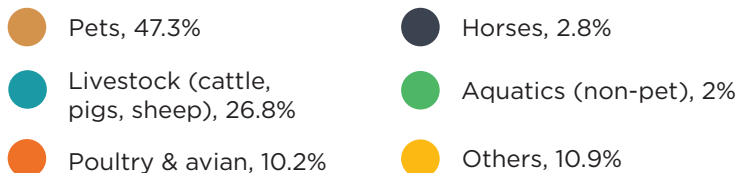
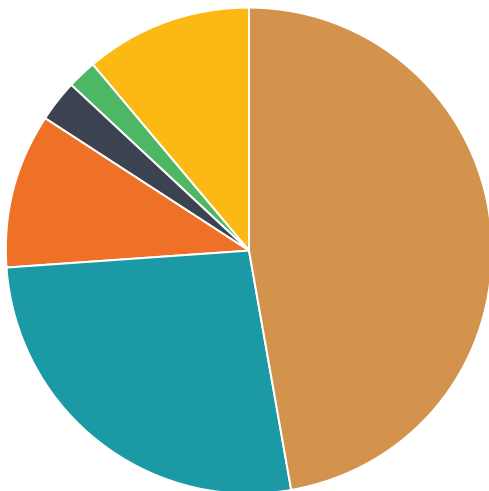
## Evolution of sales per product category (%) (2012–2022)



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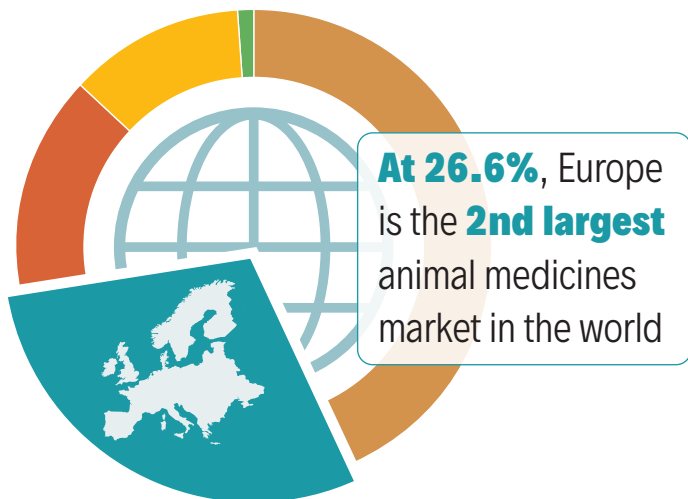
# Sales by animal species



**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%

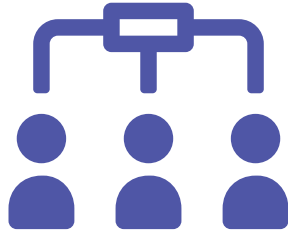
The market value of the European animal medicines industry is **3%** of the European human pharmaceutical industry

Source: CEESA (Executive Animal Health Study Centre [www.ceesa.eu](http://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

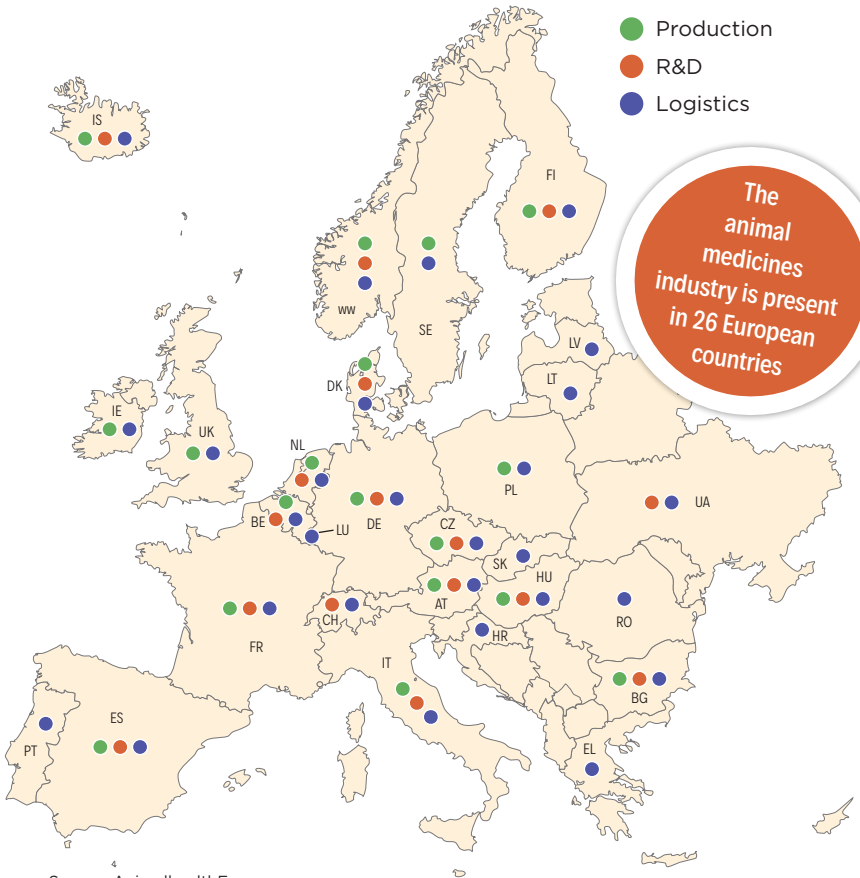


Today **91 million** European households own a pet, **46%** of all households

Source: Fediaf 2022



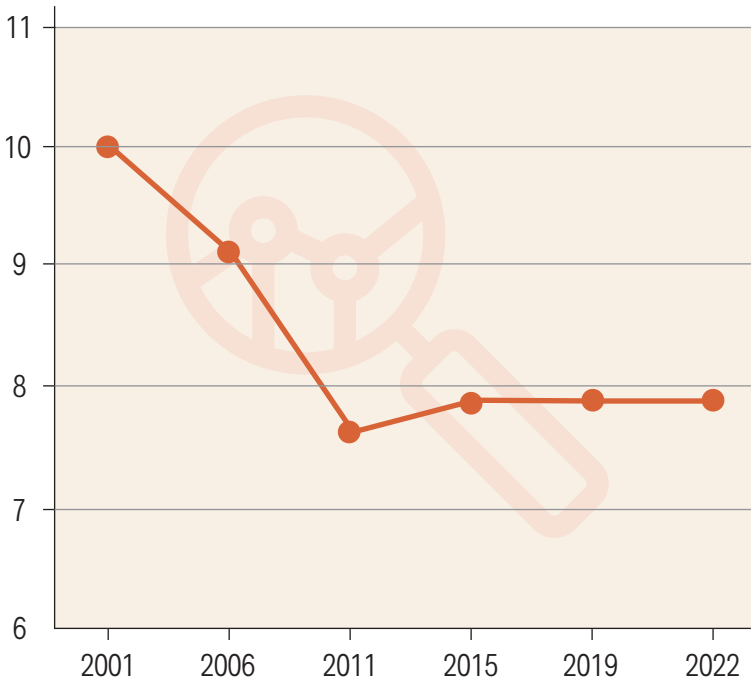
# Presence of animal medicines industry across Europe: production, R&D, logistics



Source: AnimalhealthEurope

# Investment in R&D

## R&D as percentage of turnover



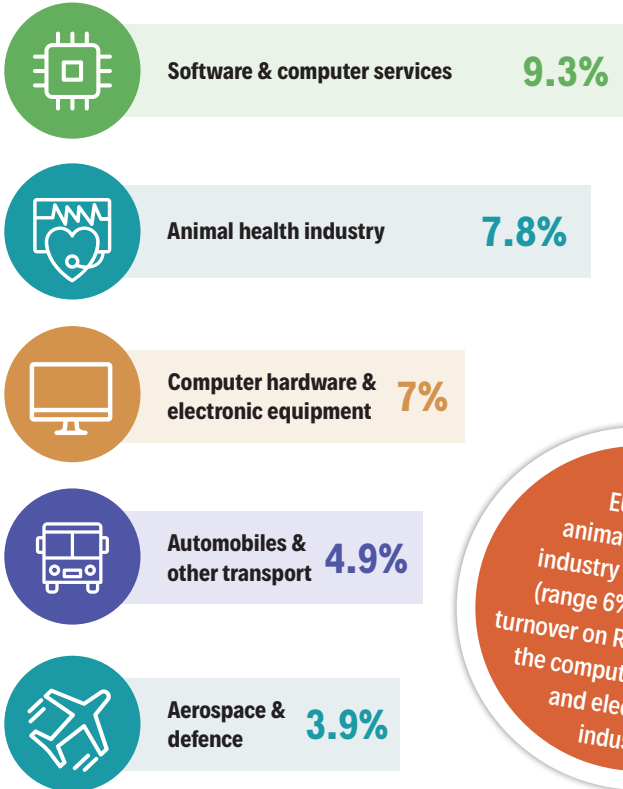
Over  
€600  
million

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



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](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

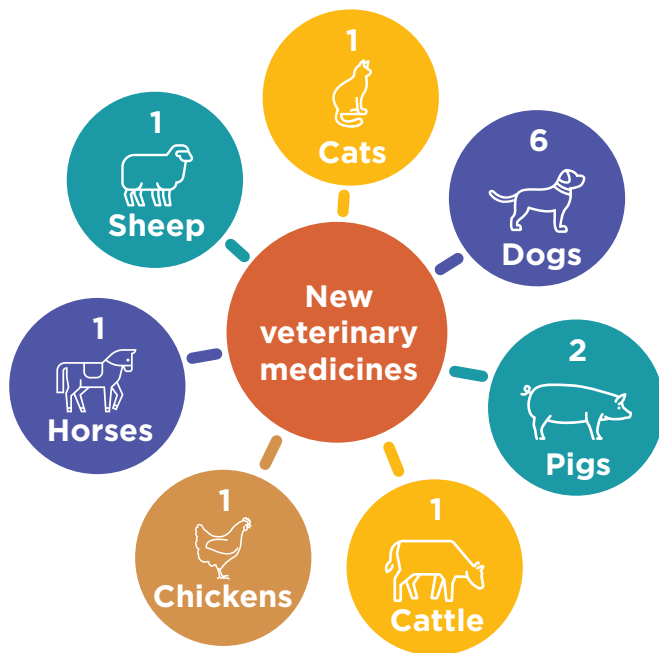


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Vaccines

# 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](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](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**

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