



The Veterinary Profession and Food in 2025

30th August 2018



VetSalus

WHOLESOME FOOD FROM HEALTHY ANIMALS

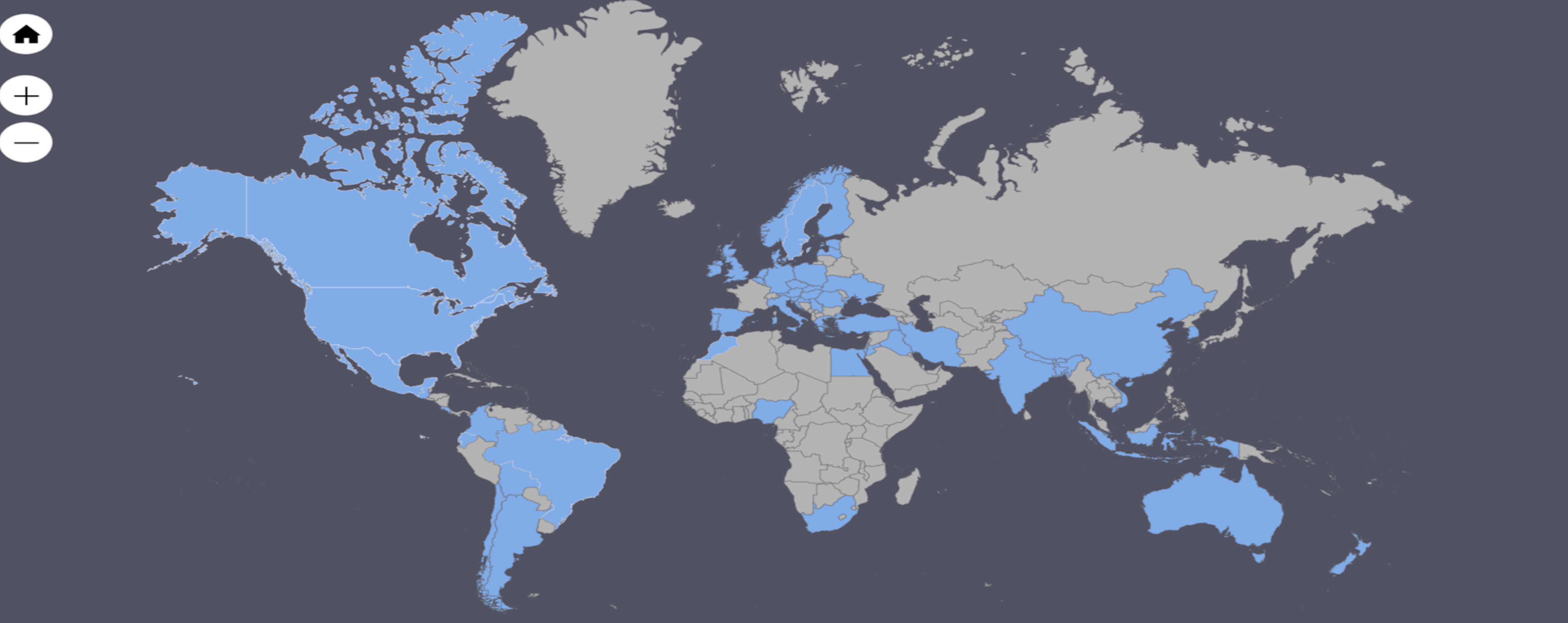
This is a Workshop!

- How might veterinary networks collaborate to deliver innovative improvements in the productivity, quality and welfare standards of wholesome food, produced from healthy animals

https://www.amcharts.com/visited_countries/#



Countries at WBC2018



Who is in the room?

- Vets in Clinical Practice
 - Business Owners
 - Associate/Assistant
- Vets in Academia/Research
- Vets in Industry
- Non-Vets



Question 1

Farm Vets and Practice 2050 What do we think our customers value?



VetSalus
WHOLESOME FOOD FROM HEALTHY ANIMALS

- Retailers/supermarkets taking control of farmer relationship
- Consolidation of farming/fewer larger clients. Increased competition
- Objective/independent views from vets will be increasingly important
- Big data will require analysis - could usurp vet role?
- Assisting producers to reach new markets
- Disruptive technologies - factory/laboratory farming. Role for vet?
- Use of paraprofessionals/“tele-vetting” - competitive world
- Loss of vet “social licence”
- Traditional vet practice will still exist - smaller scale?
- Clients have Google - challenge to vet knowledge
- Role for vets as facilitators/trainers will be important to end user/retailer
- Sustainability issues leading to reduced consumption/shrinking market for vets
- Increase in factory farming in Asia/ differing vet role
- Vets to become champions of animal welfare. Assisting farmers to meet supply conditions
- Vets will need to improve marketing/social media skills etc
- Leading vets and farmers (early adopters) will lead the way, keep an eye on them

Question 2

Challenges?



VetSalus
WHOLESOME FOOD FROM HEALTHY ANIMALS

Challenges

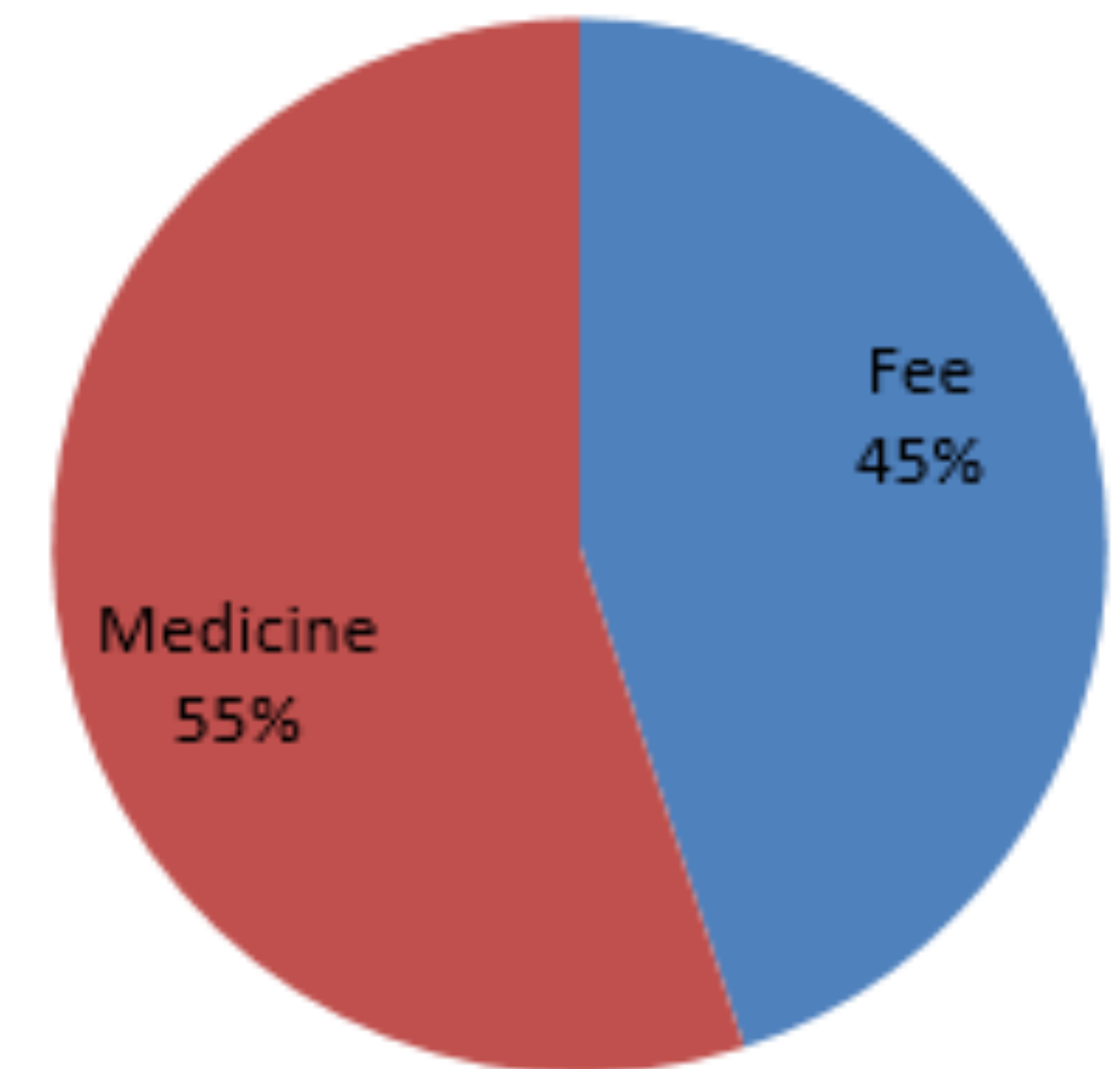
- Negative attitude from practice towards research
- Practice employment packages are holding younger vets back? Older generation getting all the perks!
- Lack of vets/ poor work life balance
- Lack of internships etc to enhance retention, career development
- Japan: only c10-15% of new students enter farm practice. Poorer employment package
- Attractiveness of companion animal practice cf farm practice eg after hours
- Need practice reorganisation to support better work life balance etc

Opportunities

Trends/Challenges

- Larger Farms with specialised staff
- Decreased labour units on farm.
- Reduced income from medicine.
- Future Decoupling?
- Increased Corporate Model
- Consultants
- Recruitment
- Social Media/Vegan publicity
- Increase in Veterinary Technicians – performing Traditional vet work

All Species vet spend



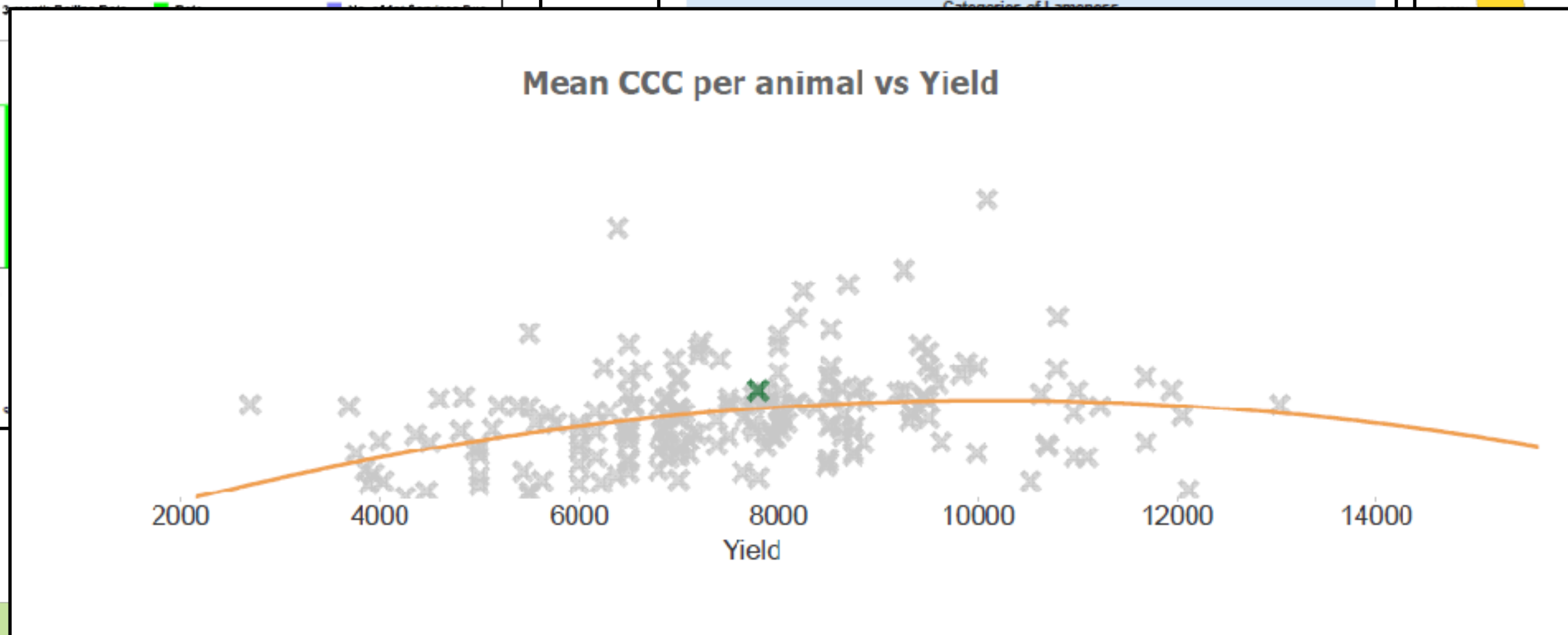
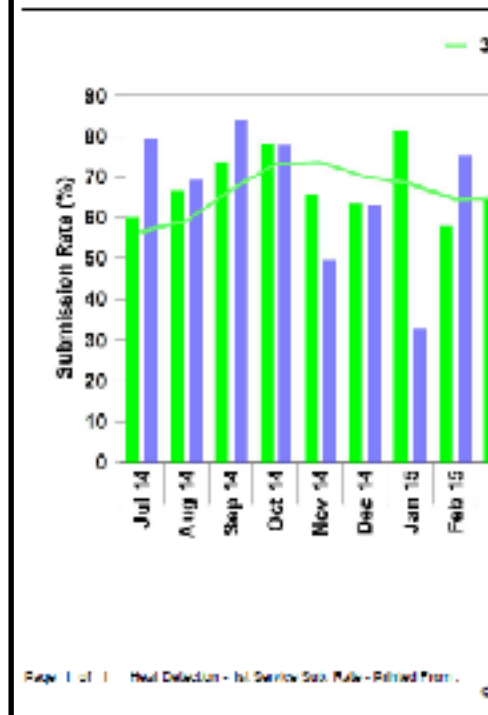
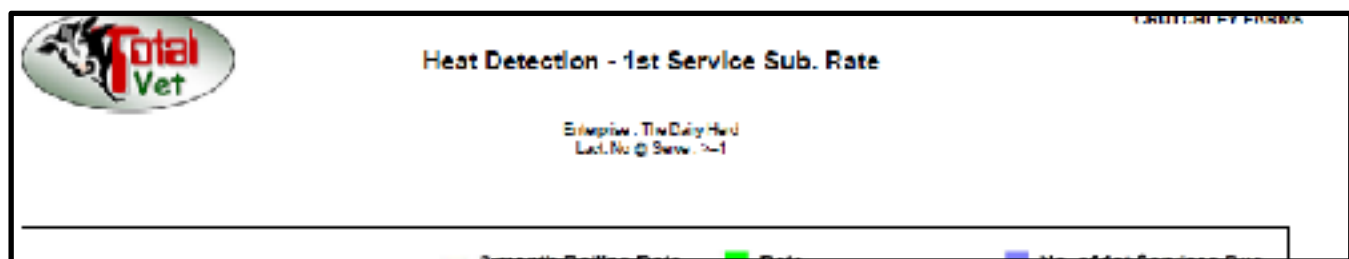
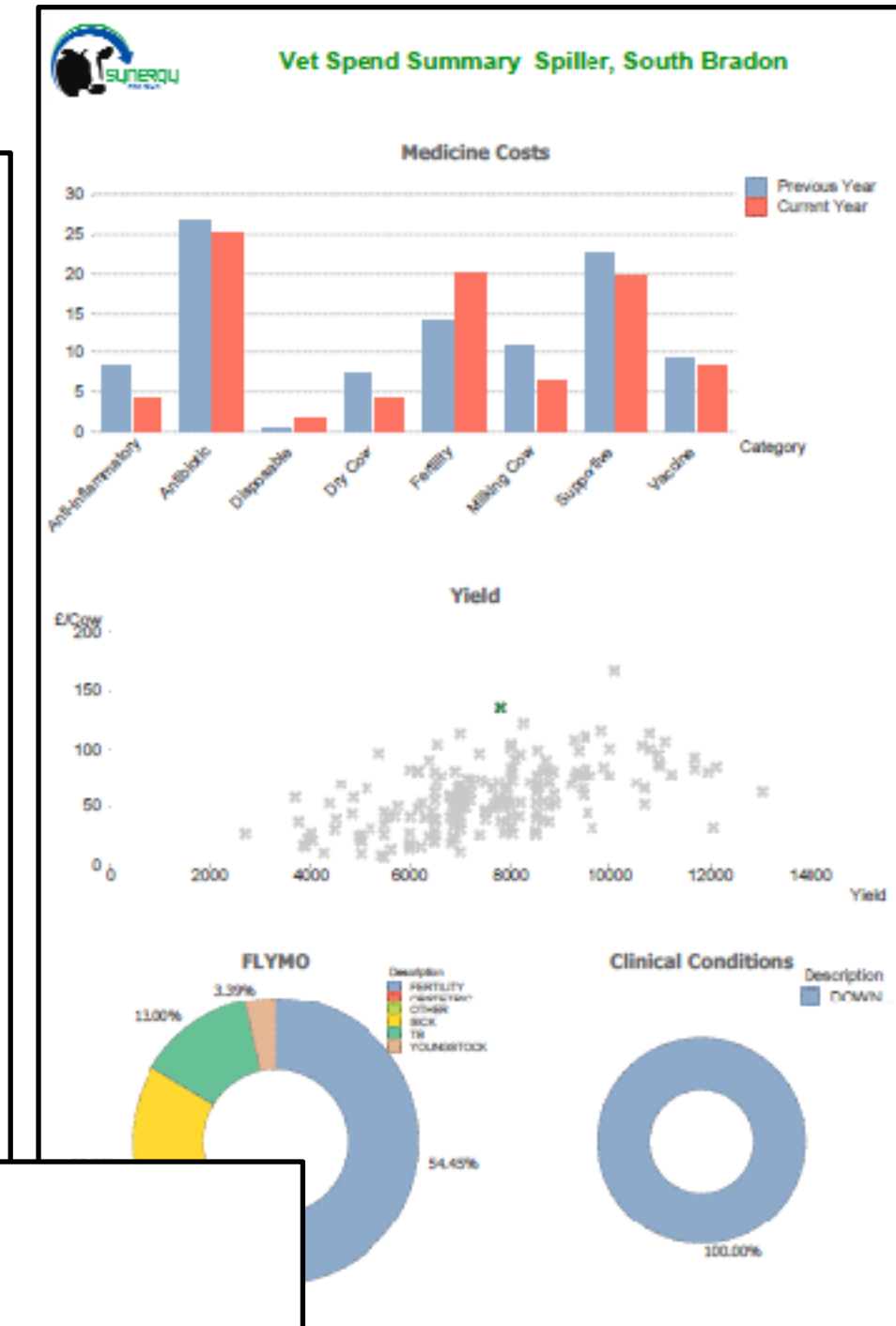
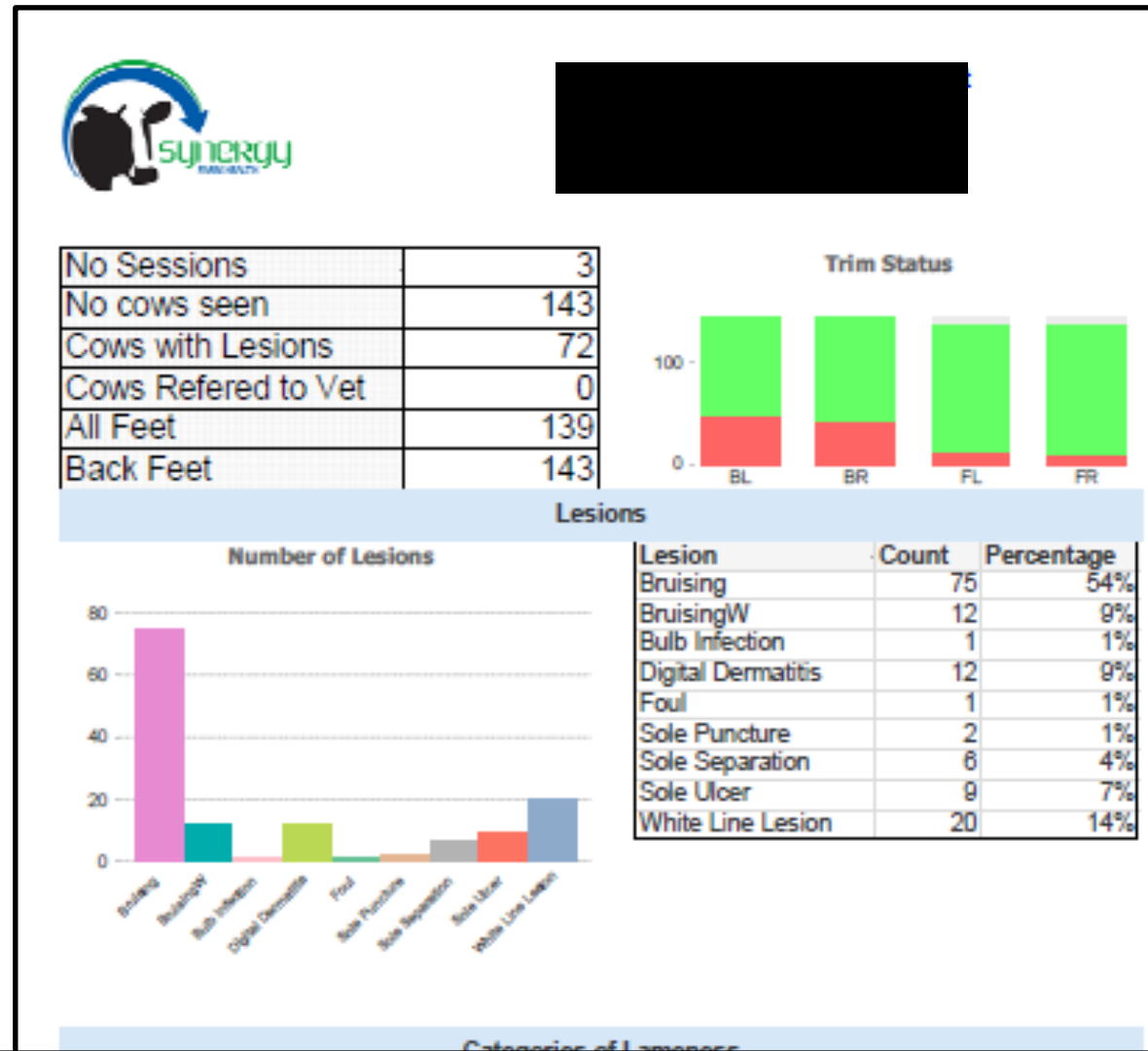
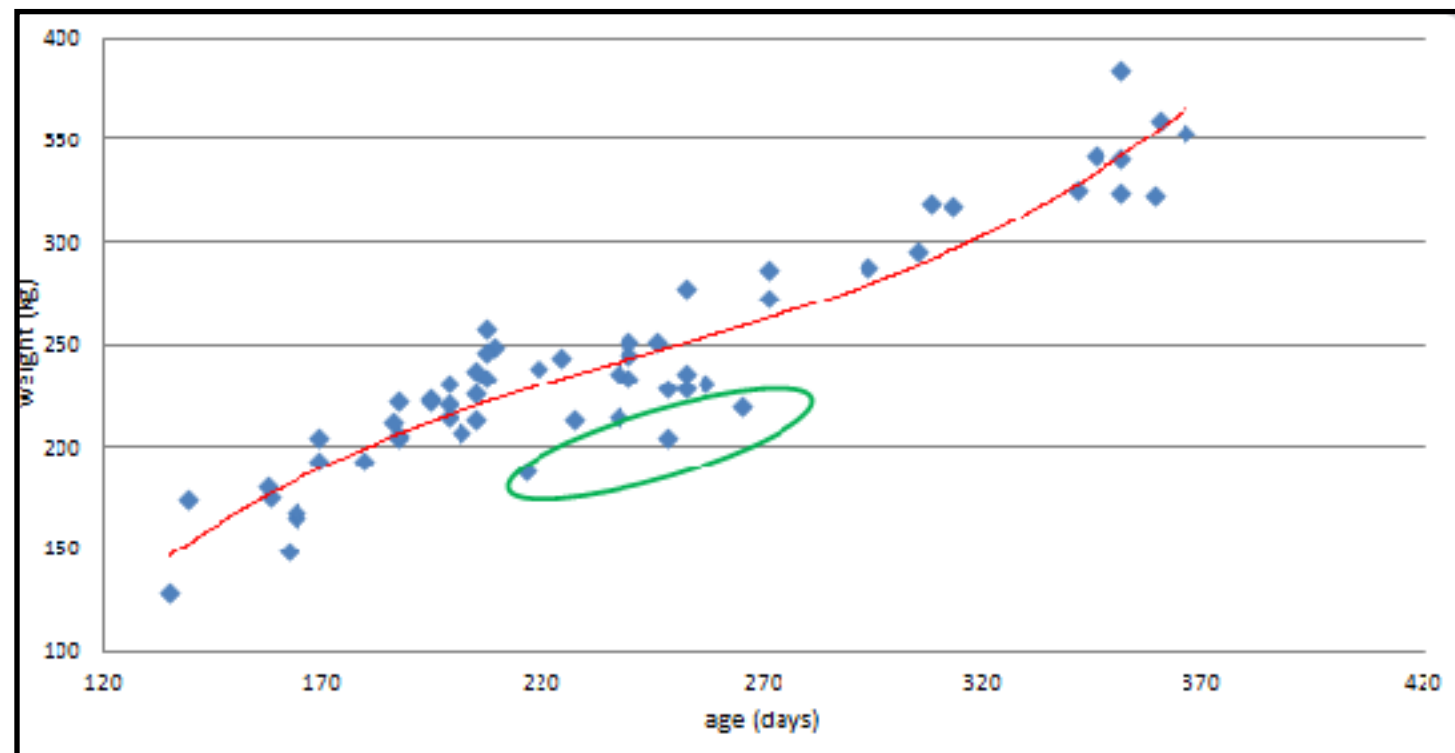
Less of:



More of:

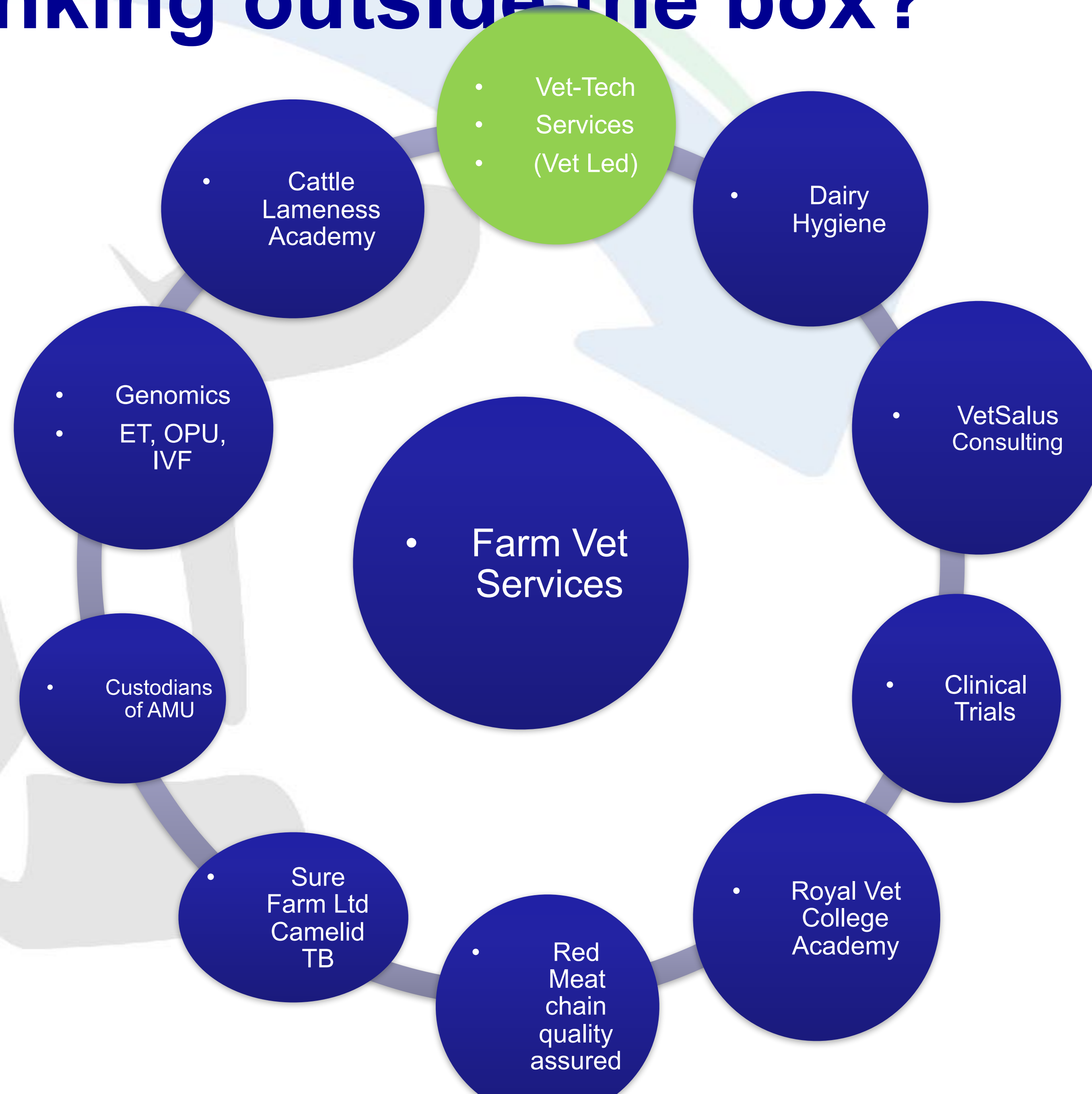
**Health
Planning!**

Data Analysis



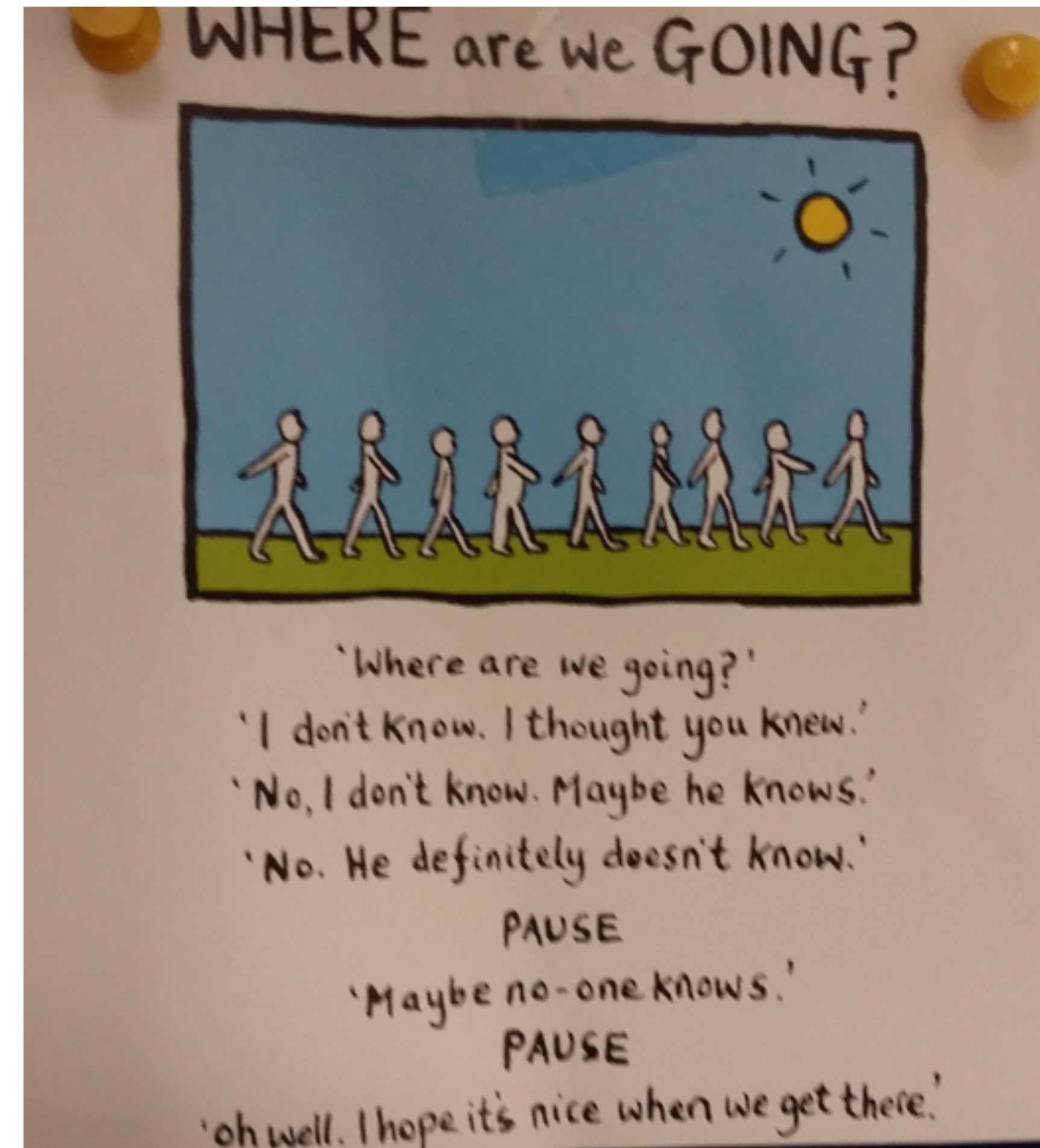
| Current | (Target ± Range) |
|---------|--|
| 90 | Number of cows in milk (90 ± 10) |
| 17% | % cows in first lactation (23% ± 9%) |
| 37% | Cull / death rate (%) (21% ± 11%) |
| 9% | % cows calving still or dead within 100 days (7% ± 5%) |
| 21% | % cows served 90 days after calving (67% ± 27%) |
| 12% | % cows pregnant 100 days after calving (35% ± 18%) |
| 35% | % cows not pregnant 200 days after calving (28% ± 28%) |
| 100 | Calving - 1st. service interval (d) (80 ± 38) |
| 25% | % cows eligible for service served (42% ± 22%) |
| 36% | Conception rate (%) (38% ± 12%) |
| 10% | % cows eligible for service conceived (14% ± 9%) |
| 41% | % service intervals 10 - 24 d (38% ± 12%) |
| 16% | % service intervals > 50 d (19% ± 18%) |
| 25.9 | Milk / cow / day (kg) (24.5 ± 4.9) |
| 3.27% | Average protein (%) (3.32% ± 0.12%) |
| 3.84% | Average fat (%) (4.16% ± 0.29%) |
| 11,053 | 305-day yield (kg) (8,548 ± 1,801) |

Thinking outside the box?



Summary

- Communication
- Preparing for the future
- Collaboration across the industry
- Teamwork
- Staff mentoring
- Thinking outside the box
- Facilitators
- Animal Health Industry cf. Veterinary Industry



Synergy Farm Health

investing in the future ...



Managing Change in Today's Veterinary Profession

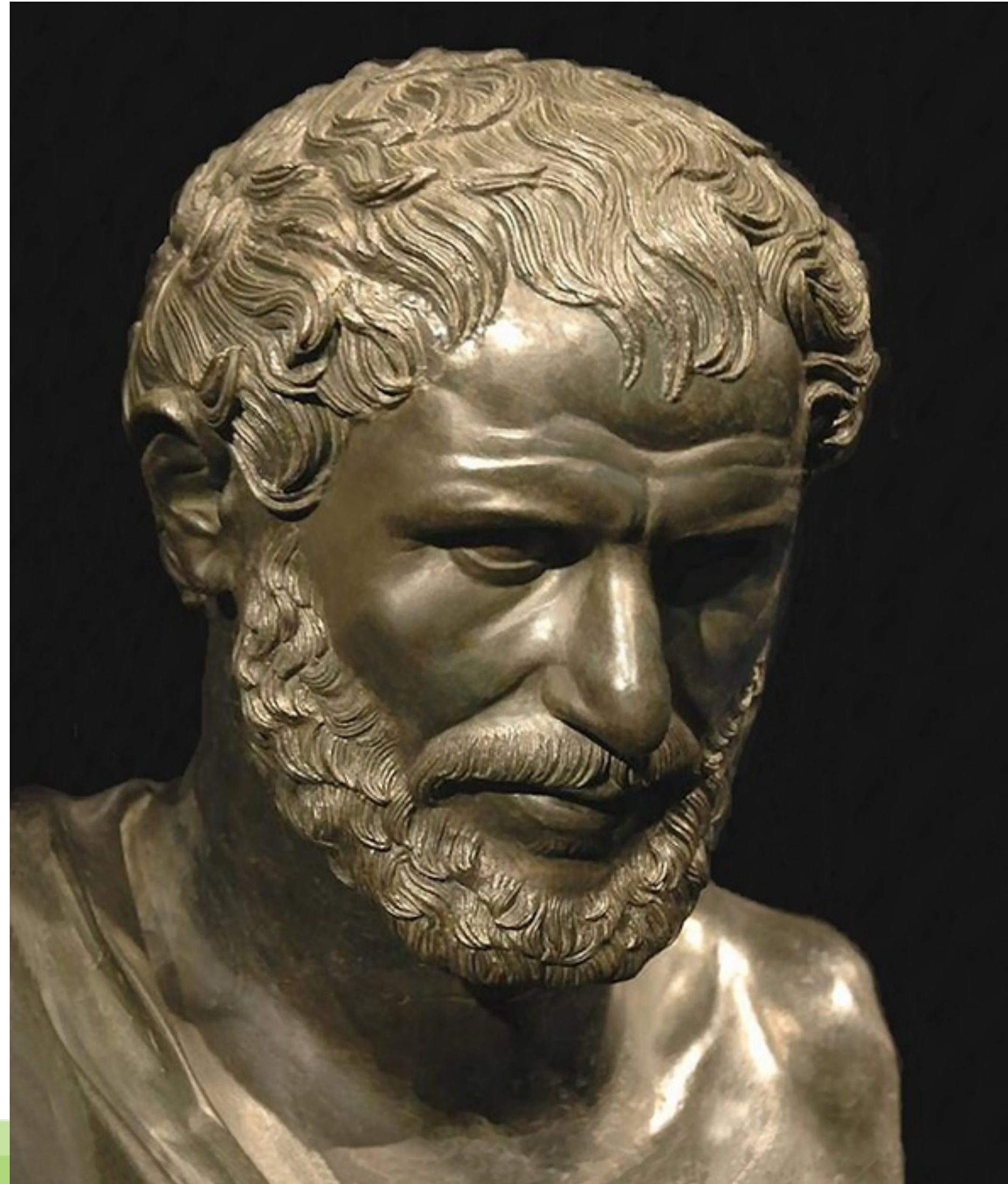


Lewis Griffiths
Hadron Consulting Ltd
lewis.griffiths@vetsalus.com

Change isn't new....

“The Only Thing That Is
Constant Is Change ”

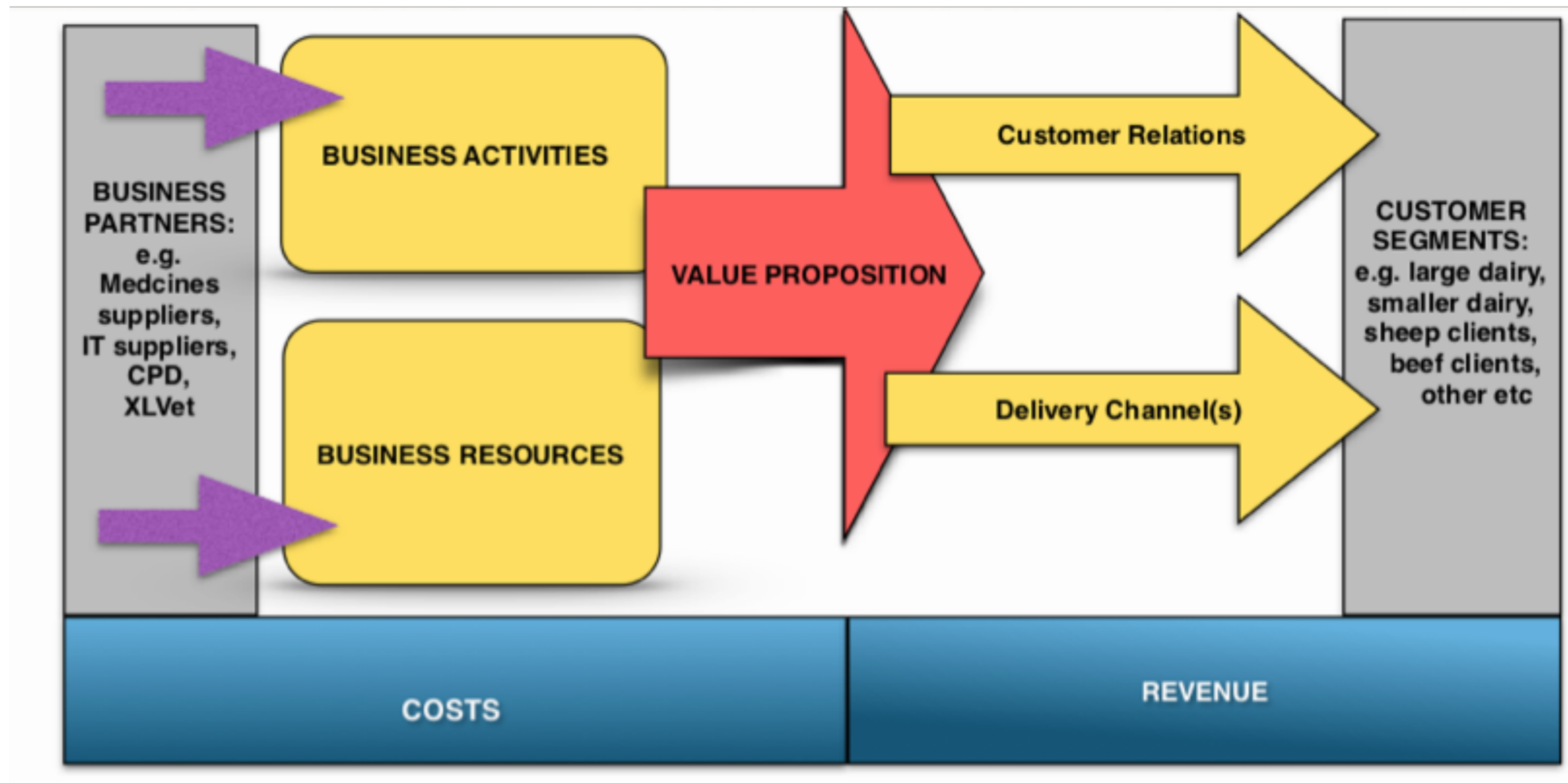
Heraclitus of Ephesus
c. 500BC



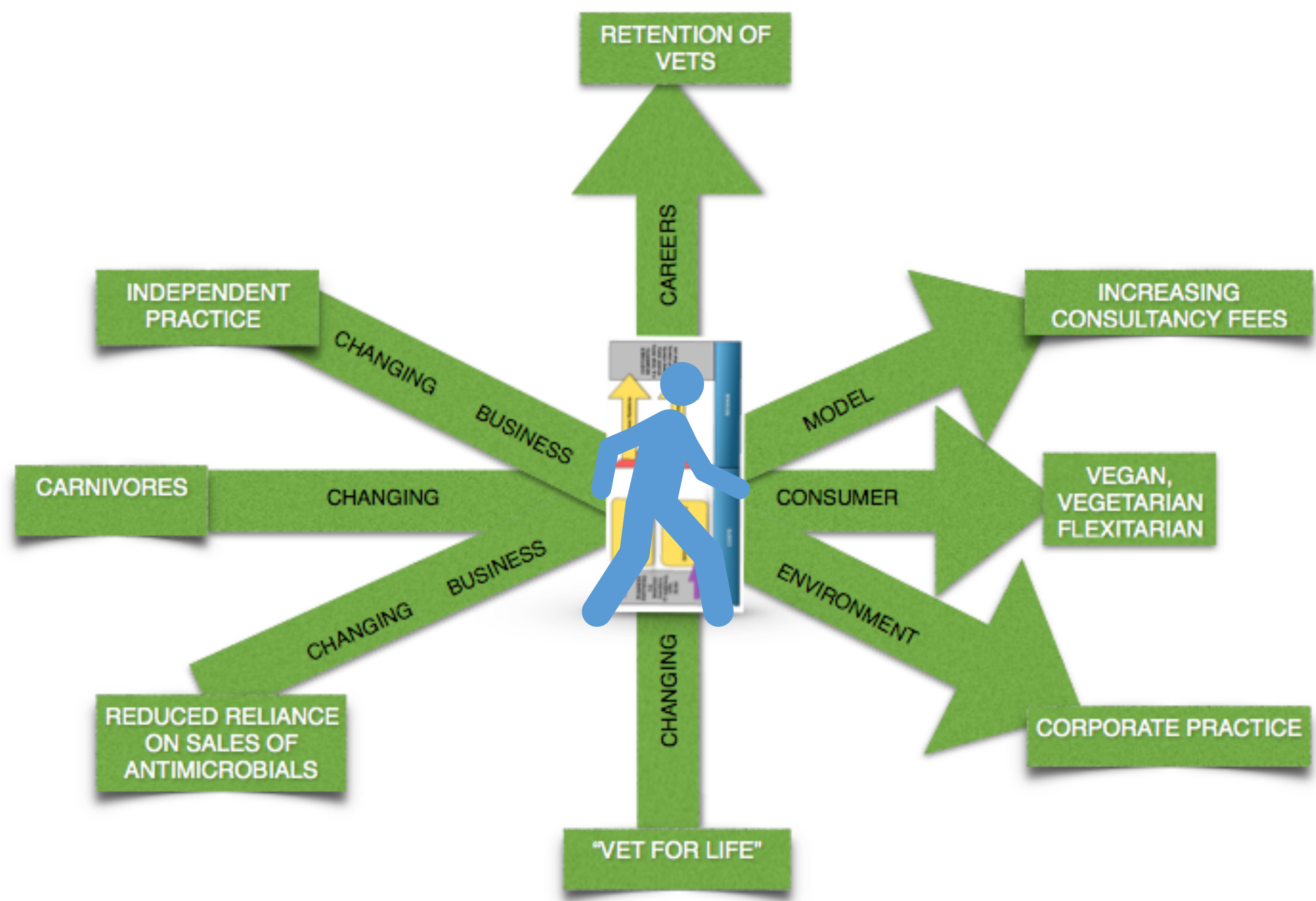
Viewpoint from a Changing Career.....

- Qualified Glasgow University 1978 into clinical cattle practice in Wales
- No prostaglandin!
- No ivermectin - oxbendazole had just arrived. No resistance!
- No computer!
- By 1982 - Doing dairy diets on a ZX81(having added 16K of RAM to the original 1K!)
- By 2005 - Changed from BVMS into MBA =No clinical practice. Consultancy in New Zealand & UK





- The classic business model?
- Still fit for purpose?



- In particular, the western consumer of food products is changing.
550,000 Vegans in UK (increased 4X over 10 years)
22million “Flexitarians”

(The Guardian-7/8/18)

- How does the farm veterinary business manage this sort of change?
- Who debates the vegan view ?



Avoiding meat and dairy is 'single biggest way' to reduce your impact on Earth
Biggest analysis to date reveals huge footprint of livestock - it provides just 18% of calories but takes up 83% of farmland

Damian Carrington *Environment editor*

Thu 31 May 2018 19.00 BST

Avoiding meat and dairy products is the single biggest way to reduce your environmental impact on the planet, according to the scientists behind the most comprehensive analysis to date of the damage farming does to the planet.

The new research shows that without meat and dairy consumption, global farmland use could be reduced by more than 75% - an area equivalent to the US, China, European Union and Australia combined - and still feed the world. Loss of wild areas to agriculture is the leading cause of the current mass extinction of wildlife.

The new analysis shows that while meat and dairy provide just 18% of calories and 37% of protein, it uses the vast majority - 83% - of farmland and produces 60% of agriculture's greenhouse gas emissions. Other recent research shows 86% of all land mammals are now livestock or humans. The scientists also found that even the very lowest impact meat and

Managing change in any business is not rocket science...

- Good governance and leadership
 - Regular strategic planning
 - Reviewing Opportunities vs Threats
 - Risk analysis
- Developing good numbers/budgets
- Testing and modelling various strategies

Managing change in any business is not rocket science...

- Good governance and leadership
- Regular strategic planning
- Reviewing Opportunities vs Threats
- Risk analysis
- Developing good numbers/budgets
- Testing and modelling various strategies
- **SHOW OF HANDS.....**

The formula for change

$$C = (D * V * F) > R$$

where

- C = CHANGE
- D = Level of Dissatisfaction with Status Quo
- V = Vision
- F = First Steps
- R = Resistance to Change

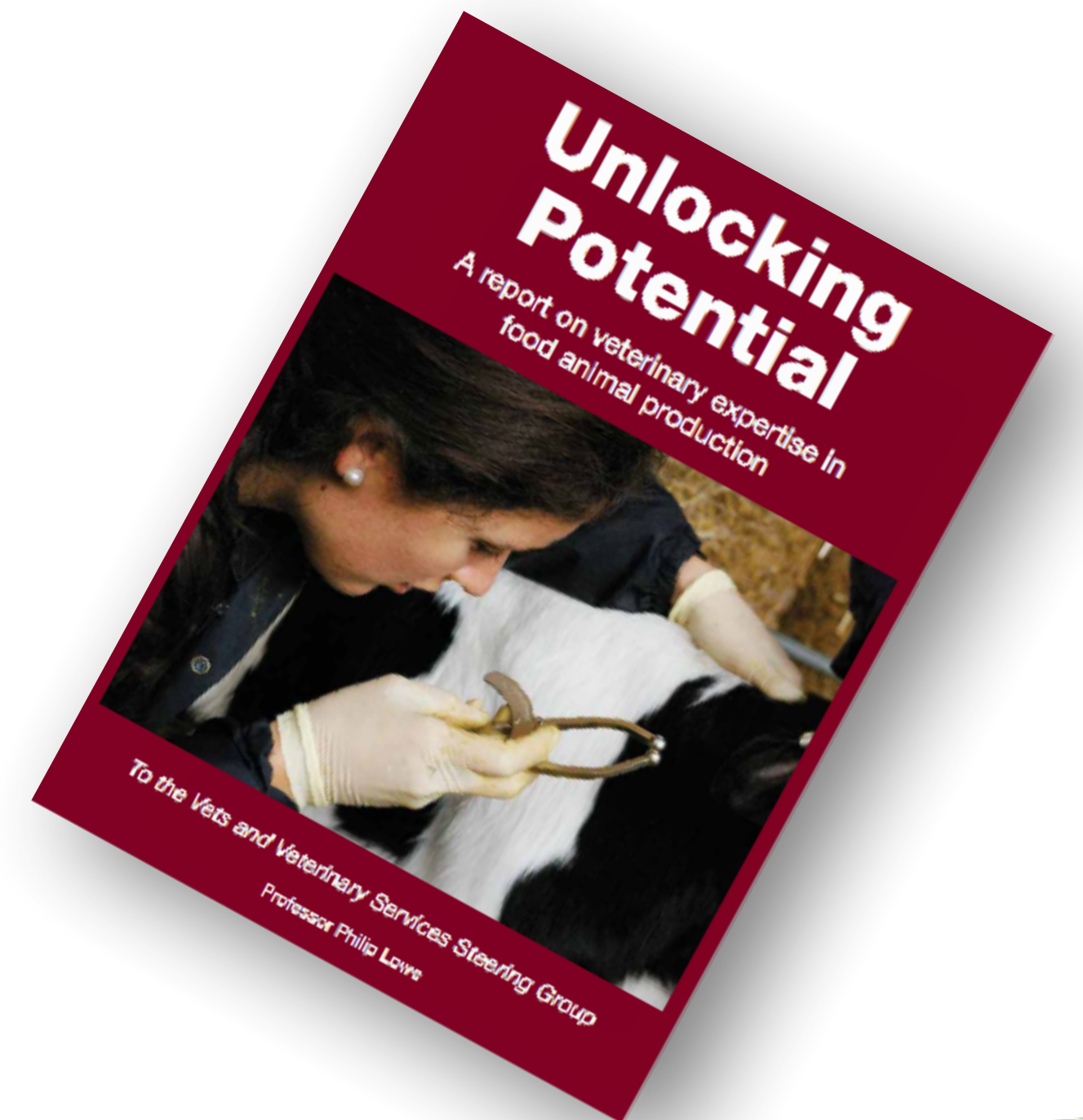
Question(s) 3:

- Are we dissatisfied enough with the status quo ?
- Have we a strong enough VISION of the future?
- If the Veterinary profession doesn't change, where will it be in 2050?

Two closing quotes:

“The character of this changing world is indifferent to tradition. Unforgiving of frailty. No respecter of past reputations. It has no custom and practice.”
Tony Blair 2005

“Both Veterinarians and farmers need to recognise that their ultimate customer is the food consumer”
Prof. Phillip Lowe



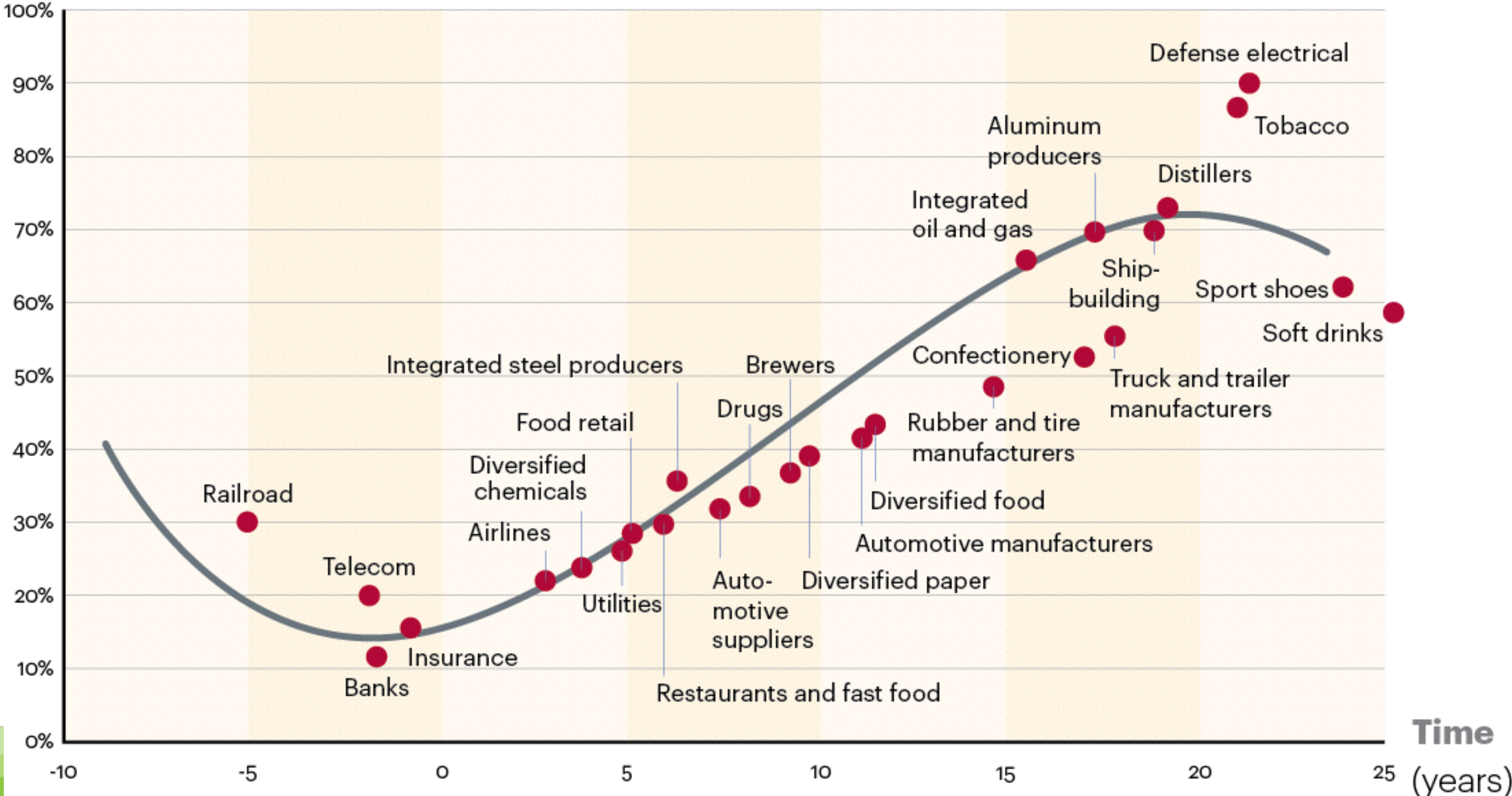
Professor Jon Huxley

- Professor of Dairy Cow Health & Head of School of Veterinary Science, Massey University, New Zealand
- [link to video](#)



The Consolidation Curve

Industry concentration
1989-2001 (CR3)



Note: CR3 is the three-firm concentration ratio, the sum of market share of the top three players.

Sources: *Winning the Merger Endgame* by Graeme Deans, Fritz Kroeger, and Stefan Zeisel; A.T. Kearney analysis



Millennials and Gender



Article [Talk](#) [Read](#) [Edit](#) [View history](#)

Lisbon

From Wikipedia, the free encyclopedia
(Redirected from [Lisbon, Portugal](#))

For other uses, see [Lisbon \(disambiguation\)](#).

Lisbon (/ˈlɪzbɔːn/; Portuguese: *Lisboa*, IPA: [liʒboɐ]) is the **capital city** and largest city of **Portugal** with a population of 547,631 within its administrative limits^[1] on a land area of 84.8 km² (33 sq mi). The urban area of Lisbon extends beyond the administrative city limits with a population of 3 million^[2] on an area of 958 km² (370 sq mi),^[2] making it the 9th most populous urban area in the **European Union**. About 2,831,000^{[3][4]} people live in the **Lisbon Metropolitan Area** (which represents approximately 27% of the population of the country). Lisbon is the westernmost large city located in **Europe**, as well as its westernmost capital city and the only one along the Atlantic coast. It lies in the western Iberian Peninsula on the Atlantic Ocean and the Tagus River.

Lisbon is recognised as a **global city** because of its importance in **finance**, **commerce**, **media**, **entertainment**, **arts**, **international trade**, **education**, and **tourism**.^{[5][6]} It is one of the major economic centres on the continent, with a growing financial centre and the largest/second largest container port in the "Europe's Atlantic coast".^[7] **Lisbon Portela Airport** serves about 13 million passengers per year, **motorway network** and hub of **high-speed rail** (*Alfa Pendular*) linking main cities in Portugal, and in 2013 will have a rail's high-speed connection to Spain.^[8] Lisbon is the 25th most livable city in the World according to lifestyle magazine *Monocle*.^[9] The city is the seventh-most-visited city in Southern Europe, after *Istanbul*, *Rome*, *Barcelona*, *Madrid*, *Athens*, and *Milan*, with 1,740,000 tourists in 2009.^[10] The **Lisbon region** is the wealthiest region in Portugal, GDP PPP per capita is 26,100 euros (4.7% higher than the average European Union's GDP PPP per capita). It is the tenth richest metropolitan area by GDP on the continent amounting to 98 billion euros and thus €34,850 per capita.^[11] This is 40% higher than the average European Union's GDP per capita. The city occupies 32nd place of highest gross earnings in the world.^[12] Most of the headquarters of multinationals in the country are located in the Lisbon area and it is the ninth city in the world in terms of quantity of international conferences.^[13] It is also the political centre of the country, as seat of **Government** and residence of the **Head of State**. The seat of the **district of Lisbon** and the centre of the **Lisbon region**. Lisbon is one of the **oldest cities in the world**, predating other modern European capitals such as **London**, **Paris** and **Rome** by hundreds of years. **Julius Caesar**

Coordinates: 38°42′49.72″N 9°8′21.79″W﻿ / ﻿38.7138111°N 9.1393861°W﻿ / 38.7138111; -9.1393861

Lisbon (*Lisboa*) Capital

facebook

Introducing Timeline - a new kind of profile
Timeline is your collection of the photos, posts and experiences
Cilly Fraser, Michael John Cook and 12 other friends have updated to the new profile.
[Get Timeline](#) [Not now](#)

David Black

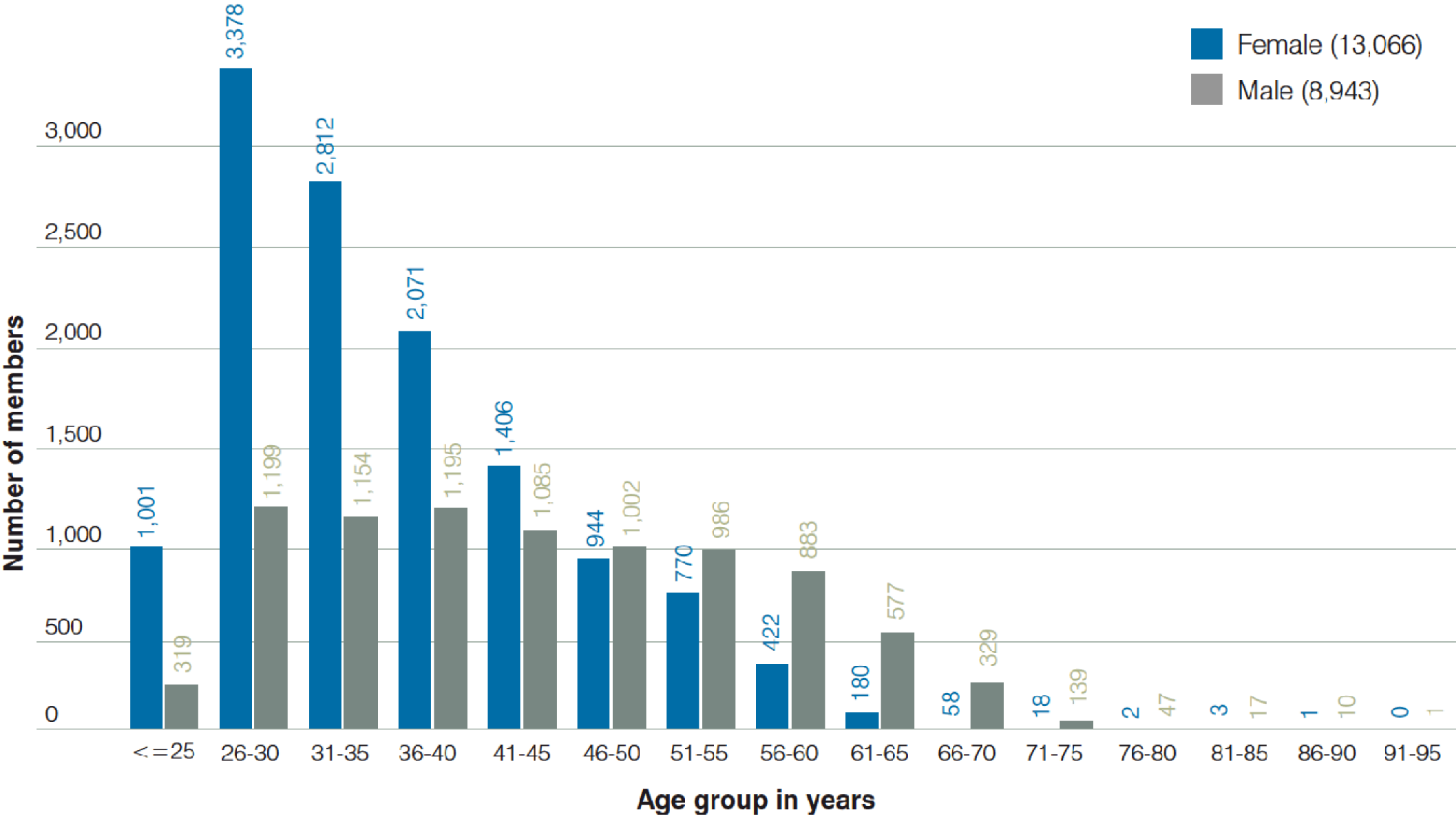
Worked at [Paragon Veterinary Group](#) Studied 2hr at [University of Liverpool School of Veterinary Science](#) Lives in [Carlisle, Cumbria](#) Married to [Susan Black](#) From [Keith, Moray](#) Born on 17 November 1982 Add languages you know Edit Profile

Update status Add photo/video

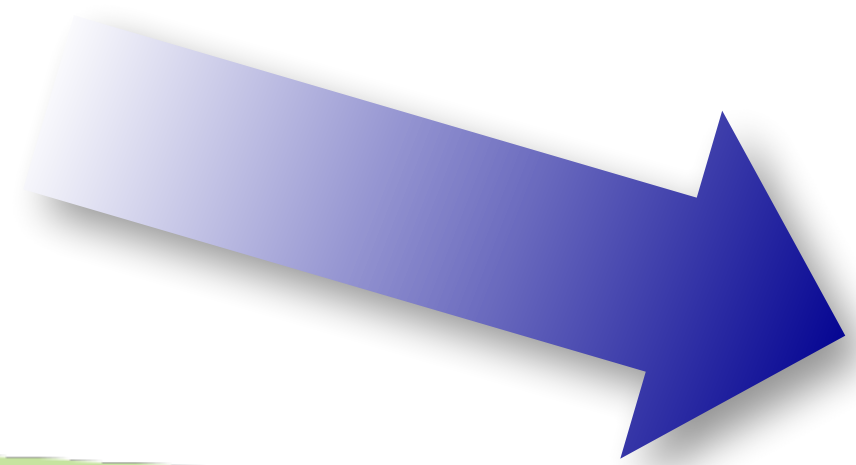
What's on your mind?

David Black was tagged in [Kate Black's album The Black Family 50 Centre Team](#) ... [view album](#)

Figure 3. UK-practising veterinary surgeons by age and gender



Business Structures



Not Just About Vets



A Fork in The Path?





www.vetsalus.com

**Extending the
traditional
client model
into other
relationships?**

Who do we have these new relationships with?

- Veterinarians - local
- Animal Health companies
- Community Representatives - de facto consumer
- Consumers global
- Farmer - local going global
- Food processors /regulators

ANIMALS BEING RAISED FOR SUSTAINABLE FOOD PRODUCTION

What is in these new relationships?

- Based from the animal (protein source, – animal centric)
- Most have a global element as this is growing
- Has a party who will to pay for knowledge, (data and info), service, product
- Has respect for the Veterinarians knowledge
- Based on independence of Veterinarian – clinician to the animal
- Veterinarian is most trusted adviser to farmer but not to the other parties in the diagram (**this is the challenge**)
- Requires veterinarians to communicate to people other than veterinarians and farmers-
new style of communication

What do these new customers want? What models- what do we want?

What do these customers want ?

- Need to mirror these new customers (global – not local).
- They do business differently from farmers
- Guaranteed standards ? QA, Brand, Global consistency
- Veterinary Led- do these business need be to veterinary led – does the customer care/know? Is it the ethos

Models

- Networks – collaborative networks – we (veterinarians) like them – do they deliver \$ etc- do they deliver something more important
- Joint Ventures- more commercial share risk and reward – can be specialised.

The One Health aspect of what we do

Mark Bryan

Managing Director
VetSouth

Winton, New Zealand

mark.bryan@vetsalus.com

[@MarkBryanNZ](#)

SMART EAR TAG

- > Monitors health status
- > Heat detection
- > Location & dual fencing



SATELLITE MEASUREMENT

- > Pasture covers
- > Soil types
- > Soil moisture

IMPROVED WORK ENVIRONMENT

- > Automation
- > Once-a-day

INEFFICIENT METHODS

People

Profit

Environment

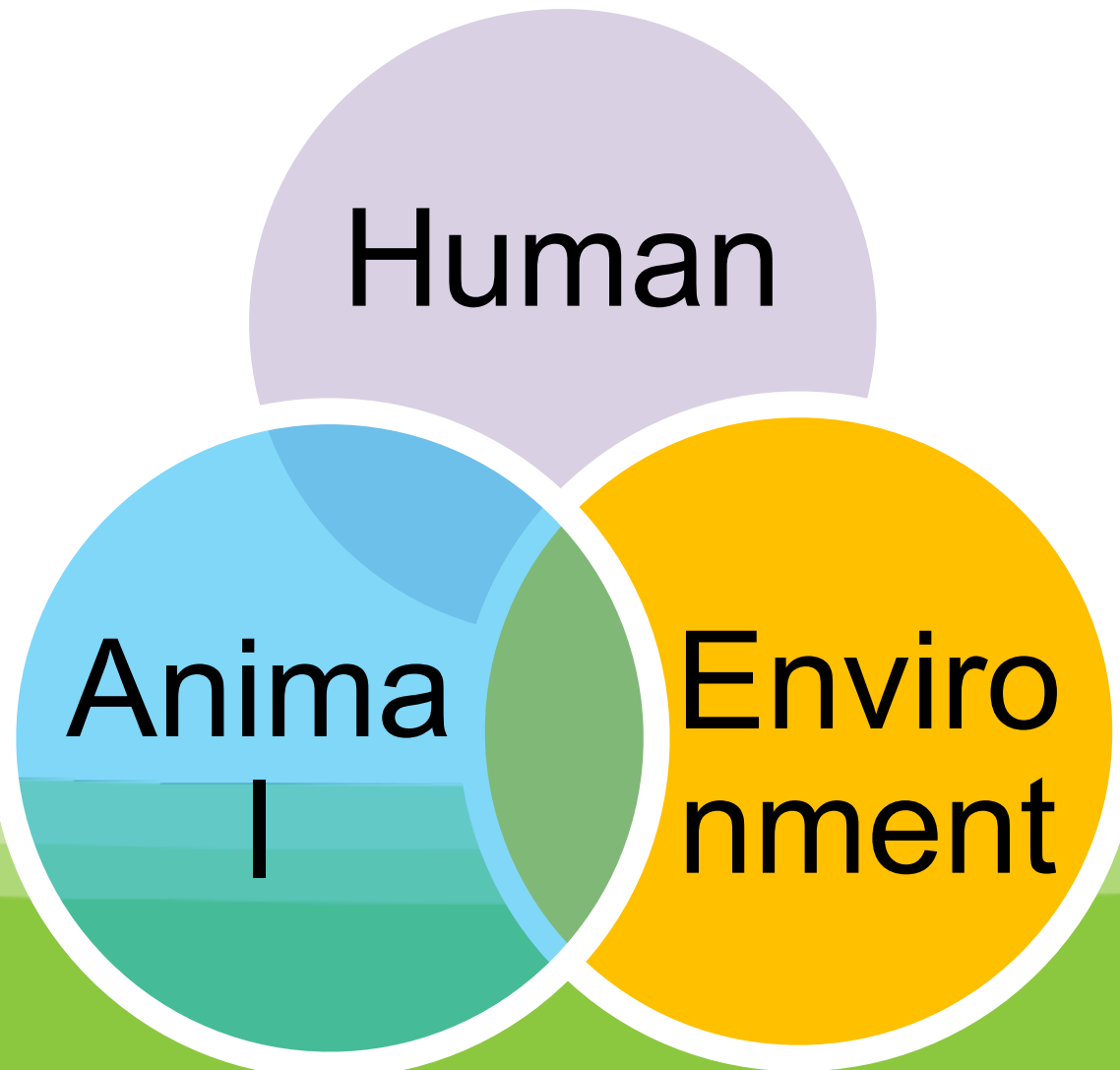
Public perception

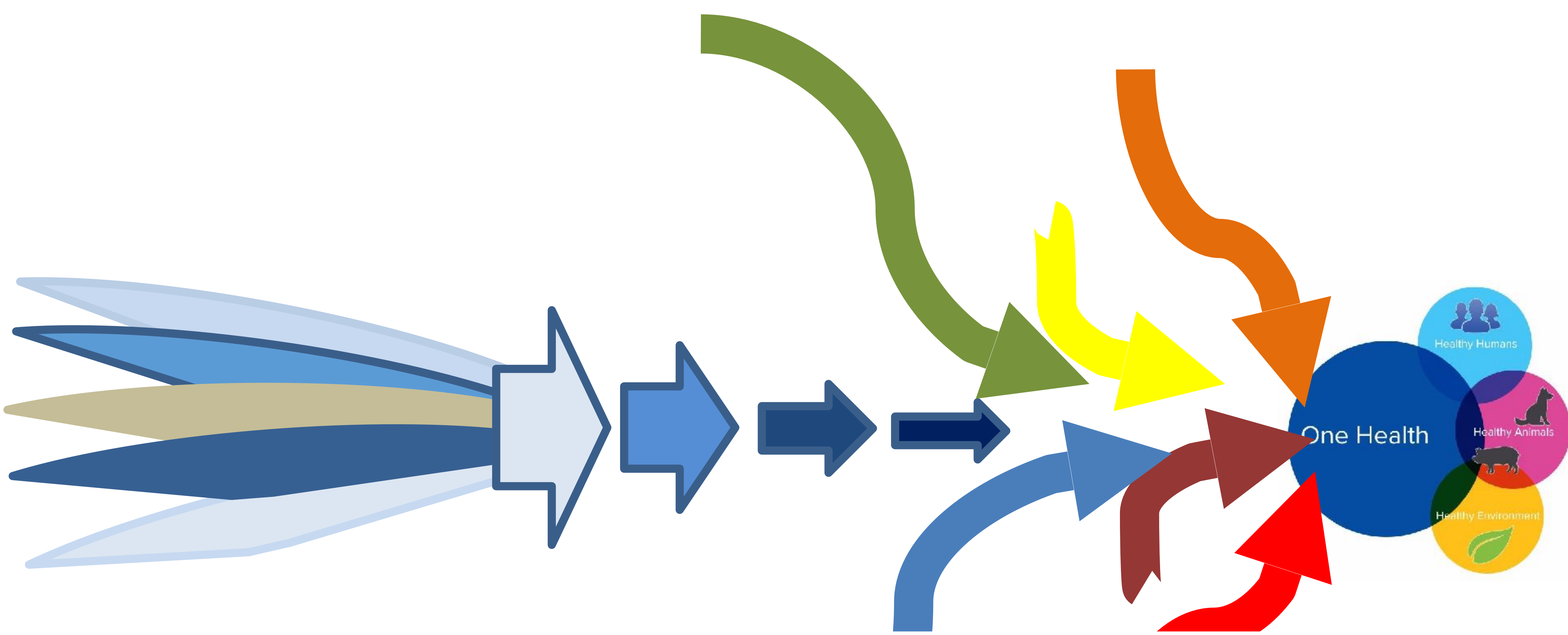
Animal welfare

High quality dairy products

▶ VOTE HERE ◀

Veterinarians typically live at the intersection of the animal- human- environment

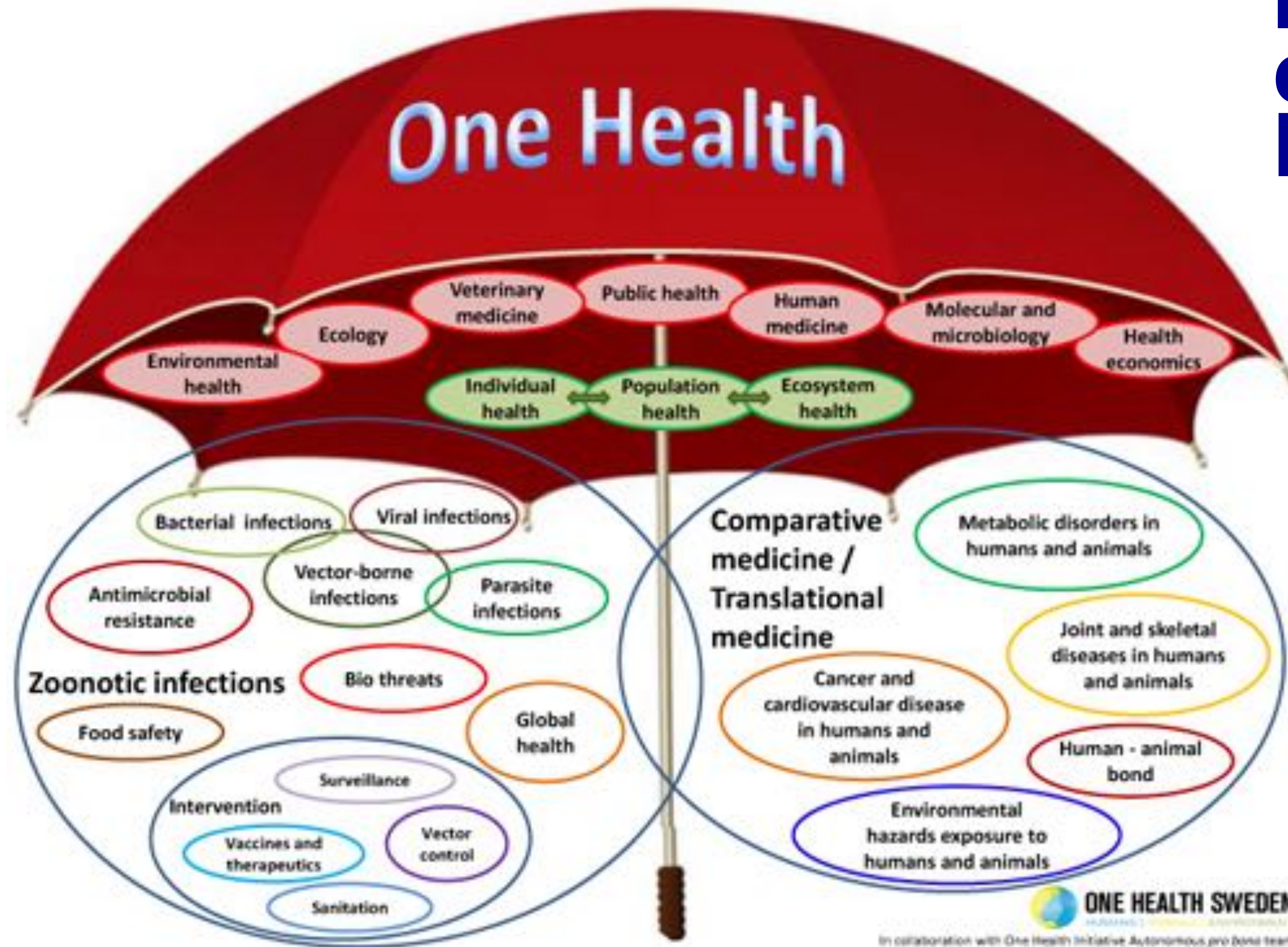




Traditional Specialised Broad One Health

GP

In the future vets will be closely aligned to One Health initiatives:



- Zoonoses
- Food safety
- AMR/AMU
- Animal welfare
- Food quality/quantity
- Environmental stewardship
- GHGs
- Climate change
- Wealth inequality
- Social impacts of biosecurity
- Water use
- Vulnerable land use
- Socio-economics
- Community health
- Communication science

The New Veterinarian: Being Fit for the Future

Fully integrated, sustainable decision making

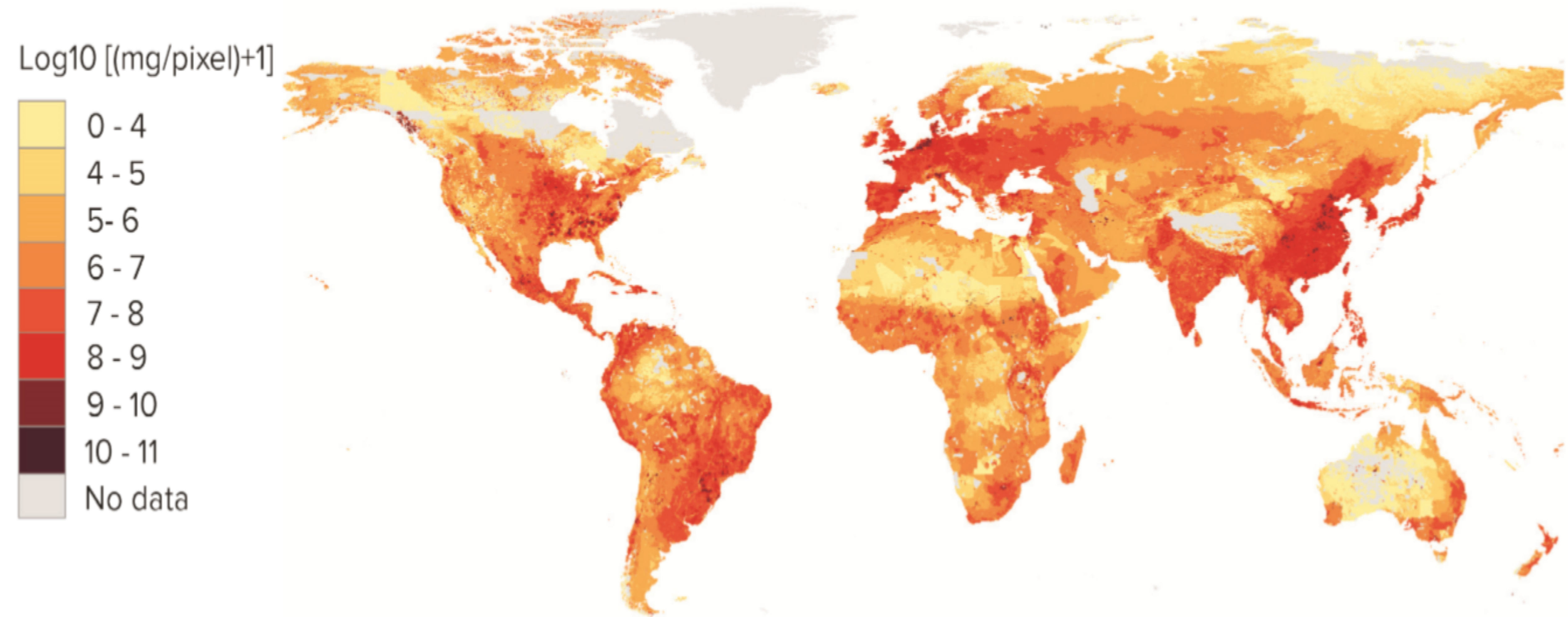
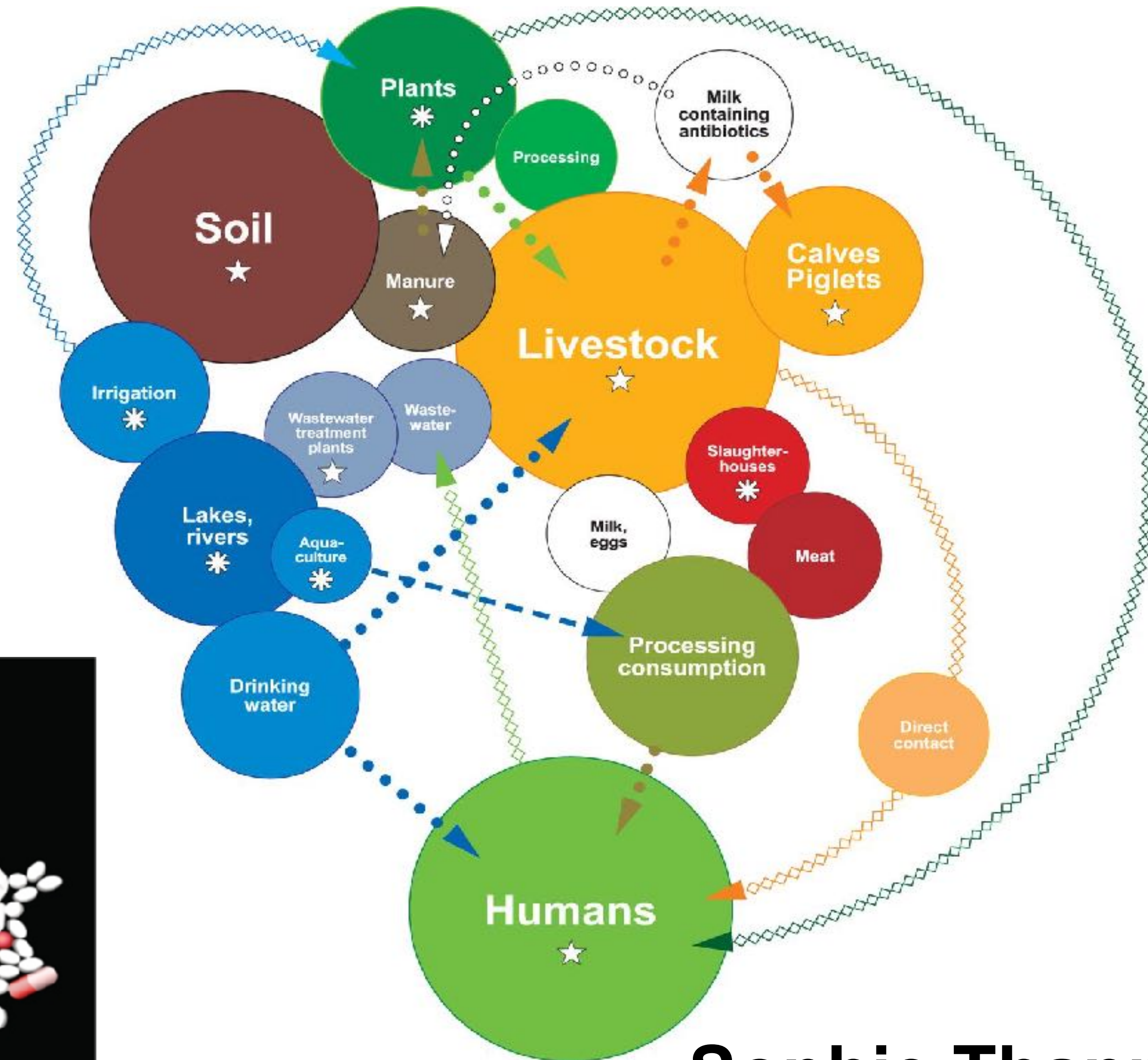
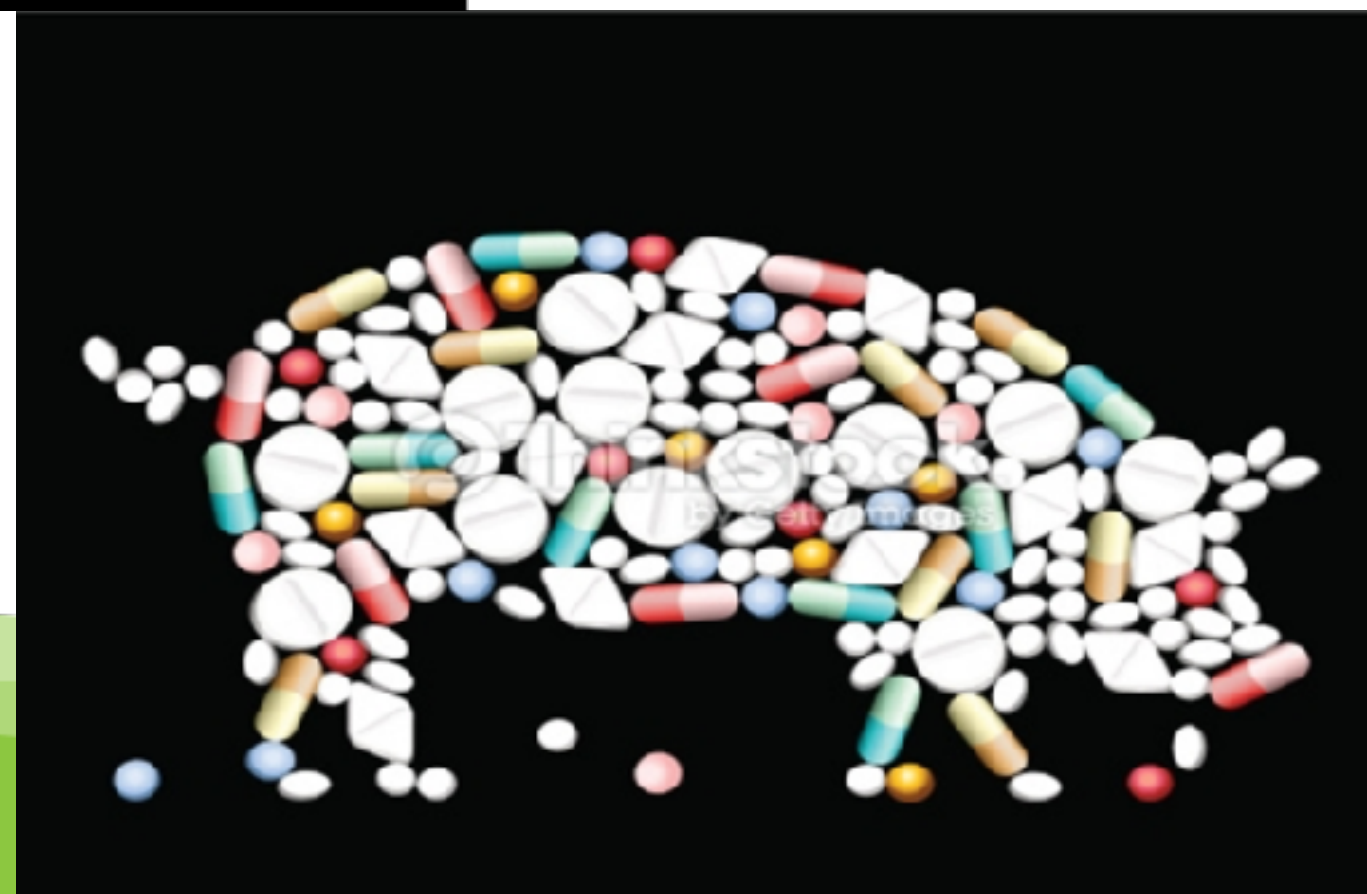


FIGURE 3-1: Global antibiotic consumption in livestock (milligrams per 10 km² pixels) 2010

Source: Van Boeckel et al. 2015

Pathway map of AMU and AMR dissemination within food systems



ood
/



Question 1- How do we as vets engage more with global food production strategy and within the food chain?

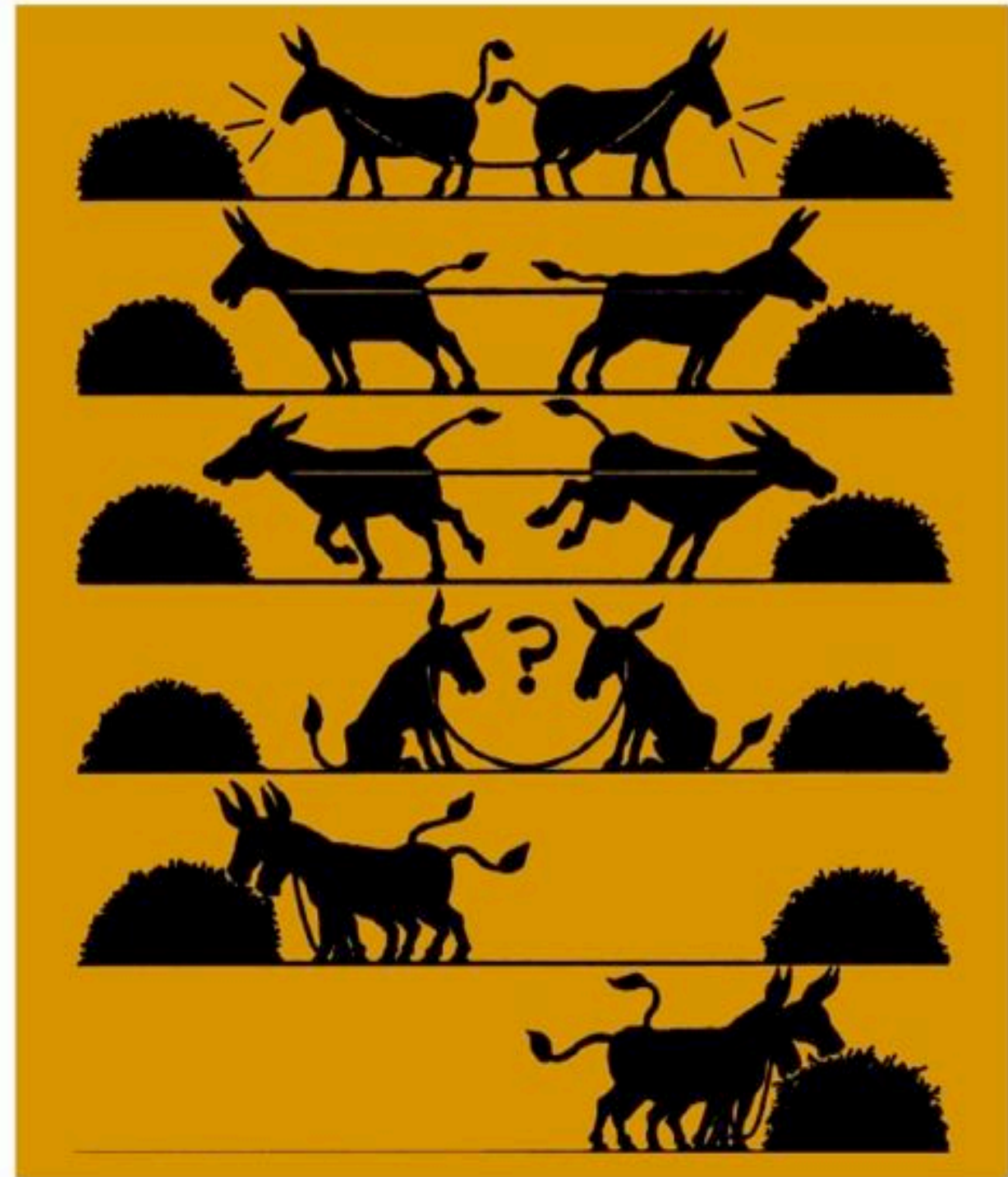
Question 2- How do we become transdisciplinary – and elevate outcomes above specific silos?

The 3 vets...



'The Two Mules'

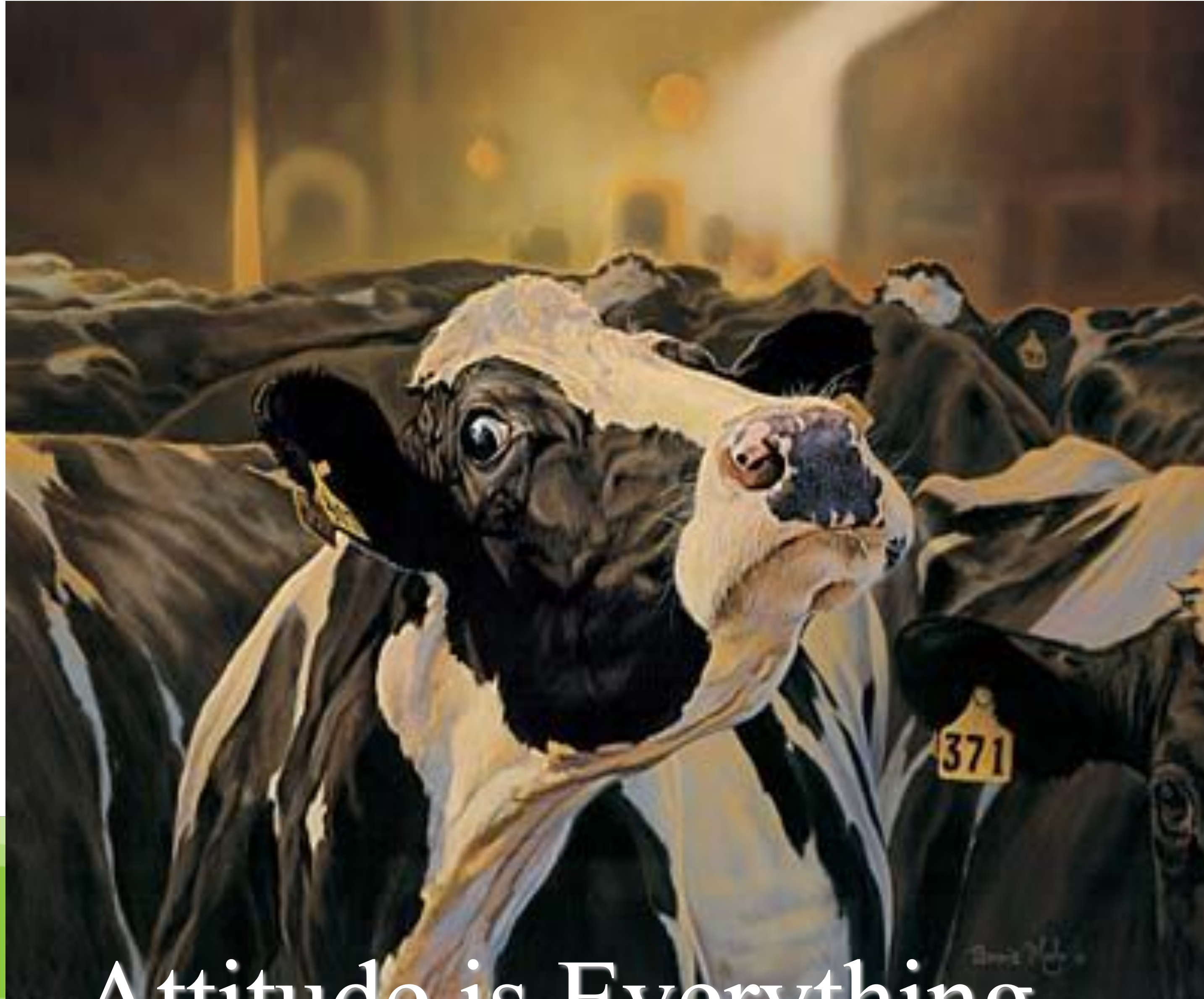
A fable for the nations



Co-operation
is better than conflict
www.quaker.org.uk



***The Future of Farming needs A Healthy Industry
which needs Wholesome Food from Healthy
Animals***





www.vetsalus.com