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Brakke Consulting's
Animal Health News & Notes for December 14, 2007
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IN THE NEWS:

other news
Dechra
Decision Resources
Imulan
Lohmann
Milburn Equine
Rood & Riddle Veterinary Pharmacy
T-Cyte
VetXX
Webster
Wood Mackenzie

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2008 U.S. Animal Health Industry Overview

As we've done for a number of years, Brakke Consulting will be presenting our 2008 Animal Health Industry Overview at both the North American Veterinary Conference and the Western Veterinary Conference.

NAVC:
Monday, January 21, 2008
2:00 - 4:00 pm

WVC:
Tuesday, February 19, 2008
2:00 - 4:00 pm

The Overview will contain industry highlights and the 2008 outlook, industry statistics in key product markets, recent financial/acquisition activity, observation of leading companies, veterinary practice trends update, summary data from Brakke multi-client studies, and more. To register, go to www.Brakkeconsulting.com and follow the link to register for the Overview of your choice.

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NOW AVAILABLE!
2007 US FLEA CONTROL AND HEARTWORM MARKETS

2007 has been a year of dynamic change in the flea, tick and heartworm markets, with a number of new product introductions from both new and established players in the segment.

Brakke Consulting has published our latest annual report on the US Flea Control and Heartworm Markets. In addition to our annual survey of over 250 small animal veterinarians, this year's report includes coverage of the many new products introduced this year, including Advantage Multi, ProMeris, Vectra 3D, and Comfortis.

The report on the US Flea Control & Heartworm Markets is available for a purchase price of $5,500.

Please contact Dr. Lynn Fondon at (972) 243-4033 or lfondon@brakkeconsulting.com to order the report or for more information, or visit our website and download the order form at http://www.brakkeconsulting.com/studies/flea.html

www.BrakkeConsulting.com.

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COMPANY NEWS RELEASES

> Dechra Pharmaceuticals announced it has acquired the Danish multinational **VetXX** for GBP 61.7 million ($126 million). The deal will increase Dechra's European coverage and significantly expand its portfolio of licensed veterinary pharmaceutical products, according to the company. VetXX was established in 2005 through a management buy-out of the companion animal business of Leo Pharmaceuticals. Unaudited sales in the 11 months to November 30th were GBP 31.8 million. It is expected to complete in mid-January 2008. *(Animal Pharm)*

> Milburn Equine, a division of **Webster Veterinary Supply**, announced that they will be partnering with **Rood & Riddle Veterinary Pharmacy** to represent its compounding services to equine veterinarians nationwide. Rood & Riddle Equine Hospital joined forces with pharmacist Anne Lane Gresham in January, 2007 to form Rood & Riddle Veterinary Pharmacy. *(company press release)*

> Imulan BioTherapeutics and **T-Cyte Therapeutics** announced a partnership to further develop and commercialize Lymphocyte T-Cell Immunomodulator (LTCI). LTCI is conditionally approved as a treatment aid for Feline Leukemia Virus (FeLV) and Feline Immunodeficiency Virus (FIV) infections. Under the agreement, T-Cyte will manufacture LTCI while Imulan will focus on technical services, clinical trials and product distribution. *(company press release)*

> Decision Resources announced an agreement to buy **Wood Mackenzie'**s life sciences business. The division includes its market research, data and analysis on the biopharmaceutical and animal health industry. Terms were not disclosed. *(Animal Pharm)*

> EU **Lohmann Animal Health** launched a new vaccine for the control of Newcastle disease in poultry. AviPro ND C131 is a live vaccine produced from a cloned strain of the La Sota virus, and is suitable for broilers, layers and breeders. AviPro ND C131 has been approved in the EU. *(Animal Pharm)*

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NIAA Annual Meeting
April 1 - 3, 2008
Indianapolis, IN

The National Institute for Animal Agriculture (NIAA) 2008 annual meeting will embrace the theme "Animal Care and Well-Being: Facts Not Fiction," April 1-3, in Indianapolis, Indiana.

A schedule of events for NIAA's annual meeting and the 2008 ID•INFO Workshop, meeting registration, list of NIAA committees and hotel information are available at the NIAA website: www.animalagriculture.org.

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ANIMAL HEALTH NEWS

> US - FDA FINAL RULE The FDA issued final regulations to implement Section 572 of the Minor Use and Minor Species (MUMS) Animal Health Act of 2004. The regulations, entitled "Index of Legally Marketed Unapproved New Animal Drugs for Minor Species" ("the Index") is intended to allow companies to legally market veterinary drugs for minor species for which there are no human food safety concerns without having to go through the long and expensive process of a new animal drug approval. Inclusion in the Index will largely be based on the evaluation of the target animal safety and effectiveness of each specific product by a panel of qualified experts. The regulations become effective on February 19, 2008. For details, view the Federal Register notice at http://www.fda.gov/OHRMS/DOCKETS/98fr/E7-23580.htm. *(FDA)*

> POLAND - AVIAN INFLUENZA Poland reported a new outbreak of H5N1 avian influenza in eastern Poland. H5N1 bird flu was found in Sadlowo in the Mazowiecki province, not far from the site where another outbreak was discovered over the weekend. This is the fifth case of avian flu registered by Polish veterinary authorities since last week. *(RIA Novosti)*

> RUSSIA - AVIAN INFLUENZA Russia is investigating whether the death of 35,000 poultry in the country's south was caused by the H5N1 strain of avian influenza. Preliminary data from a farm in the Rostov region indicate the deaths were caused by the virus. If confirmed, the outbreak would be Russia's fourth major instance of avian influenza this year. *(AnimalNet - Reuters)*

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BRAKKE CONSULTING VIEWPOINT

From the size of the newsletter this week, it's obvious that many of you have already closed out your year. Hopefully there will not be any negative surprises like the announcement on December 23 of 2003 that a case of BSE had been discovered in the US. The industry is still recovering from that "Christmas present."

The feedback we are getting from many companies is that they are comfortably achieving their 2007 sales goals without too much selling pressure on distributors and dealer warehouses. That is great news if our impressions are correct!

The other piece of good news from our perspective is the number of new technologies and companies that have come to our attention in the past few months. Innovation is alive and well in various quarters of the industry in 2007.

Have a great weekend and holiday!!

Ron Brakke

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