



# ANIMAL HEALTH INVESTMENT Europe

February 24-26, 2020

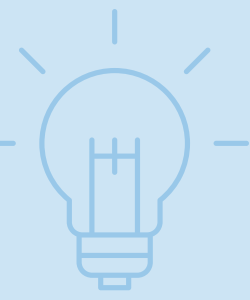
## Shaping the Future of Animal Health

Headline Partner



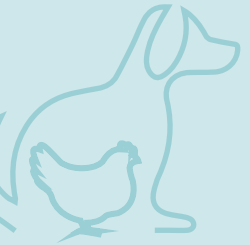
### Supporting Innovation

The premier international investment forum for animal health globally.



### 50/50 Technology Split

Companion Animals / Production Animals



### All Stakeholders

Global representation from innovative start-ups, financial investors and strategic corporate partners.



### Unrivalled Partnering with 2000+ Meetings

Engage in pre-scheduled 1-on-1 meetings to find your next European business partner.



### Start-Up Showcase

20 emerging companies presenting their innovations. Apply now to be one of them.



Associate Partners



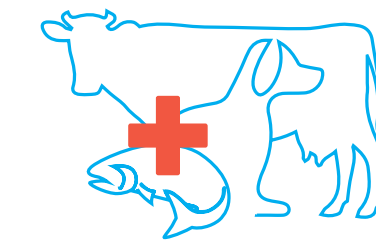
Knowledge Partner



Produced by



Etc venue, 133 Houndsditch, Liverpool St, London EC3A 7BX  
[www.animalhealthevent.com](http://www.animalhealthevent.com)



## ANIMAL HEALTH INVESTMENT Europe

Animal Health Investment Europe is the premier investment forum showcasing the most exciting investment opportunities in animal health and nutrition and connecting those businesses with financial investors and strategic corporate partners. To complement our investment pitches, we include keynote presentations and host CEO-level panel discussions that address the trends and market dynamics of the animal health industry, across all species, with 50% of our presenting businesses focused on companion animals and 50% on production animals.

As the re-shaping of animal health continues, regardless of the strategic priorities of your business, this is an event that cannot be missed in the annual calendar.



Supporting  
Innovation

50/50 Technology Split

All Stakeholders

Unrivalled Partnering

Start-Up Showcase

# THE FUTURE OF HEALTH AND DISEASE PREVENTION FOR ALL SPECIES



**PRODUCTION ANIMAL AND AGRI-TECH**

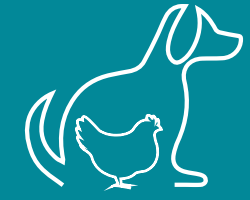
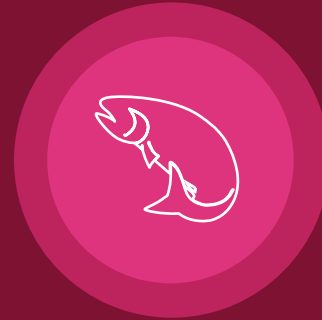
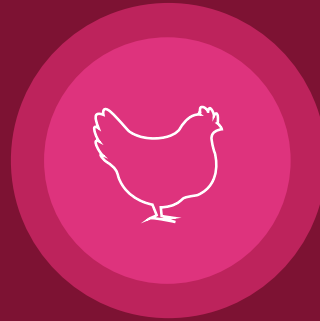


## 50/50 TECHNOLOGY SPLIT

Going forward, as the industry experiences a shift towards the detection and prevention of disease, we are increasingly focused on presenting innovation in nutritional health, data analytics, sensors and diagnostics. This year's forum will be split via Companion Animals and Production Animals, with ten emerging companies presenting in each category.



**COMPANION ANIMAL AND PET CARE**



50/50  
Technology  
Split

All Stakeholders

Unrivalled Partnering

Start-Up Showcase

Supporting Innovation

# ALL STAKEHOLDERS

 **550+**  
ATTENDEES

Engage a world class network including C-level from 90% of the major animal health worldwide, as well as Senior Partners and Healthcare Investment Leads from Venture Capital, Private Equity and Investment Banking.

 **180+**  
START-UPS

We identify the most exciting start-ups across a number of growing and developing areas of animal health



**Academics**

- International Animal Health Professors
- R&D Experts
- Universities and National Regulatory Bodies
- Technology Transfer Officer
- Associations
- Vet Colleges



**Investors**

- Seed & Angel Investors
- Venture Capital Firms
- Private Equity
- Investment Funds
- Accelerators
- M&A Advisors



**Emerging Companies at all stages.**

The Summit is designed for emerging companies at all stages of growth and development, irrespective of whether you are currently seeking investment.



**Service Providers**

- Global Distribution & Vet Service Leaders
- Market Intelligence & Consultancy Providers
- Contract Research & Contract Manufacturing Organisations



**Corporates & Multinational Companies**

(Pharmaceutical, Nutrition / Feed Additive and Pet Care)

- Business Development and Strategic Teams
- Leadership and C-Suite
- Owners of Vet Practices
- Human Biotechs Interested in Translational Opportunities in Animal Health



**All Stakeholders**

# GLOBAL ADVISORY BOARD

The Global Advisory Board is a prestigious group of individuals with extensive experience in the animal health space. This group is responsible for guiding the production and development of the global Animal Health Innovation and Investment series.



**Clinton Lewis**  
Executive Vice  
President and Group  
President  
**Zoetis**



**Joachim  
Hasenmaier**  
Independent Animal  
Health Expert



**George Gunn**  
Founder and CEO  
**Stonehaven  
Consulting**



**Alan Mackay**  
Executive Partner and  
Founder  
**GHO Capital**



**Linda Rhodes**  
Independent Animal  
Health Expert



**Aaron Schacht**  
Executive Vice  
President - Innovation,  
Regulatory & Business  
Development  
**ELANCO**



**Marc Prikazsky**  
Chairman and Chief  
Executive officer  
**Ceva Sante Animale**



**Sébastien Huron**  
Chairman of the  
Executive Board and  
CEO  
**Virbac Santé Animale**



**Kathy V. Turner**  
Corporate Vice  
President, EMEA &  
Asia Pacific  
**IDEXX**



**Dave Ross**  
Chief Executive Officer  
**Agri-EPI Centre Ltd**



All  
Stakeholders



Unrivalled Partnering

Start-Up Showcase

Supporting Innovation

50/50 Technology Split

# PARTNERING



BOOK 23+ PRIVATE MEETINGS ONSITE | OVER 2000 MEETINGS ACROSS EVENT

Across the two days you can meet face-to-face with decision makers from the full spectrum of the animal pharma and nutritional health industry. Each delegate is able to request and **book 23+ private meetings** with other delegates.

150 start-ups joined us in 2019 actively seeking financial and strategic partners. As M&A continues to dominate the space - Find your next European partner at our annual forum.

CLINT LEWIS,  
Zoetis

“It’s a great opportunity to connect with new companies and emerging technologies that are helping to advance the space”

Unrivalled Partnering

# INNOVATION SHOWCASE

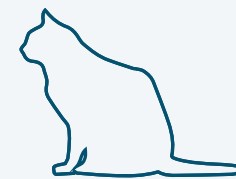
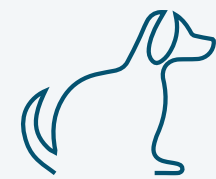
Apply Now and Present Your Company! Showcase Deadline is **November 29th**

The showcase is a unique opportunity for emerging companies with amazing technology to present in front of the industry's most influential figures and investors. 20 start-ups, hand-picked by the Selection Committee, introduce themselves and their innovations and achievements on the main stage.

This year, our presenting companies will be **split into two distinguishable sections** that will run across the show:

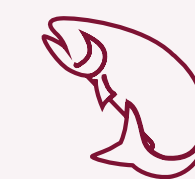
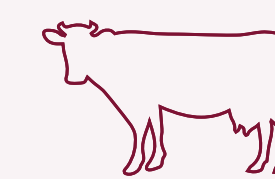
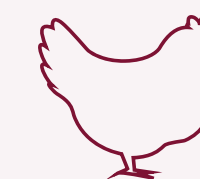
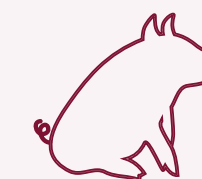
## COMPANION ANIMAL & PET CARE SHOWCASE

10 exciting emerging companies



## PRODUCTION ANIMAL & ANIMAL AGRI-TECH SHOWCASE

10 exciting emerging companies



**124 emerging companies** have presented across **4 years** of the Animal Health Innovation Series

It's free of charge to apply and all applicants receive a **£100 discount** on registration for the summit.

**APPLY HERE**

“[As a start-up] I think this is the best event to present at, because this is **the** animal health event”

Vripi Muhonen, **Askel Healthcare**



Start-Up  
Showcase

# INNOVATION SHOWCASE SELECTION COMMITTEE

This esteemed group is responsible for identifying and evaluating innovative emerging companies for presentation as part of our Innovation Showcases. Each of our committee members has an extensive breadth of experience and knowledge across animal health and nutrition industries and will be available for meetings at the conference.

If you're an emerging company with an exciting and disruptive technology for animal health, **apply to pitch in the showcase today.**



**Charles Hoare**  
Managing Director,  
Head of European  
Healthcare  
**Stifel**



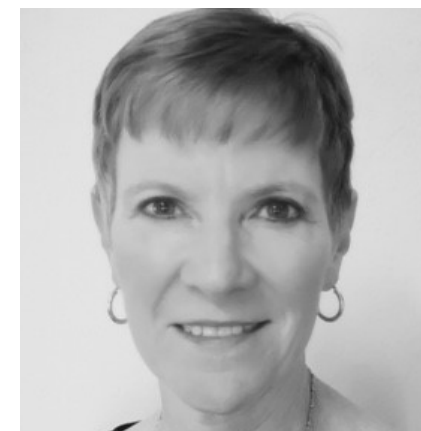
**Matthias Hofer**  
Founding Partner  
**CAH Capital**



**Julia Stephanus**  
Founder and President  
**Avviare**



**Maarten Goossens**  
Co-founder & Principal  
**Anterra Capital**



**Cindy Cole**  
Partner  
**Digitalis Ventures**



**Spencer Swayze**  
Managing Director  
**Paine Schwartz  
Partners, LLC**



**Paul Dick**  
Managing Partner  
**Vet Venture Capital  
Inc.**



**Isaac Fraynd**  
Dealflow Manager  
**Aqua-Spark**

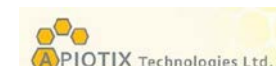


**Sarai Kemp**  
VP Business  
Development  
**Trendlines AgTech**



**Stephen Murray**  
Head of Animal Health  
Ventures  
**MSD Animal Health**

## OUR PREVIOUS SHOWCASE FINALISTS



Start-Up  
Showcase



# WHY ATTEND ANIMAL HEALTH INVESTMENT EUROPE

## COMPANION ANIMALS

### How Technology Will Change the Future of the Companion Animal Practice

This panel will explore potential future applications for technology within the practice and outline a vision for the future of the profession.

Covered by:



### Investor Pitches: Companion Animal Innovations

Ten SME's to present for investment opportunities:

- Pharmaceuticals
- Vaccines
- Novel Therapeutics
- Digital Platforms, Devices & Diagnostic Tools
- Nutritional Health

APPLY TO PITCH

### How Top Companies Think About Growth and Addressing Unmet Needs in Companion Animals

The take from leaders of top businesses on the rapid emergence of new technology and addressing the omnichannel evolution of animal health.

Covered by:



### Investor Perspectives on the Evolution of Companion Animal Health and Nutrition

An outline of the trends and dynamics in the pet sector and the funding opportunities available to start-ups.

Covered by:



## PRODUCTION ANIMALS

### The Future of Meat and How We Produce It

A thoughtful consideration of how companies within the supply chain should respond to changes in consumer attitudes.

Covered by:



### Investor Pitches: Production Animal Innovations

Ten SME's to present for investment opportunities:

- Pharmaceuticals
- Vaccines
- Novel Therapeutics
- Digital Platforms, Devices & Diagnostic Tools
- Nutritional Health

APPLY TO PITCH

### Taking on the Challenge of African Swine Fever and its Impact on Global Markets

A timeline towards the creation of a vaccine and an overview of present solutions and preventative measures for managing the disease.

Covered by:



### How the Digitisation of Animal Health is Shaping the Future of How We Manage Animals

An outline of the needs of vets on the farm and how new technology will empower them to make better decisions.

Covered by:



# 2020 SPEAKERS

Featuring **A New Perspective** on Animal Health from World Renowned Digital and Tech Experts



**INMACULADA MARTINEZ**  
Digital Scientist and A.I. Pioneer, Author, International Speaker

How to Realise the Value of Data: How Data & Analytics can Drive Decision Making and Support Health Outcomes in Animal Health



**JOAO BOCAS**  
World 1# Wearables Expert

Insights from Human Pharma and Potential of Wearable Technologies in Animal Health



**BEN LEGG**  
Managing Director, **Ola UK**, ex-COO **Google Europe**

Customer Loyalty in a Digital Age of Pet Care

Read about our 3 external industry expert speakers in our **2020 keynote announcement**

[DOWNLOAD](#)



**Dave Williams**  
Vice President & CIO  
**MSD Animal Health**



**Justin Sherrard**  
Global Strategist - Animal Protein  
**Rabobank**



**Jean-Luc Michel**  
Senior Vice President, Companion Animal Strategic Business Unit  
**Boehringer Ingelheim**



**Kathy V. Turner**  
Corporate Vice President, EMEA & Asia Pacific  
**IDEXX**



**Simon Doherty**  
Senior Vice President  
**British Veterinary Association**



**Kristin Peck**  
Executive Vice President and Group President, U.S. Operations, Business Development and Strategy - CEO elect  
**Zoetis, Inc**



**Mike Ellis**  
Senior Vice President and President of Europe  
**Covetrus**



**Jo Malone**  
Chief Executive Officer  
**VetPartners**



**Laurie Hueneke**  
Associate Vice President  
**MSD Animal Health**

2020 SPEAKERS CONTINUED



**Dave Ross**  
Chief Executive Officer  
**Agri-EPI Centre Ltd**



**Linda Dixon**  
Group Leader, African  
Swine Fever Virus  
**Pirbright Institute**



**Robert Kelly**  
President International  
Operations  
**Zoetis**



**Joachim  
Hasenmaier**  
Independent Animal  
Health Expert



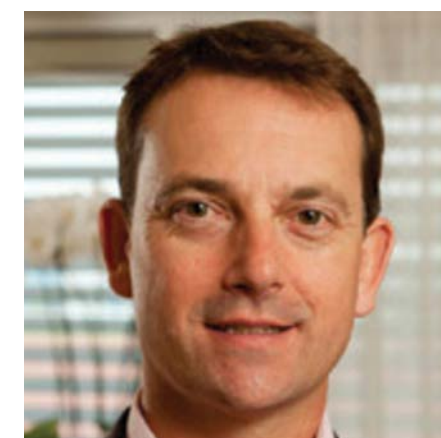
**Aaron Schacht**  
Executive Vice President -  
Innovation, Regulatory &  
Business Development  
**Elanco**



**Michael Balz**  
Partner  
**McKinsey & Company**



**Carel Du Marchie  
Sarvaas**  
Secretary General  
**HealthforAnimals**



**David Hallas**  
Managing Director  
**Sure Petcare** and  
**HomeAgain.**



**Marc de Beer**  
Senior Vice President, US  
Food Animal and Global  
Nutritional Health  
**Elanco Animal Health**



**Dr. Silke  
Birlenbach**  
**Pegasus Life Sciences  
Consulting**



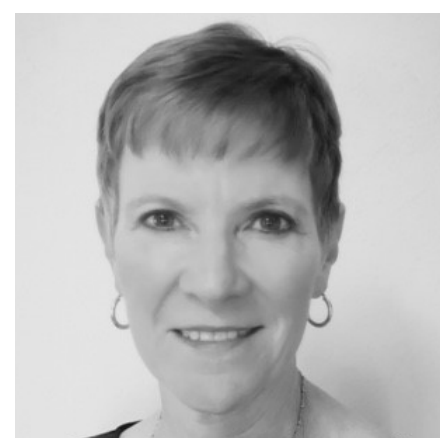
**Michael  
Helmstetter**  
Founder, President &  
CEO  
**TechAccel, LLC**



**Spencer Swayze**  
CFA, Managing Director  
**Paine Schwartz  
Partners, LLC**



**Todd B. Richter,  
C.F.A**  
Senior Managing  
Director, Global  
Healthcare Investment  
Banking Group  
**Guggenheim Partners**



**Cindy Cole**  
Partner  
**Digitalis Ventures**



**Julia Stephanus**  
Founder and President  
**Avviare**



**Kristin Bloink**  
Vice President, Global  
Research and External  
Innovation  
**Elanco Animal Health**



**Mark Heffernan**  
CEO  
**Stonehaven Incubate**



**Alexis Nahama**  
SVP Corporate  
Development, **Sorrento  
Therapeutics** and  
President, **ARK Animal  
Health**

2020 SPEAKERS CONTINUED



**Malcolm Thomas**  
CEO  
**Agile Sciences Inc**



**Dino Dedic**  
Global Healthcare  
Investment Banking  
**Barclays**



**Bjorgolfur  
Harrvadsson**  
Innovation Manager  
**Seafood Innovation  
Cluster**



**Jason  
Cleaversmith**  
Independent Aquaculture  
Expert



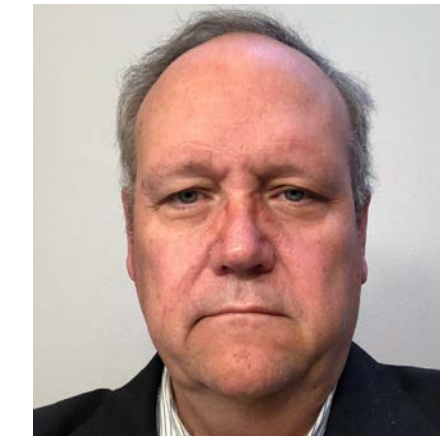
**Mark Boddy**  
CEO  
**PawSquad**



**David Prien**  
CEO  
**FirstVet**



**Bruce Whitelaw**  
FRSB, Genus Chair of  
Animal Biotechnology  
**R(D)SVS**, Deputy Director  
(Partnerships)  
**The Roslin Institute**,  
Chairman Edinburgh  
Genomics and Roslin  
Innovation Centre  
**University of Edinburgh**



**Tim Starzl**  
President & Chairman  
**BioPlx Inc**



**Sébastien Lafon**  
Founder  
**Adapt1st**



**Peter McCarthy**  
Independent Animal  
Health Expert



**Joost Matthijssen**  
Investment Director  
**Nutreco**



**Dawn Howard**  
Chief Executive Officer  
**NOAH**



**Maarten Goossens**  
Co-founder & Principal  
**Anterra Capital**



**Thomas Farrugia**  
Founder and Managing  
Director  
**Beta Bugs Limited**



**Torben Gosvig  
Madsen**  
Head, Animal Nutrition,  
Asia  
**Evonik**



**Morten Nordstad**  
President  
**Pharmaq**

For 2020 we are once again hosting our pre-day workshops for animal health companies looking for additional support and guidance around product regulation and strategic partnering.

**PLEASE NOTE:** Pre-day workshops need to be booked in separately to your event pass. They are only available to people who have booked an event pass. These are available on a first come, first serve basis.\*

11:00

**WORKSHOP 1: Operations 4.0 in the Context of Animal Health**

In this workshop, McKinsey Operations experts will explore the next generation of best practices in Manufacturing, Supply Chain, and Procurement, and discuss with participants how these practices may shape the industry moving forward.

Hosted by [McKinsey](#)

**BY INVITATION ONLY**

For Manufacturing, Procurement, and/or Supply Chain leaders from Animal Health companies with annual revenues of >£50mm. Contact Stephen at [swarray@kisacoresearch.com](mailto:swarray@kisacoresearch.com) for more information

11:00

**WORKSHOP 2: Corporate Venture investing in AH- Lessons from the frontlines**

Since 2016, MSD's Animal Health Venture team has been investing in internal and external new technology businesses that meet our customers needs in new ways. This has expanded the scope of its traditional Business Development (BD) beyond emerging companies in bio / pharma. This workshop shares our AHV portfolio, our learnings as investors and inventors, and introduces key leaders within the MSD and Antelliq businesses.

- Background of how MSD's AHV and BD groups work and introduction to some AHV investments
- Meet key leaders from MSD BD, AHV and Antelliq
- Sharing some thoughts on scaling AH technology start-ups based on Antelliq's success in dairy monitoring
- Q and A session across technology and bio / pharma

Hosted by [MSD Animal Health](#)

11:00

**WORKSHOP 3: Novel Animal Health Products: Taking Ideas to Market**

- Different product categories and their pathway to market
- Regulatory requirements of Animal Health Products with specific emphasis on Novel Therapies and Novel Feed (Additives)
- Sales and Marketing opportunities
- Incentives and business models for developers
- Q&A on business cases

Hosted by [Klifovet](#)

**13:00 Networking Lunch**

15:00

**WORKSHOP 4: Animal Health Partnerships**

How to make your business an exciting strategic partner for a multinational animal health company in the continuum of care

- What types of innovation are multinational AH companies looking for?
- Solution Innovation: partnering on emerging technologies which add value
- Expanding partnering beyond vaccines and medicines
- A multinational's assessment criteria when selecting strategic partners
- Why AH multinationals are collaborating more broadly
- Bringing new solutions together in the continuum of care: genetics, automation, diagnostics, sensors & data analytics

Hosted by [Zoetis](#)

15:00

**WORKSHOP 5: Opportunities for Developing Break-Through Innovations in Animal Nutritional Health**

- The opportunities for innovation to impact the production animals' market in Europe
- How a top tier multinational company approaches external partnerships and investments
- A One Health approach to driving innovation.
- A state-of-the-art discussion on production animal nutritional health and the solutions that will drive future innovation

AVAILABLE

15:00

**WORKSHOP 6: Animal Health Clinical Outsourcing**

- What does it take to bring your molecule to the market?
- Market overview
- How and why to focus your resources
- When do you bring external partners in?
- Where do diagnostics play a role?
- How significant are geographical differences?

Hosted by [Argenta](#)

**17:00 Close of Workshop Day**

DAY ONE

TUES

25 FEBRUARY

08:55

**MAIN STAGE: Welcome Address**

MSD Chairperson will give welcome address

09:00

**MAIN STAGE: Opening Keynote: The Changing World of Animal Health**

Animal Health is becoming digital. It's clear that the future health and well-being of animals will depend on advanced digital and tech solutions to monitor, predict and detect the onset of disease. In the last twelve months, the industry has experienced significant shifts in this direction and no more so than the historic acquisition of Antelq by MSD Animal Health - A signal to the wider world that the industry is committed to moving further towards the detection and prevention of disease, rather than simply the treatment of it. This presentation, from one of the industry's top global players, will provide a vision for the future of animal health and an analysis of the evolving needs of the its customers and partners.

**Stephen Murray**, Head of Animal Health Ventures, [MSD Animal Health](#)

**Dave Williams**, Vice President & CIO, [MSD Animal Health](#)

09:20

**MAIN STAGE: Opening Panel: Taking on the Challenge of African Swine Fever and its Impact on Global Markets**

African Swine Fever is the number one concern across the industry and has been for the last two years. The virus has resulted in over one million pigs being culled in China and subsequently caused rifts in global production markets. Our opening panel will cover the following points:

- A timeline towards the creation of a vaccine and an overview of present solutions and preventative measures for managing disease outbreaks
- Thoughts on the impact on global pork markets
- Comments on other potential viruses and zoonotic disease outbreaks
- Lessons learned and go forward actions for the industry

**Linda Dixon**, Group Leader, African Swine Fever Virus, [Pirbright Institute](#)

**Justin Sherrard**, Global Strategist - Animal Protein, [Rabobank](#)

**Laurie Hueneke**, Associate Vice President , [MSD Animal Health](#)

10:00

**MAIN STAGE: Keynote: How to Realize the Value of Data: How Data & Analytics Can Drive Decision Making and Support Health Outcomes in Animal Health**

A major challenge facing a modern company today is how to use data effectively. It's one thing to generate data, it's another thing to use that data to make smart decisions and in this case, support positive health outcomes in animals. Quite often, companies are unaware of how valuable the data is that they're generating and in some case they might even be generating data and not doing anything with it. In this presentation, international speaker, Inmaculada Martinez, will outline a vision and set of actionable practices for companies to use in order to better understand and manage their data.

**Inmaculada Martinez**, Digital Scientist and A.I. Pioneer, Author, International Speaker

11:00

**Networking Break – Private 1-on-1 Meetings****COMPANION ANIMAL TRACK**

11:30

**OPENING KEYNOTE: The Digitization of Pet Care: Monitoring and Tracking of Pets**

- A future vision and strategy for changing Pet Health through monitoring and tracking devices
- As of today, 50% of pet owners in Europe don't go to the vet. How do we increase consumer engagement with digital and tech devices?
- What role will be integrated digital and tech solutions play going forward?

**David Hallas**, Managing Director, [Sure Petcare](#) and [HomeAgain](#)

**PRODUCTION ANIMAL TRACK**

11:30

**OPENING KEYNOTE: Tackling Antimicrobial Resistance through Nutritional Health Solutions**

- Industry trends and dynamics facing the animal nutrition space
- How to tackle AMR with innovative technologies. Medicated feed additives, oral vaccines and the animal microbiome
- Global health trends and emerging zoonotic diseases impacting the gut health of livestock
- The unique regulatory requirements for feed additives in Europe

**Marc de Beer**, Senior Vice President, US Food Animal and Global Nutritional Health, [Elanco Animal Health](#)

DAY ONE

TUES

25 FEBRUARY

| COMPANION ANIMAL TRACK  | PRODUCTION ANIMAL TRACK  |
|---|--|
| 12:00   | 12:00  |
| <b>Investor Pitches: Companion Animal Innovations</b><br>Five SME's to present for investment opportunities | <b>Investor Pitches: Production Animal Innovations</b><br>Five SME's to present for investment opportunities |
| 13:00   |  |
| <b>Networking Lunch</b>   |  |
| 15:00   | 15:00  |
| <b>Investor Pitches: Companion Animal Innovations</b><br>Five SME's to present for investment opportunities | <b>Investor Pitches: Production Animal Innovations</b><br>Five SME's to present for investment opportunities |
| 16:00   |  |
| <b>Networking Break – Private 1-on-1 Meetings</b>   |  |
| 17:00   | 17:00  |
| <b>Presentation of the Innovation Awards: Companion Animal</b>  | <b>Presentation of the Innovation Awards: Production Animal</b>  |

| COMPANION ANIMAL TRACK   | PRODUCTION ANIMAL TRACK   |
|--|---|
| 17:10  | 17:10   |
| <b>PANEL DISCUSSION: How Technology Will Change the Future of the Companion Animal Practice</b><br>The veterinary profession is being presently disrupted by changes in customer needs and customer expectations. It also has challenges with talent management and talent acquisition. Technology has the potential to positively influence the direction in which the profession is headed and to enable owners of vet practice to better connect with the pet owners and ultimately increase revenues. This panel will explore potential future applications for technology within the practice and outline a vision for the future of the profession.<br><br>Hosted by <b>Simon Doherty</b> , Senior Vice President, <a href="#">British Veterinary Association</a><br><b>Kathy V. Turner</b> , Corporate Vice President, EMEA & Asia Pacific, <a href="#">IDEXX</a><br><b>Mike Ellis</b> , Senior Vice President and President of Europe, <a href="#">Covetrus</a><br><b>Jo Malone</b> , Chief Executive Officer, <a href="#">VetPartners</a> | <b>PANEL DISCUSSION: The Future of Meat and How We Produce It</b><br>Alternatives to meat protein are on the rise, there can be no doubt. Western markets are experiencing a tectonic shift and customer expectations are changing. This panel will examine the future of meat protein and how we produce it. The below questions will be presented. <ul style="list-style-type: none"> <li>• What should we do with the arable land available to us?</li> <li>• How should companies within the supply chain respond to changes in consumer behavior?</li> <li>• What role does animal health play in the rise of alternative proteins?</li> </ul> Hosted by <b>Joachim Hasenmaier</b> , Independent Animal Health Expert<br><b>Dave Ross</b> , Chief Executive Officer, <a href="#">Agri-EPI Centre Ltd</a><br><b>Aaron Schacht</b> , Executive Vice President - Innovation, Regulatory & Business Development, <a href="#">Elanco</a><br><b>Thomas Farrugia</b> , Founder and Managing Director, <a href="#">Beta Bugs Limited</a> |

DAY ONE

TUES

25 FEBRUARY

### COMPANION ANIMAL TRACK

17:35

#### Chairman's Closing Remarks

MSD Chairperson will give final comments

### PRODUCTION ANIMAL TRACK

17:35

#### Chairman's Closing Remarks

MSD Chairperson will give final comments

17:40

#### Close of Conference

17:40

#### Welcome Reception & Networking Drinks

“I enjoy being here... It's a really great networking opportunity. There are not many other locations or opportunities where you have so many people from the industry, and it's really a family, you meet old friends, you make new contacts, and it's always very insightful”

Dirk Ehle, Bayer





DAY TWO

WED

26 FEBRUARY

08:45

MSD Chairperson will give opening comments

08:50

**Vet Record Innovation Awards**

Three selected innovators in veterinary medicine will present their technologies in front of judging a panel and compete for the Vet Record Innovation Award

09:10

**MAIN STAGE: The Next Horizon of Value Creation in Animal Health**

Against the backdrop of considerable change (trade disruption, disease outbreaks, shifting consumer preferences), the Animal Health industry has continued to grow and deliver value for investors. But as the industry matures, will the recipe for success need to evolve? Building on last year's report, in this keynote presentation McKinsey explores the next horizon of value creation levers for the industry moving forward.

Michael Balz, Partner, [McKinsey & Company](#)

09:30

**MAIN STAGE: The Google Perspective on Customer Loyalty and Customer Adoption**

As more and more customers purchase animal health products online their activity and behavior will become important factors to track. Online retailers will need to develop strategies to enhance levels of customer adoption and build brand loyalty. No company has a better legacy of customer loyalty than Google. This presentation from international keynote speaker, Ben Legg, the ex-COO of Google Europe, will outline the Google approach to customer loyalty and adoption in the online marketplace.

Ben Legg, Managing Director, [Ola UK](#), ex-COO [Google Europe](#)

09:55

Presentation of the Vet Record Innovation Award

10:00

Networking Break – Private 1-on-1 Meetings

**COMPANION ANIMAL TRACK**

11:00

**KEYNOTE: Strategic Drivers of Change in Companion Animal Health**

Pet Parents are changing the way they engage with their veterinarian, they are also changing the way they purchase medicines and OTC products online. The market is now an omnichannel business. As a market leader in companion animal health, Boehringer Ingelheim is uniquely positioned to comment on the evolution and disruption in this space. This presentation will outline a view on where the companion animal health space is moving, the disruptions effecting it and how top companies are responding to the changing customer needs and trends.

Jean-Luc Michel, Senior Vice President, Companion Animal Strategic Business Unit, [Boehringer Ingelheim](#)

**PRODUCTION ANIMAL TRACK**

11:00

**KEYNOTE: How to Build a Company of Scale – Going from Five Thousand to Five Million Devices**

- The Antelliq Journey. How we built the business and our approach to scale
- The challenges and lessons learned. How we worked with our customers and how we approached the adoption of our technology.
- The future ahead. How the MSD partnership will empower Antelliq to achieve the dream of digitizing the way we manage animal health.

Jeroen van de Van, Chief Operating Officer, [Antelliq](#)

## COMPANION ANIMAL TRACK

11:20

**PANEL DISCUSSION: How Top Companies Think About Growth and Addressing Unmet Needs in Companion Animals.**

- Regulatory pressures, societal changes and consumer expectations demand quick adaptations of product portfolio in the companion animal field, as well as a need for transparency. How are top companies dealing with these changes?
- A plethora of new technologies are available in the animal health sector. They are explored by the traditional incumbents, and allow new faces to enter: These include biotech and digital startups, diagnostic companies, nutrition/feed actors. What is the take from leaders of top business on the rapid emergence of new technology?
- A dynamic channel landscape with a consolidating veterinary service sector, new entrants into vet services, and, on the other hand the growing importance of internet channels and on-line actors durably change the structure of the animal health market and the front end of customer relations. How are top companies addressing the omnichannel evolution of animal health?

Hosted by **Dr. Silke Birlenbach**, [Pegasus Life Sciences Consulting](#)

**Jean Scheftsik de Szolnok**, Member of the Board of Managing Directors, [Boehringer Ingelheim](#)

**Kathy V. Turner**, Corporate Vice President, EMEA & Asia Pacific, [IDEXX](#)

**Kristin Peck**, Executive Vice President and Group President, U.S. Operations, Business Development and Strategy – CEO elect, [Zoetis, Inc](#)

## PRODUCTION ANIMAL TRACK

11:20

**Afternoon session: Investment Perspective on Animal AgTech:**

- What are the ‘hot’ areas for investment right and where will we continue to see growth?
- Are animal health and animal nutrition good areas for investment?

The investment trends and dynamics shaping the production animal sector

- An outline of how animal health funding options are different to funding options in other industries
- What investors can bring to an emerging company
- How a typical investor assesses an early stage company

**Michael Helmstetter**, Founder, President & CEO at [TechAccel, LLC](#)

**Spencer Swayze**, CFA, Managing Director at [Paine Schwartz Partners, LLC](#)

**Maarten Goossens**, Co-founder & Principal, [Anterra Capital](#)

## COMPANION ANIMAL TRACK

12:00

**How to Present Your Start-Up Company in a Way That Opens Up Investment Opportunities**

- How do we create investor enthusiasm around animal health biotech?
- Solving the valley of death -raising £500k-£5m
- Debt, dilutive equity or licensing – the pros and cons of each funding tactic.
- How do we fund future innovation that doesn't come from the top players in animal health?

Hosted by **Mark Heffernan**, CEO, [Stonehaven Incubate](#)

**Alexis Nahama**, SVP Corporate Development, [Sorrento Therapeutics](#) and President, [ARK Animal Health](#)

**Malcolm Thomas**, CEO, [Agile Sciences Inc](#)

**Dino Dedric**, Global Healthcare Investment Banking, [Barclays](#)

12:30

**Networking Lunch**

## PRODUCTION ANIMAL TRACK

12:00

**How the Digitisation of Agriculture is Shaping the Future of How We Manage Animals**

- Agriculture is coming from a low level of digitisation, but a combination of factors is accelerating this process. This presentation will explain these factors covering industry trends, technology trends, labour and disease trends.
- What are the implications of our technologies for animal health today?
- Finally, what does the future hold? Digitisation, automation, early detection systems?
- Will these technologies and trends be enough to secure the future of the global livestock sector?

**Robert Kelly**, President International Operations, [Zoetis](#)

## COMPANION ANIMAL TRACK

14:00

**A View on Future Consolidation and Corporatization of Vet Practice**

The global veterinary services market is highly fragmented - the top six competitors in the market made up only 5% of the total in 2017. The biggest three players, VCA Inc., Banfield Pet Hospitals and Greencross Limited had about 4.2% of worldwide revenue from veterinary services. The veterinary services market has experienced rapid consolidation during the last five years, and this will continue going forward. In 2016, 15-20% of the US veterinary services market was owned by larger corporations. Merger and acquisition activity has been rife with leading deals being completed by Mars Inc, VCA, CVS and Novozymes. In this presentation Todd Richter will detail why evaluations in the vet services space have skyrocketed and to what extent that trend will continue.

**Todd B. Richter**, C.F.A, Senior Managing Director, Global Healthcare Investment Banking Group, [Guggenheim Partners](#)

## PRODUCTION ANIMAL TRACK

14:00

**PANEL DISCUSSION: Future Approaches to Better Animal Welfare**

As the industry moves away from antibiotic usage it must also consider the issue of animal welfare. Antibiotics will continue to be an effective way to deal with outbreaks in certain conditions and it must be considered that their removal could cause animals to become susceptible to health issues.

Additionally, there is no one stop solution and preventing disease outbreaks requires a multi-layered approach.

In this discussion, senior animal health executives will discuss their respective approaches to antibiotic replacement in the supply chain and the most pertinent challenges for the industry on the topic of animal welfare.

Hosted by **Carel Du Marchie Sarvaas**, Secretary General, [HealthforAnimals](#)

**Dawn Howard**, Chief Executive Officer, [NOAH](#)

**Kristin Bloink**, Vice President, Global Research and External Innovation, [Elanco Animal Health](#)

**Tim Starzl**, President & Chairman, [BioPlix Inc](#)

## COMPANION ANIMAL TRACK

14:30

**Afternoon session: Getting the Most Out of Wearable Devices**

Wearable devices have become common place in today's tech driven environment. These innovations provide businesses with unique data insights and allow them to make important decisions based on the specific needs of the user. Animal health is not new to this space, with FitBark and Whistle making the headlines, however the adjacent industries of sport, retail and human pharma can provide the industry with a useful insight into how these technologies have developed. In this presentation, Joao Bocas, a leading global thought leader on wearable devices, will share his experience and perspective around how animal health can do more and leverage the unique capabilities of wearable devices.

**Joao Bocas** – World 1# Wearables Expert

## PRODUCTION ANIMAL TRACK

14:30

**Afternoon session How Future Feed Will Influence the Gut Health of Production Animals**

Is future feed blurring the lines between health and nutrition?

- What type of products could we expect to emerge to tackle health challenges in the future?
- How is industry fueling innovation and where is it expected to come from?
- What is needed in order to translate research into commercially viable solutions?
- What can we learn from the success of microbiome applications in Human Health?
- What are the needs of industry and what challenges to overcome?

**Joost Matthijssen**, Investment Director, [Nutreco](#)

**Torben Gosvig Madsen**, Head, Animal Nutrition, Asia, [Evonik](#)

15:00

**Networking Break – Private 1-on-1 Meetings**

## COMPANION ANIMAL TRACK

16:00

**Afternoon session: Thoughts on Venture Investing in Pet Care**

The investment trends and dynamics shaping the pet sector

- Why the companion animal space is the fastest growing in animal health
- How to work with an emerging businesses to the benefit of both parties
- What investors can bring to an emerging company in pet care
- How a typical investor assesses an early stage company

Hosted by: **Peter McCarthy**, Independent Animal Health Expert

**Cindy Cole**, Partner, [Digitalis Ventures](#)

**Julia Stephanus**, Founder and President, [Avviare](#)

## PRODUCTION ANIMAL TRACK

16:00

**Afternoon session: Aquaculture: Tackling Sustainability Challenges and a Burning Need for Innovation**

The world's appetite for fish is growing. Since 1961, the global demand for fish has risen at twice the rate of the world's population. In fact, we're now eating twice as much fish as we did just 50 years ago, with per capita intake increasing from 9.9 kg to 18.8 kg annually. Rises in the global demand for fish are expected to continue—and the output needed to fulfil is expected to double, reaching an astonishing 230 million tonnes by 2050. Meeting this demand will create a market increase valued at upwards of several hundred billion dollars.

- What are the clear and present health challenges, particularly in Salmonids?
- What is being done by the major providers and by fish farmers to tackle these issues?
- Examples of break-through innovations and funding opportunities to support them

Hosted by **Bjorgolfur Harrvadsson**, Innovation Manager, [Seafood Innovation Cluster](#)

**Jason Cleaversmith**, Independent Aquaculture Expert

**Morten Nordstad**, President, [Pharmaq](#)

## COMPANION ANIMAL TRACK

16:30

**PANEL DISCUSSION: Perspectives on Telemedicine and Future Technology for Pet Owners**

Traditionally, in the veterinary profession, there has been a resistance and inertia around innovative technology and the value it has for improving existing processes. Over the years, vets have been pitched to use many technologies which have proven to be a hassle, as opposed to a tool to minimise professional pressures. Now we are seeing new technologies ranging from digital appointment booking systems designed to enhance relationships and optimise clinical practices, to telemedicine services, aimed at accommodating generational needs and bringing the veterinary profession into the digital age. In this panel of Vets turned Founders, there will be a discussion around the evolution of the veterinary profession how innovative technology can empower both veterinarians and pet owners.

Hosted by: **Sébastien Lafon**, Founder, [Adapt1st](#)

**Mark Boddy**, CEO, [PawSquad](#)

**David Prien**, CEO, [FirstVet](#)

## PRODUCTION ANIMAL TRACK

16:30

**Developments in the Field of Livestock Genetics**

Porcine Reproductive and Respiratory Syndrome (PRRS) is a viral disease infecting sows and pigs leading to reproductive failure (abortions, weak and stillborn piglets, infertility), and causes pneumonia and increased mortality in young animals. It is a global problem, affecting the swine industry worldwide, and is highly economically significant: in the US alone, the total cost to the industry has been estimated at \$664 million per year.

What if, using genetic engineering, you could create a PURRS resistant pig? Would that not be a game changer? The answer back in 2015 was yes and since then significant further research has been done in this area by both commercial companies and academics. This discussion will outline some the most recent break-throughs within the field of livestock genetics and provide a roadmap of the implementation for this exciting technology.

**Bruce Whitelaw** [FRSB](#)

Genus Chair of Animal Biotechnology, [R\(D\)SVS](#)

Deputy Director (Partnerships), [The Roslin Institute](#)

17:00

**MSD Chairperson will give closing comments**

17:05

**Networking & Close of Conference**

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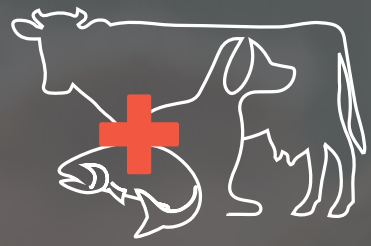
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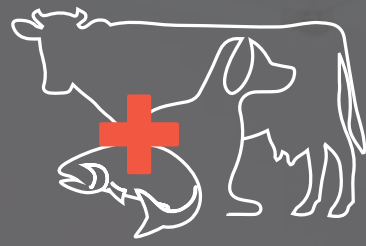
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