



# SIMV

SYNDICAT DE L'INDUSTRIE DU  
MEDICAMENT ET REACTIF VETERINAIRES

## THE ANIMAL HEALTH SECTOR: MARKET, CHALLENGES AND INITIATIVES



SIMV  
R&D DATING FOR  
ANIMAL HEALTH  
AND INNOVATION



# What are the challenges?





# « One Health »

A triptych between human health, animal health, and environment



**75% of emerging human diseases are of animal origin**

**By helping to prevent infectious animal diseases, veterinary medicines contribute to health security**



# Important issues of animal health

**Public health:  
zoonoses and  
food safety**

**Food security:  
animal protein**

**Competitiveness  
of stock farming**

**Environmental  
footprint of food  
producing  
animals**

**Economy:  
impact of  
animal disease**

**Innovation &  
technology  
acceptance**

**Ethical concerns  
(animal welfare)**

**Social needs**



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# What about the market?





# The French market



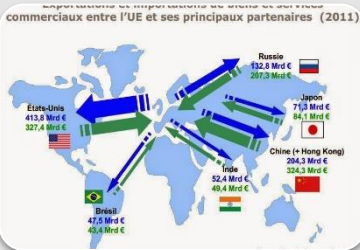
## The SIMV

- 37 manufacturers of medicines and reagents for companion & farm animals in France
- 4 French companies (Merial, Virbac, Ceva, Vetoquinol) in the world top 10 + Biomerieux, IDvet for the reagent



## Heavy network

- Over 6,600 employees including 900 R&D people
- The largest therapeutic arsenal: 2,700 AMM



## Exportation

- 30 % of companies export
- 2/3 medicines produced in France are exported



# The French market

**Human medicine**

**27 Billion France**

**25 Billion export**

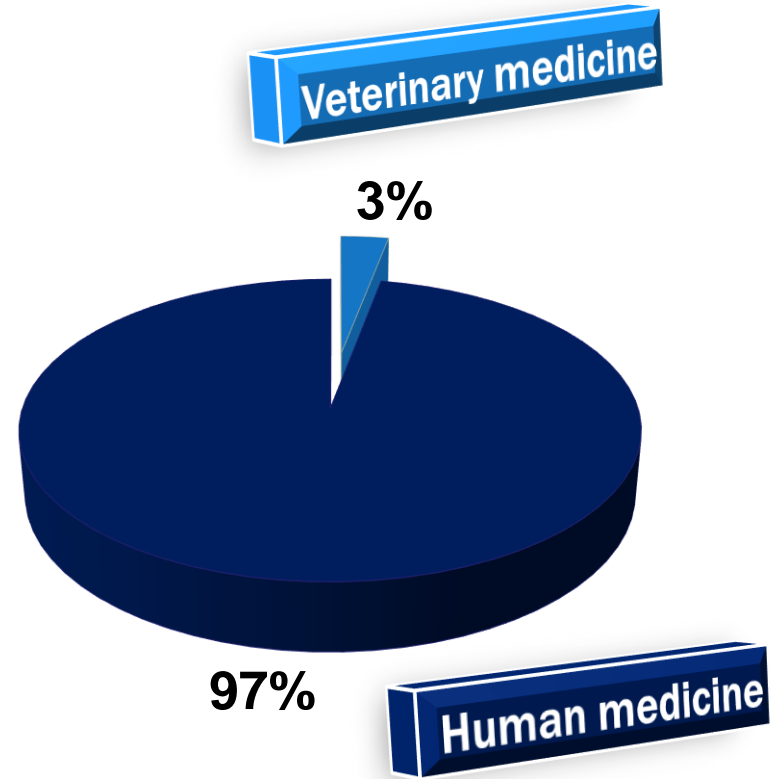
**92,5%**

**Veterinary medicine**

**865 M France**

**1,5 M export**

**173%**

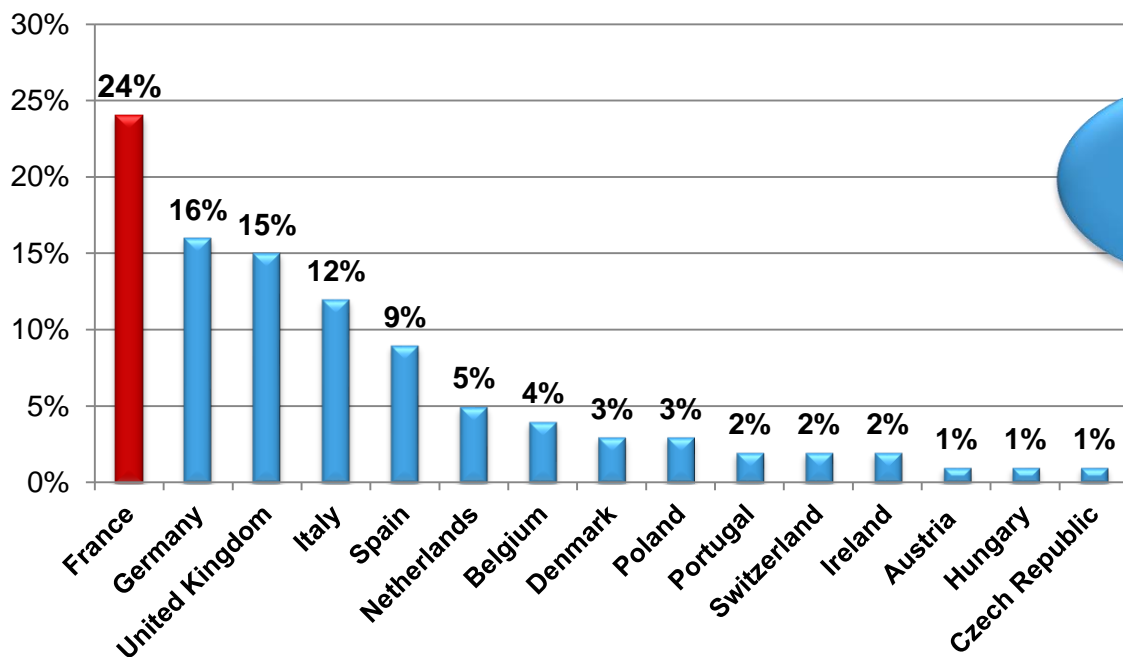


**Exportation/Internal market ratio**

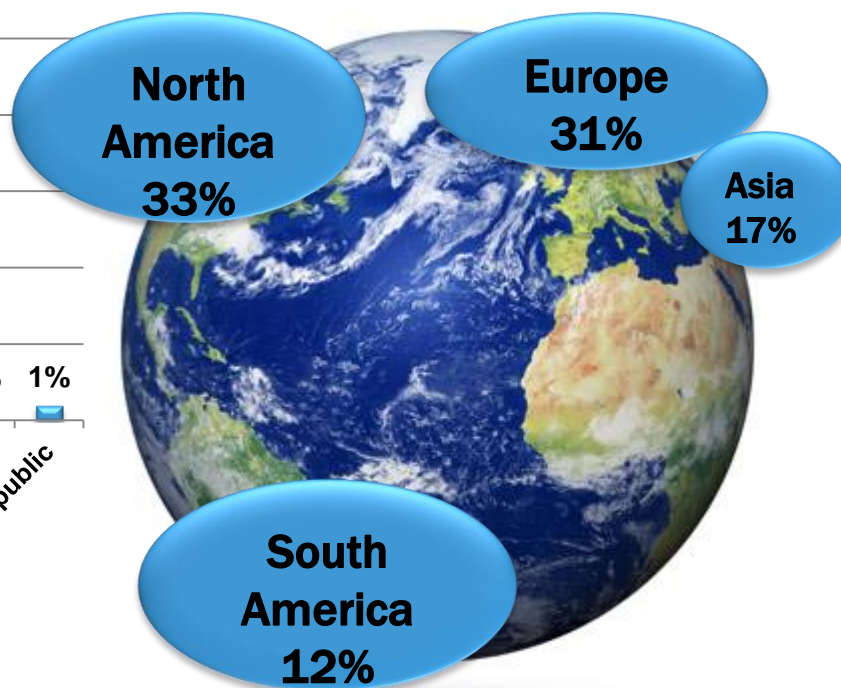


# France market is the first in Europe

- **1<sup>st</sup> european market (865 M / Europe market = €5,2 billion in 2014)**
- **Europe: the 2nd global market (Wold market = \$23 ,9 billion in 2014(+4%))**



**In 10 years = +70%**







# Animal population (million)

**X** ranking in europe



**301** (Poultry)



**19** (cattle)



**15** (pig)



**11**

**26.1%** of the French have at least one cat

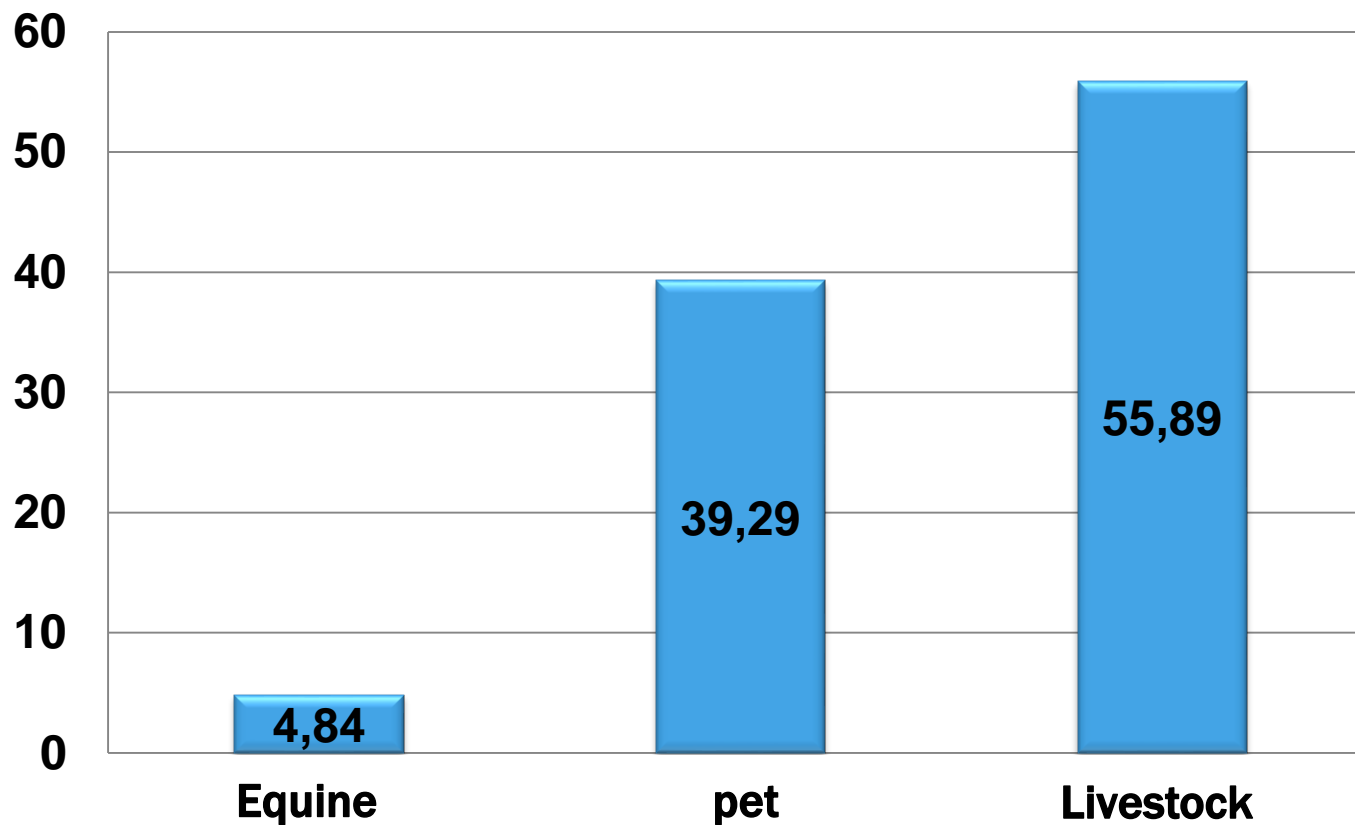


**7,7**

**22.4%** of the French have at least one dog

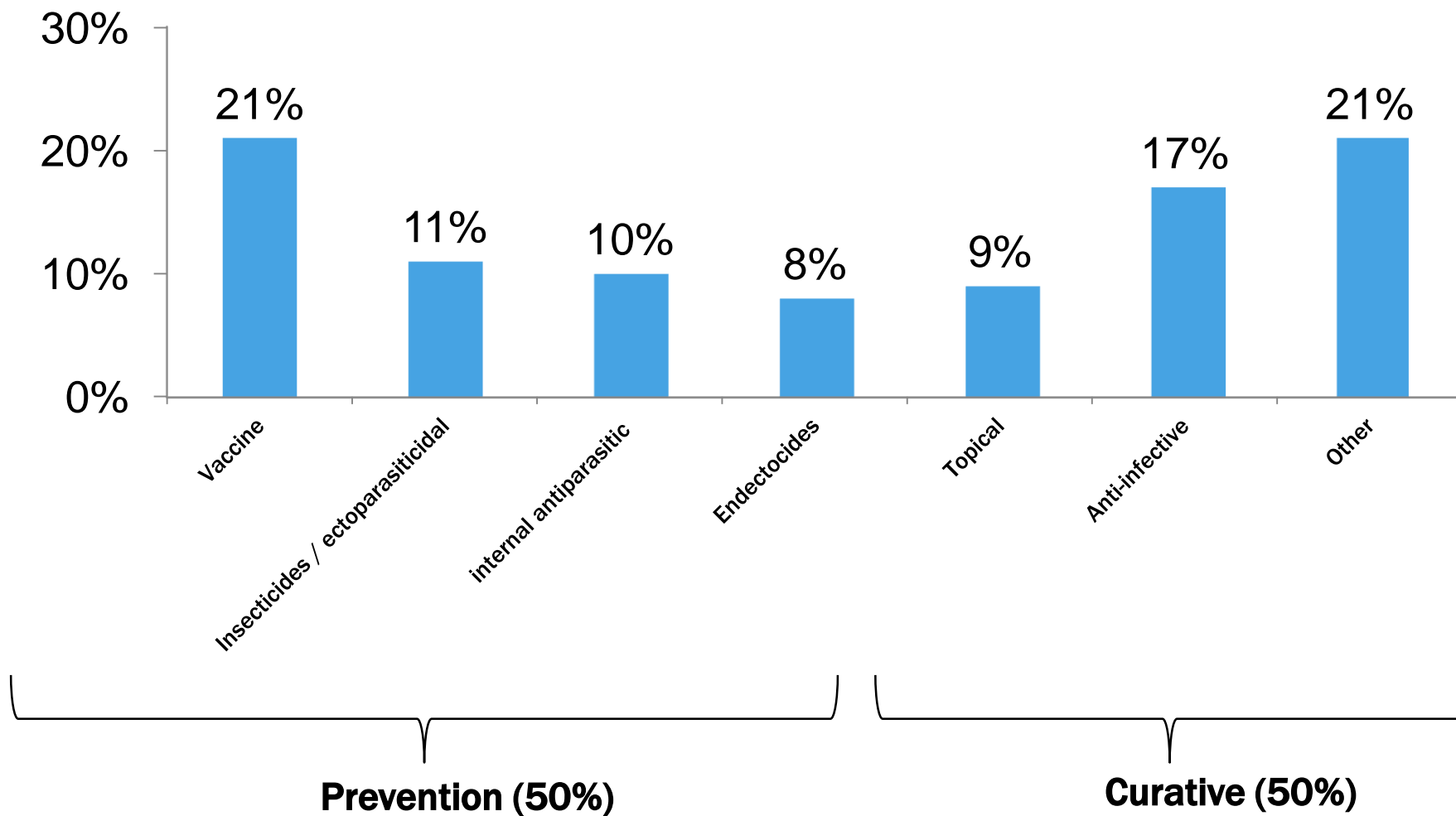


## Sales by species (%)





## Sales by therapeutic classes (%)





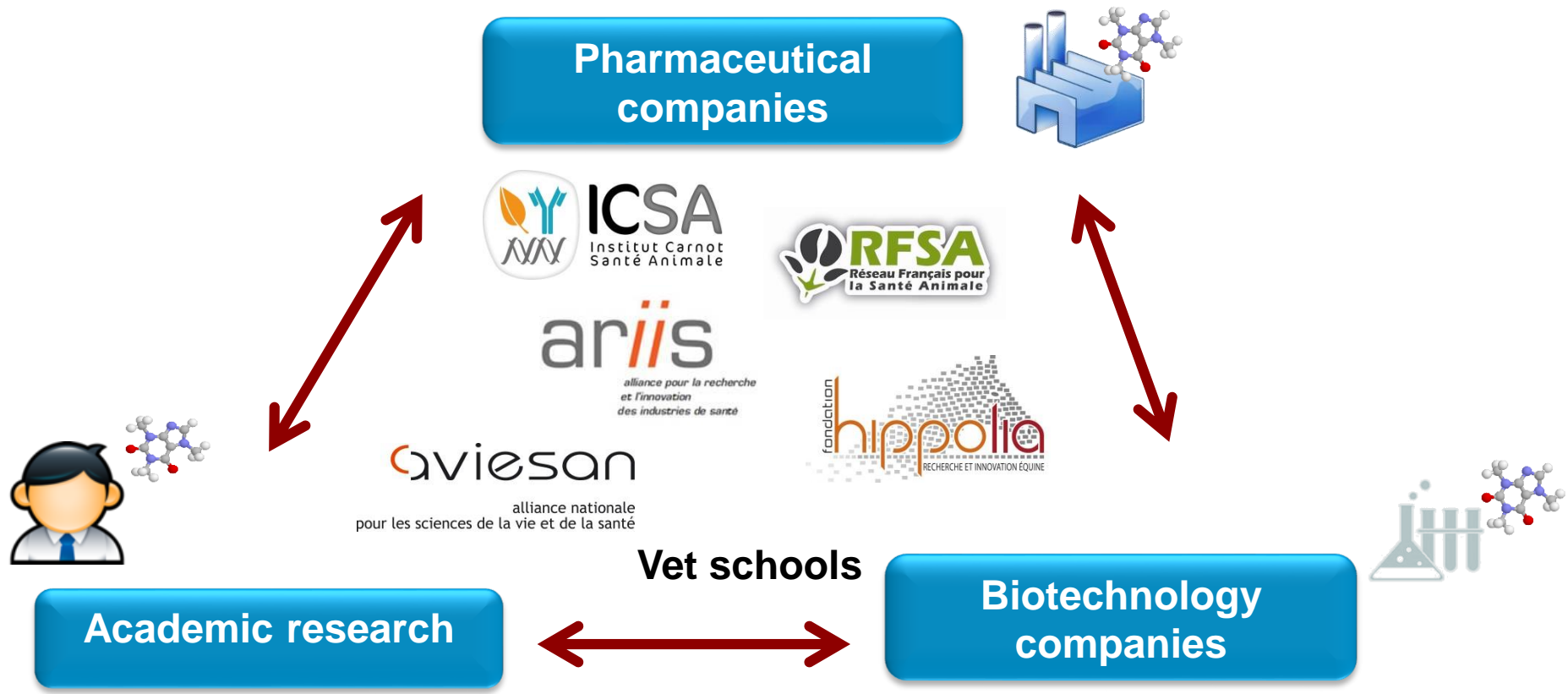
# What are our needs?



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# Open innovation: a « win-win » strategy



The veterinary medicines industry invests 10 to 12% of its share of turnover to R&D.



# R&D dating for animal health and innovation



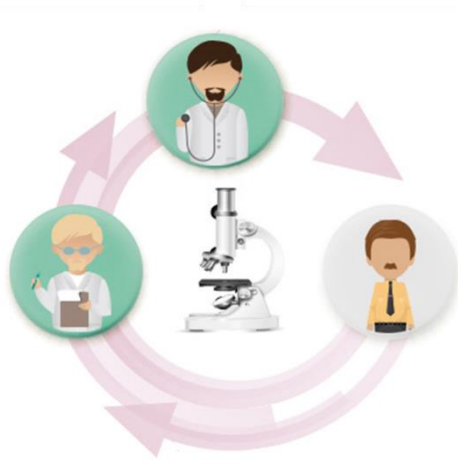
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Our ambition: To stimulate and facilitate innovation  
Our objective: To create a unique framework of exchanges  
between researchers

**The SIMV create the R&D Dating for Animal Health and Innovation**  
**First european convention in animal health**  
**Second edition : 1<sup>st</sup> and 2<sup>nd</sup>, December 2015 within BioFIT**



# R&D dating for animal health and innovation



## To promote partnerships

Innovation is born from the merging of know-how in different sectors. Partnerships enable the emergence and maturation of excellence projects.

## In a unique framework of exchanges

In the form of pre-organised face-to-face business meetings, to initiate of high-level exchanges between public and private research teams and biotechnology companies.

## For therapeutic innovation

Continued investment in R&D is necessary in order to supplement and renew the therapeutic arsenal in numerous priority fields, in human and veterinary medicine.



# Specific needs

## ❖ Anti-inflammatory and analgesics

- Alternatives to classical NSAID's
- Osteo-arthritis/joint care etc.

## ❖ Vaccines (against major animal diseases and zoonotic)

- Oral DNA vaccines against Porcine Epidemic Virus, African Swine Fever, etc.
- Emerging diseases

## ❖ Parasiticides: external and internal

- Applications in drugs, dietetic (increase genetic potential of animals) and hygiene (surface disinfection of buildings)
- Protozoa's – Vector borne diseases

## ❖ Zootechnical products

- Optimize production performance: management of herds, reproduction and production (meat, milk and eggs)
- Data management systems





# Specific needs

- ❖ **Diagnostics**: early detection of health disorders
  - Tools must be used on the field by the vet or in a lesser extend the farmer (easy-to-use)
  - Bacteriology/internal medicine...
- ❖ **Well-being and behavior**
  - Stress management, socialization, aging animal
- ❖ **Chronic non-infectious diseases in Companion Animals**
  - Atopic dermatitis, heart or kidney failure, diabetes, allergies
- ❖ **Pharmaceutical and technology solutions for improving compliance**
  - Sustained release/impact etc.



# Specific needs

- ❖ **Anti-infectives: antibiotics and alternatives to antibiotics**  
(peptides, immune modulation ..)
  - Diagnostics : Including rapid diagnostic tests
  - Treatment strategies, particularly for minor species
  - Development of immunity and vaccine strategy
  - Impact on the intestinal flora
  - Fight against bacteria and knowledge of the mechanism of resistance
  - Alternative ways to antibiotics



# Specific needs

## ❖ Precision Livestock farming

Precision Livestock Farming is the use of advanced technologies to optimize the contribution of each animal. Through this “Herd management at the individual animal” approach, the farmer aims to deliver better results in livestock farming. Those results can be quantitative, qualitative and/or addressing sustainability.

- Connected objects; Signal detection; Data processing;
- Digital : support for diagnostics (e.g. continuous monitoring) or better compliance



# Specific needs

## ❖ Biomaterials

- Less ecological foot print

## ❖ Bio-Markers

- Pathology specific markers (cario, pain inflammation etc.)
- Early pathology markers

## ❖ Customer management

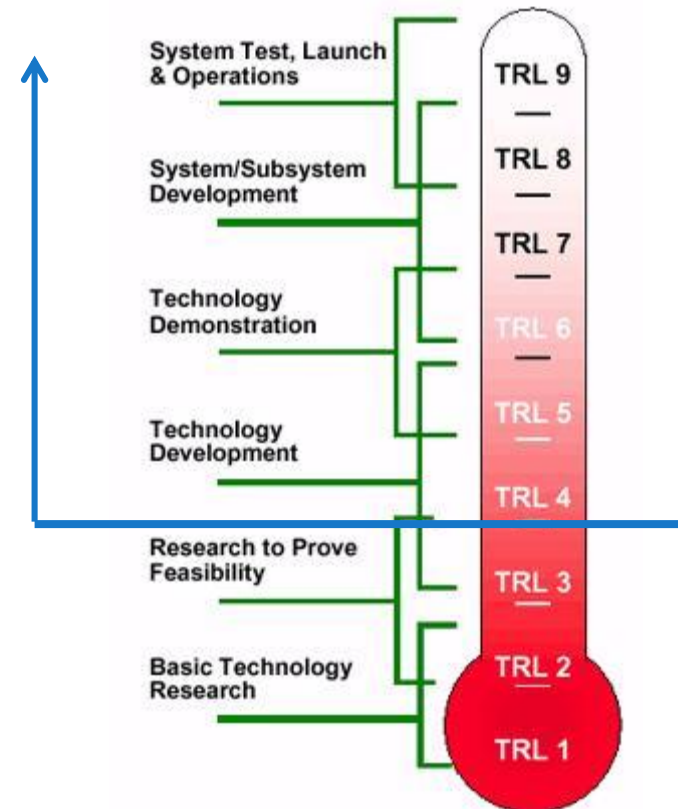
- Software based customer management solutions





# Partnerships with animal health

- ❖ Accelerate the proof of concept through the use of spontaneous animal models
- Cheaper and faster product development compared to human health industry
- 900 Animal health R&D people in the private sector in France





# Thank-you

