

Improving the quality of life
for animals and people





IFAH, the International Federation for Animal Health, is the federation representing manufacturers of veterinary medicines, vaccines and other animal health products in both developed and developing countries across five continents.

IFAH represents both corporate Members and National Animal Health Associations worldwide. These Associations comprise both local medium-size enterprises (SMEs) and international companies.

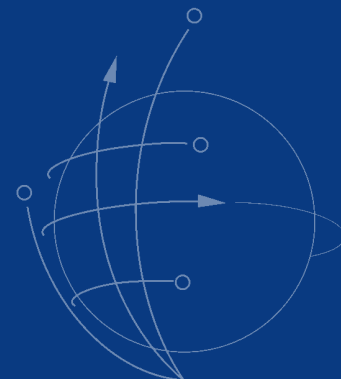
IFAH'S MISSION

IFAH's mission is to promote a predictable, harmonised, science-based and innovative market place for the provision of quality animal medicines, vaccines and other animal health products, and so contribute to a healthy and safe food supply and to a high standard of health and welfare for animals and people.

As a responsible industry we want to ensure that our stakeholders understand the work we do and the wide range of benefits we give to society at large. To achieve this, IFAH, as the voice of the industry, encourages constructive dialogue with governments, public policy makers, legislators, regulators, non-governmental organisations, the veterinary profession, the food chain, consumers and other stakeholders.

IFAH IN 2003

a joint statement by the President and the Executive Director



In 2003, IFAH continued to work towards its goal of improving the quality of life for animals and people by successfully addressing the strategic priorities that were identified in 2002, namely:

Regulatory Affairs, comprising regulatory process efficiency, international harmonisation, risk/benefit analysis and medicines availability, including the availability of antimicrobials.

Food Chain, emphasising the positioning of our industry as a recognised credible voice that influences decision making in the food sector on animal health issues and working towards the supply of safe and wholesome food.

Image Management, IFAH being a source of reliable information for stakeholders that contributes to society within a shared set of values.

This further reinforces the need for efficient and effective networking.

The animal health industry needs a common and robust approach to tackle the numerous, socio-economic and regulatory issues that confront it. IFAH's proven success in issue management is increasingly setting a favourable climate for our industry. Building on the success it has achieved in 2003, IFAH is confident that it shall meet the challenges faced in 2004 for the benefit of the entire industry.

Acknowledgements

Our strong appreciation goes to our Board Members, our Members and our employees. We congratulate you on the excellent work that you have accomplished throughout the year and we look forward to our continued success in 2004 and beyond.

Patrick James, President
Jean-Louis Delforge, Executive Director

The way forward

Medicines and other animal health products improve the quality of life and welfare for both animals and people. As such, IFAH is committed to ensure that the industry's core values are adhered to over the five continents where it operates, and that the benefits which the animal health industry offers to society are acknowledged.

As of 1 May 2004, the European Union increased its membership from 15 to 25 Member States. This clearly has a significant impact on our industry worldwide and reinforces the need for us to continually strengthen our activities in the networking area.

At the international level, the recent issues that have impacted the animal health sector, including BSE and avian influenza, have worldwide consequences.



Patrick James
President



Jean-Louis Delforge
Executive Director



CHANGES WITHIN IFAH

Board of Directors

A new Board of Directors was elected at the IFAH General Assembly of 28 April 2003. Patrick James, President of Elanco Animal Health, succeeded Alan Reade, Executive Chairman of Merial, to the IFAH Presidency.

On his election, Patrick James said "It is our intention to work through IFAH to ensure that our industry's position on a number of significant issues is fully appreciated and understood. We want to participate fully in debates that profoundly affect us, and we want a wide variety of stakeholders, including the general public, to know the contribution we make on a daily basis to animals' and people's lives."

Friedrich Berschauer (Bayer), Pedro Lichtinger (Pfizer), Alan Reade (Merial), Ruurd Stolp (Intervet) and Eric Marée (Virbac) as Treasurer were also elected to the IFAH Executive Committee.

IFAH Core Teams

In response to the IFAH Board of Directors' identification of the three strategic priorities, the following Core Teams were created in 2003:

- **Regulatory Affairs**

Under the sponsorship of Pedro Lichtinger (Pfizer) and Friedrich Berschauer (Bayer), the Regulatory Affairs Core Team is led by Mike Mc Gowan (Pfizer).

- **Food Chain**

Under the sponsorship of Dick Goodmann (Monsanto) and Ruurd Stolp (Intervet), the Food Chain Core Team is led by Ron Phillips (Animal Health Institute – AHI).

- **Image Management**

Under the sponsorship of Alan Reade (Merial) and Eric Marée (Virbac), the Image Management Core Team is led by Jean-Louis Delforge (IFAH Executive Director).

“ Building on the success it has achieved in 2003, IFAH is confident that it shall meet the challenges faced in 2004 for the benefit of the entire industry. ”

REVIEW OF ACTIVITIES 2003



INTERNATIONAL

IFAH

Regulatory Affairs

The regulatory framework initiative was presented to and adopted by the IFAH Board and General Assembly in April 2003.

The following pillars were identified within that initiative:

Regulatory process efficiency (including reduced time to market)

A first workshop on regulatory process efficiency was held in New York in August 2003. An additional workshop was held in January 2004 to focus further on EU regulatory issues and to refine the IFAH-Europe implementation plan. As a result of these workshops, there was further discussion to focus on identifying issues where time/costs could be reduced during the pre-development phase and to identify strategies to reduce post-licensing requirements for existing products, both of which are aimed to optimise conditions for industry investment in research and development. Sufficient investment shall increase medicines availability, a pre-requisite to achieving IFAH's goal of contributing to a high standard of health and welfare for animals and people.

International harmonisation

IFAH's Executive Director gave a presentation to the OIE International Committee in May 2003 in which he stressed that the VICH represents a unique international forum that has built trust and confidence between the authorities and the industry. He continued that the standards that support the predictability

and availability of the veterinary medicines across the world should be based on the same science, and that it is important that we continue together to improve the quality of life for animals and people.

The VICH Steering Committee met soon afterwards in London. On that occasion the Steering Committee reaffirmed that increased harmonisation is needed between the regions on the collection and evaluation of pharmacovigilance data.

The VICH work plan 2000-2005 was reviewed and the Steering Committee laid out a basis for the second phase of global harmonisation after 2005. Given the importance of a worldwide harmonisation in the field of veterinary medicinal products, OIE reconfirmed its commitment and support to the VICH process.

At the next VICH Steering Committee, held in Washington DC in October 2003, a major milestone was achieved by the release of the Ecotoxicity/Environmental Impact Assessment Phase II draft guidelines. The Steering Committee also acknowledged that the Antimicrobial Resistance Expert Working Group had completed its mandate on the Guidance on Pre-Approval Information for Registration of New Veterinary Medicinal Products for Food-Producing Animals with respect to Antimicrobial Resistance. The Steering Committee created a Task Force, to be chaired by OIE, mandated to propose a structure and process for operations for VICH beyond 2005. The Task Force met in Paris in early March 2004 and developed a strategy proposal for Phase II (2006-2010) of the VICH. This proposal will be presented at the May Steering Committee meeting.





**Risk/benefit analysis
(including precautionary
principle)**

Examination of the issue has demonstrated that insufficient use of risk/benefit analysis in the regulatory process for animal health products could lead to undesirable removal of useful products from the market.

Within this perspective, IFAH has been developing its knowledge on the current thinking in risk/benefit analysis, including the precautionary principle, and aims to build common understanding in the animal health sector.

As such, IFAH has created a working group dedicated to addressing the value and implementation of risk/benefit analysis. IFAH's General Assembly in Antwerp on 30 March 2004 included an Academic Session on risk/benefit analysis at which the theme "The importance of perception: How industry can improve its communication on the benefits" was developed.

Antimicrobial availability

- At the first meeting of the IFAH Global Antimicrobial Core Team (GACT), held in New York in August 2003, the objectives of the Team were confirmed.
- Antimicrobials are used to fight bacterial infections and are an essential part of animal health and welfare programmes. IFAH is concerned about the development of antimicrobial resistance in animals and humans. As partners in a responsible industry, IFAH Members continually monitor their products. In addition, these products are subject to surveillance programmes set up in collaboration with authorities and independent

institutions. Science-based regulatory processes rigorously examine the risks involved before and after any antimicrobial product is placed on the market.

- IFAH is committed to the responsible use of antimicrobial products to ensure that our products maintain the welfare and health of animals and to ensure a safe food supply.
- Within this perspective, IFAH participated in the joint WHO/FAO/OIE Expert Workshop on Non-human Antimicrobial Usage and Antimicrobial Resistance, which was held in Geneva in December 2003, and at a second Workshop held in Oslo in March 2004.

Food Chain

- The IFAH Board that met in Atlanta, USA, during the first trimester of 2003 confirmed the need for the animal health industry to develop and maintain good relationships with other stakeholders in the Food Chain, from the field to the table, to ensure that their decisions are based on sound information. As such, the Food Chain Core Team progressed its mission during the year by:

- identifying corporations and organisations in the Food Chain, and,

- examining our relationships with them on a worldwide basis.

Additionally, relevant scientific studies and other tools were compiled in preparation for IFAH's interaction with its partners in the Food Chain.

Thanks to this work, IFAH has consolidated its ability to effectively pass on its messages that animals need medicines to remain healthy and only healthy animals produce safe and wholesome food.





- Strengthened international coordination between the regions on Food Chain issues, such as traceability, was achieved at the end of the year, and is set to continue throughout 2004.

Image Management

- IFAH's mission statement was confirmed at the IFAH General Assembly in April 2003.
- IFAH's core messages were developed and approved, focusing on:
 - the need for animal health products.
 - the safety, efficacy and quality of animal health products.
 - the contribution of animal health products to food safety.
 - the contribution of animal health products to companion animals.
- The IFAH Image Management Core Team was established under the leadership of Jean-Louis Delforge, IFAH Executive Director. The mandate of the Team is to create an environment that favours the development and growth of the animal health industry, and to provide guidance on image management and stimulate inter-relationships with the other IFAH priority projects. The Team's strategy has been to offer a real input into the work of targeted international bodies including institutions, non-governmental organisations and other associations. Amongst these bodies are:
 - WHO – for public health and food safety issues, including the use of antimicrobials...
 - OIE – for animal health issues, including medicine availability, risk/benefit analysis, animal welfare and regulatory harmonisation (VICH, ...)
 - FAO – for food security and food safety issues, including risk/benefit analysis applied

- to food hygiene, traceability, food-borne diseases, use of antimicrobials, residues (ADI and MRLs), intellectual property and the related Codex committees
- WVA – for animal and public health, animal welfare, medicines availability, food production of animal origin, food safety, prophylactic campaigns...
- IABs – for vaccinations against notifiable diseases, innovations in biotechnology...

- The IFAH website (www.ifahsec.org) was developed.
- IFAH made a significant input in the organisation of the DIA International Animal Health Conference, which was held in Nice in October 2003. The conference was the first devoted to veterinary topics and offered a unique opportunity to review and debate indepth critical issues affecting the animal health in the 21st century as well as the challenges of the regulatory climate for the authorisation of veterinary medicinal products.



“ ... a real input into the work of
targeted international bodies. ”



EUROPE

IFAH-Europe

The 16 National Associations that are Members of IFAH-Europe are detailed on pages 16-17.

Regulatory Affairs

The European Union is an important legislative centre generating regulatory and social policies that not only impact its Member States, but also have high significance throughout the world. As such, our networking potential there has been used efficiently and effectively under the leadership of the IFAH-Europe Council (IEC).

Regulatory process efficiency

- Veterinary regulation review: IFAH-Europe continued its efforts to provide input to the review at the EU institutions – European Commission, Council and Parliament – throughout 2003. Our efforts were rewarded in December 2003, when the Parliament adopted its final proposals. The major achievements for our industry include:
 - Obtaining harmonised 10-year data protection and other incentives to support investment in innovation.
 - Maintaining a choice in the licensing procedures.
 - Streamlining of marketing authorisation renewal process.

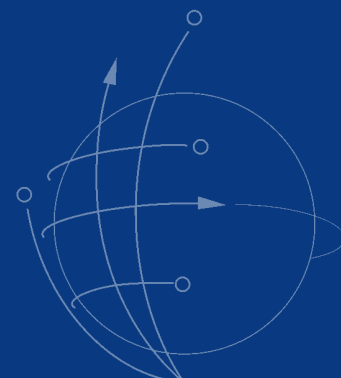
An additional success was the avoidance of an extended period of legal uncertainty that may have resulted from a delay in the adoption of the package beyond EU enlargement on 1 May 2004.

- Technical guidelines on data requirements: Through dialogue with the EMEA and the European Pharmacopoeia, IFAH-Europe made a significant input in setting technical guidelines and monographs on data requirements for animal health products with regard to their quality, safety and efficacy. Forty position papers were delivered to the EMEA and the European Pharmacopoeia on this matter.
- Medicines availability: IFAH-Europe has actively participated in conferences on medicines availability and been the driving force in alliance building with farmer and veterinarian organisations and minor species breeder groups.
- Pharmacovigilance: IFAH-Europe demonstrated the industry's strong commitment to the surveillance of animal health products. With this in mind, it developed the good practice guide on pharmacovigilance for the European animal health industry. This was launched in April 2004.
- Info days: IFAH-Europe jointly organised info days with the EMEA and HEVRA to assess the efficacy of the licensing procedures. The discussions were based on the joint surveys aimed at measuring the qualitative and quantitative performance of these procedures.

International harmonisation

- IFAH-Europe continued to participate actively in discussions within key international organisations. At Codex Alimentarius, industry's view on the risk assessment procedures and the importance of science-based decisions was emphasised. As regards VICH, several topics were successfully completed allowing for discussion on the future process.

“ ... a recognised, credible voice
in decision-making on animal
health issues. ”



Antimicrobial availability

- IFAH-Europe actively participated in the international symposium “Towards a Risk Analysis on Antibiotic Resistance” in Berlin in November 2003 and stressed the message that antibiotics contribute significantly to food safety, as only healthy animals should enter the food chain.
- During the year IFAH-Europe has continued to be proactive in investigating antibiotic resistance issues by:
 - Supporting a programme to survey and monitor susceptibility of zoonotic bacteria in animals.
 - Members undertaking risk assessments on several active ingredients.

Food Chain

- One focus of IFAH-Europe’s priorities in 2003 was to position our industry as a recognised, credible voice in decision-making on animal health issues. In 2003 the basis was formed to actively interact with food chain stakeholders to ensure that they are aware of our industry’s role and contribution to the sector by:
 - Identifying corporations and organisations in the food chain and developing the animal health industry’s relationships with them.
 - Developing a database of these corporations and organisations in order to facilitate more effective communications and assistance to them.
 - Identifying key issues to the food chain and appropriate tools to address such issues.
- A concrete example of IFAH-Europe’s engagement in this priority is its regular dialogue with the EAFN. The EAFN provides a

platform in the European Union at which senior Members of stakeholders’ organisations are able to discuss items of common interest and create alliances.

- In October 2003, the federation identified “traceability” as a strategic issue for our industry that should be managed by the IFAH-Europe Food Chain Committee. In November 2003, a Traceability Working Group was created, which has:
 - Clarified legal obligations and liabilities for the animal health industry regarding this topic.
 - Developed a concept project for the traceability of veterinary medicinal products, which shall be developed in 2004 into a more defined proposal.
- The CEESA barcode project has received a favourable overall reaction by the European Commission’s Services as a first stage of the traceability project.

Image Management

- The Communications Committee (Comcom) focused on the development of basic communications materials and internal communications structures for IFAH-Europe. Amongst the communications materials developed during the year were:
 - A PowerPoint presentation and a booklet entitled “Introducing IFAH-Europe”. These materials include a series of core messages reflecting our industry’s values. Both the presentation and the booklet have been highly successfully used at internal and external events and meetings.
 - The IFAH-Europe website (www.ifahsec.org/Europe).
 - A new IFAH-Europe stand, that was first used at the DIA International Animal Health





Conference, which was held in October 2003 in Nice.

- Standard operating procedures (SOPs) detailing the preparation and approval of IFAH-Europe press releases, rapid response statements and supporting documentation.
- Internal consultation and approval procedure for political position papers as well as an issue and crisis management protocol.
- Comcom is continuing to develop a facts and figures brochure and card.
- The Committee supported IFAH-Europe in developing various press releases on animal health topics including the veterinary regulation review.
- A highly successful reception for Members of the European Parliament and representatives of the Member States' national governments was organised for July 2003 as a part of IFAH-Europe's input to the veterinary regulation review.
- During the year, a survey aimed at providing a snapshot of stakeholders' perceptions of the industry was developed. This survey will be conducted in 2004.
- The Comcom began to develop a far-reaching Communications Plan for 2004-2005 with actions to be taken in support of the federation's three priority areas.

NORTH AMERICA

AHI, USA

CAHI, Canada

Regulatory Affairs

In the United States - AHI

- Secured national legislation which mandated performance standards for the FDA review of animal health product applications tied to industry user fees.
- Furthered the scientific review of antimicrobials through the publication by FDA of a science driven guideline for the evaluation of antimicrobials in food animals.
- Furthered the implementation of quantitative risk assessment both nationally and internationally through development of a risk assessment guide and rapid risk rating model system for antimicrobial review.
- Moderated the development of a comprehensive USDA proposal to extensively revise current labelling requirements for biological products.
- Furthered a science-driven approach to the development of AVMA and AAHA guidelines for vaccination and revaccination of companion animals.
- Represented IFAH at critical Codex Alimentarius meetings, namely, CCRVDF, Animal Feeding Task Force, CCGP, and the Codex Commission, to support global animal health industry positions.
- Represented the animal health industry in a broad coalition of food and food additive companies involved in the Codex international standards development for the food industry.



- Furthered the goals of the VICH harmonisation process by actively representing the industry at VICH Steering Committee meetings and sponsoring several industry and government Working Group meetings.
- Spearheaded the dissemination of information to the animal health industry on compliance with US export law in light of heightened governmental enforcement activities relating to bio-terrorism.

In Canada - CAHI

- Achieved improvements in Canada's Veterinary Drugs Directorate's programme delivery and establishment of performance standards for its activities.
- Ensured contribution to Canada's participation in the VICH process and adoption of 27 VICH guidelines.
- Established MRLs for most of the animal health products marketed in Canada with a focus on harmonisation with the USA.
- Participated in Health Canada's Advisory Committee and in its stakeholder consultations regarding the use of animal health products and antimicrobial resistance concerns.
- Coordinated new legislation in Canada that would bring greater accountability to all of Canada's regulatory review programmes that charge user fees.

Food Chain

In the United States - AHI

- Participated with IFAH in the identification of stakeholder contacts and relevant issues for the USA.

- Published an independent expert article on antibiotic use in the Journal of Antimicrobial Chemotherapy.

In Canada - CAHI

- Became Member of the Canadian Animal Health Coalition, which is comprised of commodity organisation, veterinary, processing and provincial government representatives. It is working toward establishment of a national health strategy and on emergency animal health measures.
- Became Member of the Canadian Supply Chain Food Safety Coalition which represents all segments of the food chain and facilitates the development and implementation of a national, coordinated approach to food safety through dialogue with industry and government.
- Provided input into commodity organisations' quality assurance programmes.

Image Management

In the United States - AHI

- Led the formation of a US Coalition for Healthy Pets.
- Hosted the successful 6th annual Pet Night on Capitol Hill.
- Surveyed Members and published annual research and development investment data.
- Worked with CEESA to publish annual market sales data for USA.



In Canada - CAHI

- Published “Inforum”, a newsletter on current issues that targets veterinarians and food animal producer groups.
- Engaged in targeted contact with political influencers, civil servants and the media on current image management issues.

SOUTH AND CENTRAL AMERICA

CAPROVE, Argentina

SINDAN, Brazil

ALAVET, Chile

INFARVET – CANIFARMA, Mexico

Regulatory Affairs

- SINDAN has been working with the new Brazilian authorities to update legislation encouraging product quality. A decree is nearing publication. SINDAN and CAPROVE are continuing their joint efforts to put in place a special task force representing officials from Brazil and Argentina, the aim of which will be to support quality assurance increases in the animal health market.
- A project to harmonise the packaging and labelling requirements for animal health products in Latin America has been running since August 2003. Specific focus has been given to achieving a single Good Manufacturing Practice legislation in the region. The IFAH team has been a strong partner in this project.
- IFAH gave a presentation on the importance of Codex Alimentarius for the future of international trade in Latin America, during the

FDA Workshop for Latin American countries in Buenos Aires in August 2003.

- SINDAN significantly contributed to the second Symposium for Antimicrobial Resistance in Brazil, coordinated by the Oswaldo Cruz Foundation. The two international key speakers were sponsored by SINDAN/IFAH.

Food Chain

- SINDAN co-sponsored with the Pan American Health Organisation (PAHO) the development of training materials to identify BSE.

Image Management

- SINDAN has been a leading partner in the National Agriculture Federation (Beef Cattle Association) that supports the eradication of foot-and-mouth disease in Brazil, Bolivia and Paraguay. At the request of PAHO, it also organised with the National Council for Beef Cattle a Symposium for the Eradication of Foot-and-Mouth Disease in Brazil in October 2003. Additionally, SINDAN represented the Brazilian non-government sector at the preparatory meeting on the Hemispheric Conference for the Eradication of Foot-and-Mouth Disease in the Americas. Further to that meeting, SINDAN coordinated the Brazilian delegation to the Hemispheric Conference for the Eradication of Foot-and-Mouth Disease in the Americas convened in Texas, USA on 3 and 4 March 2004.





ASIA-PACIFIC

AVCARE, Australia

ASOHI, Indonesia

MAI, Israel

JVPA, Japan

KAHPA, Korea

AGCARM, New Zealand

Regulatory Affairs

In Australia - AVCARE

- Published a highly comprehensive review on the value of enteric antibiotics in livestock production, adding perspective to the ongoing debate over the public health, animal welfare and environmental impact of veterinary antibiotic use.
- After many years' effort, is succeeding in bringing the Australian legislative system for data protection closer in line with overseas systems. Legislation is now expected to be presented to Australian Parliament by the second quarter in 2004.
- Developed a new quality assurance system for active constituents to give consumers confidence that industry products meet the stringent regulatory standards in place in Australia.

In Indonesia - ASOHI

- Was actively involved in the preparation of the Good Manufacturing Practice for the animal health industry.
- Assisted in updating and improving the Government Registration Process for veterinary medicinal products, and

subsequently conducted a workshop linked to this exercise.

In Japan - JVPA

- Was created following the merger of the Japan Veterinary Pharmaceutical Association and the Japanese Association of Veterinary Biologicals.
- Contributed to the initiative of the Ministry of Health, Labour and Welfare on MRLs.

In Israel - MAI

- Took part in the joint meetings with the Ministry of Health in order to regulate the procedures for the storage and supply of veterinary medicinal products and the practice of extra-label use. The new suggested procedures have been drafted and are waiting for approval by the authorities.
- Reached an agreed procedure for the new regulations and control of feed ingredients used in animal feed such as vitamins, minerals etc.

In Korea - KAHPA

- Formulated experimental regulations for determination of the antimicrobial efficacy of disinfectant in January 2003.
- Established the control system for livestock antibiotics.

In New Zealand - AGCARM

- Was heavily involved in implementing new legislation based on the Global Harmonised System.
- Positively interacted with the human health regulatory sector on antimicrobial availability.





- Participated in the local Australian/New Zealand VICH Management Group.

Food Chain

In Indonesia - ASOHI

- Held seminars on the antibiotics issue.

In Israel - MAI

- Has planned a meeting with the food industry for 2004 to strengthen relationships between the industries.

In Japan - JVPA

- Has actively dialogued with the newly created Food Safety Commission that was established in the Cabinet Office in July 2003. The Commission plays a central role for food safety in the Japanese Government.

In New Zealand - AGCARM

- Has been participating in a total diet survey.

Image Management

In Australia - AVCARE

- Continued to lead in areas including environmental reporting, long-term stewardship programmes and quality assurance matters.
- Issued its second Industry Environment Report on eco-efficiency in July 2003, highlighting its Members' commitment to sustainability.

- Through AGSAFE, continued to advocate best practice for safe handling, storage and transport of agricultural and veterinary products.

- Supported drumMUSTER, the national container management programme, which carried out 3,483 collections resulting in more than 3.7 million drums collected by June 2003.

- Continued corporate social responsibility activities through the Eco-efficiency Agreement with government.

- Examined how different food sectors are defining consumer requirements and meeting expectations and what this means for the agriculture and animal health industry at its Summit 2003, "Connecting consumers, confronting the facts".

In Indonesia - ASOHI

- Published bimonthly INFO ASOHI Bulletins on various activities and news on veterinary medicinal products.
- Conducted training on various aspects on animal health and veterinary medicinal products.
- Strengthened the role of ASOHI by holding dialogues and seminars with farmers in various provinces in Indonesia.
- Initiated the establishment of the Asian Federation of Animal Health Industry (AFAH) in Bangkok, Thailand in March 2003.



In Israel - MAI

- Organised a visit of Ministry of Health officials to a plant to highlight the efforts made by the Industry to bring safe, high quality and efficacious products leading to healthier food.
- Is planning a press conference on these issues in 2004.

In New Zealand - AGCARM

- Redesigned the website to include reference to the membership of IFAH.

AFRICA

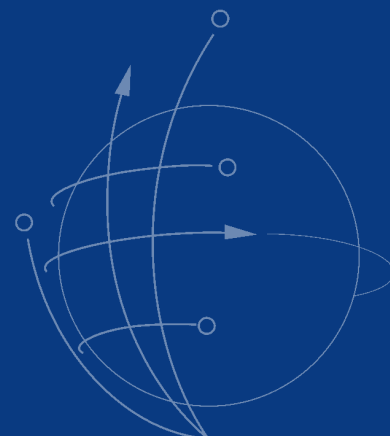
SAHA, South Africa

IFAH Members continued to actively participate in the ongoing Programme Against African Trypanosomiasis led by WHO and FAO.

ACRONYMS

AAHA – USA American Animal Hospital Association
 ADI – Acceptable Daily Intake
 AFAH – Asian Federation of Animal Health Industry
 AVMA – American Veterinary Medical Association
 BSE – Bovine Spongiform Encephalopathy
 CCGP – Codex Committee on General Principles
 CCRVDF – Codex Committee on Residues of Veterinary Drugs in Food
 CEESA – European Animal Health Study Centre
 COMCOM – IFAH-Europe Communications Committee
 DIA – Drug Information Association
 EAFN – European Agri-Food Network
 EMEA – European Agency for the Evaluation of Medicinal Products
 FAO – United Nations Food and Agriculture Organisation
 FCC – IFAH-Europe Food Chain Committee
 FDA – United States Food and Drug Administration
 GACT – IFAH Global Antibiotic Core Team
 HEVRA – Heads of European Veterinary Regulatory Authorities
 IAB – International Association for Biologicals
 IEC – IFAH-Europe Council
 MRL – Maximum Residue Limit
 OIE – Office International des Epizooties – World Animal Health Organisation
 PAHO – Pan American Health Organisation
 USDA – United States Department of Agriculture
 VICH – International Cooperation on Harmonisation of Technical Requirements for Registration of Veterinary Products
 WHO – United Nations World Health Organisation
 WVA – World Veterinary Association

THE ANIMAL HEALTH INDUSTRY IN 2003



2003 Animal Health Industry



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Animal Health Market by Product group

Product Group	2003 \$m	YoY %* Nominal	Share %
Medicinal Feed			
Additives	1,635	0.6	13.0
Biologicals	2,850	11.1	22.7
Anti-infectives	2,025	4.9	16.1
Parasiticides	3,555	14.1	28.3
Other Pharmaceuticals	2,480	18.4	19.8
Total	12,545	10.7	100.0

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* Year over year percentage

Animal Health Market by Region

Region	2003 \$m	YoY %* Nominal	Share %
North America	4,475	7.1	35.7
Latin America	1,390	0.4	11.1
West Europe	3,640	21.5	29.0
East Europe	535	17.6	4.3
Far East	2,130	8.4	17.0
Rest of World	375	7.1	3.0
Total	12,545	10.7	100.0

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* Year over year percentage

Animal Health Market by Species

Species	2003 \$m	YoY %* Nominal	Share %
Cattle	3,450	9.9	27.5
Sheep	665	12.7	5.3
Pigs	2,145	5.7	17.1
Poultry	1,450	3.2	11.6
Companion Animal/ Other	4,835	16.1	38.5
Total	12,545	10.7	100.0

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* Year over year percentage



IFAH Board of Directors as at 31 December 2003

President

Patrick James, *Elanco Animal Health*

Vice-Presidents

Friedrich Berschauer, *Bayer Healthcare*

Pedro Lichtinger, *Pfizer Animal Health Group*

Alan Reade, *Meril*

Ruurd Stolp, *Intervet International*

Treasurer

Eric Marée, *Virbac*

Directors

Sebastiao Costa Guedes, *South and Central America*

Dick Goodman, *Monsanto*

Philippe du Mesnil, *Ceva Santé Animale*

Joachim Hasenmaier, *Boehringer Ingelheim Animal Health*

Dominique Henryon, *Vétoquinol, Laboratoire Pharmaceutique Vétérinaire*

Jean-Louis Hunault, *Europe*

Ichiro Kaizuka, *Asia-Pacific*

Raul Kohan, *Schering Plough Animal Health*

Alexander Mathews, *North America*

Pierre Scarcériaux, *Janssen Animal Health*

Kurt Schmidt, *Novartis Animal Health*

Carol Wrenn, *Alpharma Animal Health Division*

Officers

Jean-Louis Delforge, *Executive Director*

Florentina Pardo, *Executive Assistant*

Member Associations as at 31 December 2003

Europe

Belgium: PHARMA.BE – Association Générale de l'Industrie du Médicament

Croatia: VETERINA Animal Health

Denmark: VIF – Veterinaermedicinsk Industriforening

Finland: PIF – Pharma Industry Finland

France: SIMV – Syndicat de l'Industrie du Médicament Vétérinaire et Réactif

Germany: BfT – Bundesverband für Tiergesundheit

Greece: HAVEPHARM – Hellenic Association of Veterinary Pharmaceutical Manufacturers

Ireland: APHA – Animal and Plant Health Association

Italy: AISA – Associazione Nazionale dell'Industria della Salute Animale

The Netherlands: FIDIN – Vereniging van Fabrikanten en Importeurs van Diergeneesmiddelen in Nederland

Portugal: APIFARMA – Associação Portuguesa da Indústria Farmacêutica

Slovenia: WAH – Working Group for Animal Health

Spain: VETERINDUSTRIA – Asociación Empresarial de la Industria de la Sanidad y de la Nutrición Animal



Sweden: LIF – Läkemedelsindustriföreningen

Switzerland: SGCI/SSIC – Schweizerische Gesellschaft für Chemische Industrie

United Kingdom: NOAH – National Office of Animal Health

North America

United States: AHI – Animal Health Institute

Canada: CAHI – Canadian Animal Health Institute

South and Central America

Argentina: CAPROVE – Cámara Argentina de la Industria de Productos Veterinarios

Brazil: SINDAN – Sindicato Nacional da Indústria de Produtos Para Saúde Animal

Chile: ALAVET – Asociación Gremial de Laboratorios de Productos Veterinarios

Mexico: INFARVET-CANIFARMA – Industria Farmacéutica Veterinaria – Cámara Nacional de la Industria Farmacéutica

Asia-Pacific

Australia: AVCARE – National Association for Crop Production and Animal Health

Indonesia: ASOHI – Indonesian Veterinary Drugs Association – Asosiasi Obat Hewan Indonesia

Israel: MAI – Manufacturers Association of Israel

Japan: JVPA – Japan Veterinary Products Association

Korea: KAHPA – Korea Animal Health Products Association

New Zealand: AGCARM – New Zealand Association for Animal Health and Crop Protection

Africa

South Africa: SAHA – South African Animal Health Association

Corporate Members as at 31 December 2003

Alpharma Animal Health Division

Bayer Healthcare

Boehringer Ingelheim Animal Health

CEVA Santé Animale

Elanco Animal Health

Fatro*

Fort Dodge*

Intervet International

Janssen Animal Health

Merial

Monsanto

Novartis Animal Health

Pfizer Animal Health Group

Schering-Plough Animal Health

Vétoquinol, Laboratoire Pharmaceutique Vétérinaire

Virbac

* Company represented in Europe only



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