

NOAH Annual Review 2022

and Outlook for 2023



Introduction

2022 represented a big change for NOAH: its Enfield office, home since 1987, was sold and the NOAH HQ moved to Co-Space Stevenage. With the NOAH team still primarily working remotely, this new office has proved an excellent hub for the team to meet in person.

Caitrina Oakes (Vetoquinol) continued as NOAH Chair, with the full officer team being Jan Moehlenbrock (MSD Animal Health) as Senior Vice-Chair, Ned Flaxman (KRKA UK Ltd) as Vice Chair and Mark Collinson (Norbrook Laboratories GB) as Treasurer, supported by the NOAH Board.



We welcomed Lucy Coyne (Senior Policy Advisor) and Jodie Bartels (Policy Intern: Environment and Sustainability) to the NOAH team and said goodbye to Grace O’Gorman, Rachael Henderson and Emma Tombling.

NOAH’s video explains how NOAH supports the future for animal health.

Watch the full video at youtube.com/watch?v=yG9qD9-Gtb8

New Strategy

The NOAH Strategy 2022–25 was developed at the NOAH Board’s first face-to-face meeting since 2019. NOAH’s purpose was redefined, explaining that we promote the benefits of licensed medicines and solutions for the health and welfare of all animals.

Our key objectives have also evolved:

- Access to Medicines (which includes international trade)
- Regulatory (which includes self-regulation through our Code of Practice on the Promotion of Animal Medicines)
- Sustainability (this is viewed very much in a One Health context)
- Public Affairs
- Governance



Key Objectives and Deliverables 2022–25

Access to medicines
To support the UK animal health industry to support animal health medicine and promote the benefits of licensed medicines, ensuring our voice is heard in international trade.

Regulatory
Provide a robust regulatory framework to ensure high standards of UK animal health and welfare and promote the benefits of licensed medicines.

Key Deliverables:

- Review international trade and regulatory issues
- Update our Code of Practice on the Promotion of Animal Medicines
- Develop a regulatory framework for self-regulation
- Review UK government policy on animal health and welfare
- Develop a regulatory framework for self-regulation
- Review UK government policy on animal health and welfare
- Develop a regulatory framework for self-regulation

Key Objectives and Deliverables 2022–25

Sustainability
Review international trade and regulatory issues and of medicines for all animal health and performance health care products.

Public Affairs
Establish an NOAH position on the issues of the industry, conduct public relations and ensure our voice is heard.

Key Deliverables:

- Review international trade and regulatory issues
- Update our Code of Practice on the Promotion of Animal Medicines
- Develop a regulatory framework for self-regulation
- Review UK government policy on animal health and welfare
- Develop a regulatory framework for self-regulation
- Review UK government policy on animal health and welfare
- Develop a regulatory framework for self-regulation

Key Objectives and Deliverables 2022–25

Governance
Work collaboratively with members to define policy priorities, communicate effectively to ensure NOAH remains the trusted, expert partner for all UK veterinary medicine and animal health issues, primarily focused on safety & through working.

Key Deliverables:

- Review & update NOAH's governance framework
- Develop a regulatory framework for self-regulation
- Review UK government policy on animal health and welfare
- Develop a regulatory framework for self-regulation
- Review UK government policy on animal health and welfare
- Develop a regulatory framework for self-regulation

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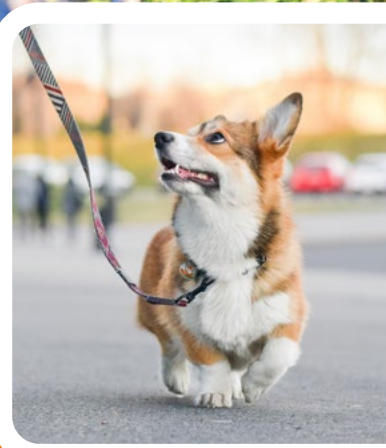
Access to medicines

Northern Ireland Protocol

A major focus all year was raising the profile of the predicted impact of the Northern Ireland Protocol on the availability of veterinary medicines in Northern Ireland. Working alongside other stakeholders, such as the British Veterinary Association NI and Ulster Farmers Union, NOAH ensured that politicians across all major parties in the UK were aware of the importance of finding a solution, through a series of meetings and lobbying briefs. There was detailed contact with the Veterinary Medicines Directorate (VMD) and other government departments. In addition, with AnimalhealthEurope, NOAH conveyed concerns to the European Commission. This resulted in veterinary medicines being recognised by national media amongst issues needing to be solved. With the prediction that up to 50% of the current veterinary medicines would no longer be available on the NI market, the threat to animal welfare and food security is very real.

Due to have expired at the end of 2022, the last-minute 3 year extension by the European Commission of the transition arrangements was most welcome and will help ensure the immediate threat to continuity of supplies of veterinary medicines to NI is lifted.

Concerns remain for the longer term; there is no change in the current divergent positions of the European Commission and the UK with regards to the requirements for regulation of products and supply into NI. Consequently, there is no consistent direction for industry to follow, which is extremely challenging for our highly regulated sector, meaning the risk to future availability of veterinary medicinal products in NI remains. NOAH continues to lobby on this issue.



International Trade

NOAH has contributed to consultations on international trade agreement negotiations between the UK and other countries, always setting out its priorities in relation to veterinary medicines.

The UK animal health sector – life sciences excellence

The animal health industry is an important part of the UK's developing life sciences sector and can support the Government's scientific ambitions. Our campaign at the start of 2022 set out to highlight this. We held a panel event including Lord Benyon, Minister for Rural Affairs, Access to Nature and Biosecurity as key panellist. Investment in research facilities remains important in the fight against the challenge of animal disease.



The story of a medicine

Before it can be prescribed or purchased to prevent or treat animals, a veterinary medicinal product will have undergone stringent regulatory assessment to ensure safety, quality and efficacy, and once authorised, a complex process with many checks and balances is in place to enable supply.

NOAH has embarked on a project to explain this process in more detail. Our November virtual conference 'Veterinary medicines supply from discovery to animal' set the scene, with Dr Abigail Seager and John Millward from VMD speaking on regulation, David John from AnimalhealthEurope on supply chain and Prof Alasdair Cook from University of Surrey on discovery and data.



Regulatory

Veterinary Medicines Regulations: delay to the VMR review consultation

The year was spent in anticipation of the launch of the VMD consultation on the revision to the Veterinary Medicines Regulations 2013, in need of overhaul. NOAH lobbied to ensure that the importance of this did not go unrecognised by policy makers, and worked with members to ensure NOAH is clear on what the regulations need to include to encourage innovation and reduce unnecessary administrative burden, thus helping ensure continued access to veterinary medicinal products.

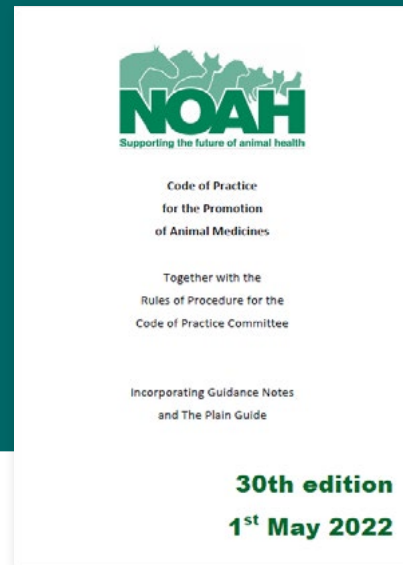
Regulatory divergence

Dialogue with the VMD continued throughout the year, with scheduled liaison and licensing meetings. One area of concern was the regulatory divergence opening between GB and the EU, as the new EU Veterinary Medicines Regulation was implemented. VMD listened and made provisions to enable companies to continue to operate as they do now, until the new GB Veterinary Medicines Regulations come into effect, with future arrangements being part of the upcoming consultation.

Regulatory opportunities

NOAH attended a meeting hosted by regulators from UK, USA, Australia, Canada and New Zealand.

A presentation was delivered on the future plans for collaborative regulatory review activity across the 5 regulatory agencies.



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. This ensured promotion was kept on track – during the year there were no cases.

To advise members about the Code, 5 bespoke training sessions were held for companies, with around 200 delegates. In addition, 3 open Code of Practice training days (2 in person and one online) were held, attended by over 50 delegates.

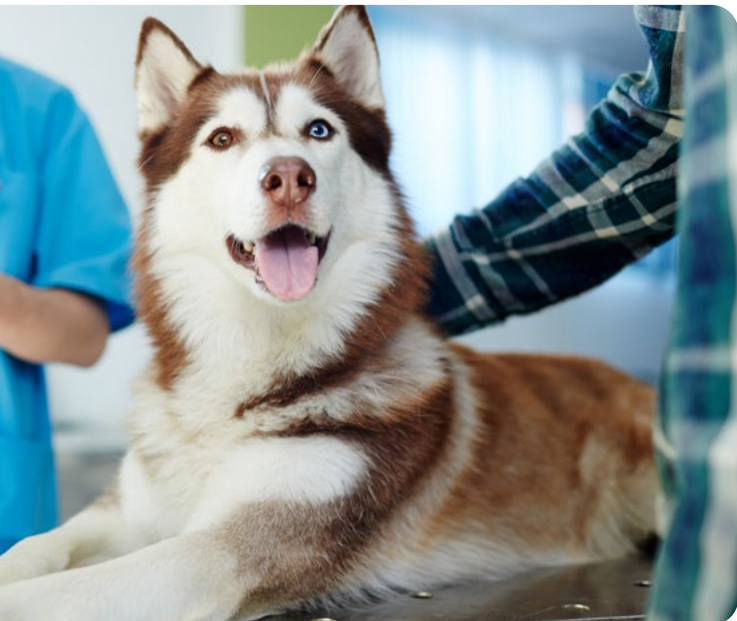
A major review was undertaken to ensure the NOAH Code continues to be fit for purpose in a changing world, with the new edition coming into force in May.

Sustainability

Sustainability strategy

The sustainability vision of the animal health industry is ensuring availability of veterinary medicines and animal health products, ensuring protection of animal health and welfare, human health and the environment, with veterinary medicines and other animal health products being manufactured, distributed and used in a sustainable manner. NOAH published its [sustainability strategy](#), explaining as the world faces significant challenges, the animal health industry plays an essential role in providing solutions to meet them.

Through the NOAH Environment and Sustainability Sub-Committee, we have developed [information on the regulatory environmental risk assessments \(ERAs\)](#) which all veterinary medicinal products are subject to before a Marketing Authorisation is granted.



Companion animal parasiticides

Debate continued about the use of licensed veterinary medicines and their potential impact on the wider environment. NOAH continued to comment in the veterinary press, and take part in workshop discussions, based on our [Q&A document](#) explaining the safeguards that exist to prevent adverse outcomes.

There has been extensive dialogue involving NOAH, the British Veterinary Association (BVA), the British Small Animal Veterinary Association (BSAVA) and the British Veterinary Zoological Society (BVZS) setting out some core principles around responsible parasiticide use. NOAH provided input into their resource to help veterinary professionals practise responsible, risk-based use of parasiticide products for dogs and cats.

Whilst there was a willingness to listen to each parties' concerns, there were some points where NOAH and the BVA continued to hold differing views: nevertheless, BVA's final document did reflect many of NOAH's suggestions.

Responsible Use

Collaboration is key to the responsible use of veterinary medicinal products. NOAH continued to work with others including:

- **RUMA Alliance** (Responsible Use of Medicines in Agriculture), which published its [Targets Task Force 2 \(TTF2\) progress report](#), building on their success which has helped to halve sales of antibiotics to treat UK farm animals.
- The **RUMA Companion Animal and Equine group**, which published its [first progress report](#).
- A One Health consortium (overall led by NHS England) which included the first **veterinary antibiotic amnesty** during World Antibiotic Awareness Week in November. This encouraged responsible use, and animal owners to return unused antibiotics to their vets/pharmacy.
- **Bella Moss Foundation**, on a short animation '[Proper Use of Medicines](#)'
- **SCOPS** (Sustainable Control of Parasites in Sheep) and **COWS** (Control of Worms Sustainably) which continued their work on helping ensure continued effectiveness of antiparasitic products. NOAH was on the Core Steering Group for a new organisation for equines, **CANTER** (Controlling ANTiparasitic resistance in Equines Responsibly), which will have a similar role for that sector.
- [Animal Health and Welfare Pathway](#) partnership between Government, farmers and other stakeholders, aiming to deliver benefits to farm health and welfare, supporting more sustainable and productive farming.
- Stakeholder groups, including **Ruminant Health and Welfare Group**, the **Cattle Antimicrobial Guardian Group**, **Pig Health and Welfare Council**, **Equine Industries Group** and **Canine and Feline Sector Group**



Livestock Vaccination Guideline

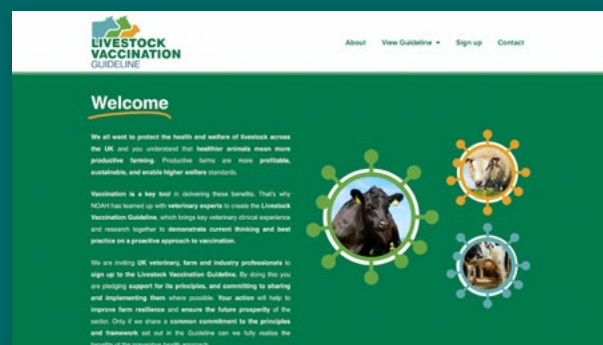
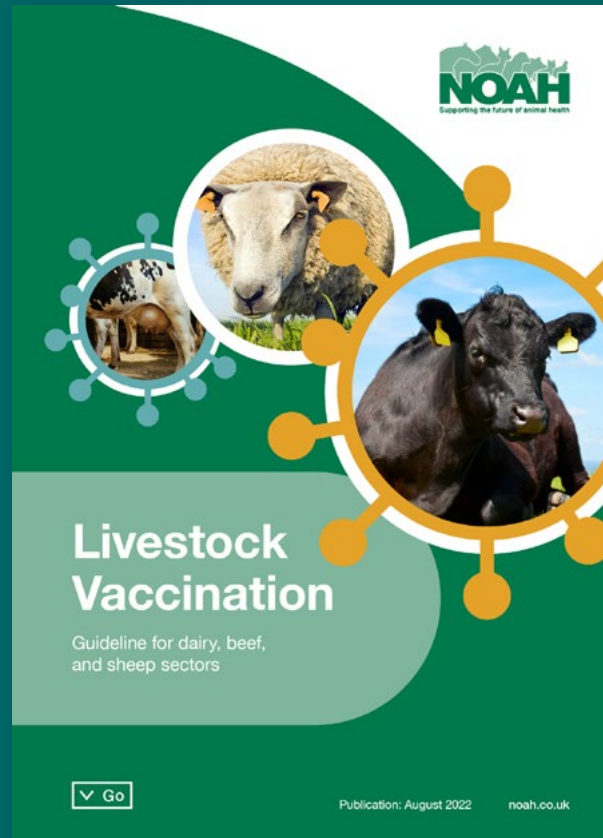
NOAH's [Livestock Vaccination Guideline](#) was launched in May, providing support to vets, SQPs and farmers to help improve the health and welfare of UK sheep and cattle and support farm resilience and sustainable improvements in productivity.

Healthier animals mean better welfare and more sustainable farming. A preventative health approach for UK livestock, supported through vaccination, is integral to achieving this.

The [Guideline](#), authored by experts Jonathan Statham, Fiona Lovatt and Joe Henry with a foreword from DEFRA Minister Lord Benyon, brings together current veterinary clinical experience and research to demonstrate a proactive, best practice approach to vaccination in the dairy, beef and sheep sectors. It encourages discussion between vets and farmers to help them apply effective vaccination strategies on farm, catalysing change to ensure that the benefits from livestock vaccination are realised.

In September, to support uptake, the [Sign the Pledge](#) campaign was launched, asking people to show their commitment to preventing disease.

The [Guideline](#) was well received, including by policy makers such as Ruminant Health and Welfare Group and Animal Health and Welfare Board England. It supports RUMA strategies to reduce the need to use antimicrobials, its use provides a Farm Vet Champion SMART goal, and it has been endorsed by organisations such as the British Cattle Veterinary Association. We continue to work to establish it as an integral part of livestock health and welfare strategies to increase its reach.



Public Affairs

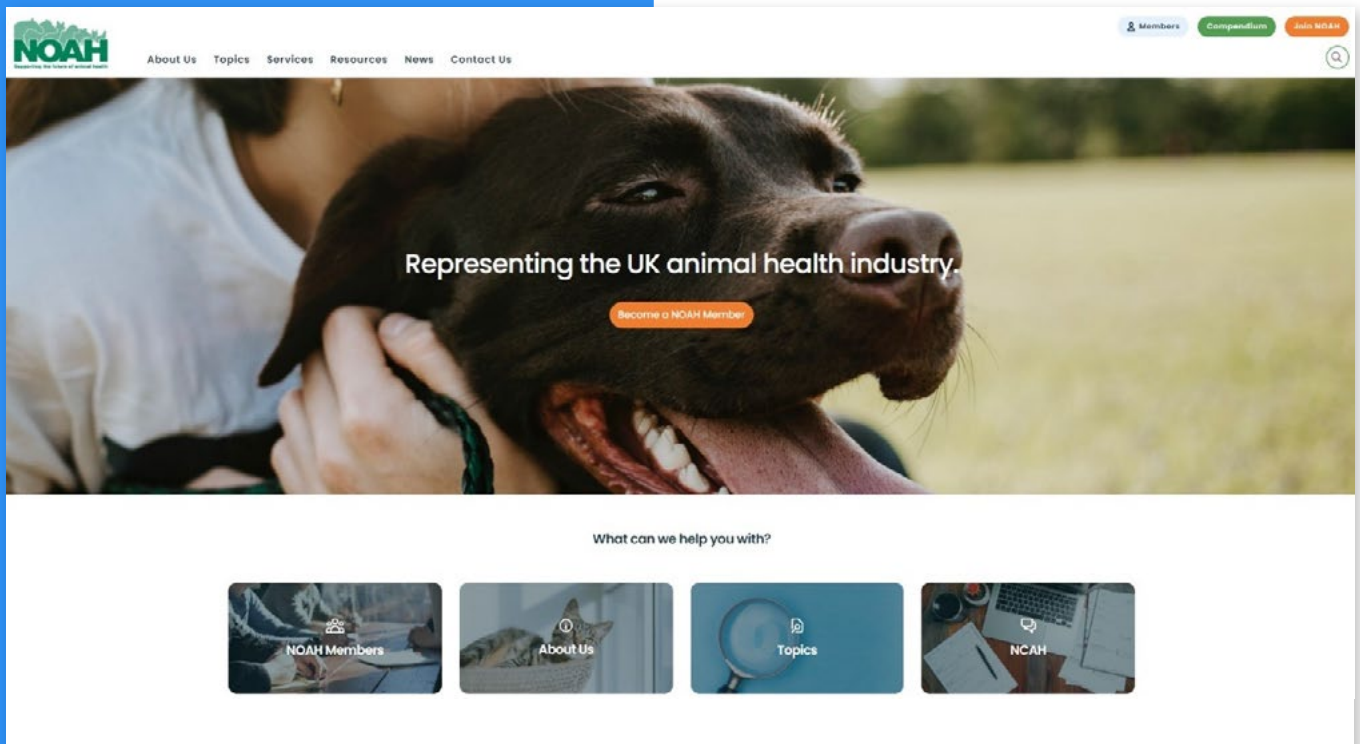
Stakeholder mapping

To help drive the new NOAH strategy, NOAH undertook a stakeholder mapping exercise to ensure we can build relationships with appropriate stakeholders, and work alongside others to help achieve our aims.

New NOAH website and social media

To better demonstrate how NOAH works to support its members, the [NOAH website](#) was redesigned and relaunched.

Social media has been integral to NOAH's communications. NOAH's twitter account @UKNOAH had over 96,000 impressions over the year and gained over 250 new followers, bringing the total to close to 3800. LinkedIn followers nearly doubled, now over 2200, with nearly 850 unique visitors during the year.



Campaigns

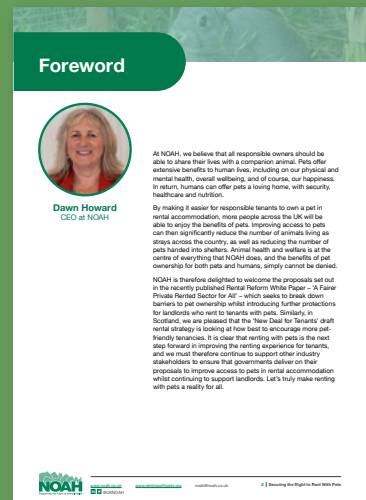
Securing the Right to Rent with Pets: Making One Health Housing a Reality

In the UK, owning a pet in rented accommodation can be very difficult. NOAH continued 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.

Working alongside other stakeholders such as AdvocATS EM, we have achieved major success with the publication by the Department of Levelling Up, Housing and Communities (DLUHC) of the 'Fairer Private Rented Sector White Paper' which includes plans to legislate on removing a landlord's ability to impose a blanket ban on pets. We published a report from NOAH surveys of tenants and landlords, to support this work.

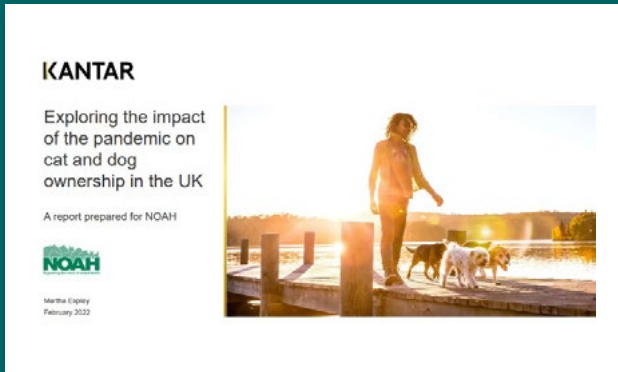
Going forward, our role will move from leading to support on this topic, as we help ensure the White Paper clause makes it through to final legislation.

This Campaign has been shortlisted for several campaign of the year awards.



Pet population and pet health survey

In January 2022, NOAH commissioned Kantar to undertake a report 'Exploring the impact of the pandemic on cat and dog ownership in the UK' to better understand the changed pet ownership landscape. The UK has recorded a substantial rise in cat / dog ownership levels, and the research explored who they were, and what were their current and future approaches to pet health care.



First presented in a members' webinar, the study found:

Approximately **3 in 10 cat/dog owners welcomed a new pet during the pandemic** – of whom **a third were first-time pet owners**. Within these new owners, the **most likely demographics** to have acquired a cat or dog during the pandemic were **young adults (18-34-year-olds) and parents with children under 10**.

Although **fewer than 1 in 5 respondents expressed concerns about their ability to cope** with their pet, **rates were notably higher among owners who acquired their pet during the pandemic**, with dog owners particularly reporting stress, worry or fear.



81%

81% cat/dog owners who acquired a pet during the pandemic said that their pet **supported their mental health**, whilst 85% of dog owners said their dog **kept them physically active**.

85%

In particular 15% and 27% of new cat and dog owners respectively were **more likely to experience behavioural issues** in their animal; whilst 13% of cat and 27% of dog owners state they **are struggling to look after their pet**. A worrying 31% of new cat/dog owners feared they **may have to give up their pet** as a result of the various challenges they now face.

31%

15%

27%

13%

However, despite 92% of new cat and dog owners agreeing that their pet is now **part of their family**, these new owners are now struggling to adapt to return to something closer to pre-pandemic life.

92%

The results supported the 2022 National Pet Month campaign in April where NOAH worked alongside PFMA to support 'pandemic pet owners'.



NOAH Member Event

A NOAH lunchtime reception at the House of Lords was hosted by Professor the Lord Trees to celebrate the role of the animal health industry. NOAH Senior Vice Chair Jan Moehlenbrock from MSD Animal Health explained how our sector will build on past achievements for a successful future. Attended by over 100 politicians, NOAH members and guests, Lord Trees spoke of the importance of innovation and Lord Benyon, DEFRA Minister responsible for animal health, welcomed the publication of the Livestock Vaccination Guideline.



 <p>BE REPRESENTED</p> <p>with regulators, government & policymakers</p>	 <p>GET SUPPORT</p> <p>on regulatory issues & important topics from sustainability to pharmacovigilance</p>	 <p>STAY INFORMED</p> <p>with newsletters, regular email updates, webinars & an annual conference</p>
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Member communications

A social media campaign was undertaken to explain NOAH's member support. Run over 8 weeks, the campaign increased NOAH's followers on both Twitter and LinkedIn. Posts received above average engagement including from current and potential members. Traffic to the NOAH website membership page increased by 983% compared to the same time period in 2021.

Governance

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

The NOAH Certificate of Animal health (NCAH) qualification helps ensure that animal medicines representatives can provide accurate and ethical information to prescribers and sellers of animal medicines in compliance with the NOAH Code of Practice for the Promotion of Animal Medicines.

The NCAH is written into the rules for NOAH company membership and is a requirement of the NOAH Code of Practice for the Promotion of Animal Medicines. It is formally academically accredited by Harper Adams University, who also host both the training courses and examinations.

We held a [virtual award event](#) for the top NCAH students for 2021, which led to good social engagement and media coverage throughout April.

NOAH Certificate of Animal Health

- Supports company training for sales representatives
- Gives a grounding in physiology, disease and treatment options
- Covers the legal framework surrounding the sale of animal medicines
- Accredited by Harper Adams University

NOAH Compendium

NOAH's free-to-access [NOAH Compendium website](#) and app continued to provide up to date information, with users surveyed to understand how further improvements could be made. The 2022 edition of the NOAH Compendium book, distributed to 5273 veterinary practices, was the last full edition of the hard copy to be published. This decision was taken as part of NOAH's environmental commitment to ensure information would be up to date.

Download our app

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Compendium of Data Sheets for Animal Medicines

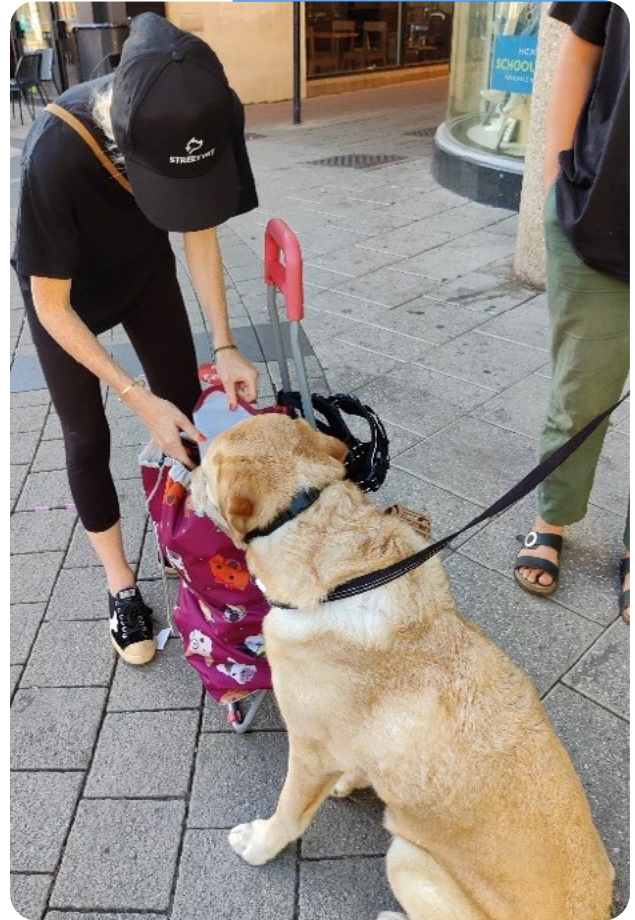
Member offer

We welcomed 3 new associate members to NOAH during 2022: Paul Dick Associates, Proagric and Argenta.

We continued to represent NOAH globally, at HealthforAnimals and in Europe, through AnimalhealthEurope, continuing to contribute to many committees and initiatives.

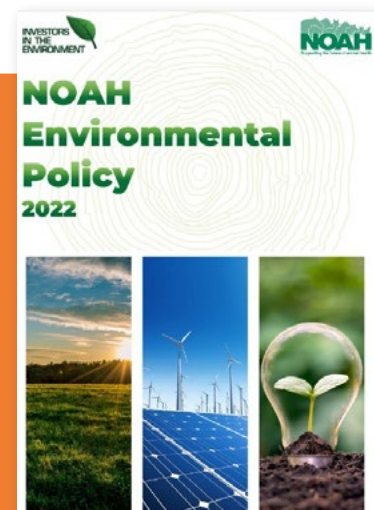
Charity

[StreetVet](#) was chosen as NOAH's charity for the year, receiving donations from the sale of our last Compendium. NOAH's Chief Executive Dawn Howard spent an evening with StreetVet to find out more about their work first hand. Our relationship will continue through 2023.



NOAH's Environmental Policy

NOAH's new [Environmental Policy](#) explained that NOAH is helping to assure a sustainable future by utilising the Investors in the Environment (iE) scheme to develop and improve the environmental impact of our business operations as we progress through the accreditation.



Outlook for 2023 and beyond



2023 sees the long-awaited public consultation on the new **GB Veterinary Medicines Regulations (VMR)**. This has been overdue: NOAH members need a regulatory framework that can enable our sector to thrive, that will encourage innovation and drive down unnecessary administrative burden. This will help ensure UK animals have access to a full range of veterinary medicines and does not become side-lined whilst products are first launched elsewhere, or it becomes unviable to keep a medicine on the market.

The animal medicines sector operates on a regional and global basis. For this reason, should GB diverge excessively from regulatory approaches in other parts of the world, requiring specific reports and data to be generated, this will lead to a significant increased administrative burden for animal medicines companies, and will impact on availability of medicines here.

We will also be continuing our robust support of the current UK system for **classification and distribution of veterinary medicinal products**, with veterinary medicines available via multiple routes. Our preference is that the SQP route remains an option for the prescription and distribution of a range of veterinary medicinal products for both farm animals and companion animals to ensure the SQP's role (especially in isolated rural areas) for animal health and welfare can continue.

NOAH will be making a full submission to the VMD in response to the consultation and we look forward to dialogue towards the introduction of the new Regulations. The VMR review provides the opportunity to support competitiveness and increase the availability of veterinary medicinal products to British livestock and companion animals, whilst still ensuring that our regulations are fit for purpose to protect treated animals, the environment, those administering animal medicines and ensuring the safety of food derived from animals.

Whilst the last-minute decision by the European Commission to extend the transition arrangements for veterinary medicines in relation to the **Northern Ireland Protocol** by 3 years was most welcome and will ensure the immediate threat to continuity of supplies of veterinary medicines to Northern Ireland is lifted, a long-term solution still has not been found. NOAH will continue to work on this issue, to try to avoid the animal health and welfare issues that a potential loss of up to 50% of products to the NI market that full Protocol implementation could bring. The Windsor Framework does not include veterinary medicinal products within its scope.

We know that the extremely stringent regulatory process to research and develop a veterinary medicine and achieve a marketing authorisation, and the complex supply chain, are little understood. A veterinary medicine is not a commodity: NOAH will highlight the **story of a medicine** during 2023.

Healthier animals are more sustainable and a major focus for 2023 will be around the **animal health sector's role in sustainability**.

In National Pet Month 2023 (April), NOAH will kick off a compliance campaign '**read the label**', predominantly through our social media channels. We will gain support from other organisations to raise awareness of the importance of following label and packaging instructions so veterinary medicines are used responsibly and effectively including observing mitigating factors such as those to protect the environment.

New functionality will be introduced for our **Compendium app and website**, to enable access to the most up to date information on responsible use of veterinary medicines.

With the cost-of-living increases biting, and adding to the challenges facing pet owners, we will undertake a second study and use the data to help **support pet owners** as they care for their pets' health.

NOAH will continue to strive to be a more sustainable operation itself, working towards achieving our **Investors in the Environment (iE) Bronze award**.

NOAH will continue to improve and deliver high quality services to our members, representing their views and promoting the benefits of licensed medicines and solutions for the health and welfare of all animals.

