

# Chairman and Chief Executive's Report



Graham Dick  
Chairman



Philip Sketchley  
Chief Executive

During 2007, NOAH built on the strategy set up to address the issues of importance, which fell into the three key areas of animal health and welfare, food safety and environment, established at the planning meeting in September 2006.

These discussions still form the core of the association's activities, and are so fundamental that the NOAH conference held in October at Hellidon Lakes focussed on how NOAH was progressing towards the objectives set after the meeting.

The work had been very positive, which is reflected in the catalogue of activities set out in this report. The year has seen unprecedented levels of co-operation – towards being ready for the diseases of the future through the European Technology Platform for Global Animal Health, towards companion animal welfare through groups such as Pet Health Council, Pet Advisory Committee and National Pet Month and through the development of our own pet health information website, towards improving farm animal health through positive farm health planning and RUMA and towards education through AMTRA.

There have been some bad moments – the reappearance of FMD – and more worrying in the long term, the appearance of Blue Tongue Virus in the UK. We are all working together to try to minimise the impact this will undoubtedly have in 2008.

The UK sales are reported in this document: NOAH is very pleased with the buoyancy of the market which reflects, following substantial research and development investment by our member companies, the launch of a number of innovative products during the year. This is a reflection of the commitment of the UK animal medicine industry (which is represented by NOAH) to provide safe, effective, quality medicines for the treatment and welfare of all animals.

NOAH's Code of Practice Committee has been very active throughout the year, showing self-regulation working in practice. An annual review process has been agreed for updates, and we are seeking more publicity for the results of the cases so that other stakeholders can see our commitment to a thorough and effective self regulatory process.

At a staff level we were very sorry to say goodbye to Kleo Kyriacou after 15 years with the association, but very pleased to welcome Emma Tombling and Jenny Townsend to the team. Also to thank and congratulate Alison Glennon who has recently completed 25 years of service, a combination of 21 years with NOAH since its creation in 1986 and prior to that with the Animal Health Register of ABPI.

# NOAH Survey Participants 2007

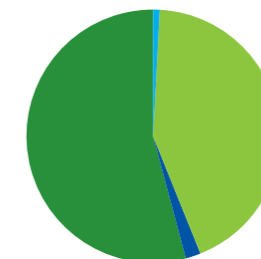
It is estimated that the survey represents approximately 90% of the UK market for authorised animal medicines. Survey participants include the following companies:-

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

The overall market figure from the survey for 2007 is £407M, based on sales for products net of all discounts, at ex-manufacturers prices, in categories POM-V, POM-VPS, SAES, AVM-GSL and NFA-VPS.

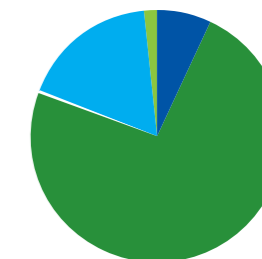
## 2007 Species Split

• Multi*	1%
• Food Producing Animal	43%
• Poultry & Avians	2%
• Companion Animal	54%



## 2007 Sales by Licence Classification

• POM-V	73.8%
• SAES	0.1%
• POM-VPS	17.6%
• AVM-GSL	1.5%
• NFA-VPS	7%



\*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.



# Annual Review 07/08

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.



## Corporate Members

(As at April 2008)

- Abbott Animal Health
- Alpharma
- Animalcare Ltd
- Animax Ltd
- Bayer plc
- Beaphar UK Ltd
- Boehringer Ingelheim Vetmedica
- Ceva Animal Health Ltd
- Chanelle Animal Health
- Cross VetPharm Group UK Ltd
- Dechra Veterinary Products (incorporates VetXX)
- Dorwest Herbs
- Elanco Animal Health
- Fort Dodge Animal Health
- Forum Products Ltd
- Genitrix Animal Health and Nutrition
- Huvepharma
- Intervet/Schering-Plough
- Janssen Cilag Ltd
- J M Loveridge
- Johnsons Veterinary Products Ltd
- Merial Animal Health Ltd
- Novartis Animal Health Ltd
- Pfizer Ltd
- Seven Seas Ltd
- Sinclair Animal & Household Care Ltd
- Vetoquinol UK Ltd
- 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
- CSI-Europe
- Covance
- Don Whitley Scientific Ltd
- GfK Group (formerly IMS Health)
- Meridian Scientific Consulting
- Probiotics International
- Veterinary Laboratories Agency



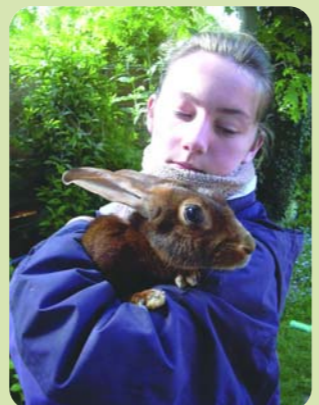
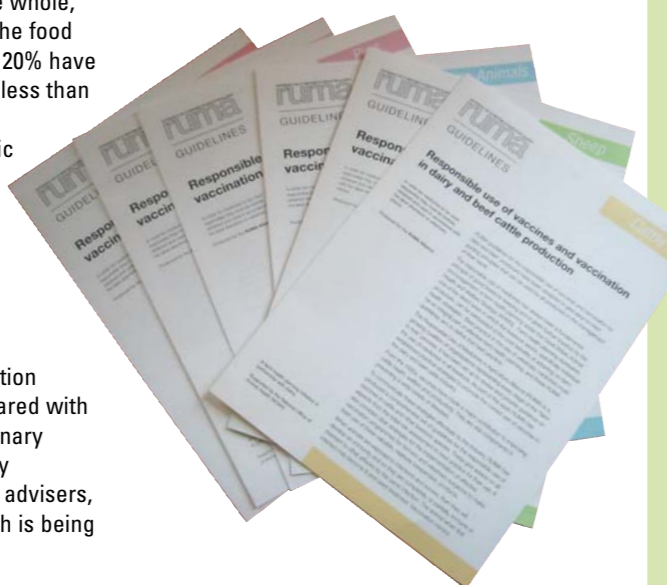
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- Quantitative market research into owner attitudes to preventive medicine for their pet was undertaken, to follow up on the focus study work done in 2006. This compared pet owners who routinely prevented disease with those who did not. Both groups of owners loved their pets, but the latter did not view pet health issues as part of that love, and sadly only sought advice on their pet's health when it was sick.
- To try to address this potential risk to pet health and welfare, NOAH has been developing a pet health information website providing pet owners with help and advice on looking after their pets. This will be launched in mid-2008. The preview site was shared with others involved with promoting responsible pet ownership, such as the veterinary profession, animal charities and other pet health professionals, at a special meeting at the Royal Society in December. There are many parallel initiatives on pet health so NOAH recognises the need for organisations to support each other.
- NOAH has continued as trustee of National Pet Week, along with Pet Food Manufacturers Association and Pet Care Trust. In 2007 the week became National Pet Month, with the theme of 'Love Is'. This move to a month-long event saw it become the most successful to date in the charity's 18 year history. Over 690 events held across the UK raised around £69,000 for local pet and animal charities. The 2008 theme is 'Great British Pets'.
- NOAH's studies carried out by the Institute of Grocery Distribution (IGD) on consumer attitudes to medicines for farm animals continued to be of interest and value to others wishing to communicate to the public. The studies had shown 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, they are perceived as being done so.
- Further breakdowns of the information were done during the year, and shared with the Food Standards Agency, Veterinary Residues Committee and Veterinary Medicines Directorate's consumer advisers, amongst others. Follow up research is being considered for 2008.

- NOAH was also very pleased with the coverage given to the information by the veterinary and farming press, who joined NOAH for a discussion on the results in November.
- There were relatively few changes introduced in the Veterinary Medicines Regulations 2007. One change welcomed was the fact that promotional material for POM-V medicines could now be sent to veterinary nurses – they are viewed by the industry as an important channel of professional communication about medicines to animal owners.
- NOAH also welcomed the enforcement of the Regulations through the VMD and DEFRA, and the recent prosecutions for illegal medicine use. NOAH has cooperated fully with the authorities and welcomes 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.
- The Animal Health and Welfare Strategy has continued to provide the backdrop as to how the health of animals on British farms can be improved, and recognises the positive role that the responsible use of animal medicines can play. But farm animal health in 2007 once again had to meet the challenge of Foot and Mouth Disease, and the emergence of Bluetongue virus on British farms for the first time.
- The European Technology Platform for Global Animal Health (ETPGAH) has been in the forefront of identifying emerging diseases, and producing collaborative efforts to find solutions. NOAH has been involved at a European level, through IFAH-Europe, and chairs the Mirror Group bringing together research organisations and industry in the UK.



- The health and welfare councils of the different livestock sectors, initiated as part of the Animal Health and Welfare Strategy, were described by the England Implementation Group (EIG) in its second progress report published in April 2008 as 'gathering pace'. NOAH has been very pleased to be a part of a number of these groups and has worked particularly closely with that of the cattle sector.
- The Positive Farm Health Planning Group, of which NOAH is a part, planned a major exhibit for the Dairy Event, which unfortunately did not take place due to Foot and Mouth Disease. Nevertheless, there has still been excellent publicity for the initiative and the challenge now is to ensure that the concept becomes more and more widely adopted on farms. NOAH is actively supporting similar initiatives for the 2008 Dairy Event and Livestock show.
- A poster with pointers on how dairy farmers can make sure their milk always meets the stringent antibiotic residues standards was launched and distributed free of charge to dairy producers. It was produced and designed by NOAH in conjunction with members of Dairy UK and the Milk Quality Forum; supported by organisations involved with milk production in the UK, including the Veterinary Residues Committee (VRC) and British Cattle Veterinary Association and sponsored by Pfizer, Elanco and the MDC. While the quality of British milk is excellent, dairy farmers need to avoid any slip-ups which will mean they lose money, as milk which does not make the antibiotic testing limits cannot be included in dairy supplies.
- 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 celebrates its 10th birthday in 2008 - 2007 saw the successful launch of the cattle vaccine guidelines at Beef Expo in Skipton in May. Pet Advisory Committee has been drafting a draft dog and cat health and welfare strategy at the request of the EIG. It is important that companion animals are not forgotten in the nation's animal health and welfare plans.

- NOAH's commitment to education remained strong, through its contribution to AMTRA (Animal Medicines Training Regulatory Authority). NOAH has supported the strengthening of the SQP qualification, and looks forward to supporting the CPD programme where it can.
- AMTRA also runs the industry's own training and qualification scheme, that of AMTRA Marketing Authorisation Holder examination. Being on the AMTRA 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, SQPs, pharmacists and other users of animal medicines.
- In addition NOAH has spoken at veterinary dispensing courses, many regional veterinary meetings in conjunction with VPMA and provided information packs to veterinary nursing colleges.
- The online version of the NOAH Compendium of Data Sheets for Animal Medicines, published at [www.noahcompendium.co.uk](http://www.noahcompendium.co.uk), remains a vital information source for users who can see the data sheets and SPCs of participants' products. Improvements to the system used by members to produce the Compendium book and the web site received the Animal Pharm award for Best IT or Technical Innovation during 2007. The website has received almost 7 million page-views since its launch.

