

The European animal medicines industry in figures



In a nutshell



COMPETITIVENESS

30% of the global market



EMPLOYMENT

Over 50,000 jobs



NUMBER OF COMPANIES

Over 130



SMEs

Over 100



R&D EXPENDITURE

8% of turnover

Sales by product category in Europe



 Vaccines, 32.9%

 Parasite control, 27.8%

 Antimicrobials, 8.2%

 Other, 31.1%

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

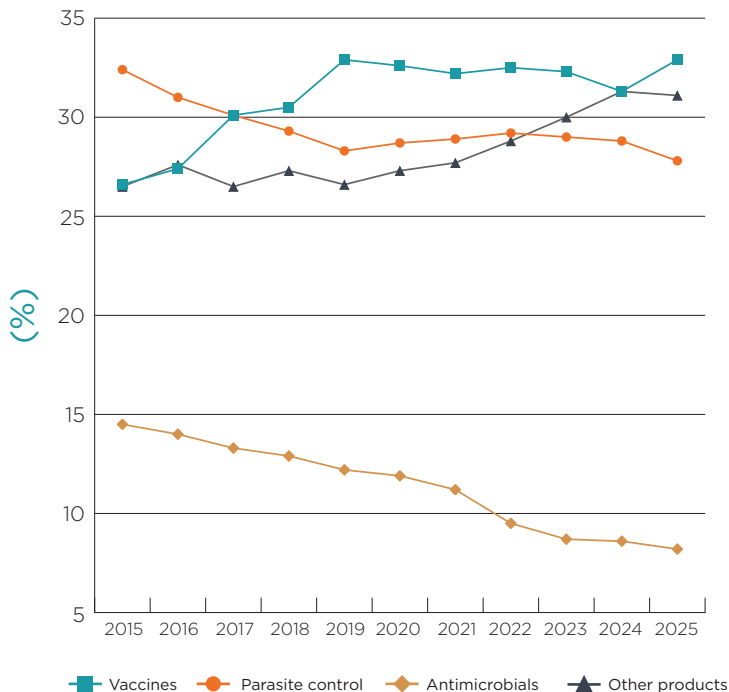
www.ceesa.eu

**Total European
sales for 2025**

€9.6 Billion

Evolution of sales per product category

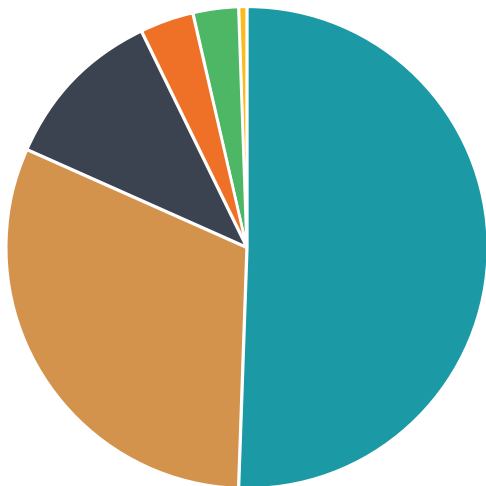
Evolution of sales per product category (%) (2015–2025)



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

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Sales by animal species



 Pets, 50.6%

 Livestock (cattle, pigs, sheep), 31.1%

 Poultry & avian, 11.2%

 Horses, 3.5%

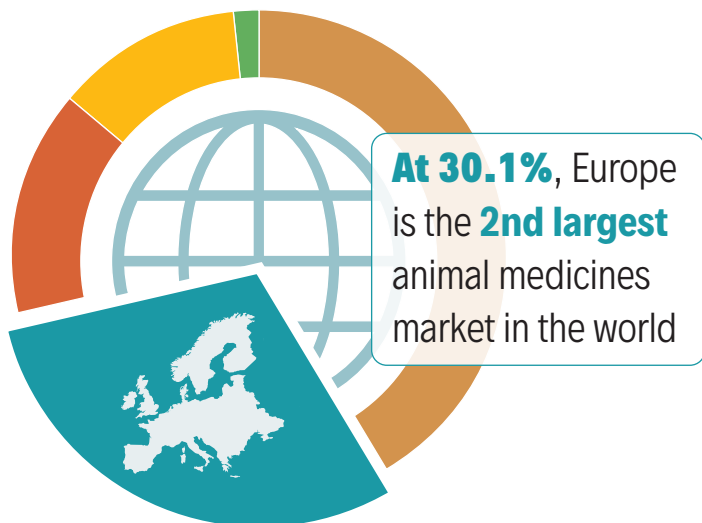
 Aquatics (non-pet), 3.1%

 Others, 0.5%

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Global sales comparison



North America, 41.4%

Europe, 30.1%

Asia-Pacific, 14.7%

Latin America, 12.2%

Middle East-North Africa, 1.6%

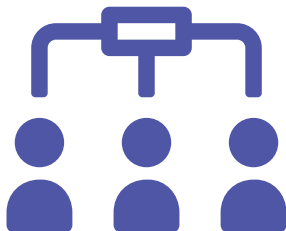
The market value of the European animal medicines industry is **3%** of the European human pharmaceutical industry

Source: CEESA (Executive Animal Health Study Centre www.ceesa.eu)
EFPIA (<https://www.efpia.eu/media/owqcqczq/the-pharmaceutical-industry-in-figures-2026.pdf>)

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 2023



Livestock farms

Around 3.1 million

Source: Eurostat

Household expenditure on companion animals in Europe

Veterinary services



€34–37 billion

Source: GGI Global Alliance 2024–2025

Pet food



€29.4 billion

Source: Fediaf 2026

Animal medicines



€5.2 billion

Source: AnimalhealthEurope



Today **140 million**
European households
own a pet, **49%** of all
households

Source: Fediaf 2026

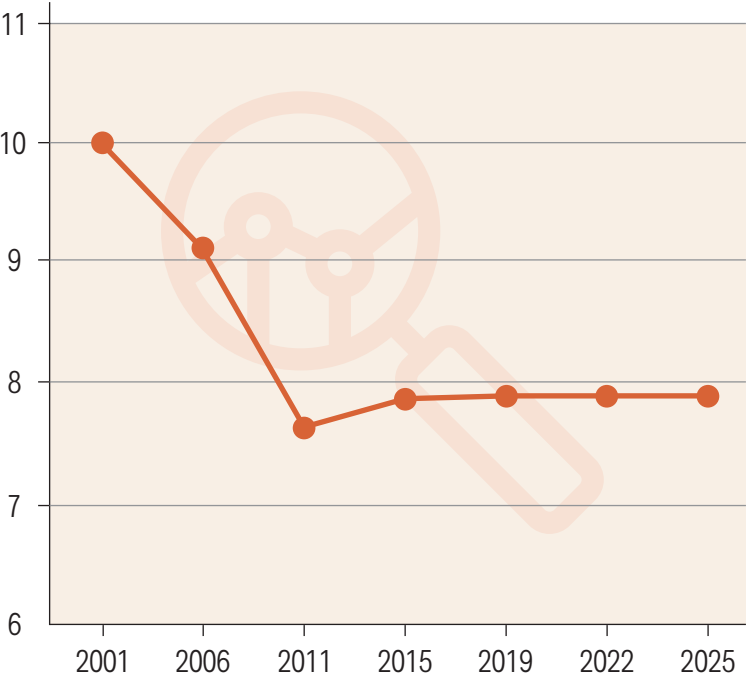
Presence of animal medicines industry across Europe: production, R&D, logistics



Source: AnimalhealthEurope

Investment in R&D

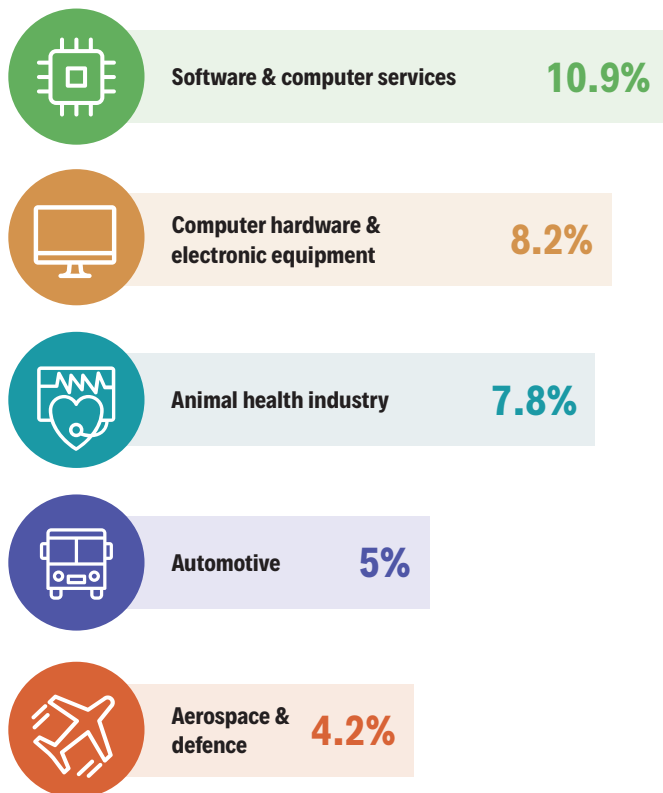
R&D as percentage of turnover



Source: HealthforAnimals

Investment in R&D

Ranking of industrial sectors by overall sector R&D intensity



Source: European Commission JRC 2025

<https://publications.jrc.ec.europa.eu/repository/handle/JRC144638>

Animal populations in Europe: farm animals



Laying hens

397.5m



Pigs 131.5m



Bovines 71.6m



Sheep 55.3m



Goats 10.2m

Source: Eurostat, DG AGRI

Animal populations in Europe: pets



Cats

111m



Dogs

91m



Birds

44m



Aquaria 28m



Small mammals 23m



Terraria 10m

Source: FEDIAF 2026 FACTS & FIGURES

https://europeanpetfood.org/wp-content/uploads/2026/06/FEDIAF_Annual-Report_2026_WEBv1.1.pdf

New animal health products approved by the EMA in 2025

In 2025 the European Medicines Agency approved
30 new animal health products for use

 **30** Positive
opinions

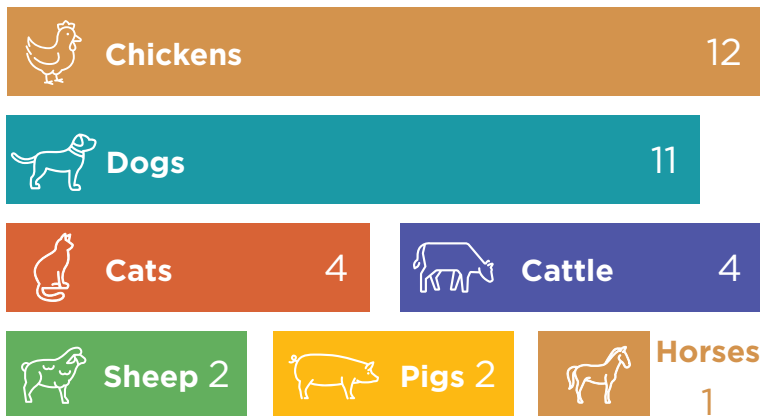
13 New active
substances



16 Vaccines

Approvals of animal health products in 2025

Of the 30 approvals by the European Medicines Agency



Source: Veterinary medicines in 2025

https://www.ema.europa.eu/en/documents/report/veterinary-medicines-2025_en.pdf

A further **160** products were approved through the decentralised procedures.



Source: CMDV annual report 2025

https://www.hma.eu/fileadmin/dateien/Veterinary_medicines/CMDv_Website/About_CMDv/Planning_and_reporting/Annual_Reports/CMDv_Annual_report_2025.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.

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