

# Brexit Barometer 4

Testing the opinion of the animal medicines industry

Winter 2018



# Introduction

In this, our final Brexit Barometer before the 29 March 2019 deadline, we take a further in-depth look at the topics that really matter to our industry.

At our Brexit and Beyond Conference in October, 150 days ahead of the deadline, we once again brought together experts from across our industry to debate every aspect of the upcoming EU Exit and how it might affect animal medicines.



**Participants and speakers were noticeably more optimistic as compared to the previous six months.**

As The Lord Trees highlighted in his remarks at the Conference, the word 'disruptive' has historically negative connotations. However, when we talk about it in terms of technology, 'disruptive' can signify a very positive change. We don't yet know whether Brexit is going to be a positive or a negative disruptor – there are still many questions to be answered. However, we do know that a strong future for animal health is of the utmost importance for stakeholders across the industry.

NOAH is committed to building on the valuable work already done to promote, support and strengthen the animal health industry throughout the Brexit process and beyond.

**Dawn Howard**

Chief Executive, NOAH

## About NOAH

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

**For further information, please visit:**  
[www.noah.co.uk](http://www.noah.co.uk)

# The Barometer

To continue to benchmark sentiment against the results in the barometer series, we asked our members and stakeholders to tell us how optimistic they are now about the six key topic areas – as well as how they consider the overall future of the industry in light of Brexit.

## Topic areas

- *R&D in the animal health sector*
- *Bringing a product to market in the UK*
- *Post-licensing controls for the overall market*
- *Animal health and welfare in the UK*
- *Public health and the production of food in the UK*
- *Trade and exports in relation to animal health*

## Optimism ratings

-  **very optimistic**
-  **optimistic**
-  **in the middle**
-  **pessimistic**
-  **very pessimistic**

## What's changed? At-a-glance overview...



The most striking thing about the latest barometer is that in spite of continued uncertainty and controversy in the press and in political circles, **overall industry sentiment is significantly more optimistic** across the board since the last time. This was also reflected in the atmosphere and the comments at the Conference, though speakers did stress the importance of the government reaching a deal.



More specifically, barometer participants seem much more optimistic around the **ease of bringing a product to market post-Brexit** than they were three months ago. Public Health & Food and Trade & Export are also areas where there has been a significant uptick in optimism since the summer.



Participants in the barometer **remain strongly optimistic on the topic of Animal Health & Welfare**, with comments reflecting significant pride in the UK's internationally recognised standards and a strong desire to maintain and improve them following EU Exit.



However, there remain **some concerns around post-licensing controls**, with labelling and potential supply chain disruptions both highlighted as areas that need more clarity.



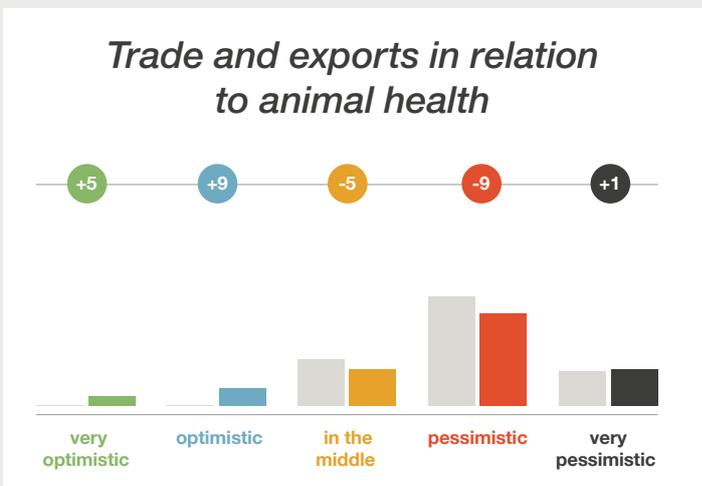
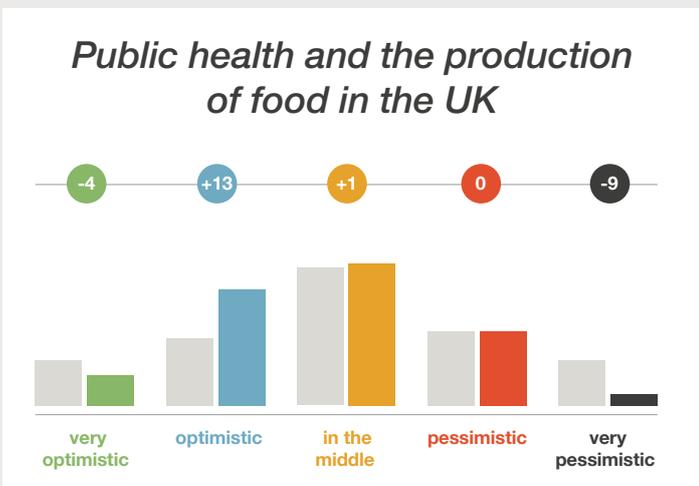
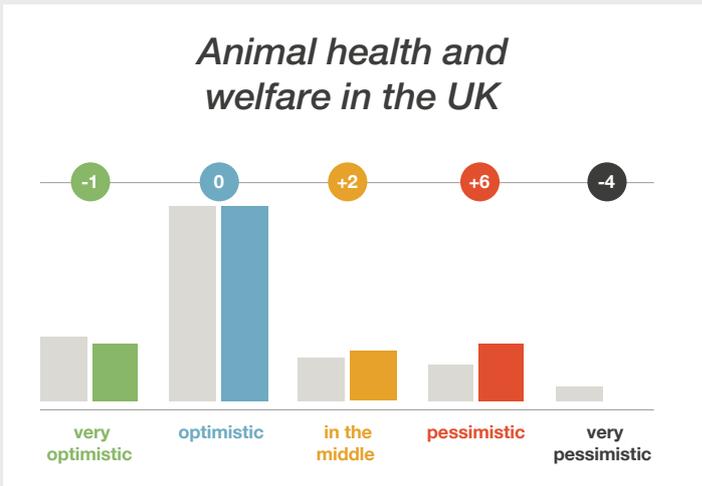
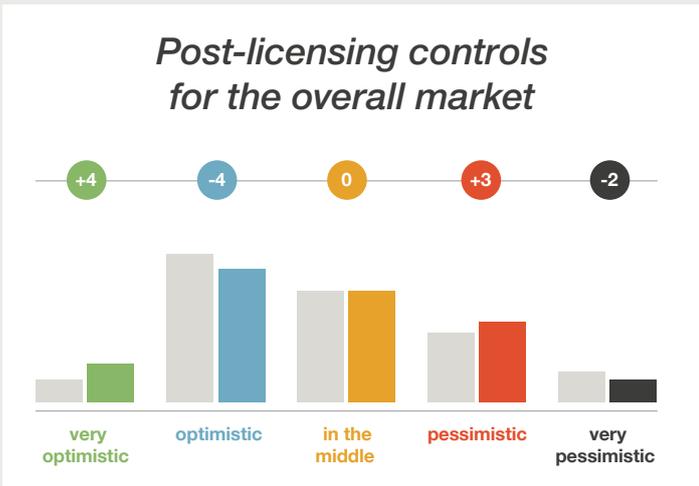
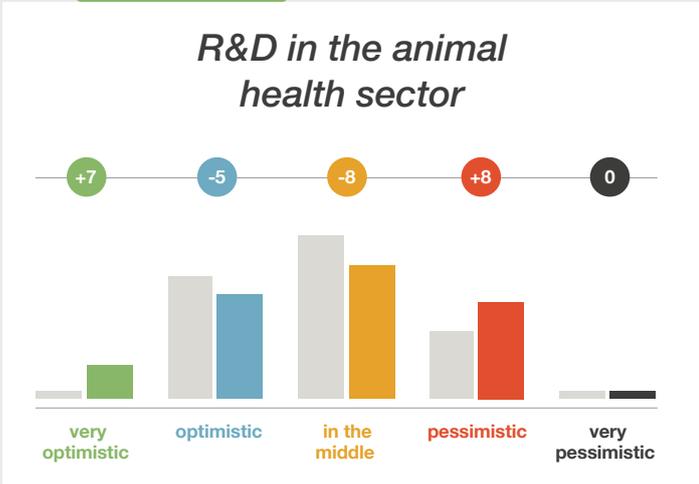
Finally, in Research and Development, sentiment has swung noticeably more to the extremes of pessimism or optimism, suggesting that **further clarity is needed in this area**.





# In light of Brexit, how optimistic do you feel about...

Previous quarter      This quarter





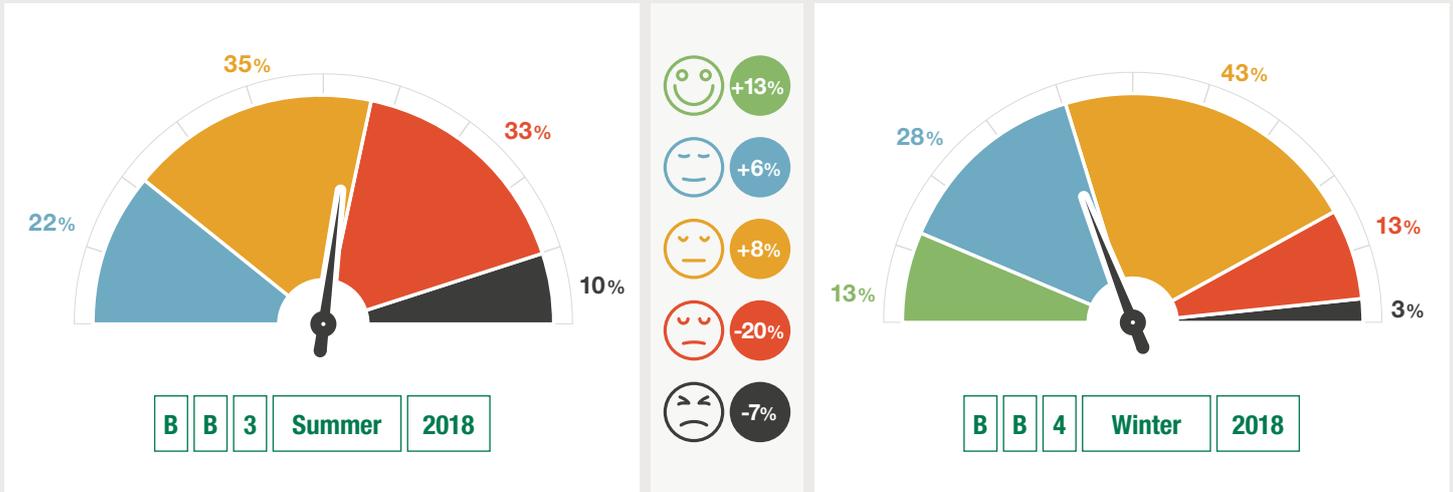
# In light of Brexit, how optimistic do you feel...

## Overall feeling: from Brexit Barometer 3 to 4

Previous quarter

The difference

This quarter



## Overall feeling: comparing Brexit Barometer 1, 2, 3 & 4



# Spotlight on the insights

## The best of the best

The unifying theme throughout the Conference was the strong desire to maintain the highest standards of animal health, supporting excellent welfare, across all elements of the industry. This widespread and vocal determination and focus is perhaps the reason for the continued optimism demonstrated in the barometer.

For Minette Batters, NFU President, it's about the farming sector fulfilling its "moral obligation" in a changing world, while providing safe, affordable and sustainable food for consumers. Whilst there remain concerns over the structure of the relationship with the EU, details of the schemes, ideas, safety nets and task forces that have been put in place to ensure the continued world class standards for which the UK is known, were clear throughout the day. Whether it is forging new partnerships or new ways of working with existing partners, setting up new institutions or reorganizing existing ones, whatever happens next on the road to Brexit, there will be a strong future for animal health.



## Plenty of people?

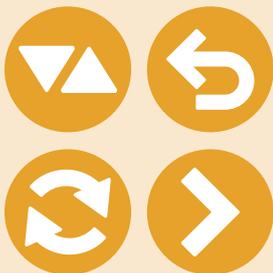


For Amanda Boag, President of the Royal College of Veterinary Surgeons, "Brexit has brought the vet workforce into sharp relief". Amanda also highlighted that just over 50% of new vet registrants this year are non-UK nationals, and there were numerous concerns expressed in the room that the end of free movement from the European Union could create a shortage of vets in the UK.

Eleanor Riley, Director of the Roslin Institute, University of Edinburgh, also brought the audience's attention to research staff, highlighting that over 40% of staff at Roslin are EU nationals, and as many are on short term contracts there may be a significant loss to the organisation in the medium term.

However, there are silver linings, as Eleanor Riley noted, almost irrespective of Brexit there is a huge opportunity for the animal health industry in the UK – it has some of the best animal health researchers in the world. Amanda also discussed the opening of new veterinary schools and the expansion of existing ones which will help to fill the gaps in the veterinary workforce. In any event, ensuring sufficient, qualified, vets and researchers is a key area of focus beyond Brexit to uphold the health and welfare standards for which the UK is known.

## Relationship status



The loss of the European Medicines Agency (EMA) was highlighted by several speakers as a blow, with Quintin McKellar CBE, Vice-Chancellor, University of Hertford, also highlighting losing European reference laboratory status as another significant loss. Access to research programmes, partnerships with world class organisations, and importantly, funding, were also highlighted.

Speakers on all different topics were united in one priority – developing new ways of working with European partners quickly and effectively, whilst maintaining world class research and health and welfare standards.

However, as Noel Joseph, Head of International Office, VMD, highlighted, Brexit presents an opportunity to reach out beyond European borders. The VMD has already established good working relationships with other international agencies and bodies. Quintin also noted that some bodies have already begun the process of developing new bilateral relationships to ensure the continuation of world class research.

## Supply and demand

John Keogh, Director, Animal and Plant Health Association (APHA) Ireland, provided an Irish perspective on Brexit – a "big and daunting issue" given the complex border between Northern Ireland and Republic of Ireland.

He noted that it would be very difficult for the government to explain to farmers that they can't get medicines because of bureaucracy, and was not the only one concerned over disruptions to supply chains and challenges in securing the necessary medicines for farmers and vets alike. Simon Doherty, President, British Veterinary Association (BVA) was amongst those calling on the government to provide clarity to the government over potential supply chain issues.



John Keogh did also note that there are starting to be some hopeful signs, such as continued close working relationship on dual language labelling between the VMD and Health Products Regulatory Authority. However, it is clear that supply chain issues, labelling and continued access to necessary medicines remain a key concern across the industry.

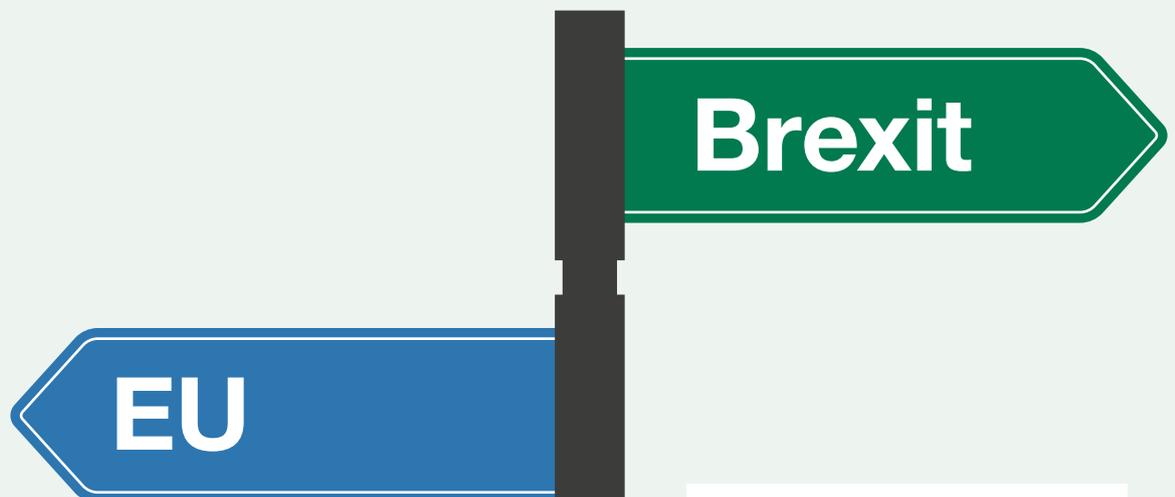
# Moving closer to Brexit

As we head into 2019, we are reassured to hear that our members and stakeholders are feeling more optimistic than they were in our previous Barometers.

It is not without uncertainty that we look ahead to the coming months; it is impossible to know what is around the corner in such an unprecedented situation. However, as The Lord Trees affirmed, Brexit is a disruptor and disruptors have the power to be positive as well as negative.

The future months will be some of the most challenging months that we as an industry face and NOAH, as ever, remains dedicated to supporting you, our members and stakeholders, through the Brexit process and beyond. Our Brexit efforts will not stop on March 29th once we are due to officially leave the EU. We are committed to ensuring the crucial transition period that would come with an agreed deal is as successful as it can be.

Keep an eye out for '**Brexit Perspectives**' where we will be continuing to listen and respond to your thoughts, concerns and opinions on the topic areas that our Barometers have profiled over the past two years.



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