

Annual Review

2021 and outlook for 2022

With the Covid-19 pandemic continuing to provide the backdrop to NOAH's activities, the NOAH team maintained 'business as usual' to deliver services for our members remotely throughout 2021, with all committee meetings, Board meetings, AGM, conferences and events being held virtually. The NOAH Board took the opportunity re-evaluate the role of the NOAH office in Enfield and it was decided to place it on the market with a view to finding a more suitable location in 2022.

In relation to Covid-19, the NOAH website and guidance was regularly updated to provide current information as government advice changed throughout the year.

EU Exit and International Trade

NOAH's 'EU Exit and International Trade Task Force' became the 'Business and Trade Sub-Committee'.

EU Exit and Northern Ireland Protocol

As we entered 2021, the ink on the EU Exit deal signature was still damp on the paper. But there was much still to resolve, not least how the Northern Ireland Protocol (NIP) would apply to veterinary medicines.

NOAH worked hard to raise the profile of this: including attending the Institute for Government's Roundtable; the DEFRA/NI Food Supply Chain Forum; and holding meetings with the Veterinary Medicines Directorate (VMD), Chief Veterinary Officers from UK and NI amongst others.

NOAH submitted evidence to the House of Lords European Affairs Committee's Subcommittee on the Protocol on Ireland/Northern Ireland. Their report stated *'We have heard serious concerns about the impact on supply of medicines and medical products to Northern Ireland in the absence of further mitigating measures'*.

Along with AnimalhealthEurope, NOAH wrote to the European Commission to express concerns in response to the UK Command paper and Commission 'Non-Paper': this resulted in a meeting and follow up letter with more detail and possible solutions.

By the end of 2021 veterinary medicines had been recognised by the European Commission as needing consideration and a long-term solution, with the existing standstill on the introduction of new requirements as required under the NIP being extended until the end of 2022. This helps provide some certainty for the NI market in the short term. Work will continue throughout 2022 to develop a meaningful long-term solution to the regulatory and supply chain challenges that the NIP poses.

NOAH continues to participate in the Agri Supply Coalition, where shared concerns and ideas can be discussed with Ministers and senior officials from DEFRA and other departments.

Looking to the future – Free Trade Agreements

NOAH developed a paper setting out its priorities in relation to international trade, calling for international regulatory collaboration in relation to veterinary medicinal products to be at the heart of any trade agreements between the UK and other countries. NOAH participates as an observer in VICH (the International Cooperation on Harmonisation of Technical Requirements for Registration of Veterinary Medicinal Products) alongside the VMD.

NOAH has been working with counterpart associations to agree joint priorities to help support our sectors. To date, joint priorities have been finalised with the US and Australian associations, while discussions are ongoing with the Indian Animal Health association.

From the 2021 NOAH Members' Survey – 79% of NOAH membership are aware that we represent the UK industry internationally

The NOAH executive continued to be active participants in AnimalhealthEurope, attending 44 meetings over 105 hours and has increased involvement in our global association HealthforAnimals by attending 26 meetings over 35 hours: all virtual except for 1 face to face meeting in Paris.

Additionally, we have taken part in several international webinars and committed to VICH membership, attending 6 meetings.

Regulatory

UK Veterinary Medicines Regulations

While the public consultation on the new UK Veterinary Medicines Regulations (VMR) did not open formally, much preparatory work was undertaken during the year.

NOAH prepared a detailed paper for submission to the VMD, which included comments from discussions at a members' meeting in May. Detailed discussions have continued throughout the year, particularly at regular Board Officer liaison meetings between NOAH and VMD, with input from the Regulatory Affairs Committee.

The new EU Veterinary Medicines Regulation applies across the EU from January 2022: it includes beneficial changes aiming to encourage innovation and reduce the administrative burden on animal health companies – changes the UK lobbied for whilst still an EU member and which would be welcome as part of the new UK VMR.

The VMD's regulatory science strategy 2021-26 sets out to ensure the regulatory basis for veterinary medicines in the UK is based on robust science, something we welcome. NOAH submitted a response to the consultation on the draft strategy in February 2021.

NOAH will work to ensure the review of the UK VMR will help create the regulatory climate companies need to encourage and foster innovation in the UK, maximising opportunities for members. The VMR revision will be a major work focus for NOAH in 2022.



**The right regulatory structures
can enable the innovative work by
our members to continue to grow
and help ensure the UK becomes a
global scientific superpower.**



Regulatory

NOAH CAMPAIGN: R&D and innovation

Animal health is part of the UK's developing life sciences industry and efforts to develop the UK as a global scientific superpower; we are a high-value, high-growth and high-skilled sector with an important role to play in the UK's economic and jobs growth.

The right regulatory structures are needed to ensure our sector thrives in the UK, to support these ambitions.

- Podcast on R&D in response to the 2021 budget
- Dawn Howard Op-Ed in PoliticsHome
- Political outreach: resulting in meetings including with Lord Beynon DEFRA Parliamentary Under Secretary, whose responsibilities include animal health and the VMD; the office of Chi Onwurah MP, Shadow Minister for Industrial Strategy, Science and Innovation; Lord Taylor of Holbeach
- Social media campaign with good engagement
- Member of the Animal Health Coalition steering committee – facilitated by Department for International Trade (DIT), it brings together industry, academia and government to promote UK animal health R&D, associated businesses and provide a virtual corridor



Code of Practice on the Promotion of Animal Medicines

NOAH companies have committed to voluntary standards on promotion higher than the legal requirement by signing up to NOAH's Code of Practice for the Promotion of Animal Medicines.

The NOAH Code works to ensure that prescribers and users can have confidence in the information they read about the products that they prescribe and use. During the year 2 cases were heard online.

To advise members about the Code, 5 virtual online Code of Practice training days were held attended by approximately 80 delegates.

Furthermore, 2 online meetings with the membership were held to review the Code of Practice requirements and fee structures. The proposals arising from these meetings are being finalised. It is hoped that these changes will be approved and adopted by the NOAH Board in March 2022.

One Health

Sustainability

NOAH and our members are working to promote sustainability across the animal health industry, using the power of innovation to help the UK reach Net Zero by 2050. We have established a dedicated Environment and Sustainability Sub Committee to bring together leading players within our industry and look at how we can achieve this.

Responsible use of companion animal parasiticides

During the year, there has been debate, widely covered in the veterinary press, about the environmental impact of flea treatment products, centred round a paper produced by the University of Sussex. Through the new Environment and Sustainability Sub-Committee, NOAH prepared a number of responses on behalf of members, which were published in the veterinary press.

NOAH took part in roundtable events, one hosted by the European Scientific Counsel for Companion Animal Parasites (ESCCAP) and another by Vet Record.

The BVA published a position statement on the use of parasiticides in dogs and cats, about which NOAH was asked for comment: again, a response was prepared and we are in discussion with the BVA on further collaborative efforts.

We care about sustainability and the health of the environment and believe companion animal parasiticides are essential for animal health and welfare and for the prevention of zoonotic disease.

COP26

NOAH highlighted the role healthy animals play in a more sustainable society, for the COP26 conference in Glasgow.

Healthier animals have a reduced environmental footprint and preventing disease on farms builds resilience for the UK farming sector while ensuring food is produced in a more sustainable and environmentally friendly manner. Research has shown that improving animal health, genetics and husbandry can cut livestock emissions by 30% – contributing to Net Zero efforts.

Healthy animals can contribute to key Sustainable Development Goals (SDGs)

Healthier livestock have a smaller environmental footprint.

It's why the UNFAO says "Animal health is necessary for sustainable livestock"



One Health

NOAH Livestock Vaccine Project

NOAH is promoting an improved approach to the vaccination of cattle and sheep across the UK. Vaccines play a major role in making farming more sustainable and resilient.

The NOAH Livestock Vaccine Group developed a paper to set out how this might be achieved which formed the basis of engagement with several politicians and key stakeholders including Daniel Ziechner MP (Shadow Farming Minister) and Jim Shannon MP (Vice Chair of APPG Farming), culminating in a roundtable workshop involving veterinary and farming stakeholders.

Arising from this, three independent livestock veterinary consultants have been commissioned to draft vaccination policy and guidelines for the ruminant livestock sectors – dairy, beef and sheep. NOAH will work closely with the consultants during the drafting and reviewing stages, as the project progresses. The ambition is to challenge the status quo and to stimulate forward momentum at national level.

NOAH's Animal Medicines Best Practice (AMBP) Programme

The NOAH Lantra AMBP eLearning platform has now sold nearly 900 courses: UK farmers already demonstrating commitment to raising standards by completing AMBP training. Demonstration of training became compulsory within the beef, lamb and pig sectors for Red Tractor accreditation, joining the dairy sector. The AMBP course can fulfil that requirement for farmers. The AMBP training programme will continue to develop in 2022 with plans for review and upgrade underway.



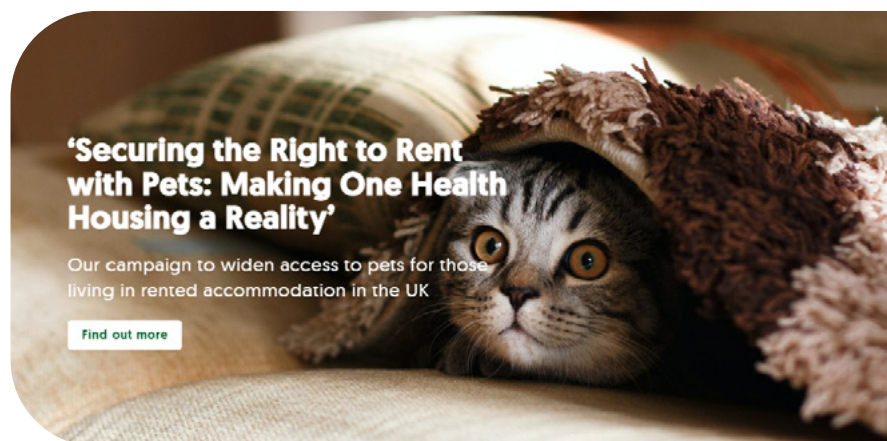
Farm Vet Champions

NOAH is represented on the Steering Group for Farm Vet Champions, run by RCVS Knowledge and funded by the VMD. It has developed learning materials for farm veterinary professionals to improve animal health and welfare standards and provide positive inspiration and leadership towards antimicrobial resistance.

One Health

Securing the Right to Rent with Pets: Making One Health Housing a Reality

In the UK, owning a pet in rented accommodation can be very difficult. NOAH launched its campaign with the ambition of improving access to pets for people living in rented or socially owned housing, by encouraging landlords to introduce more pet-friendly policies and urging the Government to adopt more pet-friendly housing policies.



- Initial relationship building with charities etc (eg Cats Protection, Blue Cross, Battersea, Dogs Trust, Society for Companion Animal Studies, Animal Law) also working on this topic; shared arrangement of roundtable event with the All Party Parliamentary Group on Cats
- Public launch of NOAH campaign #RentingWithPets included microsite and political outreach, social media and press campaign
- Political engagement included meetings with Lord Trees, Sir Roger Gale MP, Andrea Jenkyns MP
- Meeting with Ministry for Housing Communities and Local Government (now Department for Levelling Up and Local Communities DLU&LC) to discuss Model Tenancy Agreement, sharing concerns and proposing solutions
- Working with others including endorsement of AdvoCats 'Heads for Tails' report and social campaign
- Tenant survey with Tenants Voice – engagement including Shelter charity: landlord survey to follow, with information being used to engage with DLU&LC
- The campaign will continue through 2022



Member Offer

Member communication

In 2021 we undertook a survey of NOAH members to ensure we continue to meet their needs and improve our communications to them – we are a predominantly digital association!

66%
use our regular
Members Update

66%
use the NOAH
website

77%
use the
Compendium
website

29%
use the NOAH
MyPortal

95%
were most likely
to engage with
NOAH via email

72%
were aware
of NOAH's
social media

Nevertheless, when it becomes appropriate, members still value the opportunity to engage and network via NOAH events and face-to-face committee meetings.

The NOAH website has been updated to provide clearer information on our members and how NOAH can work for them. We continue to reach out and appeal to potential new members, including a focus on membership at the NOAH stand at London Vet Show.



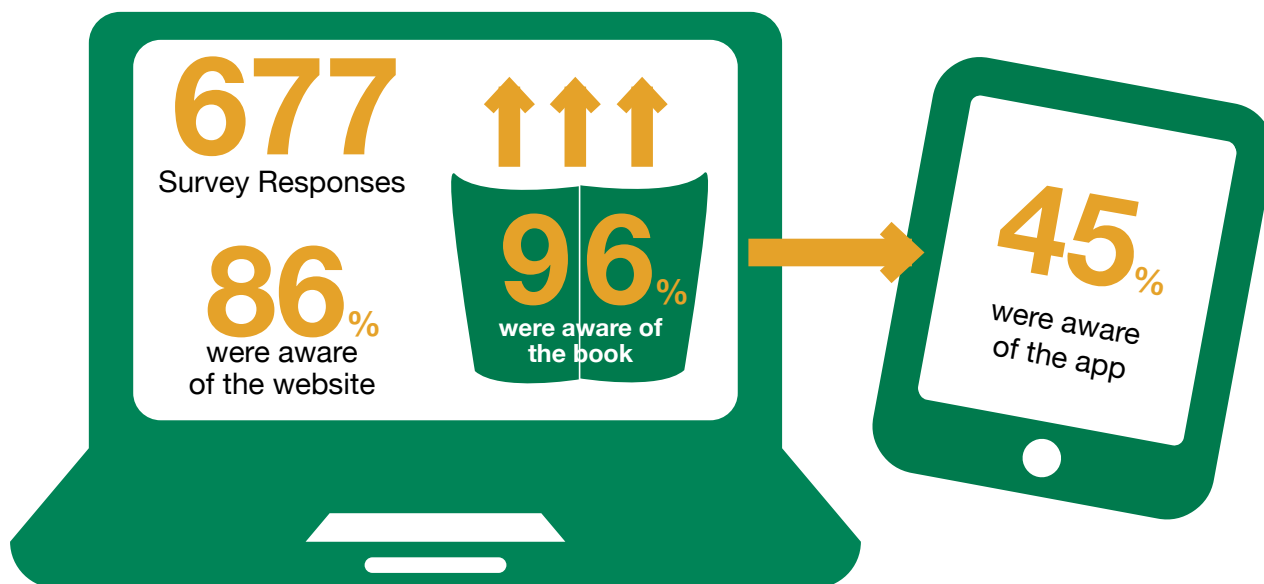
NOAH's qualification: the NOAH Certificate for Animal Health (NCAH)

The NCAH qualification, accredited by Harper Adams University (HAU), helps ensure that animal medicines representatives are able to provide accurate and ethical information to prescribers and sellers of animal medicines. The completion of the NCAH exam by company representatives is a requirement for compliance with the NOAH Code of Practice for the Promotion of Animal Medicines. In 2021 the course and examination were held online and completed by 60 people.

In 2022 the intention is that the first course and exam will be held online but we hope to be able to return to in person training and examinations later in the year.

NOAH Compendium

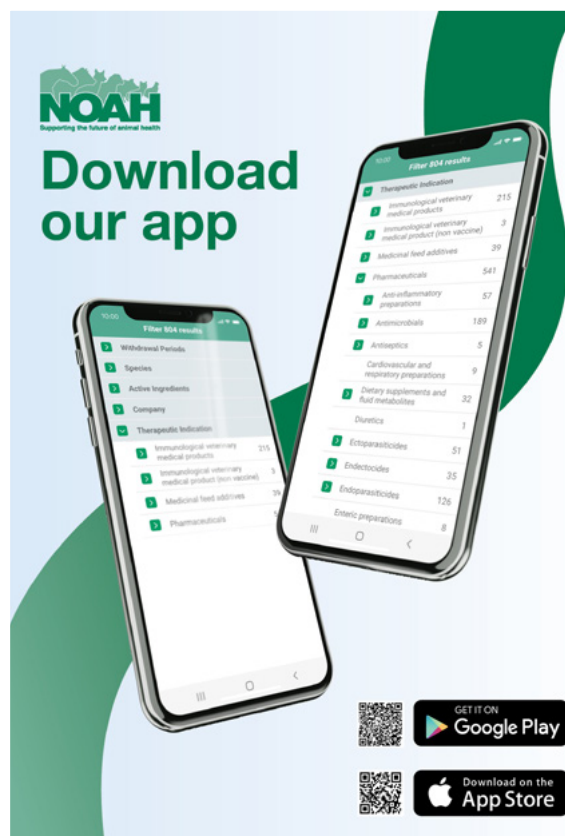
NOAH commissioned Mo Gannon and Associates to undertake an independent survey of users who work in veterinary practices to understand their usage and attitudes in relation to each of the Compendium formats.



Out of the 677 survey responses, 96% of users were aware of the book, 86% were aware of the website and 45% were aware of the app. The app was particularly popular with the 26-35 age group, with well over two thirds (71%) accessing it weekly.

In 2020 there were 2 million visits to the Compendium website, representing an increase of 29%, from nearly 80,000 users. At the same time app usage increased by 45% and now averages 45,000 users/month.

This excellent and growing awareness has enabled the NOAH Board to take the decision that the 2022 edition will be the last full edition printed as a book. The free-to-access NOAH Compendium website and app will continue, to provide the most up to date information and NOAH is working to raise awareness of the digital formats and welcomes feedback on how they can be made even more useful. This decision is part of NOAH's environmental commitment.



Public Relations

Public Relations – Voice of the Industry

Survey on knowledge and views on animal medicines in the UK

Rules on Animal Medicines



over 60% *don't feel informed* about veterinary medicines and their use.



33% think that organic farms are not allowed to use veterinary antibiotics.



59% don't know that to ensure food safety, farmers must withhold animals from slaughter for a defined period of time after treatment with veterinary medicines.

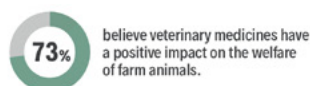


55% not aware that use of hormones as growth promoters in farming is not allowed in the UK and across Europe.

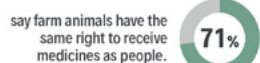


61% don't know that the use of veterinary antibiotics as growth promoters in farming is not allowed in the UK and across Europe.

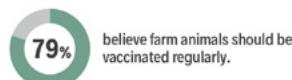
Use in farm animals



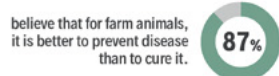
73% believe veterinary medicines have a positive impact on the welfare of farm animals.



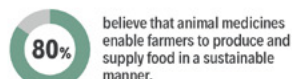
71% say farm animals have the same right to receive medicines as people.



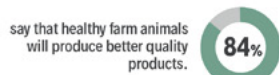
79% believe farm animals should be vaccinated regularly.



87% believe that for farm animals, it is better to prevent disease than to cure it.

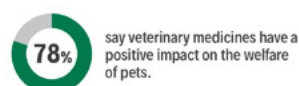


80% believe that animal medicines enable farmers to produce and supply food in a sustainable manner.

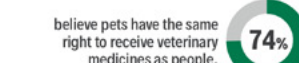


84% say that healthy farm animals will produce better quality products.

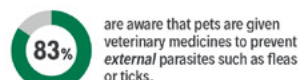
Use in pets



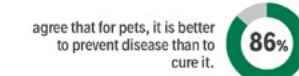
78% say veterinary medicines have a positive impact on the welfare of pets.



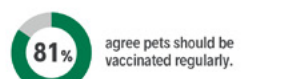
74% believe pets have the same right to receive veterinary medicines as people.



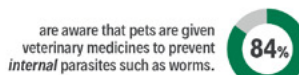
83% are aware that pets are given veterinary medicines to prevent external parasites such as fleas or ticks.



86% agree that for pets, it is better to prevent disease than to cure it.



81% agree pets should be vaccinated regularly.



84% are aware that pets are given veterinary medicines to prevent internal parasites such as worms.

NOAH is a member of AnimalhealthEurope, who commissioned Produkt+Markt to carry out an online survey among citizens in Sweden, Norway, Denmark, Germany, the Netherlands, Poland, Spain and the United Kingdom. The target group was a representative and balanced sample of citizens in terms of regional distribution, gender and age (>18 years), and counted 6,000 respondents (1,000 per country – Sweden, Norway and Denmark combined). The survey focused on topics covering the right to receive medicines, animal welfare, disease prevention and cure, as well as zoonoses, food safety and general awareness.



THE VOICE
OF THE ANIMAL
MEDICINES INDUSTRY



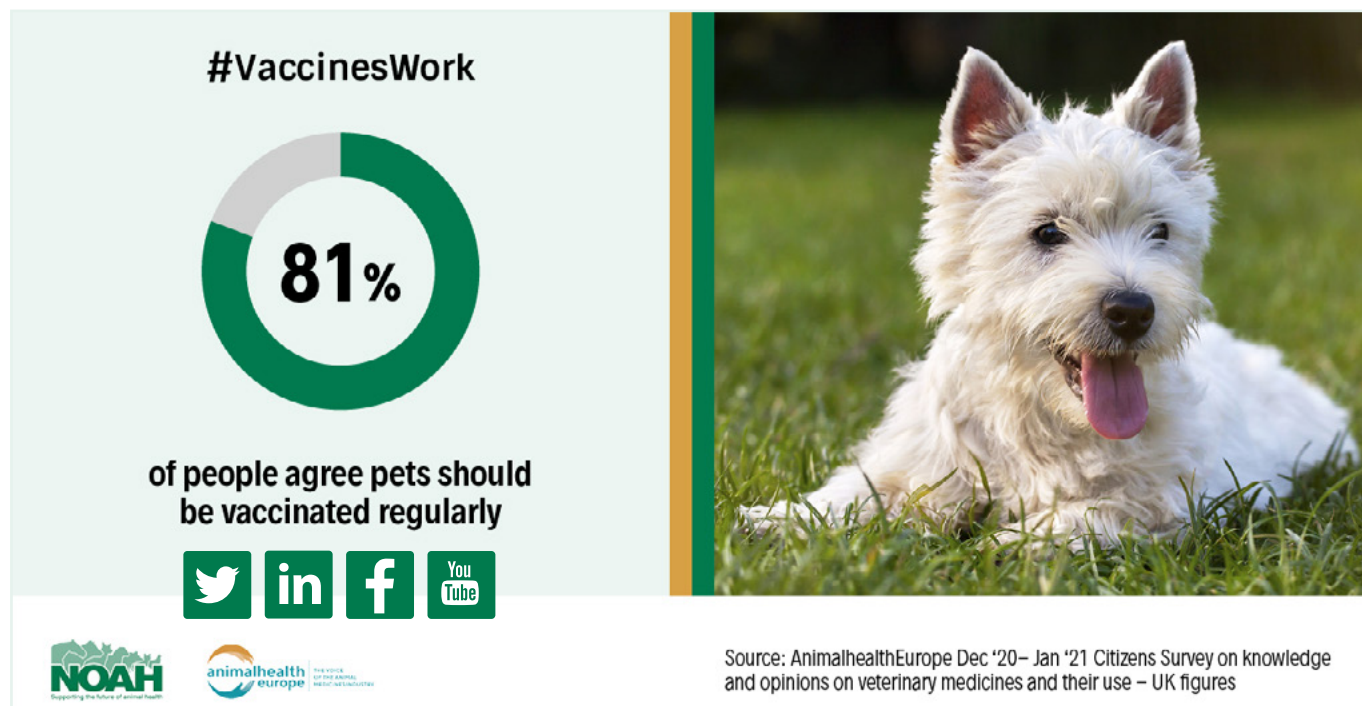
In 2021 @UKNOAH Twitter made 246 tweets; gained 208 new followers, with good engagement and over 215,163 tweet impressions. Our LinkedIn following has more than doubled during the year, standing at over 1,000. Our IHeartMyPet Facebook page continues to provide a useful means to reach pet owners.

This engagement focussed on our campaigns and key priorities, but also capitalised on topical opportunities. Statistics derived from the UK element of the European citizens' survey on knowledge and views on animal medicines have provided useful background.

We have continued to represent members in the media, including through press releases, articles and statements on NOAH policy, campaigns and news. We have used the press to help reassure customers on the measures taken to help ensure continuity of supply of medicines in challenging times and have responded to concerns such as reports in national and veterinary media about the potential impact of pet flea treatments on the aquatic environment.

Public Relations

For National Pet Month, NOAH, working with PFMA, launched a campaign on responsible pet ownership: from the start of April 2021 a week was dedicated to each of the legally-enshrined 5 welfare needs. We also celebrated #PetPawsitivity: how our pets enhance our lives.



NOAH has continued to support Dogs for Good as our charity of the year for 2021 and has also provided sponsorship for the Veterinary Policy Research Foundation (Lord Trees), the RUMA Conference and the National SQP Awards.



Outlook for 2022 and beyond

In March 2022 the consultation for the revision of the UK Veterinary Medicines Regulations (VMR) is expected to launch, and discussion on the detail will form a major workflow for NOAH. We are very keen for this to move forward without delay, as our regulations need to be updated. We are pleased to see that precious parliamentary time has been promised to enable our new regulations to be made.

The UK VMR revision does present broader opportunities to explore potential partnerships further afield. This is against the backdrop of trade agreement discussions on a wider scale and is an opportunity the industry is looking to grasp.

The Northern Ireland Protocol discussions remain outstanding. While some short-term certainty has been achieved, a long-term solution to regulatory and supply chain requirements for vet medicines for the NI market is still urgently needed. The European Commission has said discussions on veterinary medicines will continue over the coming months. NOAH, alongside AnimalhealthEurope, will continue to raise the importance of veterinary medicines supply through the dialogue that has started – and we will be doing this in parallel with others impacted such as SQPs, the veterinary profession and farming organisations.

A review of the NOAH Strategy by the Board in March is set to confirm the major focus on the topic of sustainability as a major thread for our One Health approach – this covers not only the benefits our member companies' products can bring to a sustainability, but also what we as an association can do to help bring about a greener future.

Outlook for 2022 and beyond

NOAH and sustainability

- New Environment and Sustainability Sub-Committee with company expert members
- The 2022 edition of the NOAH Compendium will be the last printed. This will also drive people to the latest information for prescribing and use decisions and will stop the impact of producing and distributing 6000 copies of a publication of over 2,000 pages (even using FSC paper)
- Similarly, the 282 page NCAH Handbook is now only available online
- Working towards reducing our carbon footprint across all working practices including establishing our new office, future conferences and remote working
- NOAH is digital by default, and looks at public transport as first option to attend face to face meetings (avoiding flights where possible)
- Working to achieve environmental sustainability accreditation

We will continue our work to support better animal health through our livestock vaccine project and will be reviewing our AMBP resources to bring them up to date in the fight against antimicrobial resistance.

Innovation in animal health goes beyond traditional animal medicines. Many of our members are engaged in new technologies including smart sensors that continually monitor an animal's vital signs, to big data prediction technologies and smarter diagnostics. Some are working on nutritional supplements and on new vaccine technologies. During 2022 we will be reaching out to other companies involved in animal health to explain the benefits of NOAH membership, so we can all work together towards ensuring the UK is a good place for research – and for business.

NOAH has commissioned Kantar to carry out a survey on the pet population of the UK, looking at the impact of the lockdowns. The results will be available in early 2022. This is primarily for our members, to help them plan for future companion animal health veterinary needs in the UK. We will continue to campaign to level up the opportunities to share our lives with a companion animal through our #RentingWithPets campaign, while spotlighting how to care better for our pets.

With this in mind, we are delighted to be working with StreetVet as the NOAH charity for 2022.