
**Brakke Consulting's
Animal Health News & Notes for June 27, 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.

Registration is \$375 for the first company attendee and \$350 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

> **Merial** announced the launch of Equioxx (firocoxib), a new coxib-class nonsteroidal anti-inflammatory drug (NSAID) proven in field trials to relieve the pain and inflammation associated with osteoarthritis (OA) in horses. Equioxx, an oral paste, is approved for use up to 14 days. *(company press release)*

> **Boehringer Ingelheim** recalled several batches of its joint supplement Seraquin in the US and parts of Europe, following discrepancies among some of the tests used to determine the chondroitin sulfate content of a product, subsequent to a change of supplier. The company stressed that it did not believe there to be any problem with the batches in question. *(AnimalPharm)*

> **Nutreco** announced it is expanding capacity at its fish feed production plant in Averoy, Norway, investing EUR 24 million (\$32 million) in the facility in order to keep pace with demand for feed from the international aquaculture industry. The company plans to quadruple the plant's production capacity by June 2008, and is considering further increases after that date. (*Animal Pharm*)

> **Eklin Medical Systems** announced the latest addition to its product line. The Eklin Mark III is a portable, all-in-one digital radiography system specifically developed to meet the demands of the equine practitioner. (*company press release*)

> **SeeSaw Networks** announced the addition of emebaVet to its extensive network of out-of-home digital media venues. emebaVet engages a captive audience through a veterinary network that reaches pet lovers with educationally focused programming. Forty-two-inch screens in the clinic lobby improve the waiting experience with content that instructs pet owners about pet care, informs visitors of other "while you are here" services and includes advertisements. (*Business Wire*)

ANIMAL HEALTH NEWS

> **JAPAN - BSE** The Hokkaido government reported that a dead cow has tested positive for BSE. The cow will be sent to the National Institute of Animal Health for a final test to confirm the diagnosis. (*AnimalNet - Kyodo News Int'l*)

> **GERMANY - AVIAN INFLUENZA** Six wild birds found dead in Nuremberg have tested positive for highly pathogenic avian influenza. The wild birds, five swans and one goose, were the first to be infected in Germany this year. Three further swans have been found to have died of the disease near Leipzig. The agriculture ministry said it is possible the disease spread from the Czech Republic, where an outbreak was recently reported. In response to the outbreak, a 21-day ban has been imposed on moving poultry or poultry products in or out of the quarantine zone. (*Meating Place, Wattnet*)

> **US - ETHANOL PRODUCTION** POET, the largest dry-mill ethanol producer, has reached a milestone in the commercial production of cellulosic ethanol: the production of ethanol from corn cobs. The company has been working with equipment manufacturers in developing options for farmers to use in the collection of corn crops during their harvest. The cobs must be ground before being converted to ethanol. (*Feedstuffs*)

> **US - AMA JOINS WITH AVMA** The American Medical Assn. (AMA) voted at its annual meeting to adopt a new policy supporting more educational and research collaborations between the medical and veterinary professions to help with the assessment, treatment and prevention of cross-species disease transmission. The AVMA pointed out that through the new policy, AMA joins the AVMA "One Health" Initiative, which will take another step forward at the upcoming AVMA convention when members of the One Health Initiative Task Force will be announced. Through the initiative, AVMA and AMA will work collaboratively on areas of mutual interest such as pandemic influenza, bioterrorism risks and biomedical research. (*Feedstuffs*)

> **EUROPE - NEW PRODUCT TARGETS** IFAH-Europe, the European animal health industry association, has set targets to reduce the cost and time it takes to develop new products in Europe. This follows a benchmarking survey commissioned by IFAH last year to compare the efficiency of regulatory systems in the EU, US, Australia, Canada and Japan. A comparison between the EU and US, the results of which were revealed at IFAH-Europe's general meeting in Brussels, Belgium, earlier this month, shows that the regulatory burden in the EU is greater than in the US. It is more costly and takes longer to develop and launch new products on the market

than in the US. Between 1991 and 2005, it took an additional 5.9 years to develop a product for a major livestock species in Europe, compared with 3.5 years in the US. For the development of a companion animal species, it took an additional 3.2 years compared with 2.6 years in the US, and 2.3 years for a minor species product in Europe compared with 2.2 years in the US. (*Animal Pharm*)

> US - GESTATION CRATES BANNED The Oregon legislature has approved a measure banning sow gestation stalls. The move makes Oregon the first state to ban sow gestation stalls by legislative action and the third state to ban gestation stalls. (*Alliance Link*)

BRAKKE CONSULTING VIEWPOINT

This is the last business day of the second quarter of 2007, and it's our impression that most companies will report a very positive first 6 months. While there continues to be heavy press related to the impact of ethanol on the cost of corn, moving feed prices higher, there has been little solid evidence that higher feed prices will dampen animal health product sales.

It appears to us that heavy rains could be a blessing or a curse to this fall's grain crops. Those in the business of forecasting corn, soybeans, and wheat production have their hands full. Additionally, there will be plenty of pasture for grazing and hay.

So, the food animal projections remain a bit cloudy and wet for the last half of the year, while the companion animal business continues its robust growth despite this year's petfood recall. In summary, we believe that 2007 will be another great growth year for the industry.

There are still a few spots available for our mid-year update and first glimpse of 2008, to be held at the AVMA convention on July 16. We'll see many of you there!

Have a great weekend!!

Ron Brakke

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