

## IFAH-Europe

Representing the European Animal Health Industry

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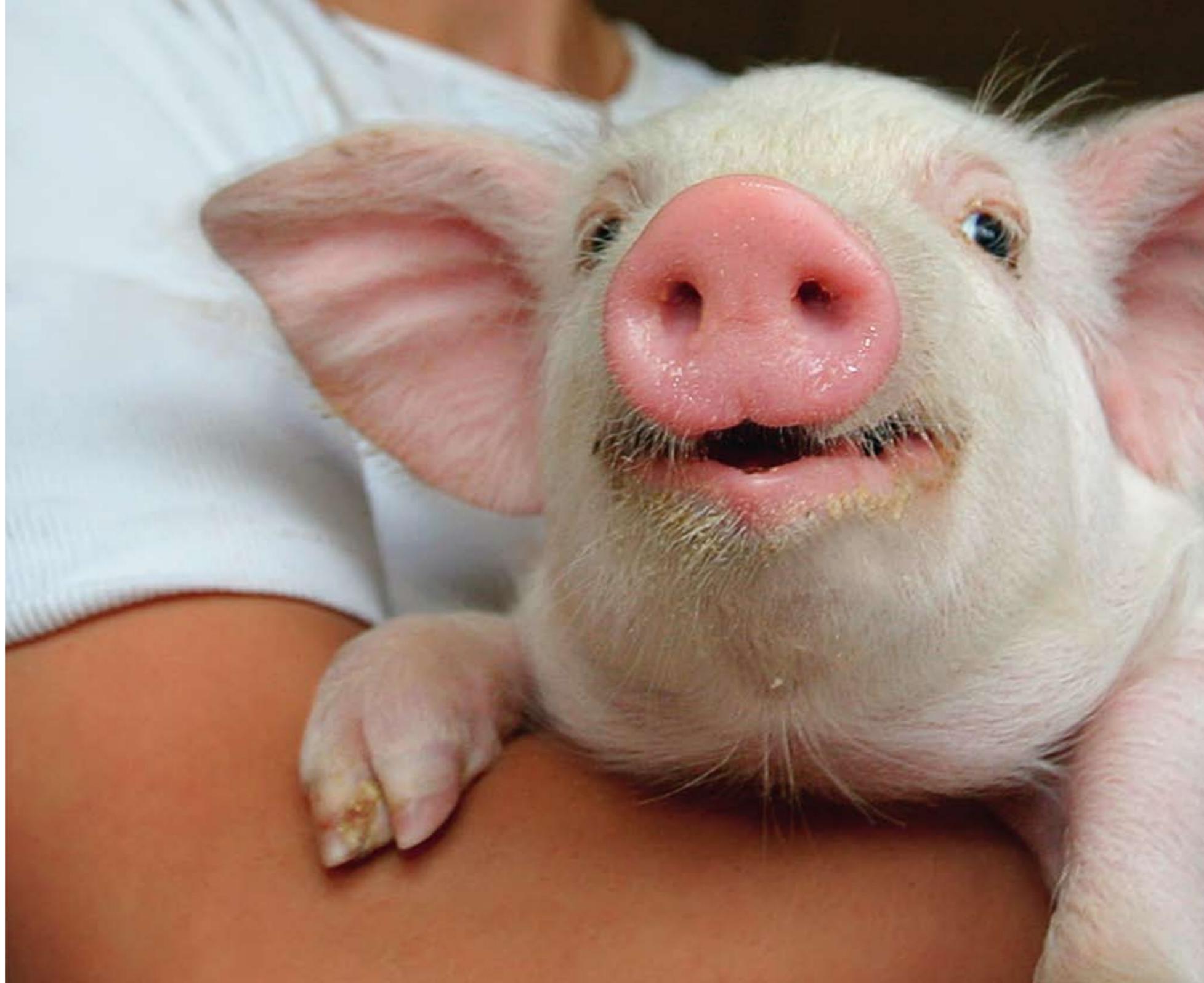
May 2007

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# 2007 ANNUAL REPORT

# Table of contents

About IFAH-Europe	3
A message from IFAH-Europe's Chairman and Managing Director	4
Activities and achievements in 2007	6
Regulatory affairs	8
Food chain issues	10
Communications	12
European Pet Night	14
European Technology Platform for Global Animal Health	16
Pursuing alternatives to animal testing	18
Future challenges	20
Regulatory affairs	20
Food chain issues	22
Communications	24
The European animal health industry in profile	26
IFAH-Europe Council Members	28
IFAH-Europe Secretariat	29
Corporate members	30
National member associations	31
Associated members	32
Glossary	33



## About IFAH-Europe

IFAH-Europe is the federation representing manufacturers of veterinary medicines, vaccines and other animal health products in Europe. It represents both corporate members and national associations across the region. In turn, these associations act on behalf of local, regional and international companies. IFAH-Europe's membership covers 90% of the European market for veterinary products.

### IFAH-Europe's mission

IFAH-Europe's mission is to promote a predictable, harmonised, science-based and innovative marketplace for the provision of quality animal medicines, vaccines and other animal health products, thereby contributing to the supply of safe, healthy food and to high standards 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 broad range of benefits we offer to society at large. To achieve this, IFAH-Europe, as the voice of the European animal health industry, encourages constructive dialogue with governments, public policy makers, legislators, regulators, non-governmental organisations, the veterinary profession, the food chain, consumers and other stakeholders.

## A message from IFAH-Europe's Chairman and Managing Director



Brian Clark  
Chairman of the IFAH-Europe Council



Declan O'Brien  
Managing Director of IFAH-Europe

The toll exacted by bluetongue on Europe's ruminant populations in 2007 offered a stark reminder of the threats posed by emerging animal diseases. Equally, the speed with which IFAH-Europe member companies reacted to the bluetongue threat underlined once again the vital role our industry plays in safeguarding the health and welfare of the region's animal populations. By the end of the year, products offering protection against serotype 8 of the bluetongue virus – the strain that spread rapidly across much of northern Europe – were on course to be made available for use in member state vaccination programmes that will help to prevent a repeat of the problems witnessed in 2007.

Costs involved in the development of new products are considerable, and have risen sharply in recent years, with animal medicines subjected to a growing range of catch-all standards that have been applied to human and veterinary pharmaceuticals alike – regardless of their very different requirements and the huge gulf in resources that exists between the two sectors. A survey carried out by the federation shows that development costs faced by IFAH-Europe members have increased by 150% since the early 1990s, while the time taken to bring a new product to market has risen by almost five years in little more than a decade.

Against that background, can Europe remain at the cutting edge of innovation in animal health? That was the question we posed at our annual conference, where

regulators and a range of other stakeholders heard representatives of the federation deliver some stark messages – and table constructive proposals designed to ensure that Europe remains a world-class force in animal health.

We have set a number of explicit targets for improvement. Under the banner "The Magic Number is 20" we are pursuing a 20% reduction in development costs, a 20% reduction in the time it takes to bring a new product to market and a reduction from 35% to 20% in the amount being spent by our member companies on defensive R&D. We are working closely with regulators to address a number of key issues, and are confident that the regulatory tide has finally begun to turn.

While the commitment of our industry to investment in innovation may have been sorely tested, it has never wavered – a fact highlighted by IFAH-Europe's contribution to the European Technology Platform for Global Animal Health, which made further significant progress during 2007. The ETPGAH initiative aims to make best use of available research resources in a bid to encourage and accelerate the development and distribution of effective tools to control major animal diseases, not just in Europe, but across the globe.

We remain equally committed to the health and welfare of animals, as illustrated by our continued involvement with the European Partnership for

Alternative Approaches to Animal Testing (EPAA), and the role played by the federation in a range of other multiple-stakeholder initiatives. IFAH-Europe's proactive, cooperative approach, typified by our contribution to the highly successful European Pet Night held in Brussels towards the end of the year, is helping a wider audience to appreciate the vital role played by our industry, and our commitment to be a trusted partner.

The establishment of a new IFAH-Europe Policy Working Group in 2007 will help to shape the future of the federation and will provide an important focus to our communications with European institutions and other stakeholders.

As ever, the achievements we catalogue in this report were made possible by the hard work and dedication of our Brussels-based team, member-company and national-association representatives, to whom we offer our heartfelt thanks. Finally, we wish a warm welcome to Orion Corporation and the Norwegian association, LMI, whose membership further strengthens our representation of the European animal health industry. We look forward to working alongside them in 2008.

## Activities and achievements in 2007

IFAH-Europe focuses its resources on three strategic areas:

- **Regulatory affairs**
- **Food chain issues**
- **Communications**

Significant progress was accomplished in each of these three fields during 2007. Key activities and achievements are reviewed in the following pages of this report.



## Regulatory affairs

In line with priorities drawn up by the IFAH Board, our technical group is pursuing improvements in the efficiency of regulatory procedures, working to ensure a science-based approach to the authorisation of antibiotics and supporting VICH in its push for regulatory harmonisation at global level. Its overriding aim is the establishment of a regulatory framework capable of supporting a sustainable, innovative animal health industry. Supported by a series of expert working groups under the guidance of IFAH-Europe's Technical and Regulatory Committee, it continued to work closely with regulators on a range of topics, including key issues such as oncology products, user safety, quality and inspections, pharmacovigilance, and EMEA transparency.

- **Regulatory reform:**

The introduction in 2004-2005 of a revised regulatory framework brought about several improvements in the authorisation of veterinary medicinal products across the region. During 2007 IFAH-Europe continued to monitor the impact of the revised legislation and to ensure it is implemented in a harmonised and proportionate manner. It also drafted proposals that address a number of issues arising from the revised legislation. The effect of new rules on the balance between innovative products and generics is a key issue, notably where the provision of safety data, including environmental risk assessments, is concerned.

- **Amending variation procedures:**

IFAH-Europe has contributed to and commented on proposals from the European Commission to amend legislation governing variations to existing marketing authorisations. The proposed changes promise to deliver significant improvements such as shorter approval periods for variations, while reducing administrative and financial burdens faced by applicants.

- **Simplified rules for maximum residue limits:**

Concrete proposals to amend the EU regulation on MRLs were released by the European Commission in April. These aim to clarify procedures and improve

the availability of products for the treatment of food-producing animals. IFAH-Europe supported the changes, which will remove previously unreasonable requirements imposed on its members, whilst maintaining high levels of consumer protection. IFAH-Europe monitored the progress of this new legislation through the co-decision procedure between the European Parliament and the Council of the EU, and coordinated the development of its message.

- **Safety and risk assessment:**

Retaining a balance between safety and the continued availability of veterinary medicines remains a priority for the federation. Its pharmacovigilance experts were involved closely in moves to synchronise periodic safety update reporting, which will enable work-sharing by competent authorities and reduce the administrative burden of these requirements for all concerned. Toxicology and safety experts also held detailed discussions with the authorities on guidelines covering user safety and environmental risk assessment.

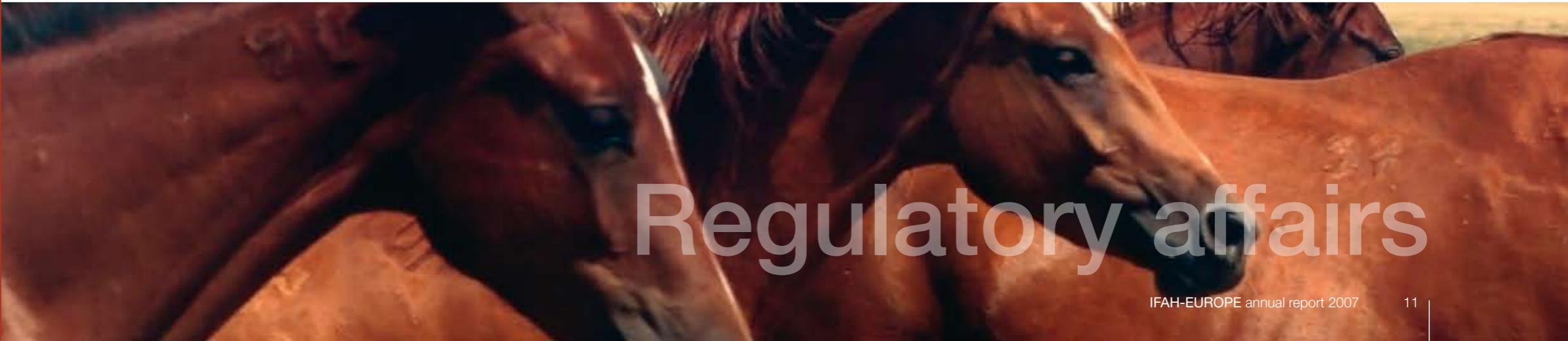
- **Antibiotics:**

Ensuring that regulations governing the use of antibiotics for the treatment and prevention of animal diseases are based on sound scientific principals is a priority for IFAH-Europe. The federation monitors and contributes

to scientific debates, participates in conferences and research into the causes and control of antibiotic resistance, and continues to collect data from the field. It has also promoted the use of antibiotic resistance/sensitivity cut-off values that are of clinical relevance, and has played a key role in the development of the European Platform for the Responsible Use of Medicines in Animals (EPRUMA). It has also contributed to the development of an OIE list of antibiotics that are essential for veterinary medicine.

- **Other regulatory initiatives:**

Throughout 2007, IFAH-Europe experts were heavily engaged in projects concerning the future regulatory control of coccidiostats and feed additives, the electronic submission of regulatory documents and international harmonisation initiatives (VICH). The federation also continued to monitor EU product-approval systems, updating its annual survey of the mutual recognition and decentralised procedures. A new survey on the referrals procedure was initiated, while plans for a one-off survey of the centralised procedure were drawn up.



# Regulatory affairs



# Food chain issues

## Food chain issues

IFAH-Europe and its members have been instrumental in the development of stakeholder alliances, forging productive relationships with groups representing all links in the regional food chain. These are helping to promote a broader understanding of the valuable role our industry plays in the protection of animal health and welfare, food safety and human health. As a result, the federation is regarded increasingly as a pro-active and trustworthy partner in the animal health debate.

- **Encouraging responsible use of animal medicines:**

Significant progress was achieved in this area through the European Platform for Responsible Use of Medicines in Animals (EPRUMA). Designed to encourage best practice in the use of animal medicines, EPRUMA was established by IFAH-Europe and bodies representing farmers (COPA-COGECA) and the veterinary profession (FVE), but is evolving rapidly into a broader coalition. The European Initiative for Sustainable Development in Agriculture (EISA) joined the platform in 2007, while FESASS, the body representing animal health and hygiene professionals in the region, has announced that it will also sign up to the initiative. IFAH-Europe discussed EPRUMA and its goals with a range of other food-chain partners, including bodies representing the feed industry, feed-additive manufacturers and retailers. Constructive dialogue with retailers, through GLOBALGAP, was particularly significant, since this cooperation promises to broaden the platform's reach further along the food chain. Progress towards the adoption of a framework document on best practice in the use of antimicrobials in food-producing animals was also reported, with a final guideline now likely to be in place by the middle of 2008.

- **Spearheading improvements in traceability:**

Traceability systems enabling produce to be tracked from farm to fork represent a major development in food safety. IFAH-Europe and its member companies have made a significant contribution to developments in

this sphere, investing substantial sums in a scheme to upgrade and harmonise veterinary product identification systems. This will not only improve traceability, but will also help the industry's food chain partners – including distributors, retailers and veterinary surgeons – to comply easily with record-keeping requirements. Our industry is the first to adopt the datamatrix identification standard – which allows the identity of a product, its batch number and expiry date to be verified with a single scan – on a broad scale. By the end of 2007, implementation of the system was 80% complete in the region, while some companies were reporting almost 100% compliance. The initiative has been monitored with growing interest by regulators and other industrial sectors alike, with the human pharmaceutical industry now committed to the implementation of datamatrix coding.

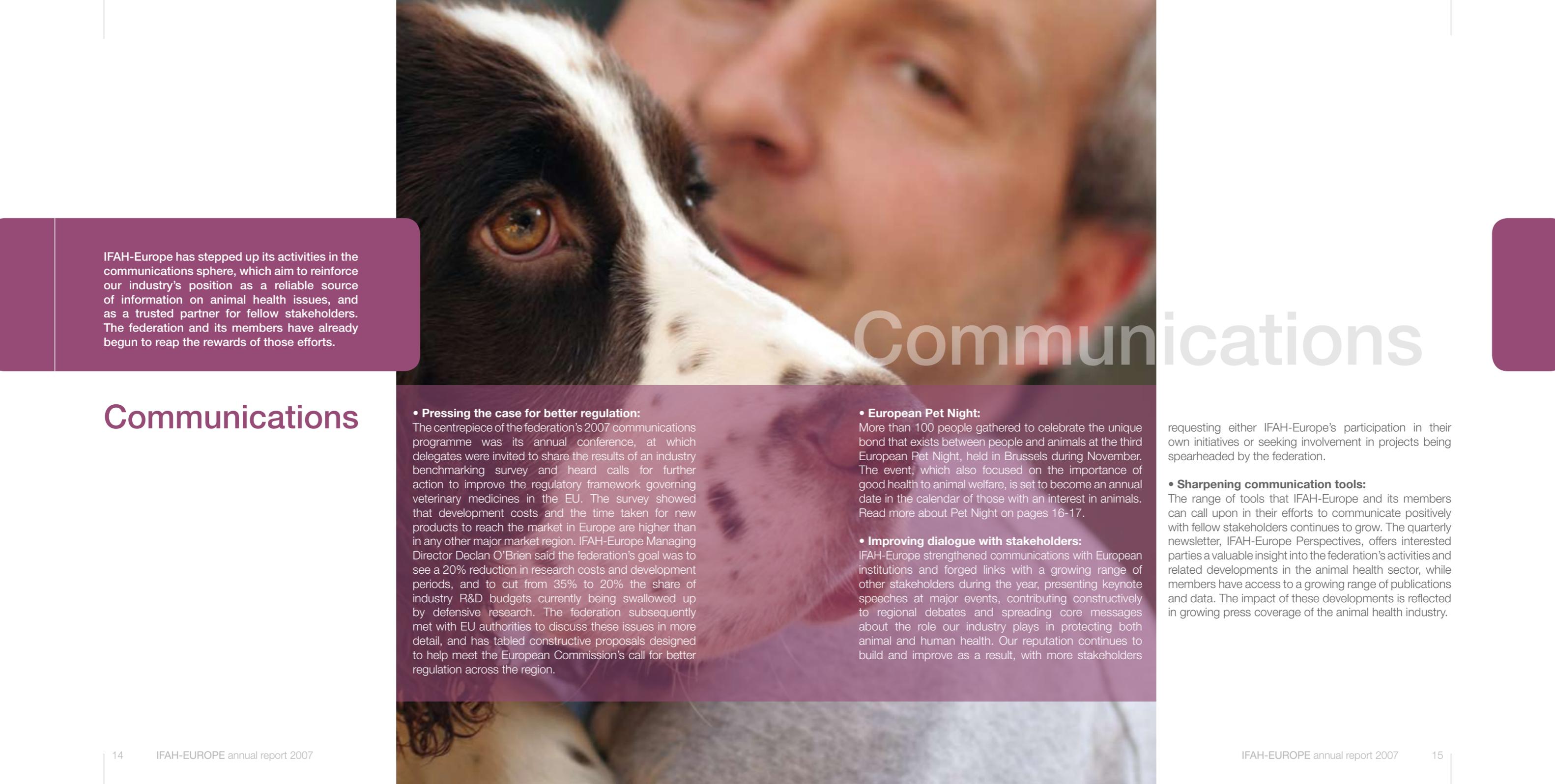
- **Collaboration with the EFSA:**

2007 marked the fifth anniversary of the European Food Safety Authority – an institution that is growing in stature and with which IFAH-Europe has increasingly close links. The federation provided valuable input to the EFSA's consultative stakeholder platform and held one-to-one discussions with the organisation on the vaccination of animals against diseases such as bluetongue and avian influenza. It is clear that vaccines are set to play an increasingly prominent role in the prevention and control of emerging disease threats across the region, and several IFAH-Europe member companies have developed vaccines against various serotypes of the bluetongue

virus – including serotype 8, which had such a detrimental impact on Europe's sheep and cattle populations in 2007. EU funding for emergency vaccination programmes has now been agreed, and authorisations for novel vaccines have already been issued.

- **Helping to shape animal health policy – “Prevention is better than cure”:**

Science, innovation and research is one of the four pillars upon which the EU's new Community Animal Health Policy will be based. IFAH-Europe contributed to the work of the European Commission's DG SANCO, which outlined new approaches to animal health in a communication document published during 2007. The paper highlights the role played by veterinary products and recognises the need for a coherent regulatory framework to encourage investment in research that will deliver effective tools for the prevention and treatment of animal disease.



IFAH-Europe has stepped up its activities in the communications sphere, which aim to reinforce our industry's position as a reliable source of information on animal health issues, and as a trusted partner for fellow stakeholders. The federation and its members have already begun to reap the rewards of those efforts.

## Communications

- **Pressing the case for better regulation:**

The centrepiece of the federation's 2007 communications programme was its annual conference, at which delegates were invited to share the results of an industry benchmarking survey and heard calls for further action to improve the regulatory framework governing veterinary medicines in the EU. The survey showed that development costs and the time taken for new products to reach the market in Europe are higher than in any other major market region. IFAH-Europe Managing Director Declan O'Brien said the federation's goal was to see a 20% reduction in research costs and development periods, and to cut from 35% to 20% the share of industry R&D budgets currently being swallowed up by defensive research. The federation subsequently met with EU authorities to discuss these issues in more detail, and has tabled constructive proposals designed to help meet the European Commission's call for better regulation across the region.

- **European Pet Night:**

More than 100 people gathered to celebrate the unique bond that exists between people and animals at the third European Pet Night, held in Brussels during November. The event, which also focused on the importance of good health to animal welfare, is set to become an annual date in the calendar of those with an interest in animals. Read more about Pet Night on pages 16-17.

- **Improving dialogue with stakeholders:**

IFAH-Europe strengthened communications with European institutions and forged links with a growing range of other stakeholders during the year, presenting keynote speeches at major events, contributing constructively to regional debates and spreading core messages about the role our industry plays in protecting both animal and human health. Our reputation continues to build and improve as a result, with more stakeholders

requesting either IFAH-Europe's participation in their own initiatives or seeking involvement in projects being spearheaded by the federation.

- **Sharpening communication tools:**

The range of tools that IFAH-Europe and its members can call upon in their efforts to communicate positively with fellow stakeholders continues to grow. The quarterly newsletter, IFAH-Europe Perspectives, offers interested parties a valuable insight into the federation's activities and related developments in the animal health sector, while members have access to a growing range of publications and data. The impact of these developments is reflected in growing press coverage of the animal health industry.

# Communications

# Celebrating healthy, happy animals



*"The success of Pet Night shows that citizens take a keen interest in animal health and welfare. So animals might not only be good for human health, they might also bring the European Union closer to its citizens"*  
P. Casaca MEP

Galia and Usi



Accompanied by the Belgian Police Cavalry, D. O'Brien, MEPs P. Casaca (PSE), N. Parish (EPP) and E. Estrela (PSE) and some of the partners organising Pet Night: Ethologia, ADEu (Dyadis), IAHAIO (Ethologia)

Pets are kept in more than 55 million European households, bringing joy and companionship to many millions of owners. The therapeutic benefits of pet ownership have been widely documented, but animals can be much more than 'one of the family', as those who attended the third European Pet Night in Brussels last November found out.

Most of us are aware of the massive contribution guide dogs make to the quality of their blind owners' lives, but how many realise that some 30% of the 'assistance dogs' working in Europe fulfil other, equally valuable roles? These include hearing dogs for deaf people, rescue dogs trained especially to locate casualties in disaster zones – even medical assistance dogs capable of alerting others if their owners suffer a seizure or other serious health event. Similarly, while we are all familiar with the role of the police horse, how many realise the joy that our equine friends bring to disabled individuals given the chance to participate in Riding for the Disabled initiatives?

Organisations representing these special animals, alongside IFAH-Europe and the Federation of Veterinarians of Europe (FVE), came together in Brussels to celebrate the unique bond that exists between people and animals, and to underline the importance of healthy, happy animals to Europe's population. Hosted by MEPs Neil Parish and Paulo Casaca, current and former chairs of the European Parliament's Intergroup on the Welfare and Conservation of Animals, European Pet Night was a huge success, and is set to become an annual feature at the request of organisations involved in the 2007 event: IFAH-Europe, FVE, ADEu, IAHAIO, FRDI and IRO.



Ms. Van Moer and her assistance dog Galia have shared the story of their daily life

*"The success of this event highlights a keen interest in the animal cause among politicians, interest groups and citizens in general,"* said IFAH-Europe Managing Director Declan O'Brien. *"Animals play an important role in our society, so we must work together to protect their health and welfare."*

*"We now need to ensure that the political will is translated into concrete actions to improve the health and welfare of animals."* Paulo Casaca, MEP, former Chair of the Intergroup on the Welfare and Conservation of Animals

# European Pet Night

# Harnessing the potential of research resources

In July 2007, the ETPGAH finalised an action plan designed to deliver the key goals laid down in a strategic research agenda published some 12 months earlier. The plan outlines measures required to encourage the development of new and improved tools for the control of major animal diseases, and identifies key areas in which EU research funding is required if current gaps in the range of available vaccines and therapeutic medicines are to be plugged successfully.

Both the ETPGAH and its action plan received a ringing endorsement from EU Science and Research Commissioner Janez Potočnik, who said the document would be extremely valuable – not only for regulators and the industry, but also for those charged with prioritising and funding European animal health research programmes.

The plan will be available for use by the European Commission's own Research Directorate General as it allocates funds under the EU's 7th Research Framework Programme (FP7), and by those in charge of national schemes, which account for 90% of animal health research funding in Europe. With that figure in mind, the ETPGAH is setting up national 'mirror groups' to spread key messages contained in the action plan, and to ensure that national funding is aligned with its priorities.

In a further significant development, funds have been allocated under FP7 to support a four-year project that will prioritise requirements and examine the deployment of cutting-edge technology in the field of animal health research. The Disease Control Tools (DISCONTTOOLS) initiative will be spearheaded by IFAH-Europe, which has appointed Portuguese veterinary surgeon Telmo Valinhas to project manage the scheme. Under the guidance of the ETPGAH Steering Council, he will coordinate the work of building a disease information database, organising gap analysis and developing a prioritisation model that will help to deliver key goals laid down in the ETPGAH action plan.

ETPGAH website: <http://www.ifaheurope.org/EUPlatform/Platform.htm>

Technology platforms of the European Commission: [cordis.europa.eu/technology-platforms](http://cordis.europa.eu/technology-platforms)

Underlining its commitment to combating animal disease, IFAH-Europe co-founded and now chairs the European Technology Platform for Global Animal Health (ETPGAH). The platform is a multi-stakeholder coalition set up to encourage and accelerate the development and distribution of effective tools for the control of major animal diseases, both in Europe and throughout the world, by harnessing public and private research funds more effectively. By improving human and animal health, food safety, animal welfare and market access, the initiative will contribute to the achievement of the UN's Millennium Development Goals.

## European Technology Platform for Global Animal Health

European Commissioner for Science and Research  
Janez Potočnik, receiving the Action Plan of the ETPGAH

## Pursuing alternatives to animal testing

Determined to minimise the use of animals in the research and development of veterinary medicines, IFAH-Europe is a founding member of the European Partnership for Alternative Approaches to Animal Testing (EPAA), a collaboration involving the European Commission and major companies from seven key industrial sectors that was established in 2005. Stakeholders in this unique alliance have embraced a set of principles known as the '3Rs Declaration', which encapsulates their desire to refine, reduce and replace the use of animals in product testing wherever possible, and have worked tirelessly over the past two years in pursuit of those goals.



Regulatory acceptance – and notably the harmonisation of approaches pursued by authorities in Europe and across the globe – remains a barrier to the widespread use of alternative approaches to animal testing. A workshop held by the EPAA in June explored potential solutions to some of these problems, and recommendations adopted at the workshop are now being implemented at a variety of levels. The partnership has already developed guidance for both regulators seeking further information and companies responding to such requests in respect of more than 20 alternative testing methods.

Regulatory acceptance was also the core theme of the EPAA's third annual conference, held in Brussels during November. Addressing delegates there, EU Research Commissioner Janez Potočnik called for a "systematic and sustained exchange" between regulators, the research community and industry. Echoing those sentiments, Enterprise and Industry Commissioner Günther Verheugen called for greater involvement by regulators in the development of alternative approaches, from validation through to acceptance.

Where veterinary medicines are concerned, IFAH-Europe has developed a number of proposals designed to reduce animal experimentation – including batch testing of veterinary vaccines – and has shared these with regulators. The federation and its members are active contributors to the EPAA's five working groups, which were set up to deliver key goals outlined in the partnership's action plan. Representatives from our industry have contributed to the mapping of 3R activities, the promotion of future research based on 3R principles and the identification, dissemination and implementation of best practice where 3R approaches are concerned. IFAH-Europe member company Meril hosted an EPAA working group session on improving the dissemination and take-up of 3R approaches at its facility in Lyon, France, during October.



# Future challenges

## Future challenges

# Regulatory affairs

**The federation's technical team will continue to focus on improving the efficiency of regulatory systems, seeking to eliminate unnecessary costs and delays that slow the entry of innovative new veterinary medicines to the marketplace.**

Building on progress already achieved, key areas of activity in 2008 will involve initiatives designed to:

- Establish a regulatory-decision database, as a means to reduce referrals to the CVMP;
- Further develop proposals for future regulatory reform, particularly to address deficiencies in data-protection provisions, in order to provide the necessary stimulation for product development in the veterinary-specific, multi-species marketplace;
- Rationalise labelling and packaging requirements to encourage access to veterinary products in all corners of the European marketplace;
- Remove unnecessary national requirements that hinder efficient European decentralised marketing-authorisation procedures;
- Investigate the causes of high product-maintenance costs in the EU, including 'defensive' R&D costs;
- Develop a European policy for the consistent and balanced assessment of the benefits and risks of veterinary medicines during regulatory procedures.

The European Commission's proposals for a new MRL Regulation and new rules governing variations to existing marketing authorisations will remain priority issues for 2008. The draft MRL Regulation will complete its first reading in the European Parliament, and will be passed on for initial scrutiny by the Council. The proposals for new variation procedures are expected to enter the comitology process during 2008.

Further progress will be sought in other areas, including the international harmonisation of standards under the VICH initiative and moves towards the efficient electronic submission of regulatory documents, where the focus will be on variation procedures and electronic application forms. Elsewhere, IFAH-Europe will continue to defend the use of coccidiostats, and will address developments in the debate surrounding antibiotic resistance, including MRSA. Bluetongue and new initiatives designed to improve safety-assessment procedures for veterinary medicines (notably injectable products) will also feature among a broad range of regulatory challenges.





## Future challenges

### Food chain issues

**Building on progress achieved to date, IFAH-Europe will look to consolidate links with fellow stakeholders and forge relationships with new partners along the food chain.**

- **Expanding the EPRUMA initiative:** A definitive best-practice framework for the use of antimicrobials in food-producing animals will be published during 2008. The document will be presented to the authorities and disseminated throughout the EU member states in a bid to encourage widespread compliance with best practice. Participants will also work to raise awareness of and broaden involvement in the EPRUMA project, while the development of best-practice frameworks governing the use of other veterinary product types will be discussed.

- **Implementing improved traceability systems:** By the end of 2007, the implementation of the new datamatrix product identification system by IFAH-Europe member companies was well advanced. Completing the rollout of the new system, which will improve traceability and help users of veterinary medicines comply with record-keeping requirements, will be a priority in 2008.

- **Strengthening relations with fellow stakeholders:** The federation will look to build on its existing relationship with the European Food Safety Authority, and will examine the possible development of joint 'info-days' – along the lines of those held regularly by IFAH-Europe and the EMEA – to discuss issues of common interest. Relations with other links in the food chain will also be strengthened through participation in a range of multi-stakeholder initiatives, with involvement in the European Agri-Food Network (EAFN) and the European Initiative for Sustainable Development in Agriculture (EISA) high on the agenda.

- **Shaping Community Animal Health Policy:** New approaches to EU animal health policy outlined in the European Commission's recent communication are encouraging, but IFAH-Europe believes additional elements need to be considered – notably the importance of curative care, companion animal health issues, approaches to the adoption of new technologies and trade issues linked to the use of veterinary vaccines. The federation will raise these issues through the Commission's Common Animal Health Policy Advisory Group.



## Future challenges Communications

**Effective communication is crucial if we are to drive home our industry's core messages successfully. Exciting new developments lie ahead in this field.**

- **Creation of a Policy Working Group:** The federation's new Policy Working Group, comprising members of the IFAH-Europe Council and heads of its main committees, met for the first time in November 2007. The Working Group will act as a think tank, helping to shape the future of IFAH-Europe. Sound policies are an important vehicle for effective communications with European institutions and for spreading messages to other stakeholders.

- **Animal Health Solutions for the Future:** IFAH-Europe's 2008 annual conference, to be held in Brussels on 12 June, will focus on the potential that exists for the development of new tools to prevent, treat and control animal disease, and on the establishment of new strategies to address emerging disease threats. The programme will include sessions on: global responses for global health threats; food safety and animal health policy; fostering innovation in animal health; and companion animal issues.

- **New communication tool:** The IFAH-Europe website will undergo a major upgrade in 2008, enhancing the range and accessibility of information available to both members and our external audience. External users will also benefit from the provision of new online tools providing information on our industry and a range of topical animal health-related issues, following on from the bluetongue 'fact sheet' and Q&A resources made available recently.

# The European animal health industry in profile

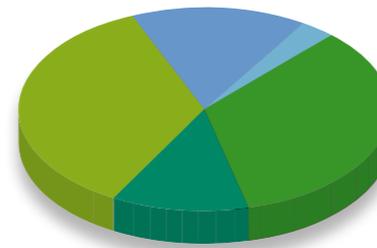
IFAH-Europe is led by a ten-member Council comprising representatives from member companies and national industry associations. Headed by IFAH-Europe Chairman Brian Clark, the Council is the federation's decision-making body.

Policies agreed by the Council are executed by four key operating committees: the Technical and Regulatory Committee (TRC); the Food Chain Committee (FCC); the Committee of National Associations (CNA); and the Communications Committee (ComCom). These are supported by a range of working parties and ad-hoc groups focused on specific issues, and by a permanent, Brussels-based secretariat led by IFAH-Europe Managing Director Declan O'Brien.

IFAH-Europe is a member of IFAH, the federation representing the animal health industry at international level.

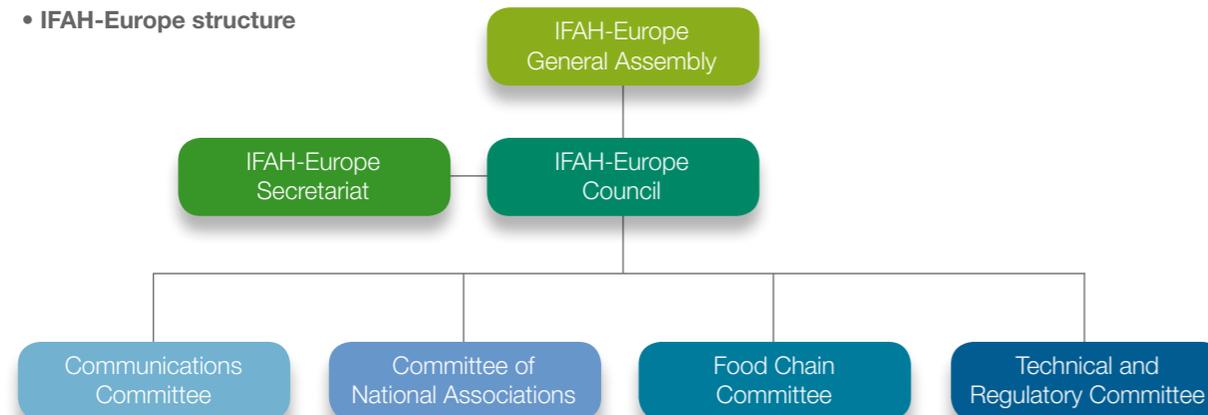
## • Animal health market by region

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- North America: 34.1 %
- Latin America: 11.6 %
- Europe (East and West): 35.3 %
- Far East: 15.3 %
- Rest of world: 2.8 %

## • IFAH-Europe structure



## • CEESA survey of sales statistics (2007 data) - EUROPE

Countries covered include: AT, BE, CH, CZ, DE, DK, ES, FR, GB, GR, HU, IE, IT, NL, PL, PT, SK.  
Source: 14 IFAH-Europe and CEESA member companies. 20% added for non-participating companies

Animal health products	Subtotals	Total values	%
Vaccines		€974.395.499	23,44
<b>Antimicrobials</b>			
• Injectable forms:	€458.814.038	€875.582.521	21,07
• Oral forms:	€416.768.483		
<b>Parasiticides</b>			
• Endoparasiticides:	€392.346.644	€1.171.393.846	28,18
• Ectoparasiticides (ears excluded)	€639.232.762		
• Endectocides:	€139.814.440		
<b>Topical products (skin ecto excluded)</b>	€233.993.612	€297.704.808	7,20
<b>Other products</b>		€837.375.631	20,70
<b>Total</b>		€4.156.452.305	100,00

## IFAH-Europe Council Members

Chairman	<b>Brian Clark</b> Virbac SA
Vice-Chairs	<b>Martin Schneidereit</b> BfT - Bundesverband für Tiergesundheit, Germany
	<b>Jochen Wieda</b> Intervet/Schering-Plough Animal Health
Treasurer	<b>Folkert Kamphuis</b> Novartis Animal Health Inc
Members	<b>Jean-Louis Crosia</b> Merial
	<b>Santiago de Andrés</b> VETERINDUSTRIA
	<b>Jean-Louis Hunault</b> SIMV
	<b>Jens Kjær</b> Boehringer Ingelheim Animal Health GmbH
	<b>Anne Birgitte Lundholt</b> VIF
<b>Phil Sketchley</b> NOAH	

## IFAH-Europe Secretariat

Managing Director's office	<b>Declan O'Brien</b> Managing Director
	<b>Florentina Pardo</b> Executive Assistant
Technical affairs	<b>Rick Clayton</b> Technical Director
	<b>Sylvie Meillerais</b> Technical Project Manager
	<b>Yara Antonissen</b> Technical Assistant
	<b>Marie-Hélène Delvaux</b> Executive Secretary
Communications	<b>Bernd Halling</b> Communications Director
	<b>Myriam Alcain</b> Communications Manager
	<b>Laurence Leclercq</b> External Communications Officer
	<b>Pamela Barcellona</b> Senior Secretary
Administration and IT	<b>Linda Moortgat</b> Administration Manager & IT Coordinator

## Corporate members

Alpharma Animal Health Division

Bayer HealthCare AG, Animal Health Division

Boehringer Ingelheim Animal Health

Ceva Santé Animale

Elanco Animal Health

Fort Dodge

Huvepharma NV

Janssen Animal Health

Merial Ltd

Novartis Animal Health Inc

Orion Corporation

Pfizer Inc., Animal Health

Intervet/Schering-Plough Animal Health

Vétoquinol

Virbac SA

## National member associations

Belgium	<b>pharma.be</b> Association Générale de l'Industrie du Médicament
Cyprus	<b>CAVEMID</b> Cyprus Veterinary Medicines Importers and Distributors Association
Denmark	<b>VIF</b> Veterinærmedicinisk Industriforening
Finland	<b>PIF</b> Pharma Industry Finland
France	<b>SIMV</b> Syndicat de l'Industrie du Médicament Vétérinaire et Réactif
Germany	<b>BfT</b> Bundesverband für Tiergesundheit
Greece	<b>HAVEPHARM</b> Hellenic Association of Distributors, Importers and Manufacturers of Veterinary Pharmaceuticals
Italy	<b>AISA</b> Associazione Nazionale dell'Industria della Salute Animale
Ireland	<b>APHA</b> Animal & Plant Health Association
Netherlands	<b>FIDIN</b> Vereniging van Fabrikanten en Importeurs van Diergeneesmiddelen in Nederland
Norway	<b>LMI</b> Legemiddelindustriforeningen

Poland	<b>POLPROWET</b> Polish Association of Veterinary Drug Producers and Importers
Portugal	<b>APIFARMA</b> Associação Portuguesa da Indústria Farmacêutica
Spain	<b>VETERINDUSTRIA</b> Asociación Empresarial Española de la Industria de Sanidad y Nutrición Animal
Sweden	<b>LIF</b> Läkemedelsindustriföreningen
Switzerland	<b>SGCI</b> Chemie Pharma Schweiz
United Kingdom	<b>NOAH</b> National Office of Animal Health Ltd

## Associated members

Croatia	<b>VETCRO</b>
Slovenia	<b>SPMA</b> Working Group for Animal Health

## Glossary

<b>3Rs</b>	Refine, reduce and replace (the use of animals in product testing)
<b>AI</b>	Avian influenza
<b>CAHP</b>	Community Animal Health Policy
<b>COPA-COGECA</b>	Committee of Professional Agricultural Organisations - General Committee for Agricultural Cooperation in the European Union
<b>CVMP</b>	EMA Committee for Medicinal Products for Veterinary Use
<b>DCP</b>	Decentralised Procedure
<b>DG</b>	Directorate General
<b>DISCONTTOOLS</b>	Disease Control Tools
<b>EAFN</b>	European Agri-Food Network
<b>EC</b>	European Commission
<b>EFSA</b>	European Food Safety Authority
<b>EISA</b>	European Initiative for Sustainable Development in Agriculture
<b>EMA</b>	European Medicines Agency
<b>EP</b>	European Parliament
<b>EPAA</b>	European Partnership for Alternative Approaches to Animal Testing
<b>EPRUMA</b>	European Platform for the Responsible Use of Medicines in Animals
<b>ETPGAH</b>	European Technology Platform for Global Animal Health

EU	European Union
FAO	Food and Agriculture Organisation of the United Nations
FVE	Federation of Veterinarians of Europe
GL	Guideline
GLOBALGAP	The Global Partnership for Good Agricultural Practice - voluntary certification body representing retailers of agricultural produce
GMP	Good Manufacturing Practice
HMA	Heads of Medicines Agencies
IWP	Immunologicals Working Party
MA	Marketing Authorisation
MRL	Maximum Residue Limit
MRP	Mutual Recognition Procedure
MRSA	Methicillin-resistant staphylococcus aureus
NGO	Non-Governmental Organisation
OIE	World Organisation for Animal Health
QWP	EMA Quality Working Party
VICH	International Cooperation on Harmonisation of Technical Requirements for Registration of Veterinary Medicinal Products
WHO	World Health Organisation