



We are IVC Evidensia

EUROPE'S LARGEST AND FASTEST-GROWING VETERINARY GROUP



IVC EVIDENSIA

Europe's largest and fastest-growing vet group

IVC Evidensia is Europe's largest veterinary care provider with a network of clinics, hospitals and out-of-hour centres based across 13 countries employing 23,000 staff. We invest in our people, premises and processes to provide clinical excellence.

World-class veterinary care delivered locally

Founded in 2011, we have grown rapidly by offering vets a unique and innovative working environment, promoting the highest standards of care while retaining clinical freedom and the flexibility of local service delivery.

Our mission is bringing people together to make animal care better

We believe the best veterinary practices are those led by local teams, which is why we are pioneers in developing our people, investing in continuous professional development through education, defining best clinical standards and our celebrated academies.

Advised by our Clinical Boards we ensure the best treatments and medicines are available for our clinicians, backed up by expert advice.

We promote the responsible use of antibiotics, raise awareness of infection prevention and champion many animal welfare issues.

Our purpose is simple: healthy animals and happy owners.

2020 Annual Proforma Sales

c£1,314m

CAGR

(FY18 - FY20 Proforma Sales)

40%

Like-for-like organic growth over past 12 months

11.1%

Please note all figures quoted in this document are company estimates at time of publication.

An extensive network of clinics and hospitals across 13 countries

Our growing network of first opinion, referral and out-of-hours practices work together in redefining exceptional veterinary care across Europe.

Countries in which we operate:

- | | |
|---|--|
|  Belgium |  Norway |
|  Denmark |  Portugal |
|  Finland |  Spain |
|  France |  Sweden |
|  Germany |  Switzerland |
|  Ireland |  United Kingdom |
|  Netherlands | |



Caring is core to our success

At IVC Evidensia, we share a common vision, mission, customer promise, purpose and group strategy in all clinics across Europe.

We build and implement common core support processes to gain coherency and transparency, leaving our clinics to focus on what they do best, putting patients and customers first.

We create long-term value by investing in our people, practice and systems to deliver exceptional veterinary care and sustainable organic growth. We create our future through innovation and diversification.

Our principles

Our whole business is built around six key principles:



Belief in people

The success of a clinic is down to the individuals that work there. We invest in continuous professional development for everyone within IVC Evidensia.



Investment in your practice

We invest our money in refurbishments, facilities, equipment and technology so that our clinics can provide the best possible patient care.



Exceptional care

We know the primary concern is delivering the best possible care. That's why IVC Evidensia practices always put their patients first.



Clinically led practices

We believe that the best practices are led by our vets and we want it to stay that way. That's why we place so much emphasis on our clinical boards.



An independent spirit

Our clinics are the heart of the community and we want it to stay that way. We always keep the spirit of the original practice intact.



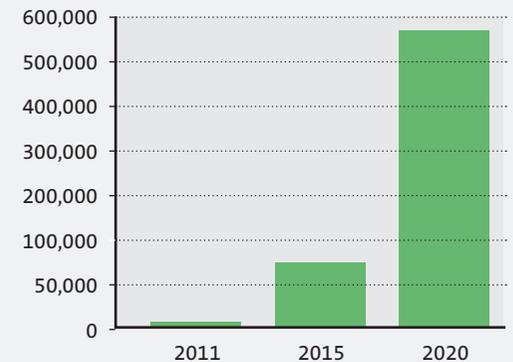
Sharing expertise

We are incredibly proud of the depth of talent among our referral clinicians, as well as their state-of-the-art facilities.

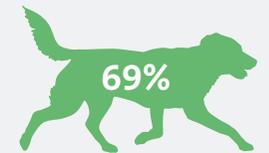
'Exceptional, affordable care'

We offer our clients across Europe access to high quality treatment and care, backed by our commitment to value and service delivery.

IVC Evidensia healthplan members



Our most common patients



We are united by our unique values

At IVC Evidensia we share a common vision, mission, customer promise, purpose and group strategy across all of our clinics and hospitals throughout Europe.

We Care

We care for animals and people, keep our promises, and treat each other with decency and respect.

We Dare

We dare to innovate, encourage entrepreneurial thinking and identify opportunities to succeed in a changing world.

We Share

We share knowledge, best practice and make decisions based on trust, dialogue, commitment and engagement.

IVC Evidensia in numbers

As the largest and fastest growing veterinary group in Europe, our statistics grow on a daily basis.

From a small group of practices in the UK and Sweden in 2011 to a network spanning 13 countries, IVC Evidensia has come a long way in just a few years. These figures illustrate our fast and sustained growth as both the leading veterinary services provider and largest employer within the European veterinary industry.



>4m
pets are treated at IVC Evidensia clinics and hospitals per annum.

23,000
employees across Europe including vets, nurses and support staff.



2,200
new clients turn to IVC Evidensia every day so that we can help them give their pets the best possible lives.

6,100
of our vets are working in 12 countries, treating small animals, horses and livestock every day.



179
Referral centres, referral hospitals and out-of-hours sites and sites offering referral services.

682
referral vets and nurses across Europe.



152
diplomates situated across our group.

7,700
nurses play essential roles in the teams that care for our pet patients.



24 hours a day, 365 days a year - on average we treat a patient every
8 seconds

97
total number of MRI and CT scanners the group had access to in July 2020.



The strength of our group lies in its people

IVC Evidensia has always been veterinary led with a focus on clinical excellence.

IVC Evidensia's international Group Veterinary Medical Board supports each country's clinical board in regard to evidence-based care, quality assurance and medical strategies. It provides IVC Evidensia with a forum to discuss, advise and decide on clinical matters related to the group as a whole.

We build and implement common core support processes to gain coherency and transparency, letting our clinics focus on what they do best, putting patients and customers first.

We create long-term value by investing in our people, practice and systems to deliver exceptional veterinary care and sustainable organic growth. We create our future through innovation and diversification.

Group veterinary advisors and Medical Directors help local clinical teams by using their years of experience to influence policy and practice at every level.

“If we can be seen as a positive influence across the whole profession, why wouldn't we aspire to that?”

ALISTAIR CLIFF – CHAIR, GROUP VETERINARY MEDICAL BOARD

IVC Evidensia's Group Veterinary Medical Board



Alistair Cliff

BVM&S CertAVP MRCVS,
Chair GVMB



Marlene Areskog

DVM, PhD, Country Medical
Director Sweden



Edward Davies

BVSc MRCVS, Chairman
Clinical Board UK



Sarah Proot

DVM, Country Medical
Director Netherlands



Anette Spohr

DVM PhD, Country Medical
Director Denmark



Mirja Kaimio

DVM, National Specialist,
Clinical Board Finland



Monica Heggelund

DVM, Country Medical
Director, Norway



Reto Neiger

DECVIM-CA, DACVIM,
PhD, Country Medical
Director DACH



Guillaume Ragetly

Dip ECVS, ACVS, PhD,
Country Medical Director
France



Finbarr Heslin

MVB MRCVS BSc (Hons)
Mgmt Prac, Country Medical
Director Ireland



David Martin

Group Animal Welfare
Advisor



Mark O'Byrne

Group Head of Nutrition



Jan Lievaart

Group Head of Farm
Animal and Equine



Anna-Maria Andersson

Group Hygiene Director



Amanda Boag

Group Referral Director

Ethical Statement

The IVC Evidensia Ethical Statement outlines the values and responsibilities of our group. It considers our patients, their owners, our staff and colleagues, as well as public health and global sustainability.

For IVC Evidensia, to be a responsible company means to behave ethically in all aspects of our business and to care for the environment. We must set good examples in the way we act towards each other as employees and the way we treat our business partners, always respecting laws and regulations in the countries we do business.

These guidelines direct our everyday work as well as policy decision processes and apply to all activities within the company, extending beyond clinical practice. This is not a complete list, rather a template to guide our ideals.

Read our complete Ethical Statement [here](#).

IVC Evidensia is leading the way in setting a new standard of veterinary care, developing the unique concept of Animal Wellbeing.

People development

The IVC Evidensia Academy is where our employees grow and develop their skills and knowledge. It allows each staff member to choose their own career path. Be it clinical or non-clinical, practical or lecture-based - the IVC Evidensia Academy is the home of learning and development.

IVC Evidensia Academy courses and programmes are targeted at all members of the Practice Team wanting to develop their skills within chosen fields.

Our courses and training programmes are offered across a range of European countries and include several international programmes, including the IVC Evidensia Graduate Academy.

Our Key Strategic Priorities are the basis of everything we do:

- Develop careers through Learning & Development
- Develop digital capacity that enables access to responsive, flexible learning
- Develop partnerships that facilitate access to high quality, credible & accredited clinical development
- Promote the wellbeing of our staff

“Our aim is to train our teams to be the best in their field and excel in their career.”

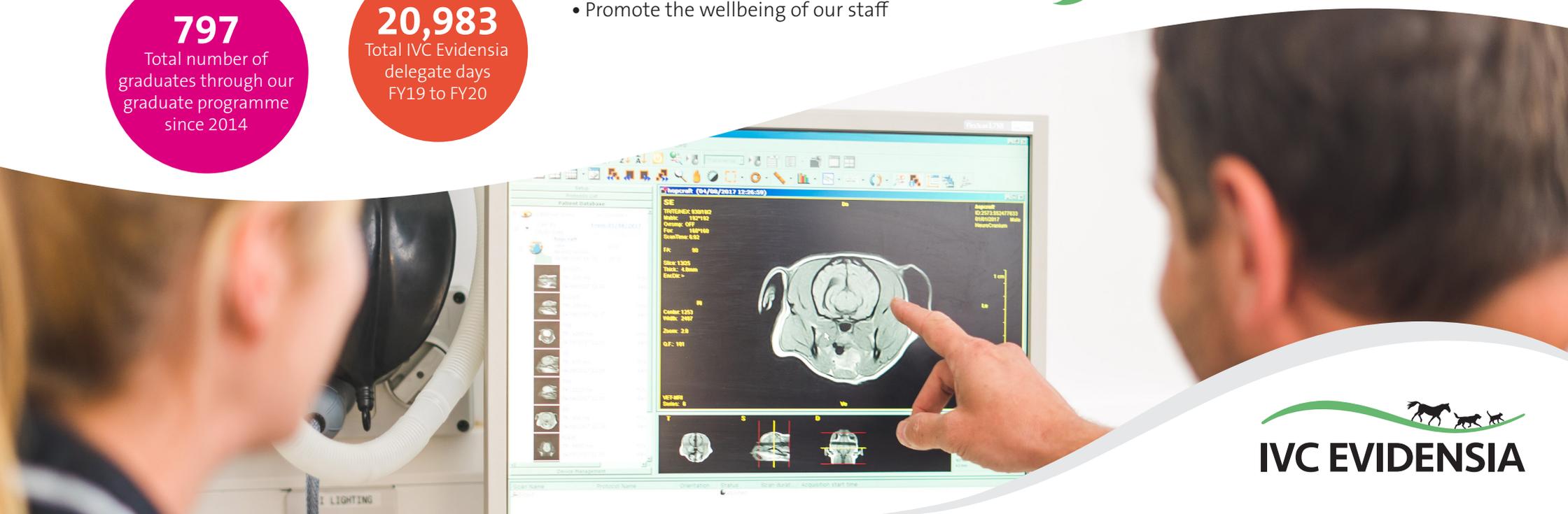
STEPHEN CLARKE – CEO, IVC EVIDENSIA

797

Total number of graduates through our graduate programme since 2014

20,983

Total IVC Evidensia delegate days FY19 to FY20



Our Group Strategy

Our group strategy relies on a framework of developing a growing network of first opinion, referral and emergency clinics and hospitals across Europe.

Acquire

Acquiring great veterinary clinics that share our values and want to build their future with us.



Build

Building and implementing common core support processes to gain coherency and transparency, letting our clinics focus on what they do best, putting patients and customers first.



Create

Creating long-term value by investing in our people, practice and systems to deliver exceptional veterinary care and sustainable organic growth. We create our future through innovation and diversification.



Sustainability

The topic of sustainability is growing in importance for IVC Evidensia’s stakeholders, clients and people.

Establishing the Positive Pawprint

For structural reasons, the veterinary industry has never comprehensively addressed this topic and at IVC Evidensia, progress on sustainability has largely relied on the discretionary efforts of passionate individuals at clinic level.

As part of IVC Evidensia’s vision of building the world’s best veterinary group, we are committed to building a more strategic approach to sustainability for the group - thereby, making a more positive impact on the world, better meeting the expectations of our teams and clients, and ultimately becoming the market leader for sustainability in the sector globally.

At IVC Evidensia, caring is what we do and who we are - by protecting the health and happiness of people and their pets, and the joy their relationships bring. We care every day for animals, clients, colleagues, and for a cleaner environment.

Believing in a sustainable approach to how we operate is the reason that sustainability has become a key part of the Group’s strategy. As well as growing the business and constantly improving clinical standards, this means caring about the difference we make to people and the environment.

It means becoming both the best veterinary group in the world, and the best veterinary group *for* the world.

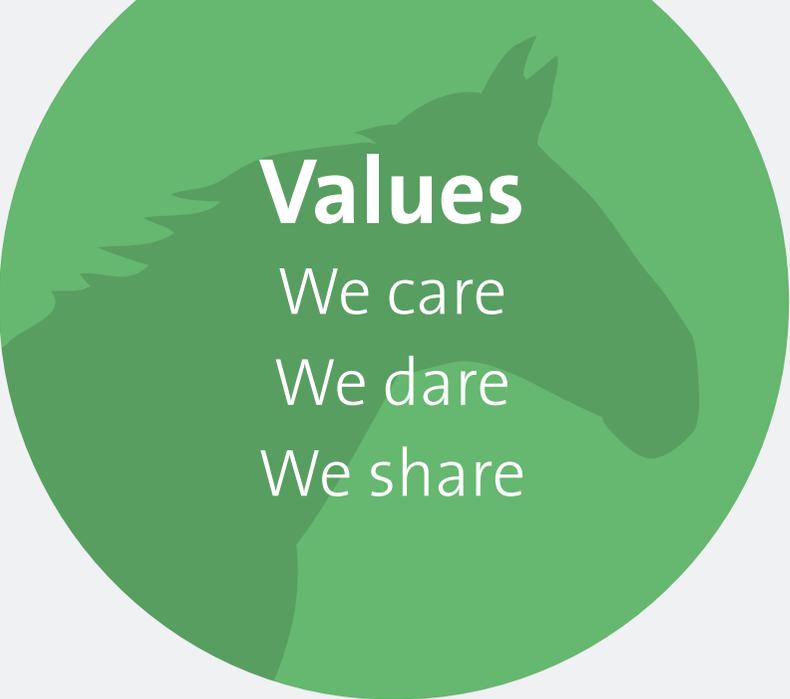


Positive Pawprint

Growing our Group as a force for good

Caring for people	Caring for planet	Caring for pets
Protect and promote the health and wellbeing of our teams	Transition our company toward net-zero climate impact	Deliver highest possible standards of care quality and safety
Offer the highest standards of client care and communication	Minimise our waste footprint through optimal management	Promote and innovate integrated animal health solutions
Create welcoming, diverse and inclusive workplaces	Train all clinicians on applied sustainability in veterinary care	Continually grow our clinical knowledge and skills
Empower clinics to contribute to their local communities	Evolve industry-leading sustainable procurement practices	Continually share knowledge, incidents and best practice
Ensure human rights are respected across our value chain	Practice leading standards of chemical and pharma management	Collaborate with peers to innovate best practice on AMR





Values

We care
We dare
We share



Mission

Bringing
people together
to make animal
care better.



Vision

Building the
world's best
veterinary group.

One IVC Evidensia for the future



Purpose

Our purpose is
healthy animals and
happy owners.



Group Strategy

Acquire, build,
and create.



Customer Promise

World-class
veterinary care
delivered locally.



www.ivcevidensia.com