



Annual Report
2013 - 2014

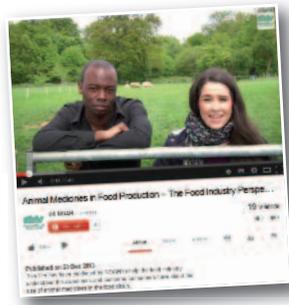
NOAH's year 2013/14

- NOAH undertook a review of its strategy from 2014-2020 with clear priorities identified as the UK industry's response to the review of the European Veterinary Directive, the use of antimicrobials in animals, member services and external communication.
- As part of its membership of IFAH-Europe, NOAH continues to prepare for the forthcoming revision of the Veterinary Medicines Directive in Europe. However, the industry continues to be disappointed by the delay in the publication of the draft. We believe that it represents an opportunity for a true single market in veterinary medicines along with enhanced data protection, thus helping promote innovation and increase availability of medicines for animal health and welfare. When the draft legislation is finally published, NOAH will be working to help ensure there is no negative impact on access to medicines in the UK.
- The use of antimicrobials for animals continues to be the subject of much discussion. NOAH remains part of the RUMA (Responsible Use of Medicines in Agriculture) Alliance which published an action plan for the livestock sector to implement the joint Department of Health and DEFRA's 5 year UK Antimicrobial Resistance Strategy, published in September. The Strategy said that increasing scientific evidence suggests that the clinical issues with antimicrobial resistance that we face in human medicine are primarily the result of antibiotic use in people rather than antibiotics in animals. The House of Commons Select Committee on Science and Technology undertook an inquiry into the UK Strategy, to which NOAH gave written and oral evidence. NOAH was also involved with the veterinary sector activities on European Antibiotics Awareness Day in November, co-ordinated by the Veterinary Medicines Directorate.
- NOAH has developed a members' website to facilitate communications with its members.
- NOAH's Code of Practice on the Promotion of Animal Medicines is recognised as being effective and a good example of self-regulation. Revised every year to keep abreast of developments in promotional activities, the 24th edition was published in October.



- What does NOAH do for you? Two videos were developed to highlight the value NOAH brings to its members and to the animal health sector, to add to NOAH's growing YouTube channel.

<http://www.youtube.com/user/TheUKNOAH>





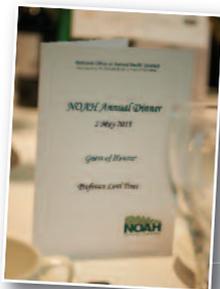
- The NOAH Certificate of Animal Health (NCAH) continued to give candidates a thorough grounding in animal physiology, animal disease and treatment options, as well as giving them a full knowledge of the legal framework in which medicines are regulated, advertised and sold.

- Dispelling the myths, the theme of the 2013 Food Chain conference, continued through NOAH's communications activities during the year. NOAH released two films to help industry and consumers understand issues surrounding the use of animal medicines in the food chain. NOAH co-ordinated a meeting of livestock sector organisations to discuss further how these misunderstandings could be addressed and developed an ongoing meeting programme to talk to retailers and other organisations to see how we can continue to work together.

- NOAH's pet owner website www.pethealthinfo.org.uk was completely updated and made responsive for ease of accessibility on mobile devices. It was also made more interactive while still retaining its identity with no brand names being used and aims to get pet owners to seek expert advice. Once again it was supported by NOAH's 'I heart my pet' campaign harnessing the love pet owners feel for their pets and reminded them of the vital importance of preventative healthcare. The campaign runs through traditional and social media. One highlight was the production of an infographic on our 'pet obsessions', and highlighting the need for vaccination.



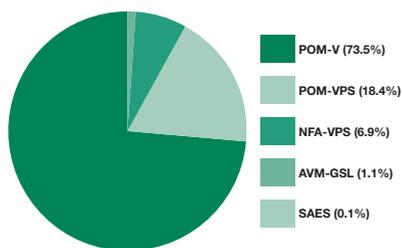
- NOAH continued as trustee of National Pet Month, which reached its 25th anniversary with the appropriate theme of 'Celebrating our Pets'.
- NOAH's year started in April with its Annual Dinner, including a raffle for its 2013 charity, Riding for the Disabled.



The UK Animal Medicines Industry – facts and figures 2013

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 2013 was £565m. This is based on sales for authorised products across the UK legal distribution categories, net of all discounts, at ex-manufacturers' prices. Following inclusion of new members to the survey it is now estimated to represent in excess of 90% of the total UK market.

Sales by legal category



Legal Category Definitions

AVM-GSL Authorised Veterinary Medicine – general sales list.
This may be sold by anyone.

NFA-VPS Non-food animal medicines – veterinarian, pharmacist, Suitably Qualified Person.

A medicine for companion animals which must be supplied by a veterinarian, pharmacist or Suitably Qualified Person.

POM-VPS Prescription-only medicine – veterinarian, pharmacist, Suitably Qualified Person.

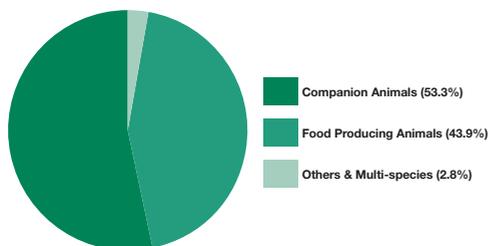
A medicine for food-producing animals (including horses), to be supplied only on veterinary prescription, which must be prescribed by a veterinarian, pharmacist or SQP (either orally or in writing) and which must be supplied by one of those groups of people in accordance with the prescription.

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.

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 authorization and not therefore required to prove safety, quality or efficacy, but must be manufactured to the same standards as authorized medicines and are subject to pharmacovigilance reporting.*

Sales by species



**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.*

More information on the UK animal medicines market can be found at www.noah.co.uk/focus/members.htm

NOAH members as at April 2014

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

- Abbott Animal Health
- 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
- Forum Animal Health
- HIPRA UK Ltd
- Huvepharma
- Johnsons Veterinary Products Ltd
- Kela UK
- Merial Animal Health Ltd
- MSD Animal Health
- Novartis Animal Health Ltd
- Solvay Interox Ltd
- Vétoquinol UK Ltd
- Virbac Ltd
- Zoetis UK Limited

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
- Don Whitley Scientific Ltd
- GfK Kynetec
- Probiotics International
- Triveritas
- Vetark Professional



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