



5TH ANNUAL ANIMAL HEALTH, NUTRITION & TECHNOLOGY INNOVATION USA

2023 POST-EVENT REPORT

12-14 JUNE | BOSTON



“The event is the epicenter for the pet and production animal startup community helping to drive forward innovation. If you are an investment leader, business or corporate development leader or a start-up, this is a must attend event”

Bruce Truman, Founder, **BLT Technology and Innovation Group**



“Animal Health and Nutrition and Technology Innovation USA is a well-organized event attracting the world’s top animal health and nutrition companies, start-ups, investors, and service providers. There are a myriad of opportunities for engagement, from the workshops to networking events and 1:1 sessions”

Emily Aston, Senior Program Manager, Animal Health & Nutrition, **TechAccel**

KEY SPEAKERS:



Mark Krivis
Senior Director, Business Development Lead
Zoetis



Megan Grether
Head of Global Business Development and Licensing Animal Health
Boehringer Ingelheim



Lucas Huntimer
Senior Advisor External Innovation
Elanco



Paula Bamford
VP, Veterinary Services
Petco



Stephen Lesser
Principal
Novaquest Capital Management



Aaron Schacht
CEO
BiomEdit



Luis Lopez
Sr. Leader Healthcare
Amazon Business



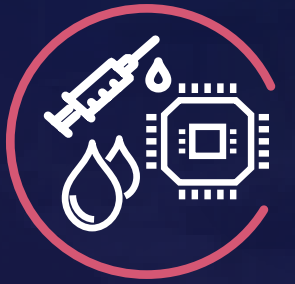
OVERVIEW



200+
ATTENDEES



40+
SPEAKERS

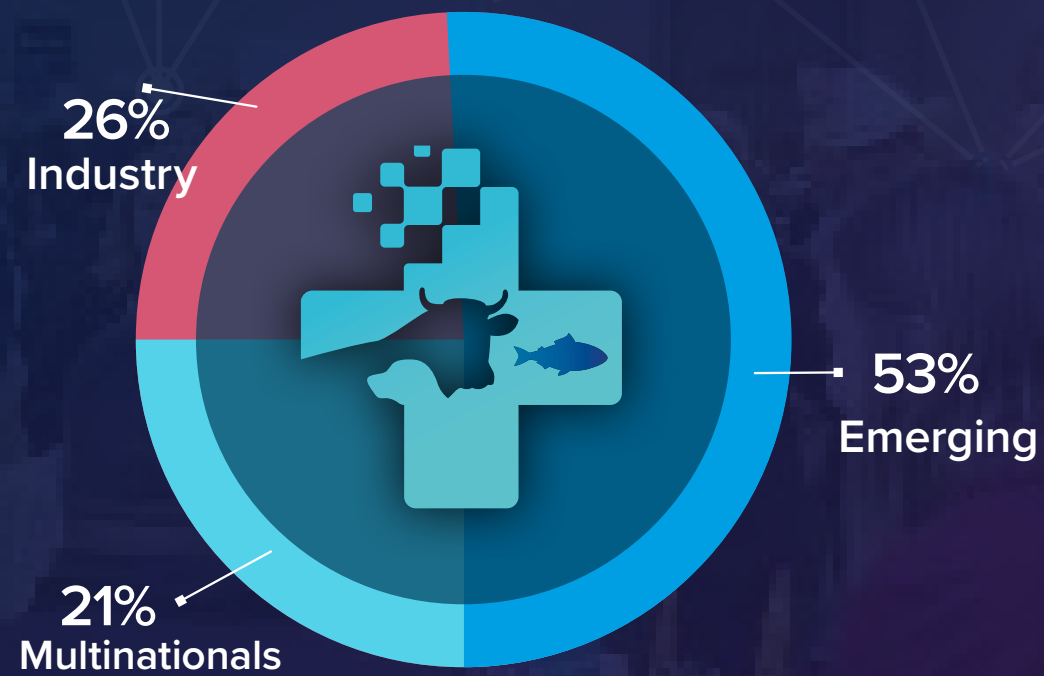


50+
START-UP
COMPANIES



500+
MEETINGS

AUDIENCE BREAKDOWN



“One of my favourite events of the year – it just keeps getting better!”
Candise Goodwin, Principle, Outlier Advisors



“It is just phenomenal. I always find it very enriching and a positive experience to be surrounded by entrepreneurs and early-stage company owners because they’re the future.”
Cherylyn Harley Le Bon, Partner, Womble Bond Dickinson

We were joined by over 200 attendees from Animal Health, Nutrition and Technology industries, including:

amazon business



anterra capital

ARCHIMED

argenta

BetterVet

BIOMEDIT

Bistro.Cat

BLACK PET BUSINESS NETWORK

Boehringer Ingelheim



clinglobal

CRODA

cryoport systems

CYTOPHAGE



DIGITALIS

Diversigen



embark

ENALARE

HIPRA



Kyoritsu Seiyaku

Lawless Strategic Communications

MAZEN ANIMAL HEALTH

McKinsey & Company



NOVUS SOLUTIONS SERVICE SUSTAINABILITY

Odie

Pda Paul Dick & Associates Ltd.

PetMedix ANTI-BODY INNOVATION IN ANIMAL HEALTH

petco

Petfolk

relief rover



Syngene Putting Science to Work

Transpharmation Science that translates into results

wagz

The Washington Post

WellHaven Pet Health

zoetis

ZumVet

2023 ATTENDEE GEOGRAPHIC BREAKDOWN



WITH ATTENDEES FROM OVER 30 COUNTRIES, INCLUDING:

- | | | | |
|--|---|---|--|
| 
Australia | 
Canada | 
Chile | 
France |
| 
Georgia | 
Germany | 
Israel | 
Japan |
| 
Portugal | 
Singapore | 
South Korea | 
Spain |
| 
Switzerland | 
Taiwan | 
United Kingdom | 
United States |

ROUNDTABLE ROUND-UP

Discover the key takeaways from some of our roundtables hosted by leaders in the space.

Current Trends in Pet Parasiticides with Stephi Teat, Senior Director, Pipeline and Portfolio Strategy at Boehringer Ingelheim



Companies are consolidating by offering veterinary services, OTC products, grooming, wellness, etc. This enhances buying power as purchasers can easily compare products. Products are also consolidating with more combination therapies coming to or already on market.



Consolidation and the impact of Covid-19 has changed the user experience. In many cases, purchasing products and going to the vet has become easier.



There is increased chemical scrutiny and a sustainability push. Public scrutiny of ectoparasiticides has been around for a while. There has been a push for plant based or “natural” products but how are these viewed? Are they seen as effective versus traditional products?



There are lots of apps in phone stores but there is a need for user education on products and how to use them properly. Is there a way to leverage technology to improve user experience, access to veterinary services and update the parasiticide world?

The Importance of the Microbiome in Guiding the Care of our Pets with Judy Schnurr, Director, Nutrition Innovation, Hill's Pet Nutrition



The pet microbiome holds significant promise in positively influencing pet health. It offers a distinctive avenue to enhance the well-being of our furry companions, and within this context, stool characteristics emerge as critical and revealing indicators of their overall health status. This holds true not only for popular pets such as cats and dogs but also extends to equine companions like horses.



Exciting new applications of technologies will lead to the evolution of our understanding regarding the role of the microbiome and its application to animal health.



Improving the communication of nutritional benefits through the pet microbiome can be achieved by establishing a connection to an actionable outcome, such as employing direct-to-consumer (DTC) microbiome testing to prompt necessary actions in case of imbalances.



Products that leverage the power of the microbiome, such as prebiotics, probiotics, and postbiotics, are not just passing trends but rather are expected to become a permanent fixture in advancing pet health and wellness.

ROUNDTABLE ROUND-UP

Discover the key takeaways from some of our roundtables hosted by leaders in the space.

The Biggest Opportunities in Aquaculture: Data, Analytics, and New Farming Methods with Emily Aston, Senior Program Manager, Animal Health & Nutrition, TechAccel



Navigating the regulatory hurdles is a particular challenge involved in establishing aquaculture facilities in the United States and other regions around the world



Offshore aquaculture is growing, with opportunities to address spatial constraints, improve water quality, and minimize conflicts with other operations in other locations.



Research on alternative feeds, especially alternatives to fishmeal and soybean meal, is a continuing trend, and many alternatives show promise to reduce or eliminate the need for these protein sources.

The Importance of Regulatory Knowledge at All Levels in your Company with Dr. Haley Larson, Assistant Professor of Animal Health, Kansas State University



Identifying Barriers to Innovation

Industry/Agency communication

- Jurisdiction
 - Unequal understanding of study execution
- Product Strategy
- Understanding of viable market
 - Global Go-to-market
 - Return on Investment

Risk of Unknown limiting the innovative space

Although all of these categories involve regulation, regulatory teams themselves may not be seated at the decision table.



How Can We Overcome Barriers?

It is perceived that regulatory affairs teams limit the creativity of innovative teams because of the strict “guard rails” they enforce to guide products successfully through licensure/application process. However, integrating regulatory knowledge into all facets of solution development pipelines ensures business appropriate development from early point in the process. With any successful regulatory specialist comes a knowledge of regulation, litigation, statistics, biology, experimental design, and more. So often the individual who is in this role is “seasoned” with experience and is not easy to be replaced.

Generally, graduates have no exposure to regulatory affairs prior to coming to industry. This is being taught on the job, through years of experience in multiple facets of the industry.



Preparing Our Employees to Face Our Barriers

Integrating regulatory knowledge into future and current employees as a piece of professional development or even better as a longer-term program (i.e. graduate certificate program) provides an added layer to innovation – increased agility and faster timelines. Because those “risks of the unknown” can be identified quickly to establish how long creative ideas would take to implement. Not as an intention to stop creative innovation but as a mechanism for establishing realistic timelines early in the development process that will match the demands of the customer base and when they need solutions deployed.

THE INNOVATION SHOWCASE

The Innovation Showcase offered a unique opportunity for emerging companies to present in front of the industry's most influential figures and investors. In 2023, we received applications from over 60 emerging companies! Our prestigious Selection Committee picked 20 game-changing start-ups who were given to opportunity to introduce themselves and present their innovations and achievements on the main stage across production and companion animal health.

This Year's Finalists:

Companion



Late Stage



Production



This Year's Winners:



2023-24 ANIMAL HEALTH SERIES CALENDAR

December
5-6
California



**PETCARE
INNOVATION USA**

Driving Innovation and Investment to Build a Data-Driven and Sustainable Petcare Industry

March 2024
4-6
London



**ANIMALHEALTH, NUTRITION
& TECHNOLOGY INNOVATION
EUROPE**

Shaping the Future of the Animal Health Industry by Showcasing Innovations in Prediction, Prevention and Treatment

June 2024
4-5
Berlin



**PETCARE
INNOVATION EUROPE**

Showcasing the latest innovations across Europe to drive partnerships and investment within petcare

June 2024
10-12
Boston



**ANIMALHEALTH, NUTRITION
& TECHNOLOGY INNOVATION
USA**

Shaping the Future of the Animal Health Industry by Showcasing innovations in Prevention, Prediction and Treatment

October 2024
Location
TBC



**ANIMALHEALTH, NUTRITION
& TECHNOLOGY INNOVATION
ASIA**

Advancing Innovation, Product Regulation and Strategic Corporate Partnerships in Asia Pacific



Speak to our team to discuss partnering with the events that best align to your goals. Contact us at + 44 (0) 203 696 2920 or or email Stephen Swarray at swarray@kisacoresearch.com