



The National Office of Animal Health (NOAH) represents the UK animal medicines industry. Its aim is to promote the benefits of safe, effective, quality medicines for the health and welfare of all animals.

Annual Review



06/07

Chairman and Chief Executive's Report



Graham Dick,
Chairman



Philip Sketchley,
Chief Executive

a success. As it moves from being a week of activity, we welcome the support we have received from our sponsors: Iams, Hoseasons and Companion Care.

NOAH is also embarking on a major new initiative – a Companion Animal Disease Awareness and Prevention campaign. This will focus on educating the pet owning public on the importance of preventative health care for their pets and will commence with the development of a website.

NOAH takes its responsibility for maintaining high levels of self regulation very seriously and its Code of Practice has been regularly reviewed in order to keep in tune with the changing Veterinary Medicine Regulations. This Code plays a large part in fostering high ethical standards and responsible advertising and promotion. Our thanks go to the stalwart team of committee members and the chairman (Richard Arnold QC) and the secretariat (Desmond Hutchinson and Sue Wells).

NOAH has worked closely with AMTRA (Animal Medicines Training Regulatory Authority) as it has gone through a metamorphosis in its structure with the recent changes to the Board structure and a new AMTRA council. We will be working with AMTRA to ensure that the Manufacturers' Register qualification gets the recognition that it deserves. Being on the Register is a requirement for all NOAH member company representatives promoting POM-V, POM-VPS and NFA-VPS medicines and also for non-member companies in the NOAH Compendium. It is a very high level academically recognised qualification and holders are ideally placed to provide high quality advice to veterinarians, merchants, pharmacists and farmers.

Although it is no longer a legal requirement to produce animal medicine data sheets it is clear that the veterinary profession and other prescribers and suppliers of animal medicines really value the NOAH Compendium of Data Sheets. Therefore we are committed to continue to produce the NOAH Compendium, a copy of which is supplied free of charge to every veterinary practice in the UK. Of course this is complemented by the online web version, with further refinements this year, available free of charge to all at www.noahcompendium.co.uk.

As the regulatory and market environment changes a Trade Association needs to embrace change and re-examine its objectives. These in-depth assessments of aims and objectives are crucial to ensure the ship (ark) is being steered in the right direction. NOAH held a long range planning review in September last year. The Board of NOAH and its committees now are fully up to date with its membership's aspirations, which are undoubtedly going to keep the NOAH team busy for some time to come.

The association has continued to work on regulatory matters as the Veterinary Medicines Regulation is updated each year - and regulatory matters remain high in the priorities defined in the planning meeting - but now the major changes are over there will be more time to work alongside the VMD to see how the processes relating to applying for an authorisation can be made more efficient. We are concerned that there could be threats to the budget for the valuable enforcement work carried out by the VMD.

The main focus for 2006 has been on communication, and we have started by finding out what people really think about the use of animal medicines, both for farm livestock and for companion animals, by carrying out two sets of market research.

The Public Affairs Committee of NOAH has used these, along with the outcome of the planning meeting, to set out a structured communications plan for the next few years.

Our planned programme of contacts in the food chain arena has been consciously balanced by activity in the companion animal sector. We have worked very closely with our fellow trustees for the charity National Pet Month – the Pet Food Manufacturers Association and the Pet Care Trust, in order to make it

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Associate Members

Virbac Ltd
VetXX (formerly Leo Animal Health)
Vetoquinol UK Ltd
Sinclair Animal & Household Care Ltd
Seven Seas Ltd
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Novartis Animal Health Ltd
Merial Animal Health Ltd
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GfK Group (formerly IMS Health)
Meridian Scientific Consulting
Phytopharm plc
Provim Ltd
Veterinary Laboratories Agency

(These are companies that at present do not hold a UK marketing authorisation for animal medicines but are otherwise involved in the industry.)

Corporate Members
(As at April 2007)

NOAH Survey Participants 2006

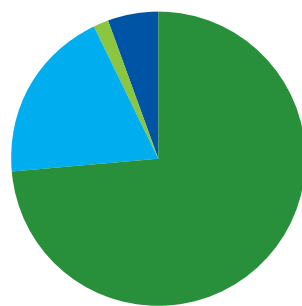
It is estimated that the survey represents approximately 90% of the UK market for authorised animal medicines. Survey participants are the following companies:-

- Alpharma
- Animalcare Limited
- Arnolds Veterinary Products Ltd
- Bayer plc
- Bimeda UK
- Boehringer Ingelheim Limited
- Ceva Animal Health Limited
- Elanco Animal Health
- Fort Dodge Animal Health
- Forum Products Limited
- Genitrix Ltd
- Intervet UK Limited
- Janssen Animal Health
- Merial Animal Health Ltd
- Novartis Animal Health UK Ltd
- Pfizer Ltd
- Schering-Plough Animal Health
- Vétoquinol UK Ltd
- VetXX Ltd
- Virbac Limited

The overall market figure, based on sales net of all discounts and rebates for products from these companies in categories POM-V, POM-VPS, SAES, AVM-GSL and NFA-VPS for 2006 is £373.2M

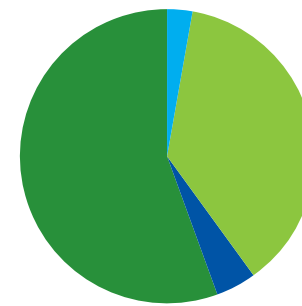
2006 Sales by Licence Classification

POM-V	74%
SAES	0%
POM-VPS	19%
AVM-GSL	2%
NFA-VPS	5%



2006 Species Split

Multi*	2.9%
Food Producing Animal	37.3%
Poultry & Avians	4.5%
Companion Animal	55.3%



*Many products are licensed to be used in different species, and some for both food producing animals and pets. Manufacturers do not always know exactly where they will be used. If greater than 90% of sales are estimated to fall within one of the three summary categories, products are allocated to that category. If less than 90%, they are allocated to the 'multi' category in the survey.

LEGAL CATEGORY

AVM-GSL Authorised veterinary medicine – general sales list. This may be sold by anyone. (Formerly GSL).

NFA-VPS Non-food animal medicine – veterinarian, pharmacist, Suitably Qualified Person. A medicine for companion animals which must be supplied by a veterinarian, pharmacist or Suitably Qualified Person. (Formerly PML companion animal products and a few P products)

POM-VPS Prescription-only medicine – veterinarian, pharmacist, Suitably Qualified Person. A medicine for food-producing animals (including horses), to be supplied only on veterinary prescription, which must be prescribed by a veterinarian, pharmacist or SQP (either orally or in writing) and which must be supplied by one of those groups of people in accordance with the prescription. (Formerly PML livestock products, MFSX products and a few P products).

POM-V Prescription only medicine – veterinarian. A medicine, to be supplied only on veterinary prescription, which must be prescribed (either orally or in writing) by a veterinarian to animals under his care following a clinical assessment, and which may be supplied by a veterinarian or pharmacist in accordance with the prescription. (Formerly POM products and a few P products).

SAES This non-official term is used to indicate medicines marketed in accordance with the Small Animal Exemption Scheme. These are medicines for use in certain pet species (aquarium fish, cage birds, ferrets, homing pigeons, rabbits, small rodents, and terrarium animals) the active ingredient of which has been declared by the Secretary of State as not requiring veterinary control. These medicines are exempt from the requirement for a marketing authorisation and are not therefore required to prove safety, quality or efficacy, but must be manufactured to the same standards as authorised medicines and are subject to pharmacovigilance reporting.

NOAH's Year

■ Twenty years after it was formed, in 2006 NOAH took stock of its focus and direction in order to ensure the future continuation of its recent successes.

■ NOAH member company senior executives met for a structured long range planning meeting. They identified the issues of importance, which fell into the three key areas of animal health and welfare, food safety and environment. From that they identified the direction in which NOAH should be heading and the areas and activities the association should focus on.

■ NOAH commissioned the Institute of Grocery Distribution (IGD) to undertake a study into consumer attitudes to medicines for farm animals. This study combined qualitative (focus group) and quantitative research. The studies showed that, on the whole, consumers were happy with how the food they buy has been produced. Over 20% have no concerns. Very few customers, less than one in 20, cite animal vaccines, preventive medicines or therapeutic medicines as their main concern - a great reflection that not only are animal medicines needed and used responsibly, but also that they are perceived as such.

■ The study was presented at a seminar 'Healthy Animals - Safe Food' organised by NOAH in November in London. The audience drawn mainly from food processing companies, dairies and retailers also heard a number of other expert speakers on animal medicines issues. The event was chaired by farmer and journalist David Richardson.

■ The study did show that there were some myths that existed in consumers' minds, mainly relating to disease prevention.

■ Follow up meetings are taking place to share the results with other interested people and organisations. So far, NOAH has met Farm Animal Welfare Council, the veterinary section of the Food Standards Agency and a presentation is planned for the RUMA (Responsible Use of Medicines in Agriculture) Alliance. More discussions will take place during 2007.

■ A DVD is being produced to show the highlights of the event.

■ Market research has also been carried out in the companion animal sector. Discussion groups were held with groups of pet owners who routinely carried out preventive healthcare for their pet (e.g. vaccination and worming) and those who did not. There was no difference in the amount of love these owners have for their pets: however providing preventative health care is not necessarily seen as part of that love. Sadly many owners only take health advice when their pets become ill.

■ NOAH will be developing its Pet Health website during 2007 to help provide a good source of reference for pet owners on the health of their pets, and to show how professionals can help them keep their pets healthy. This part of NOAH's overall campaign to promote awareness of preventable disease and the benefits to pets and their owners of good pet healthcare.

■ This year saw a more stable regulatory environment, with relatively few changes introduced in the Veterinary Medicines Regulations 2006. Changes that were introduced included a new fees structure for new marketing authorisation applications; useful clarification as to the responsibilities for individuals involved in prescribing and supplying medicines to end users; various improvements to the Small Animal Exemption Scheme and controls on feed additives; the requirement for users of sheep dips to have a certificate of competence; and the removal of the requirement for some UK-specific wording on medicine labels.

■ The online version of the NOAH Compendium of Data Sheets for Animal Medicines, published at www.noahcompendium.co.uk, goes from strength to strength. This free-to-view site is increasingly accessed by users who can see the data sheets and SPCs of participants' products. There have been almost 3 million page views since the site was launched. There are currently over 2000 visitors to the site each day.

■ All prescribers and users of livestock medicines understand the importance of keeping up-to-date with withhold times. The withhold time for any medicine can now be conveniently and easily looked up in a table, and copied to other formats to create bespoke lists for the end user.

■ The process for online submission of information for both the website and the book continues to be streamlined with many more processes being automated. The site is republished weekly so that those who prescribe, supply or use animal medicines have access to the most up-to-date information, including new datasheets and changes to withhold information, to help ensure the correct use of medicines and enhance food safety.

■ The Compendium book is still also valued. A free copy is sent to each veterinary practice premises and special editions were again commissioned by AMTRA this year - one edition containing all POM-VPS and NFA-VPS medicines, for all SQPs who can prescribe and supply medicines for farm animals, and a second edition including only those POM-VPS and NFA-VPS medicines for equines and companion animals.

■ NOAH has continued to speak directly to those organisations involved with animal medicines. The association again sponsored a session at the British Veterinary Association congress in London: this year on vaccination. A number of presentations have been made to veterinary dispensing courses organised by BVA divisions. Presentations have been made to animal health distributors (at the AHDA conference); to AMTRA (Animal Medicines Training Regulatory Authority) SQPs; to the Veterinary Pharmacists Group; and to Veterinary Practice Management Association and veterinary dispensing course meetings run by BVA specialist divisions, including the VPMA/BEVA equine practice management roadshow.



■ The association has remained a member of the RUMA (Responsible Use of Medicines in Agriculture) Alliance; the Pet Health Council; Pet Advisory Committee and FACE (Farming and Countryside Education). RUMA itself published general and species specific guidelines on vaccines and vaccination in both long and short format - these were launched at the NOAH Food Chain conference in November. This project was jointly funded by DEFRA and the NOAH farm animal vaccine companies.

■ NOAH has been pleased to continue to play a part in progressing the Animal Health and Welfare Strategy for Great Britain, in particular through the Farm Health Planning Group, and cattle health initiatives. RUMA (the Responsible Use of Medicines in Agriculture Alliance), of which NOAH is a member, acts as one of the keys to bringing together stakeholders in this area.

■ NOAH has actively participated in the BVD strategy group along with a wide group of other industry stakeholders and helped to facilitate a major survey of cattle farmers and cattle vets to determine their understanding of BVD and its implications to cattle health and productivity. This was jointly funded by Defra and NOAH members. The detailed results of these surveys have proved invaluable in determining a framework and strategy whose long term aim is the eradication of BVD. It has been achieved in Orkney, so why not in the whole of the UK?

■ NOAH has welcomed the new Animal Welfare Act, and in particular the need to prevent disease as part of the new 'duty of care'. This recognises the importance of animal health as a part of its welfare. There is still work to be done to ensure that the health and welfare of companion animals features highly on the agendas of group such as the England Implementation Group. The Pet Advisory Committee is looking at how this might be addressed.

■ Acting as an information source on animal medicine topics for politicians, their researchers and journalists remains a key priority. NOAH continued with its microsites on www.epolitic.co.uk and www.politics.co.uk - an interview was conducted with Phil Sketchley for the former site. The association also took the opportunity to place articles in the political magazine 'Parliamentary Monitor'.

■ National Pet Week 2006 was a tremendous success, with many events pushing the charity's aims of promoting responsible pet ownership and the benefits of pets for people being held by vet practices, pet shops, schools and animal charities. NOAH is a trustee of National Pet Week (along with Pet Food Manufacturers' Association and Pet Care Trust). As soon as the week was over, attention turned to planning activities for 2007 - and it was agreed that National Pet Week should be extended to National Pet Month, running from 7 April - 7 May. The trustees were delighted to secure lams/Eukanuba as principal sponsors, and with the support of Hoseasons and Companion Care, and a dedicated PR agency, the profile of the charity has been even higher this year.

■ During National Pet Week 2006, NOAH coordinated an event in the House of Commons. This reception for MPs and peers, themed 'Animals are good for us - be good to them' was very well attended and hosted by Eric Martlew MP, chairman of the Associate Parliamentary Group for Animal Welfare.

■ Epolitic runs awards for 'Charity Champions'. NOAH prompted the National Pet Week's nomination of Roger Gale MP for the animal welfare section of this award, for his long-standing support of the health and welfare of animals.

■ The NOAH Conference moved to a new venue, Helliidon Lakes and continued its success with record member attendance and keynote speakers providing new ideas for both members and the Association.

■ Once again, NOAH sponsored a Guild of Agricultural Journalists prize for the best article on animal health and welfare. The award to Joanne Pugh for her article 'Two stage lambing process proves a success' published in Farmers Guardian in April was presented at the 'Healthy Animals - Safe Food' conference in November.

■ In early 2006, the authorisations for cypermethrin sheep dips were suspended because of environmental concerns. Since then we have been working with the Environment Agency, VMD and allies in the farming industry to find ways to return these products to the market safely. Their lack of availability has narrowed the choice for farmers and increases the selection pressure for resistance in the other products available. We have also been involved in a number of initiatives in Scotland and in England & Wales to control better and hopefully eventually eradicate sheep scab.

■ NOAH monitors local press cuttings: during the summer it was apparent that there were many more cuttings from around the country reporting cases of parvovirus than had been seen in the past. NOAH issued a press release advising dog owners to talk to their vet to check their dogs' vaccinations were up-to-date.

■ A number of prosecutions have been made of people selling medicines illegally and using unauthorised products. NOAH has cooperated fully with the authorities and welcome the work that has been done as a further way to ensure public safety and that animals can benefit from the proper use of authorised medicines. NOAH is concerned that the funding for this valuable public service appears to be under threat from the Treasury.

■ NOAH as a UK association has been very closely involved with the work of the European association IFAH-Europe, and its global parent IFAH.

