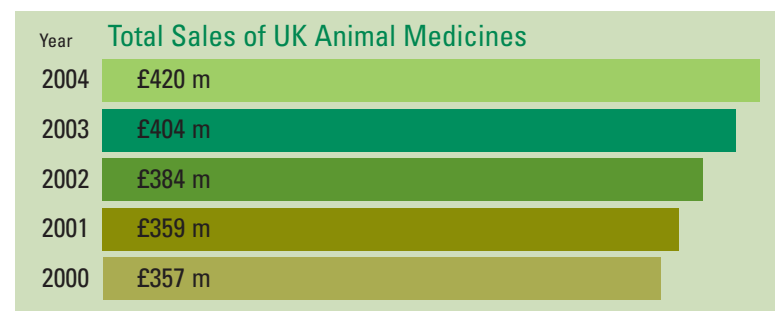
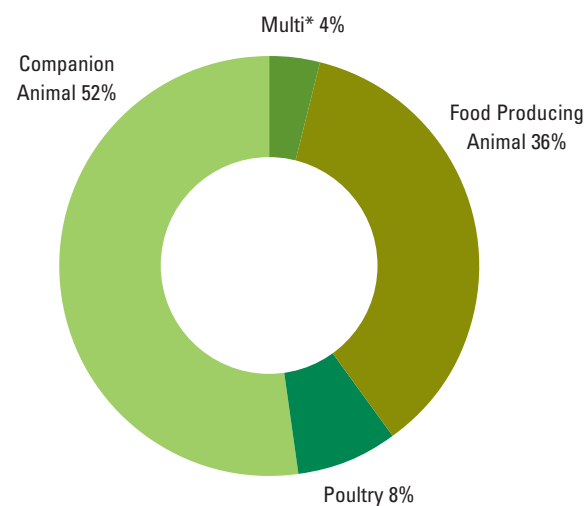


Animal Medicines in the UK - 2004 sales



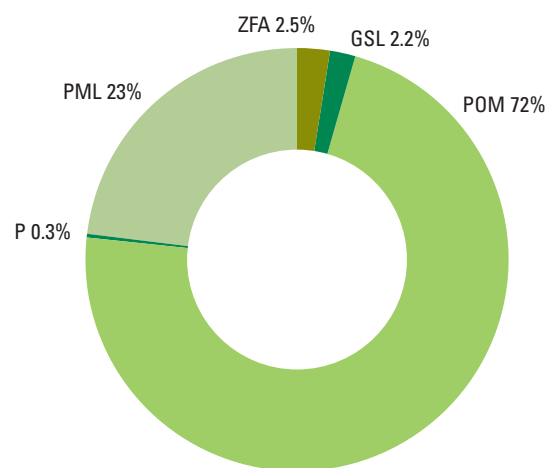
2004 Species Split



*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.

2004 Sales by Licence Classification



ZFA (Zootechnical Feed Additives)
 POM (Prescription Only Medicine) includes medicated premixes
 P (Pharmacy)
 PML (Pharmacy & Merchants List) includes anthelmintic premixes
 GSL (General Sales List)

Sales Survey of Animal Health Products 2004 £ million sterling at ex-manufacturers' prices (net)

	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Total 03(1)	Total 04
Medicinal Feed Additives	5.5	5.8	5.4	6.2	25.1	23.0
Pharmaceuticals	57.2	64.8	72.6	62.9	257.2	257.5
Vaccines	23.4	20.7	27.1	24.6	92.2	95.8
Total (survey figure)	86.1	91.3	105.1	93.7	374.5	376.3
Total (Extrapolation for non-participating companies)	10.6	10.3	12.4	10.4	29.9	43.8
Grand Total	96.8	101.6	117.4	102.2	404.4	420.0

(1) 2003 have been adjusted slightly from results published last year to take into account amendments subsequently made to data.

NOAH Membership 2004-05

Corporate Members

Abbott Animal Health
 Alpharma Animal Health
 Animalcare Ltd
 Animax Ltd
 Arnolds Veterinary Products
 Bayer plc
 Beaphar UK Ltd
 Bob Martin Company
 Boehringer Ingelheim
 Ceva Animal Health Ltd
 Chanelle Animal Health
 Cross VetPharm Group Ltd
 Denes Natural Pet Care Ltd
 Dorwest Herbs Ltd
 Elanco Animal Health
 EVS Ltd
 Fort Dodge Animal Health
 Forum Bioscience (Holdings) Limited
 Genitrix Ltd
 Intervet UK Ltd
 Janssen-Cilag Ltd
 J M Loveridge plc
 Johnsons Veterinary Products Ltd
 Masterfoods (Complementary Petcare)
 Merial Animal Health Ltd
 Novartis Animal Health Ltd
 Pfizer Ltd
 Schering-Plough Animal Health
 Seven Seas Ltd
 Sinclair Animal and Household Care Ltd
 Sorex Ltd
 Vetoquinol UK Ltd
 VetXX (Leo Animal Health until 1/3/05)
 Virbac Ltd

Associate Members

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

ADAS Redesdale
 Antec International Ltd
 Brixham Environmental Laboratory
 Covance
 CSI-Europe
 Don Whitley Scientific Ltd
 GfK Healthcare UK Ltd
 Huntingdon Life Sciences
 Inveresk Research International Ltd
 Kendle International Ltd
 Moredun Scientific Ltd
 Phytopharm plc
 Provimi Ltd
 Veterinary Laboratories Agency



3 Crossfield Chambers, Gladbeck Way, Enfield, Middlesex, EN2 7HF
 Tel +44 (0)20 8367 3131 Fax +44 (0)20 8363 1155
 Email noah@noah.co.uk Web www.noah.co.uk
 Registered No 2145809



Annual Review 04|05

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.



Message from the Chairman and Chief Executive

The regulations governing the authorisation and control of animal medicines are changing. The year started with NOAH considering the implications of the new European Veterinary Medicines Directive, and how it might be transferred to UK legislation. This was not the only consideration: the new UK legislation needed to embrace not only the new regulations from Europe but also the UK Independent Review of Dispensing (the Marsh Report), the Competition Commission Report and the overarching wish of the Government to reduce legislation.

With this background, the Veterinary Medicine Directorate's consultations with stakeholders began – and have continued in a most open manner. NOAH was very keen to see a classification and distribution system that would allow the controlled yet accessible system that exists in the UK to continue – and welcomed the VMD's proposals in the draft legislation for distribution categories that will include the ability for suitably qualified persons to prescribe a specific category of prescription medicines which will roughly correspond to the current PML class. Of concern to us was the proposal on advertising: in particular that the draft legislation stated that POM-V medicines (those that can only be prescribed by vets) can only be advertised to vets and pharmacists. NOAH believes that would cut off a vital route of communication to farmers about new disease prevention

and treatment methods – and could potentially cut down dialogue between a vet and his farmer clients. NOAH was not alone in this view, and it was recognised by the VMD who published an informal consultation note suggesting a route forward. As this report is published discussions continue – NOAH does not believe their suggestions will solve all potential problems but it is a significant step in the right direction.

Building on the success of the Pet Event at the House of Lords held in March 2004, NOAH arranged a second successful event in December, at the Royal Smithfield Show. Entitled 'Healthy Animals – Safe Food', delegates from all aspects of the food chain heard from a number of eminent speakers about how animal medicines contribute to healthy food and the controls that exist to provide consumer reassurance that they are used responsibly. The conference was only part of the story: NOAH also took an exhibition stand in the Profitable Meat Production area of the show and staged dialogues between eminent farmers and vets for each species, again on healthy food from healthy animals.

Companion animals were not neglected during the year. NOAH chaired the Pet Health Council during 2004. And, NOAH, the Pet Food Manufacturers Association and Pet Care Trust, the three trustees of National Pet Week, took over the administration of the charity and the planning of National Pet Week 2005. Taking place from 30 April – 8 May with the theme 'Best of Friends, Best of Health', NPW has been delighted to secure ASDA as principal sponsors of the 2005 event.

Much of NOAH's activities for 2004 will continue into 2005, and we look forward to working with our colleagues towards the health and welfare of animals in the future.



Roger Stone,
Chairman



Philip Sketchley,
Chief Executive

NOAH's Year

- NOAH worked with the Veterinary Medicines Directorate (VMD) and other stakeholders on the UK implementation of the European Veterinary Medicines Directive, from informal consultation through to detailed comments on the draft regulations. The draft includes a structure of classification that should ensure animal health merchants can continue in their important role in making animal medicines available for the health and welfare of UK's animals. There are still many important points under discussion.
- DEFRA published the Animal Health and Welfare Strategy for Great Britain. Following NOAH's representations, from one mention of medicines in the original proposal for a strategy, the importance of animal medicines in the prevention of disease has been recognised to the extent that a whole section is devoted to them. RUMA (the Responsible Use of Medicines in Agriculture Alliance), of which NOAH is a member, acts as the core to bringing together stakeholders in this area.
- A Memorandum of Understanding was drawn up between NOAH, VMD, the Association of the British Pharmaceutical Industry (ABPI), and the Medicines and Healthcare products Regulatory Agency (MHRA) on the release of data by the regulators under the Freedom of Information Act. This project, held up by the Cabinet Office as an exemplar to all Government on how the FOI Act should be handled, means that the public and NOAH members have much greater clarity as to which types of information are releasable under the Act.
- NOAH was invited to meet the Cabinet Office's Business Regulation Team. The BRT works full time to tackle excessive regulation. Medicines are included within the scope of their programme for 2005, which gives NOAH an opportunity for further discussion on regulation impacting on the animal medicines industry and its future development and competitiveness.
- A study conducted by the Animal Health Trust and funded by the vaccine companies through NOAH showed that there is no relationship between the onset of ill-health in dogs and time of vaccination. This study was published in the prestigious journal *Vaccine*.
- NOAH produced the 2005 edition of the Compendium of Data Sheets for Animal Medicines, and this year, for the first time, produced a special edition excluding prescription-only medicines for the Animal Medicines Training Regulatory Authority (AMTRA) to provide to qualified animal health merchants.
- NOAH organised a conference 'Healthy animals – safe food' at the Royal Smithfield Show. Delegates included members of the food processing industries, food retailers and their respective associations. The programme tackled key issues relating to the use of animal medicines in the food chain. It was chaired by Baroness Byford, Shadow Minister for Food, Farming and Rural Affairs, and had speakers from the VMD, Food Standards Agency, DEFRA, RUMA, Royal Veterinary College, and the animal medicines industry. The event attracted good press coverage.
- Also at the Royal Smithfield Show, NOAH had a stand in the 'Business of Meat' section and took part in the series of farmers' seminars.
- RUMA published revised farmer guidelines for the responsible use of antimicrobials in pigs, poultry, dairy and beef cattle and sheep.
- NOAH welcomed the publication of DEFRA's strategy for developing and implementing a surveillance programme for antimicrobial resistance in animals. This outlined a programme to increase knowledge about how antimicrobial resistance emerges and spreads. Its approach endorsed and built upon measures already in place to ensure the responsible use of antibiotics, to the benefit of animal health and welfare.
- NOAH commented on the FSA's 5-year plan – the main thrust of its comments was that as part of its communication role, the FSA ought to include reassuring consumers about the controls already in place to ensure the safety of animal medicines.
- NOAH developed a new logo and mission statement, to describe more accurately what NOAH does.
- The Annual Dinner and NOAH Conference were both successful events.
- Media relations continued, including a briefing for the veterinary, agricultural and pharmacy press focusing on NOAH's views on the new medicines regulations, the Animal Health and Welfare Strategy, and providing an opportunity for the press to meet NOAH chairman Roger Stone. A number of press releases were issued during the year and articles produced, particularly in relation to the new medicines regulations.
- NOAH sponsored a Guild of Agricultural Journalists prize for the best article on animal health and welfare. This was won by freelance journalist Chris Walkland.

- NOAH also sponsored two sessions at the British Veterinary Association Congress in London.
- The website www.noah.co.uk continued to act as a focus for NOAH's direct communications to the public. This included an update of all the briefing documents, and their publication in an easily printable format, suitable for vet practices to use with clients, or for educational establishments.
- National Pet Week was successful in 2004, with a tie in with the BBC's Test Your Pet programme and many events being held by vet practices, pet shops, schools and animal charities. As one of the trustees of National Pet Week (along with Pet Food Manufacturers' Association and Pet Care Trust), NOAH helped bring about a change in the charity's administration to reduce costs while allowing activities to promote responsible pet ownership and the benefits of pets for people to flourish. NPW 2005 will be 30 April to 8 May with the theme 'Best of Friends – Best of Health'.
- NOAH chaired the Pet Health Council throughout 2004. The Society for Companion Animal Studies (SCAS), Royal College of Nursing, and Royal Pharmaceutical Society of Great Britain/National Pharmaceutical Association were recruited, and PHC revised its website www.pethealthcouncil.co.uk
- NOAH continued with its microsite on www.epolitix.co.uk and established a new public affairs site on www.politics.co.uk. Both of these will help spread the association's messages to politicians, researchers and journalists.
- A PowerPoint presentation on NOAH's activities was developed. Used initially for internal communication to member companies, where it has been well received, this will be adapted for external use over the next year.
- The NOAH Code of Practice Committee on the Promotion of Animal Medicines continued to meet during the year and heard 7 cases. It also worked towards clarifying and tightening its function, through changes in the code itself and additional guidance notes.

