
**Brakke Consulting's
Animal Health News & Notes for December 9, 2005**
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2005 FLEA & HEARTWORM REPORT NOW AVAILABLE!

TIME TO REGISTER FOR THE BRAKKE CONSULTING 2006 INDUSTRY OVERVIEW

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COMPANY EARNINGS RELEASES

> **Central Garden & Pet** Company announced fourth quarter and full year results for its fiscal year ended September 24, 2005. Net sales for fiscal 2005 for the Pet Products division were \$639 million, an increase of 12% from \$569 million in fiscal 2004. (*company website, 10K*)

> **Provimi** reported turnover for the first nine months of 2005. Revenues fell 2.7% to EUR 1.2 billion (\$US 1.5 billion), mainly due to the knock-on effect of low raw material prices. (*Animal Pharm*)

> **Sanderson Farms** doubled its profit for the fourth quarter ended Oct. 31, reporting earnings of \$10.1 million compared with \$5.1 million during the same period a year ago. Fourth-quarter sales

totaled \$249 million compared with \$259 million during fourth quarter 2004. Net income for fiscal 2005 was \$70.6 million compared with net income of \$91.4 million last year. Net sales for the year were \$1.006 billion, compared with \$1.052 billion for fiscal 2004. (*Meating Place*)

BRAKKE CONSULTING, INC.

NOW AVAILABLE!

2005 US FLEA & HEARTWORM MARKETS REPORT

As we've done for the past several years, Brakke Consulting has published an update of our annual report on the US Flea Control and Heartworm Markets. The report includes up-to-date sales data on the leading flea and heartworm products, advertising expenditures, and information on new and developing products.

The 2005 report also includes a survey of over 180 small animal veterinarians regarding flea, tick and heartworm products. Veterinarians shared their thoughts on retail sales of products, prescription fulfillment services, incentive programs, and other current topics affecting flea and heartworm product sales, and even supplied open comments to the product manufacturers. Shouldn't you know what your clients are thinking?

The report on the US Flea Control & Heartworm Markets available for a purchase price \$4,995.

Please contact Dr. Lynn Fondon at (972) 243-4033 or lfondon@brakkeconsulting.com to order the report or for more information.

COMPANY NEWS RELEASES

> **IDEXX Laboratories**, Inc. introduced a new prepackaged Quality Control Panel for use with the VetTest Chemistry Analyzer to ensure the most accurate test results for patients. The VetTest Quality Control (QC) Panel is packaged with four panels per box, giving veterinarians a four-month supply of quality-control slides. Each panel consists of the chemistries veterinarians need to efficiently perform quality control on the VetTest Chemistry Analyzer. This new panel also simplifies inventory control by offering 24-month dating. (*company website*)

> **IDEXX Laboratories**, Inc. introduced a new in-house medication monitoring panel of tests for use with the VetTest Chemistry Analyzer. The NSAID Monitoring Panel is designed to support veterinarians in monitoring and ensuring the health of patients being treated with nonsteroidal anti-inflammatory drugs (NSAIDs). The NSAID Monitoring Panel is a single package that includes five tests (12 panels) recommended to evaluate potential insult to the liver and kidneys: ALKP (alkaline phosphatase); ALT (alanine aminotransferase); AST (aspartate aminotransferase); BUN (blood urea nitrogen); and CREA (creatinine). (*company website*)

> **Phibro Animal Health** Corporation announced it has completed the sale of its Rixensart, Belgium manufacturing facility on November 30, 2005. The sale was completed with GlaxoSmithKline Biologicals S.A. ("GSK") on terms substantially the same as previously disclosed in PAHC's financial reports. PAHC will continue to operate a European sales and service office from its new location in Wavre, Belgium. The company has transitioned the manufacturing technology from Rixensart to a facility in Guarulhos, Brazil. PAHC is expanding its Brazil facility to add production of virginiamycin and to increase capacity for salinomycin and semduramicin production. Financial terms were not disclosed. (*Business Wire*)

> **Products Group International (PGI)** and **Siemens Medical Solutions** announced an exclusive agreement to provide Siemens ultrasound imaging equipment, service and training to the veterinary industry. (*DVM Newsmagazine*)

> **Pets Best** pet insurance announced a free, easy-to-use pet recovery program for veterinary clients. Pet owners can receive a free, peel-off sticker listing a toll-free number that adheres to a pet tag. This number can be called to match up missing pets with their owners. The pet recovery program is being administered by Smart ID. Pets Best is offering these free programs in selected states, and anticipates being able to offer the program in 25 states by the end of this year, and all 50 states by the end of 2006. (*PRNewswire*)

> **Cimbix** Corporation announced that it has finalized on its obligation to **On4 Communications**, Inc. (formerly **PetsMobility Network** (Canada), Inc.), for the exclusive worldwide marketing rights to the PETsCELL, a voice-enabled pet tracking device that is worn on the pet's collar. The PETsCELL 2-way communication device has Global Positioning Capabilities that provides the pet's location in real time via a wired or wireless delivery format and can be delivered to a desk top PC, hand held device, telephone text or traditional voice message service. In addition, the device allows for pet owners to set geo-fence boundaries that will alert the owner when its companion steps outside the set boundary. (*Business Wire*)

SIGN UP NOW TO ATTEND BRAKKE CONSULTING'S 2006 INDUSTRY OVERVIEW

Brakke Consulting will once again be presenting our 2006 Industry Overview at the North American Veterinary Conference and the Western Veterinary Conference.

NAVC

The 2006 Industry Overview will be presented on Monday, January 9 from 2pm - 4pm at the Gaylord Palms.

WVC

The 2006 Industry Overview will be presented on Tuesday, February 21 from 8:30am - 10:30 am at the Four Seasons hotel adjacent to the Mandalay Bay.

Early registration is \$325 for the first company attendee and \$300 for additional attendees at the same presentation. To register, call Jane Morgan at 972-243-4033 or email jmorgan@brakkeconsulting.com.

ANIMAL HEALTH NEWS

> **VIETNAM - AVIAN INFLUENZA** Vietnam reported four new avian influenza outbreaks have killed more than 900 ducks and chickens in a northern province on the border with China. Test results showed the birds were positive with the H5 virus. (*Reuters*)

> **ROMANIA - AVIAN INFLUENZA** Authorities have quarantined another village in eastern Romania after three chickens tested positive for the H5 subtype of avian influenza. Animal health workers began to cull about 8,000 domestic birds in Cioacile, a village located in Braila County, where the H5 bird flu was detected last week in three other villages. Authorities believe the virus is the H5N1 strain, but are awaiting confirmatory testing. (*Scotsman.com, Reuters*)

> **US - BOVINE TB** The USDA has stripped Minnesota of its "bovine TB-free" status due to tuberculosis infections discovered in five cattle herds in the northwest region of the state. As a result, adult breeding cattle sold out of state will require additional testing for at least two years,

according to state veterinary officials. Veterinary officials said USDA's change was expected and characterized it as mild. (*Meating Place*)

> JAPAN - PLAN TO ALLOW US BEEF IMPORTS Japan's food commission declared American beef as safe as its own, paving the way for the government to ease a two-year ban. The Food Safety Commission agreed unanimously to send its conclusions to the Health and Agriculture ministries, which will make a final recommendation to the government. Media reports say the Cabinet could decide to ease the ban on US beef as soon as Dec. 12. (*AP*)

> UKRAINE - AVIAN INFLUENZA Ukraine reported its first outbreak of avian influenza, discovered among some 1,500 dead chickens and geese in the Black Sea region of Crimea. The dead birds, mostly domesticated chickens and geese, tested positive for the H5N1 type. (*AnimalNet - AP, URA*)

> ASIA - AVIAN INFLUENZA INITIATIVE Asian countries vowed to exchange information, develop new vaccines and enhance investment in their joint efforts to control the spreading epidemic of Highly Pathogenic Avian Influenza (HPAI). Representatives from 16 Asian countries and six international organizations reached the above consensus, which was written in an agreement entitled Kunming Initiative, at a ministerial conference for Asian cooperation on HPAI control. Since late 2003, HPAI has hit more than 20 countries and regions, especially those in Asia. (*Xinhua online*)

> US - DOG GENOME Scientists at a number of institutions and universities around the globe have sequenced the dog genome, decoding around 2.41 billion nucleotides that make up a set of genes in dogs. Researchers say that they have found strong similarities in these genes with those found in man. The paper detailing the dog genome sequence is published in the December 8 issue of the journal Nature. (*Earthtimes.org*)

**ANIMAL AGRICULTURAL ALLIANCE
FIFTH ANNUAL STAKEHOLDERS SUMMIT
MARCH 20 - 22, 2006**

The Animal Agriculture Alliance (Alliance) announced its Fifth Annual Stakeholders Summit to be held March 20-22, 2006 at the Sheraton Crystal City in Arlington, Virginia. The theme for the upcoming Summit is "Animal Welfare, Antibiotics and Activism: Leadership, Action and Solutions to Challenging Issues." The program builds off last year's success and will include prominent speakers on key topics including:

- The importance of leadership in successful animal welfare and anti-terror initiatives
- Consumers' views about animal welfare
- Advances in animal welfare
- International animal welfare standards
- Domestic regulatory initiatives
- The legal status of animals and efforts to change their status
- Ways to improve media relations

For more information, please visit the Alliance website at www.animalagalliance.org

BRAKKE CONSULTING VIEWPOINT

The early winter weather conditions in most of the US could make for some interesting successes or negative results in product sales over the next few weeks and months. I don't know where

you're located today but it's down right "cold" here in Dallas this week. Have you had your flu shot yet?

How the winter weather impacts product sales is probably dependent on which products you're selling. If you're in the cat litter business, a few extra tons of product being used for traction on ice for cars could make for a nice increase, to say nothing about the increased use by the "smart cat" who finds going outside a bit uncomfortable. It's probably a good time for those selling high energy pet foods for both dogs and cats. Those companies in the vaccine business may find it difficult to find customers working livestock or taking their pet to the veterinarian during this period. However, if you're in the antibiotics business there will likely be some fall out in more sickness caused by the cold weather.

Have a great weekend and keep WARM!!

Ron Brakke

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