

# Annual report 2024

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# Message from the Secretary General and President

As President and Secretary General of AnimalhealthEurope we invite you to browse through our annual report to learn more about our activities to continue raising awareness on why animal health matters, as we worked throughout the year to ensure EU-wide implementation of the Regulations on Veterinary Medicines and Medicated Feed, as well as reduce potential negative impacts of horizontal legislation on the availability of animal health products.

## New Parliament, new potential

With the new European Parliament taking up its seat in July 2024, this offered our Public Affairs colleagues a great opportunity to meet up with some fresh faces to highlight the important role that animal health plays in some of the key dossiers they will be working on, such as the proposal for a Regulation on dog and cat welfare and traceability and possibly the remaining animal welfare proposals. This was also an opportunity to promote one of our key asks from our 2024-2029 Manifesto, ensuring benefit-risk prevails in policy-making so that the availability of animal medicines is not unduly impacted in the future due to some of the chemicals-focused legislative files.

## Year three of the new EU rules on veterinary medicines

We have been working very closely with our national associations on the implementation of the new EU Regulations on Veterinary Medicines and Medicated Feed. As we're now in the third year it's probably time enough now to stop calling them the 'new rules', particularly since the



**Roxane Feller**  
Secretary General



**Rob Kelly**  
President



many Delegated and Implementing Acts have now all been published, with just some secondary legislation still outstanding. Work continues to ensure the Union Product Database functions as is intended, and some final elements are being ironed out.

## One Health, Sustainability and Innovation remain our driving force

We've been pleased to be invited to speak at a number of events this year where we highlighted the role of prevention in animal health and innovations for sustainable livestock farming, and we have started a conversation with relevant stakeholders on the potentials for big data use in the animal health space. One Health was also a focal point in 2024, as we published a Call to the Action for the European Commission to develop an over-arching One Health Strategy for the future.

## A new Commissioner for Health and Animal Welfare

As the new College of Commissioners was formed towards the end of the year, AnimalhealthEurope welcomed the new Commissioner and new title of 'Health and Animal Welfare'. With animal health playing a central role both for health and animal welfare, we look forward to exchanging with the new Commissioner and providing some useful information on why animal health matters to the EU.

## A call for dialogue, and not the one you think

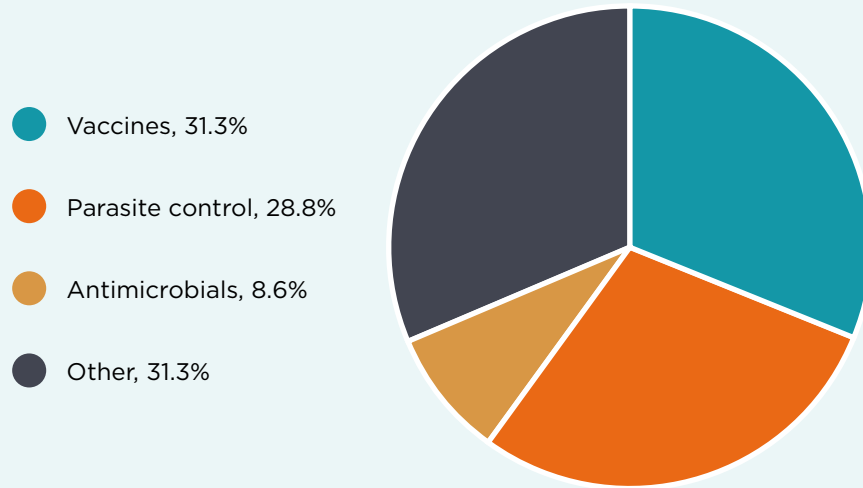
2024 has been a great year for the word 'dialogue' as those invited to take part in the Strategic Dialogue on the Future of EU Agriculture will be well-aware. As the animal health industry, we have been campaigning for more dialogue on agriculture for many years. But this year we started our own call for dialogue, in this instance between the animal health industry and veterinary authorities, for a more structured partnership to anticipate demands for vaccines and increase preparedness for animal disease outbreaks. Read more about this in the feature article on page 6.

## A final word of thanks

None of what we have achieved this year would have been possible without the support of our member companies, associations and various experts we work with on a daily basis. Thanks also go of course to the association's eager and dedicated secretariat who never seem to tire. And lastly, thanks to our partners in the Brussels bubble, the regulatory authorities and EU decision-makers who have involved the animal health sector in key meetings, spoken at our events, and willingly exchanged with us on animal health related topics.

# Key figures 2024

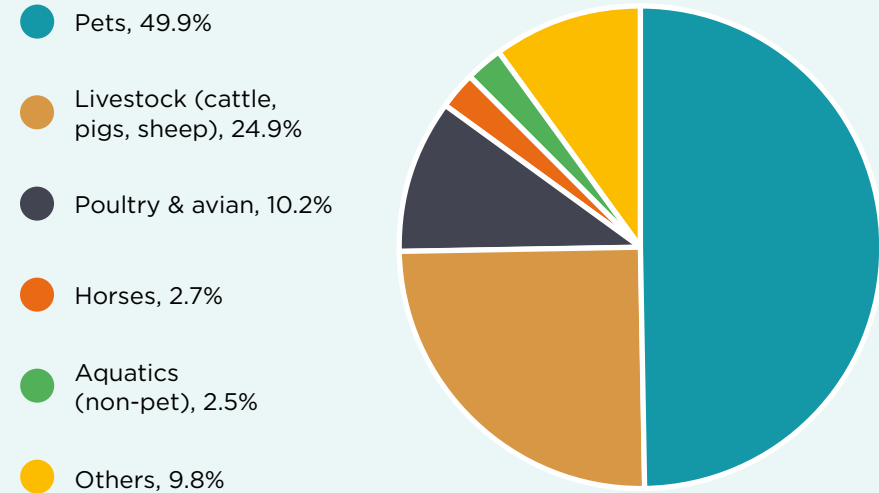
## Sales by product category in Europe



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

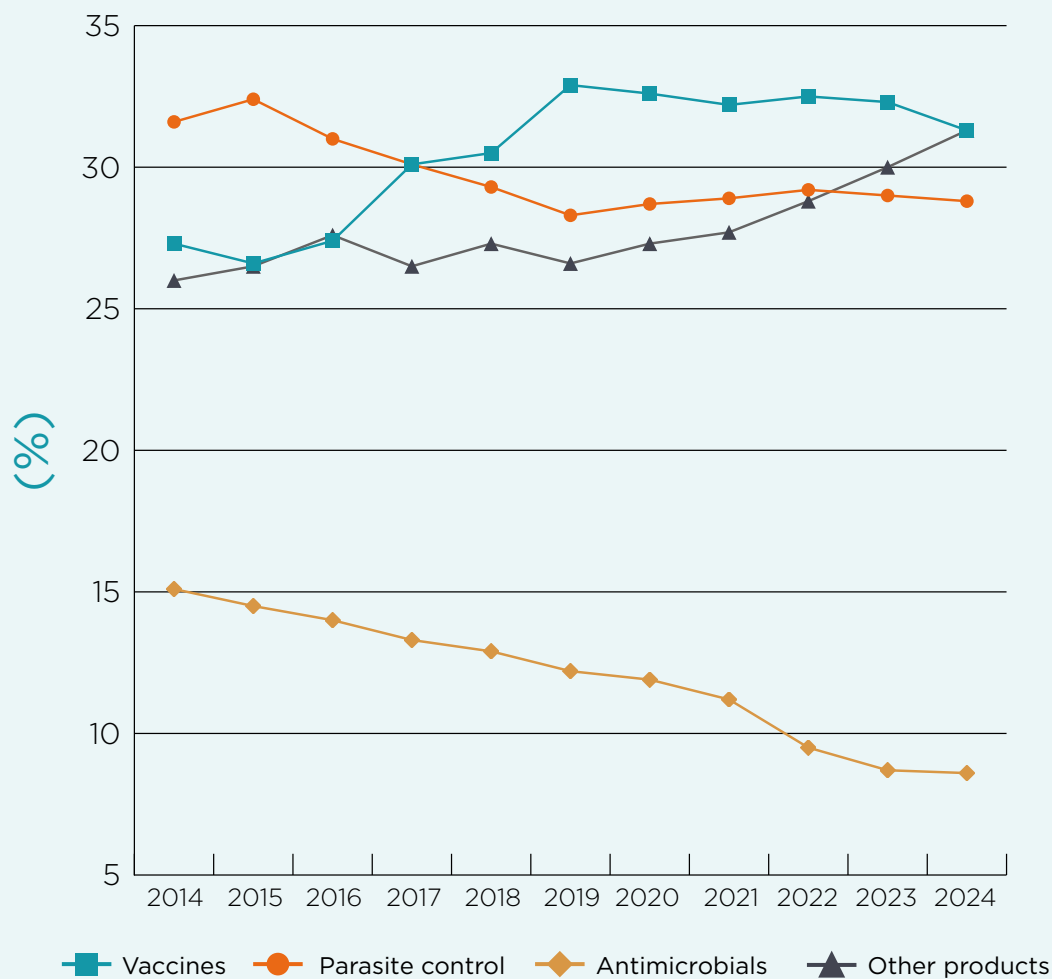
## Sales by animal species



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

## Sales per product category in Europe (%) (2014–2024)



**Total European  
sales for 2024:  
€8.9 Billion**





## Establishing a Dialogue for Animal Disease Prevention, Preparedness and Response

Transboundary and emerging animal diseases have been increasing in occurrence over the past decades. Diseases which were once only reported outside of Europe's borders are now more frequently occurring on European soil, and not solely in the continent's southern climes. When a new disease outbreak is serious enough to impact food production and the agricultural economy, very often the first reaction is to come knocking on the doors of veterinary medicines manufacturers to request rapid development of vaccines.

In 2024 the reactive approach to disease prevention was relatively sufficient as vaccines existed already for avian influenza and the strain of bluetongue virus (BTV3) was known to the industry, although no vaccines were available at the time of the outbreak in the Netherlands. In the case of bluetongue, the animal health sector swiftly developed and distributed the much-needed vaccines to limit the impact of this outbreak on the Europe's farming sector.

**It is only a question of time until the  
next animal disease outbreak occurs  
– be it a known or a new disease.**

Relying on the reactive approach may not be the best strategy to protect Europe's animals – and maybe even our human population – from the next inevitable disease outbreak. We need a fundamental shift from a “firefighting” approach to a “fire prevention” approach.

Otherwise, the consequences of a future outbreak could spiral beyond our control, dealing a serious blow to European agriculture, public health, and the wider economy.

*“We need a fundamental shift from a ‘firefighting’ approach to a ‘fire prevention’ approach.”*

Global trade, rapid and more international travel, a more prolonged and wider presence range of disease-carrying vectors, alongside sometimes contradictory animal health and trade policies are increasing both the risks and negative impacts of disease outbreaks among animals, and their potential spillover to people. Changes in climate also serve to exacerbate the challenges, with rising temperatures and fluctuations in rainfall patterns affecting the incidence and spread of diseases across Europe.

## A challenge to be faced head on

When authorities send urgent requests for a vaccine to be developed and supplied only after the emergence of an outbreak, it is very difficult for companies to act within the required timeframe to immediately address the outbreak. So, this raises a number of pertinent questions.

- Are the authorities really satisfied with the status quo of last-minute decisions?
- Are livestock farmers content with having to bear the costs and mental health burden of animal culling and/or fatalities during disease outbreaks?
- Is the financial risk for companies developing vaccines – that may or may not be sold in the event of an outbreak – not a matter of concern for national economies?

## Time for a structured dialogue between industry and the veterinary community

A more structured partnership, based on a 3Rs approach – but not the ones you think – would help to ensure industry can anticipate demands for vaccines and increase preparedness to ensure predictable disease outbreaks are prevented and managed more effectively. This would also help respond to increasing societal opposition to mass culls.

## The new 3Rs

Everyone has heard of ‘Reduce, Reuse, Recycle’ and those working with animals for scientific purposes will know the ‘Reduce, Refine, Replace’ principle. What the animal health industry would like to see now is:

- **Regular Dialogue** between industry and national chief veterinary officers
- **Rapid and early** decisions on whether a vaccination programme will be implemented
- **Risk sharing** so that companies do not invest time and financial resources unduly

In the case of known diseases, surveillance data is available which could allow for rough predictions of the likelihood of disease occurrence and potential impacts, forming a baseline for regular discussions. Antigen banks could form part of the outbreak preparedness arsenal. And response could be further supported by adapted regulatory pathways with quicker authorisation processes aligned with specific needs.

Taking this 3Rs approach will not just help gain valuable time, but it will help protect the health and welfare of Europe’s animals, while preserving the farming community and Europe’s wider economy.

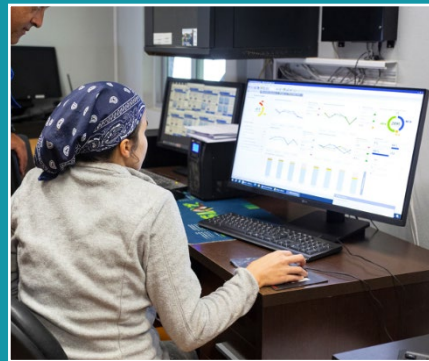


# 2024 at a glance

22 January 2024

## Welcome recognition of essential role of vaccination by Belgian Presidency

The Belgian Presidency to the Council of the EU organised a Ministerial Conference on Animal Health highlighting the essential role of biosecurity measures and vaccination as tools in the fight against animal diseases.



13–14 March 2024

## EMA Veterinary Medicines Info Day

The annual info day saw regulators and industry exchange on the latest updates on veterinary regulatory policy and scientific and legislative developments.



30 January 2024

## AnimalhealthEurope welcomed newly launched Antimicrobial Sales and Use (ASU) Platform

All EU Member States and European Economic Area countries are legally obliged to submit both sales and use data annually to the newly launched ASU Platform.



19 March 2024

## Report on Trends in Parasite Control in Pets – Europe published

The trends report outlines how the landscape for parasite control is shifting in Europe, where threats may be rising, and what can be done to better prevent parasites from harming pets and people in the future.



11 April 2024

## United with 1000 organisations in call for European Industrial Deal

1000 supporters from business leaders of companies, associations and Trade Union organisations representing 25 sectors across Europe, in historic display of unity for a European Industrial Deal to be developed.

**Vaccines work on a community level**

When a majority of pets are vaccinated it creates herd immunity that protects even the unvaccinated.

23 April 2024

## Highlighting the challenges of a universal PFAS ban

AnimalhealthEurope created an infographic highlighting the challenges of a universal PFAS ban and impacts on the availability of veterinary medicines.

**Manifesto 2024-2029**  
#AnimalHealthMatters

We all depend on animals in some way — for shaping landscapes and invigorating rural areas, for companionship, assistance, leisure, and for food. In short animal health contributes to our shared One Health. No matter how well we care for our animals, they can still get sick and may need medicines. But treating sick animals is just one part of our story. Today's animal health toolkit offers so much **More than Medicine**. Advances in animal health care are prioritising better welfare, improved disease prevention and animal resilience, as well as earlier diagnosis. This facilitates better animal husbandry and improves overall animal health and wellbeing, contributing to a healthier future by:

- Supporting sustainable and resource-efficient livestock farming
- Ensuring an affordable supply of safe and good quality milk, meat, fish and eggs
- Protecting people from illnesses that are shared between animals and people
- Maintaining the close bond and quality of life for both animals and people

**How you can support a healthier future**

Europe is the birthplace of modern veterinary medicine and home to world-leading animal health companies. We have ambitious ideas for Europe to maintain its first-class reputation for animal health and welfare, sustainability and innovation. During your mandate, you will come across a wide variety of topics which might have an impact on the health and welfare of farms and companion animals. You can help by supporting:

- One Health approaches in decision-making**  
Understanding that animal health, human health, and the environment are interconnected and dependent on each other. Fostering that decision-making does not prioritise one for the protection of the other.
- Animal health as a solution to improve animal welfare**  
Understanding that animal health is a prerequisite for animal welfare. Supporting the deployment of the entire modern-day animal health toolkit, including new technologies for data-supported decisions.
- Benefit-risk over risk-only processes in policymaking**  
Understanding that animal health products are approved for their wide-ranging benefits, while adhering to strict EU laws, guidelines, and authorisation procedures many of which are controlled by the European Medicines Agency.
- Balanced dialogue on the future of animal farming**  
Understanding the important contributions of Europe's agrifood sector. Supporting fact-based exchanges on livestock health and welfare, and sustainability of food systems.

The future of Europe is made with industry [#AnimalHealth](#)

Europe is the birthplace of modern veterinary medicine and home to world-leading animal health companies. We have ambitious ideas for Europe to maintain its first-class reputation for animal health innovation, but we need a targeted industrial policy so Europe can also remain a continent for production of innovative animal health solutions.

**Roxane Feller**  
Secretary General, AnimalhealthEurope

[Will you join us? >](#)

[antwerp-declaration.eu](#)

19 April 2024

## Vets and industry call for value of animal vaccination to be recognised

AnimalhealthEurope joined FECAVA and FVE in a campaign for World Animal Vaccination Day to highlight the wide-ranging value of animal vaccination.

**The challenges of a universal PFAS ban**  
Impacts on animal health and welfare, research and innovation, as well as manufacturing capabilities in the EU

The animal health industry stakeholders about the environmental impact of PFAS. However, PFAS is a broad term: specific, some which does not allow either a complete ban, or a ban on PFAS overall. The environmental impact, although essential for continued availability of veterinary medicines.

Key challenges include:

- Research obstacles and equipment for manufacturing and supply chains
- Substances for scientific research, development, and quality control
- Packaging of veterinary medicines and devices

**PFAS are present throughout R&D, manufacturing, packaging, and administration of veterinary medicines.**

R&D	Manufacturing	Packaging & Distribution	Administration
<ul style="list-style-type: none"> <li>Equipment: Laboratory, Analytical, Imaging</li> </ul>	<ul style="list-style-type: none"> <li>Chemicals: Starting materials, Intermediates, Solvents</li> </ul>	<ul style="list-style-type: none"> <li>Production equipment: Pipes, Cables, Tanks, Drums, Containers, Bags, Tablets</li> </ul>	<ul style="list-style-type: none"> <li>Storage &amp; transport: Pallets, Containers, Barbed wire</li> </ul>

Key findings:

- All of PFAS substances present the same **human health and environmental risk**.
- Veterinary medicines are highly regulated and only receive marketing authorisation when they pass through quality, safety and clinical assessments, and undergo extensive and lengthy risk analysis. Restrictions on use of substances which do **not pose a risk as low as the prevalence of PFAS**.
- The ban of PFAS will therefore **increase the cost of production**. This ban will impact on the ability of animal health companies and their owners primarily and particularly **small companies and associated manufacturing of major competitive disadvantage**.
- Reduced appropriate regulations, **there will be health and environmental risks** to both animals and people through use of treated technologies and animal products.
- Many veterinary medicines in Europe will be impacted by a **shortage of key raw materials** if facilities cannot produce or import into the EU.

**With a universal ban for PFAS, access to medicines will be impacted for:**

- 300,000** Veterinarians<sup>1</sup>
- 91 million** Households that have pets<sup>2</sup>
- 3.3 million** Farms with animals<sup>3</sup>

15 May 2024

## Animal Health Matters: Our Manifesto for the EU elections

We highlighted our four key asks for the new European Parliament to ensure that animal health remains a central focus.

03–05 June 2024

## AnimalhealthEurope spoke at the Canadian Animal Health Institute’s Conference

Our Senior Technical Manager Jaume Colomer was invited to give a presentation on the EU framework for packaging and packaging waste amongst other shared topics.



20 June 2024

## Roundtable: animal health and beyond

On June 20 AnimalhealthEurope hosted a roundtable discussion with key stakeholders to reflect on current legislative and geopolitical challenges and to forge forward-looking opportunities and alliances.



19 June 2024

## Housewarming party at AnimalhealthEurope’s new offices

The association moved to new offices in May 2024 and held a housewarming party for members and stakeholders in June to celebrate and show off the new offices.



04 July 2024

## Joint call for an ambitious and well-funded FP10

We joined a call for a significant budget increase for research Framework Programme 10 and to make pan-European collaborative research the cornerstone.



26 July 2024

## Call for societal role of livestock farming to be recognised in Strategic Dialogue

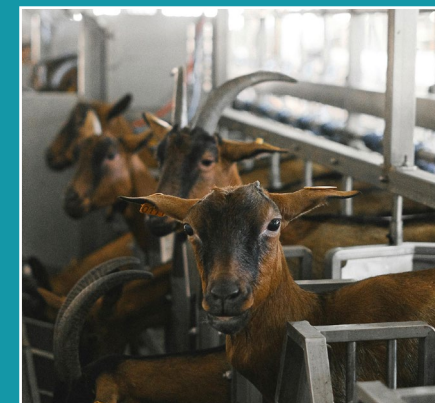
12 associations joined efforts in a letter to President Von der Leyen calling for the wider societal role of livestock farming to not be overlooked in the outcomes of the Strategic Dialogue on the Future of EU Agriculture.



13 September 2024

## AnimalhealthEurope welcomed UN Political Declaration on AMR

The broad consensus for better animal health and disease prevention, alongside actions in human health and environmental areas, welcomed as a core pathway to address AMR in a One Health manner.



04 September 2024

## Welcome recognition of role of animal health in Strategic Dialogue on the Future of EU Agriculture

AnimalhealthEurope was pleased to see the important role of animal health recognised in the outcome report from the Strategic Dialogue on the Future of EU Agriculture.



19 September 2024

## Plea for European Commission to pay greater attention to animal health

AnimalhealthEurope highlighted the lack of mentions of animal health, and scarce mention of One Health during Commissioner hearings.



30 September – 02 October 2024

## TOPRA Veterinary Symposium 2024

Regulators and industry met at the 2024 TOPRA Symposium in Rotterdam, in partnership with the Medicines Evaluation Board, the Netherlands' national authority of medicines and health products.



30 September 2024

## Human Animal Bond: A research compilation on #PetPower

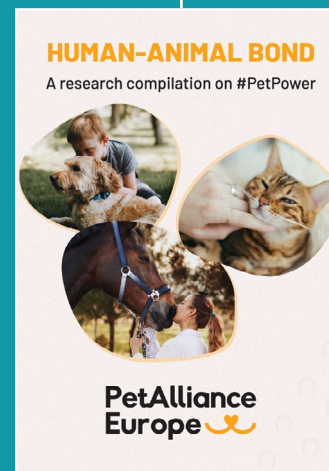
Pet Alliance Europe launched a second edition of their booklet with highlights from research studies on the benefits of the human-animal bond.



30 September 2024

## #PetPower Night 2024: Empowering the human-animal bond

Pet Alliance Europe welcomed IAHAIO President Marie-Jose Enders-Slegers as keynote speaker at their annual #PetPower Night in Brussels.



14 October 2024

## 4th Veterinary Big Data Stakeholder Forum

Our Public Affairs Manager, Diana Teixeira, spoke at the EMA's 4th Veterinary Big Data Stakeholder Forum on stakeholder discussions for a potential animal health and welfare data space.



05 November 2024

## Hungarian Presidency event on vaccination and TADs

Our Secretary General, Roxane Feller, spoke at the Hungarian Presidency of the Council of the EU event on “Vaccination as a preventive tool against transboundary animal diseases”.



02 December 2024

## Pieter-Jan Serreyn joined us as our new Technical Director

With the retirement of current Technical Director Rick Clayton at the end of 2024, AnimalhealthEurope welcomed Pieter-Jan Serreyn to the team as the new Technical Director.



13–14 November 2024

## 7th VICH Conference: VICH and a new Era

VICH's 7th public conference was hosted by AnimalhealthEurope and the European Medicines Agency on 13-14 November at the EMA's headquarters in Amsterdam.



11 December 2024

## Workshop on Vector Borne Disease Management

At a workshop hosted by MEP Benoit Cassart our Secretary General spoke about the need to move from a firefighting to fire prevention approach to vaccination through early dialogue with authorities.

# 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, Finland, Iceland,  
Norway, Sweden



France



Germany



Greece



Hungary



Ireland



Italy



Netherlands



Poland



Portugal



Spain



Switzerland



United Kingdom



Ukraine



