‘Learning from success, to achieve more success’

Global Leaders Group AMR

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Animal antibiotic use is falling dramatically in many (developed) markets

Prevention works: Reductions in AB use mirrored by a rise in prevention products

Antibiotics remain a critical tool: ‘optimized use’ where prevention is maximized

One Health: majority of human AMR transfer in human health care settings

Animal health is a global leader
Global antimicrobial use is declining

The World Organisation for Animal Health collects global antimicrobial use data from countries across the globe. They have found that “global antimicrobial use in animals has declined by 27% in 3 years” and provided the following figures.

<table>
<thead>
<tr>
<th>Year</th>
<th>Antimicrobial Use (mg/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>120</td>
</tr>
<tr>
<td>2017</td>
<td>107</td>
</tr>
<tr>
<td>2018</td>
<td>88</td>
</tr>
</tbody>
</table>

Antimicrobial sales have fallen up to 65% in major markets

- UK: 52% since 2014
- US: 38% since 2015
- EU: 43% since 2011
- Germany: 65% since 2011

Critically important antimicrobials have seen the largest reductions

- Polypeptides: -62%
- Macrolides: -43%

2016–2018
Markets are achieving steady, ‘optimal’ levels of use

Animal antimicrobial Sales Trends (2010–2020)

The below charts show how animal antimicrobial sales have changed for six nations. The sales levels differ for each (see source below for the underlying numbers), however the trend lines are similar for all.
Sales in Prevention Products are Rising

Sales per product category (%) (2013–2021)

Sales data from leading animal health companies demonstrate how global shifts towards prevention are reducing the need for antimicrobials worldwide. Since 2013, vaccines and parasiticides have grown from 56.7% to 62.6% of the product portfolio of the leading animal health companies, while antimicrobials fell from 20.9% to 15.2% (a relative reduction of 28%).

## Animal sector actions

- Pharma sector working on responsible use since 1990s
- Most species groups and producer/food operators have responsible use programs
- Animal food chain coalitions working: RUMA, EPRUMA, Aliança, etc.
- These coalitions are examples of private sector and government collaboration

### Roadmap to reducing the need for antibiotics

- Vision for improving responsible use
- 25 commitments + 25 measurable actions by 2025

<table>
<thead>
<tr>
<th>Action</th>
<th>Target</th>
<th>Progress</th>
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<tbody>
<tr>
<td>Invest at least $10 billion in research and development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Progress: at least $3.17B has been invested to-date</td>
<td>$3.17B</td>
<td>On track</td>
</tr>
<tr>
<td>Deliver at least 100 new vaccines</td>
<td>49 out of 100</td>
<td>Ahead of schedule</td>
</tr>
<tr>
<td>- Progress: 49 vaccines delivered to-date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver at least 20 new diagnostics tools</td>
<td>17 out of 20</td>
<td>Ahead of schedule</td>
</tr>
<tr>
<td>- Progress: 17 delivered to-date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deliver at least 20 new nutritional enhancement products</td>
<td>7 out of 20</td>
<td>On track</td>
</tr>
<tr>
<td>- Progress: 7 delivered to-date</td>
<td></td>
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<tr>
<td>Deliver at least 30 other products that can reduce the need for an antimicrobial by reducing animal stress or boosting the natural immune system</td>
<td>8 out of 30</td>
<td>On track</td>
</tr>
<tr>
<td>- Progress: 8 delivered to-date</td>
<td></td>
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</table>
1. Learn from successes in many markets: prevention + investment

2. Key to success will be:
   • attacking the underlying problem – animal diseases
   • providing technologies/finance that help to reduce the need to use antibiotics
   • start with shared classes

3. Key groups that need further engagement are:
   • emerging market producers - where largest animal protein increases happening
   • emerging market banking - to co-finance investments needed
   • emerging market ag authorities - to help create right circumstances

4. GLG can help global financing institutions promote prevention – to help governments to support/encourage their livestock farmers

4. GLG can also take a leading role in promoting better use of vaccination and overcoming the (trade and other) barriers currently limiting vaccination