
**Brakke Consulting's
Animal Health News & Notes for June 22, 2007**
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**BRAKKE CONSULTING, INC.
2007 INDUSTRY OVERVIEW AND MID-YEAR UPDATE
AT THE AVMA ANNUAL CONVENTION
JULY 16, 2007
WASHINGTON, DC**

For the first time, Brakke Consulting will be presenting our 2007 Industry Overview at the American Veterinary Medical Association Annual Convention. The Mid-Year update will include current information on the leading animal health companies, observations of successes and challenges for new product and company entries into the marketplace, and estimates for year end 2007. We'll have a special section on our expectations for the market place in 2008 for your planning purposes. We would encourage you to have your senior marketing and sales management participate in this Mid-Year update.

Early registration is \$350 for the first company attendee and \$325 for each additional attendee from the same company at the same presentation. To register online, visit our website at <http://www.brakkeconsulting.com/2007AVMA.html>. Or call Jane Morgan in the Dallas office at 972-243-4033 or email jmorgan@brakkeconsulting.com.

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COMPANY NEWS RELEASES

> **Fort Dodge Animal Health** announced the EPA has approved ProMeris for cats for the effective control of existing flea infestations and to prevent re-infestation on cats and kittens 8 weeks and older. ProMeris for cats is the only product available to control fleas that contains the active ingredient metaflumizone. ProMeris for cats is only available through practicing

veterinarians involved in an established veterinarian-client-patient relationship. (*company press release*)

> **Elanco** announced that the EPA has approved StandGuard Pour-on for fast-acting, continuous control of horn flies and lice in beef cattle of all ages. Its active ingredient is gamma-cyhalothrin, the newest technology in the pyrethroid class of insecticides. In addition to demonstrating this new pour-on's effectiveness through research, Elanco Animal Health is introducing StandGuard with a satisfaction guarantee, providing added reassurance for cattle producers. (*company press release*)

> **Alpharma Inc.** announced it has acquired certain assets of Chinese company **Yantai JinHai Pharmaceutical Co. Ltd.** The company's Animal Health business plans to utilize this site to blend products it currently processes in its US facilities and sells in Asia. Financial terms were not disclosed. (*company press release*)

> Patterson Companies, Inc. announced the acquisition of **New England X-ray, Inc.** New England X-ray Inc. is a leading provider of veterinary radiographic design, equipment and service throughout New England. This acquisition expands **Webster Veterinary Supply's** ability to offer outstanding equipment installation and repair services to its veterinary customers. Financial terms were not disclosed. (*company press release*)

> LLR Partners Inc. announced the completion of a \$10 million equity investment in **Pet Food Direct, Inc.** The equity will allow Pet Food Direct to continue its rapid growth and provide additional services and products to its customer base. Pet Food Direct was founded in 1997 and currently serves over 200,000 customers throughout the US. (*Business Wire*)

> **Sergeant's Pet Care Products** announced that independent clinical data show that Sergeant's new flea and tick control product kills fleas and ticks faster than Frontline. Sergeant's Gold Flea and Tick Squeeze-On for Dogs is formulated with cyphenothrin to kill 90% or more of fleas and ticks in as little as one hour and controls flea re-infestation for up to nine weeks. (*PRNewswire*)

> USDA's Animal and Plant Health Inspection Service announced that **Y-Tex Corporation** is an approved manufacturer of official animal identification number tags for the agency's National Animal Identification System. AIN tags are designed for one-time use, and each tag is imprinted with a 15-digit, nationally unique number along with the US shield and the term "Unlawful to Remove." All six of the currently APHIS-approved AIN tags contain a radio frequency identification transponder. (*Drovers Alert*)

> **GeoPharma**, announced it has acquired **EZ-Med Technologies** for an undisclosed sum. EZ-Med will continue to operate as a wholly owned subsidiary and will be consolidated into GeoPharma's manufacturing facilities within the next three months. In addition to manufacturing companion animal nutritional supplements under the private labels of US and international animal health companies, EZ-Med manufactures patented soft-textured chew pharmaceutical and over-the-counter products for animal and humans. (*Animal Pharm*)

> In response to what it said is "broadscale consumer demand," **Tyson Foods Inc.** announced that it is producing all of its Tyson brand fresh chicken from birds "raised without antibiotics." Tyson started selling 100% All Natural, Raised Without Antibiotics chicken this week. The product is being distributed nationwide in newly-designed packaging highlighting that the chicken is raised without antibiotics and contains no artificial ingredients. (*Feedstuffs*)

> A highly sensitive test used throughout parts of Europe to accurately detect bovine viral diarrhea virus (BVDV) is now available in the US. BoVir reagents and a proprietary lysis buffer, developed by **AnDiaTec** of Germany, are being first used in the US by the Kansas State

Veterinary Diagnostic Laboratory (KSVDL). The newly available BVDV test identifies and differentiates both persistent infection and transient infection, the two types of BVDV infection in cattle. The BoVir reagents and the proprietary lysis buffer are being distributed in the US and worldwide by Enfer Diagnostics. The two BVDV test components have also been submitted to the USDA by Agriculture Professional Services for sale and distribution approval. *(PRNewswire)*

> **Tissue Genesis**, Inc. announced an exclusive distribution and licensing agreement for the veterinary market with **Vet-Stem**, Inc. Tissue Genesis received a combination of equity and royalties under the agreement, and expects in the future to receive revenue from the sales to Vet-Stem of TGI 1000 cell isolation systems, TGI 1000 disposables and TGI 100 kits. Tissue Genesis expects its proprietary cell isolation system to more rapidly process a small quantity of a patient's own fat tissue to produce large quantities of cells, including adult stem cells and microvascular cells. Vet-Stem's clients could in the future have access to these powerful regenerative cells right in the clinic without a need to ship the samples to a central laboratory for processing. *(Genetic Engineering News)*

> **Lily&Me**, Inc. announced that ThePetCheckup is now available internationally through distributors in Australia, New Zealand, the United Kingdom, and Canada. The kit contains urine tests that show imbalances which can lead to over twelve of the most common illnesses, including diabetes, kidney disease, urinary, bladder and kidney infections, autoimmune diseases, Cushing's disease, prostate disease and liver diseases. *(PR Web)*

ANIMAL HEALTH NEWS

> **US - BOVINE TUBERCULOSIS** Bovine tuberculosis (TB) has been detected in dairy cattle in eastern New Mexico. The discovery will likely lead to the destruction of the Curry County herd. Because of a TB outbreak three years ago, New Mexico has a split-state TB status, with Curry and Roosevelt counties facing additional restrictions, while the rest of the state is considered TB free. *(Feedstuffs)*

> **CHINA - FAKE VETERINARY DRUGS** Almost one-fifth of veterinary drugs tested in China in the first quarter were not up to standard, according to the Ministry of Agriculture. That one-fifth figure is a slight improvement over the same period of last year. *(Scientific American)*

> **US - VETERINARY COLLEGE EXPANSION** North Carolina State University will soon start a 20-year, \$500 million experiment that will quadruple the size of its veterinary school. The College of Veterinary Medicine plans to break ground on a 47,500-square-foot building in a few months. The facility is meant to attract private and government researchers and is part of a plan to add more than 20 new research buildings. The new Biomedical Centennial Campus would eventually cover 1.5 million square feet. The school also hopes to start work on its Randall B. Terry Companion Animal hospital as early as the spring, depending on whether \$38 million in state funding arrives in time. *(Charlotte Observer)*

BRAKKE CONSULTING VIEWPOINT

The insecticides segment of the market appears to be heating up, with two new product introductions in the newsletter this week following the launch of several others earlier this year. We're pleased to note that there have been a number of novel new products, in various product segments, approved by regulatory agencies since the beginning of 2007. We hope to see more new products launched as the year progresses; as we've said before, new products and technologies are the key to continued growth in the animal health market.

Have a great weekend.

Lynn Fondon

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