



Annual Report
2014-15

NOAH's year 2014/15 – progress on key priorities

Veterinary Medicines Regulatory Review

- European Commission proposals to review the legal framework for veterinary medicinal products were published in autumn 2014. These include new Regulations for both Veterinary Medicinal Products and Medicated Feed. As members of the European Federation IFAH-Europe, NOAH has been involved in the close scrutiny of the proposals, to help ensure they achieve the stated aim of increasing availability of animal medicines. This may provide opportunity for a single market in veterinary medicines, enhanced data protection and help promote innovation to benefit animal health and welfare. However, challenges remain before the final Regulations are agreed and any benefits delivered. One risk is that the established UK veterinary medicine classification and distribution system could potentially be under threat.



NOAH chairman David Ellerton welcomes new Chief Executive Dawn Howard.



- As both draft Regulations go through the European consultation process, NOAH has been lobbying in Brussels, meeting members of the European Parliament and those involved in Council deliberations, ensuring UK industry views are heard. This work will continue as a key priority throughout 2015.

Antimicrobials

- The use of antimicrobials for animals continues to be debated. NOAH remains an active member of the RUMA (Responsible Use of Medicines in Agriculture) Alliance, which has worked on agreeing definitions and producing new responsible use guidelines for vets and farmers. NOAH also supported the veterinary sector involvement in European Antibiotics Awareness Day in November with a social media pledge to become an 'Antibiotic Guardian'.



Member Services

- Following a review of its strategy from 2014-2020 and setting new priorities, NOAH Committees have revised their roles and responsibilities to deliver NOAH's key priorities.
- The NOAH Compendium of Data Sheets, the association's flagship publication, continues to be an invaluable resource as a book and online, with over 8.4 million online visitors since its launch. This is being upgraded to improve usability and access and will enable other new functions such as access via an app.
- NOAH launched a new Members-Only website to improve communications with members.



- NOAH's Code of Practice on the Promotion of Animal Medicines is recognised as a very effective example of self-regulation. Revised every year to reflect developments in promotional activities, the 25th edition was published in December 2014.
- The NOAH Certificate of Animal Health (NCAH) continued to give candidates a thorough grounding in animal physiology, animal disease and treatment options, as well as giving them knowledge of the legal framework in which medicines are regulated, advertised and sold.

Public Image

- NOAH produced a Manifesto for Animal Health for prospective MPs. Many responded with messages of support for the animal health industry. The manifesto called on candidates to:
 - Contact MEP colleagues and write to the new Secretary of State for Environment, Food and Rural Affairs to voice support for new EU regulations and changes that will increase availability of medicines for animal health and welfare
 - Ensure future decisions made by all governments are based on robust scientific evidence and not myths about the use of animal medicines in the food chain
 - Support efforts to change the law so that 140,000 older people every year are not forced to give up their pet when they enter supported accommodation.
- NOAH hosted a Food Chain Roundtable discussion at The Gherkin in London with invited representatives from across the retail and food supply chain to present the results of the 2014 NOAH-commissioned IGD research on consumer attitudes to veterinary medicines. NOAH is preparing a communications tool kit to help dispel misunderstandings about veterinary medicines.
- A Pet Event with the theme 'Pets and the Elderly' was held in the House of Lords. The event featured charities involved with pets and elderly people. This theme will continue for NOAH in 2015.
- Capitalising on two successful photo competitions achieving national recognition during 2014 ('Winning Smiles' and 'Picture of Health'), the 3rd year of the 'I Heart My Pet' campaign, will revolve round the Happy Healthy Pets photo gallery project. The campaign supports veterinary practices and pet care professionals through NOAH's pet owner website www.pethealthinfo.org.uk.
- NOAH continued as a trustee of National Pet Month, which for its 26th year picked up the Pet Event theme of Pets and the Elderly.



The UK Animal Medicines Industry

– facts and figures 2014

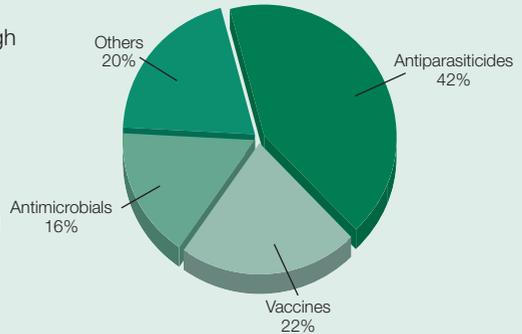
The UK animal medicines industry is an innovative, skills-based sector. We employ around 2,000 people directly and represent £600m of sales every year.

The industry invests £500m across Europe in research and development, creating and improving veterinary medicines to keep animals healthy.

Background to the Sector

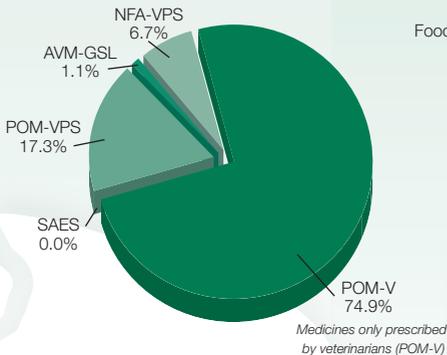
According to the sales survey co-ordinated through NOAH, the overall market for sales of animal medicines in the UK for the 12 months ending December 2014 was £601m. This is based on sales for authorised products across the UK legal distribution categories, net of all discounts, at ex-manufacturers' prices. The survey is estimated to represent over 90% of the total UK market.

The UK Market for Animal Medicines 2014 - approx sales by product type



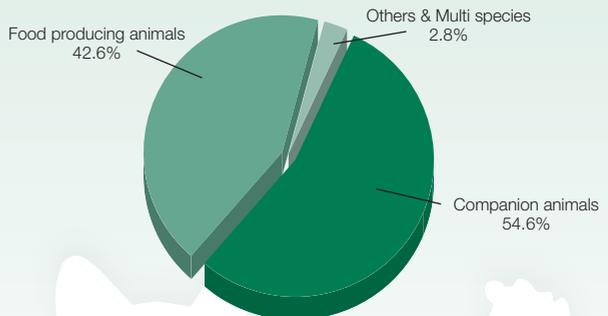
Sales by legal category

Sales by licence category, 12 months to December 2014



Sales by species

Species split, 12 months to December 2014



For more information about UK animal medicine sales, including the major product groups and an explanation of the UK licensed animal medicines categories, see http://www.noah.co.uk/focus/facts_figures.htm

NOAH members as at May 2015

NOAH represents the UK animal medicine industry: its aim is to promote the benefits of safe, effective, quality medicines for the health and welfare of all animals.

Corporate Members

- Animax Ltd
- Bayer plc
- Beaphar UK Ltd
- Bimeda
- Boehringer Ingelheim Vetmedica
- Ceva Animal Health Ltd (includes Sogeval UK Ltd - formerly Alstoe Ltd)
- Chanelle Animal Health
- Dechra Veterinary Products
- Dorwest Herbs
- ECO Animal Health Ltd
- Elanco Animal Health (includes Novartis Animal Health Ltd)
- Forum Animal Health
- HIPRA UK Ltd
- Huvepharma
- Johnsons Veterinary Products Ltd
- Kela UK
- Lintbells Ltd
- Merial Animal Health Ltd
- MSD Animal Health
- Nimrod Veterinary Products Ltd
- Solvay Interlox Ltd
- Vétoquinol UK Ltd
- Virbac Ltd
- Zoetis UK Limited (includes Abbott Animal Health)

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
- GfK Kynetec
- Triveritas
- Vetark Professional



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