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ONE HEALTH  
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# INDIAN ANIMAL HEALTHCARE CHALLENGES AND OPPORTUNITIES

**H**olistic healthcare is most essential for disease mitigation, maintaining health and ensuring efficient animal production. Animal Healthcare Industry has been playing a very important role in safeguarding vast livestock resources of the nation. With significant investment in the veterinary products manufacturing, Industry is emerging as an important growth lever of the Indian economy ensuring availability of best possible healthcare solutions to the large livestock population and thereby contributing to farmers' welfare.

With ever increasing demand for animal origin protein, India has untapped potential in animal health sector to emerge as one of the leading players in the world. To leverage this high growth potential and to meet the rising demand, a sustainable and strong farming base will be critical. For achieving this, it becomes equally essential to address key challenges faced by the sector such as inadequate veterinary care, poor farm

management and frequent occurrence of the disease outbreaks etc.

## **Challenges in Animal Healthcare**

Though India is the leading producer of milk and poultry products, the global share of the Indian animal health business is quite small. Due to smaller market size, the allocation of financial resources is limited, which hinders innovation and new product development.

Also, the availability of skilled manpower

**India has adequate infrastructure for manufacturing veterinary formulations; however, it is highly dependent on import of raw materials/APIs due to the cost and technology advantages**



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Manufacturing & sale of Animal Feed and Feed supplements in India are not well regulated; BIS standards & specifications are prescribed for compounded animal feed & mineral mixtures. For import of Animal Feed Supplement / Feed additive products in India, DAHD is the competent authority that issues approved list of Feed Supplements / Additives. There have been on-going discussions at FSSAI & DAHD along with other stakeholders for creation of separate regulations for Animal Feed and Feed Supplements.

for R&D and limited translational research are some of the limiting factors for innovation. Animal biotechnology is yet another area that has not been explored to its potential. Lack of access to biotechnological advances and its cost vs benefit ratio limits commercialization of such concepts.

India is highly dependent on import of raw materials/APIs due to the cost and technology advantages. Many APIs of novel formulations are not manufactured in India, posing challenges for indigenous development of formulations and to become globally competitive.

Inadequate animal health infrastructure and coverage severely affect immunization & disease control programs in many parts of the country. However, current Government has considered animal husbandry as a priority sector and has undertaken many initiatives for overall improvement of the sector and to boost farmer's income.

### Regulatory Policies

Regulation and guidelines for veterinary drugs follow the same process applicable for human medicines. New drug approval and registration require submission of adequate data supporting the safety, quality and efficacy of a product in a detailed dossier. Depending upon the nature of the veterinary product, multiple regulatory agencies (including CDSCO, DAHD, GEAC, and IVRI), are involved in approval of new veterinary drug or biological, which makes the process little complex and time consuming. Govt. of India has been very active in the past few years in bringing digital reforms across the sectors. SUGUM, the digital window of CDSCO, facilitates online regulatory submission, review of applications and grant of permissions/licenses.

With the creation of separate veterinary cell at CDSCO, various reforms are

undertaken considering the specific needs for veterinary drugs and biologicals. New guidelines for conducting field / clinical trial of new drugs have been prepared by DAHD in collaboration with CDSCO. Recently, DAHD has also launched NANDI portal for grant of NOC for new veterinary drugs and biologicals. In near future, there will be further streamlining of the process through its integration with CDSCO's Sugam portal.

### AMR & Animal Healthcare Practice

Many a times, veterinary use & over-use of antibiotics has been projected as the prime cause of emergence of bacterial resistance to the drugs, which in fact is untrue. In general, the effect of antibiotic residues in meat, eggs and milk are insignificant when compared with the issue of selection and

amplification of antibiotic resistant strains of bacteria. There has been scientific consensus that the prime driver of AMR emergence in human is due to human use only. Also, limited focus is laid on the of environmental factors in propagating resistance.

Recently, Indian Federation of Animal Health Companies (INFAH) that represent approximately 85% of the Animal Health Industry of India compiled an estimated usage of antibiotics in organized animal healthcare for the year 2020 and 2021 and submitted to Department of Animal Husbandry & Dairying (DAHD). The estimated data on antibiotic usage in 2020 and 2021 were 912 MT and 963 MT respectively. Besides, there is no systematic, comprehensive data on the prevalence of AMR infections in livestock.

Animal healthcare companies are also focusing on various growth strategies including collaborations, in-licensing, mergers and acquisitions in order to enhance their market presence; also making continued efforts to bring in more advanced and innovative products to ensure optimum health and productivity of animals and the market is expected to maintain its growth momentum with the continued thrust on product innovation by leveraging newer technologies.

