
**Brakke Consulting's
Animal Health News & Notes for September 22, 2006**
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IN THE NEWS:

other news

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**BRAKKE CONSULTING, INC.
EQUINE MARKET MEGA-STUDY
Order now and SAVE!**

The Equine Market Mega-Study, a comprehensive study of horse owner buying and decision-making behavior, will soon get underway.

This first-of-a-kind survey examines horse owner purchases by equine segment. Based on more than 1,000 respondents in a random national survey, the report covers purchasing frequency by brand and by type of sales outlet, including veterinarians, Internet suppliers, catalogs, event exhibitors and brick-and-mortar retail stores.

The study tracks purchases of individual brands in such product categories as:

- Dewormers
- Insect control
- Feed and treats
- Skin and coat care
- Liniments and other muscle treatments
- Ulcer prevention and treatment
- Wound care
- Supplements of all kinds
- Vaccines
- Pain management and other medications

The study also measures readership of individual equine publications and websites, as well as use of equine radio and television programming as information sources. The report also includes a wealth of information on horse owner demographics and segments.

The Equine Market Mega-Study will be published by Jan. 12, 2007. Price is \$12,500. Companies that order by Oct. 2, 2006 with payment by Oct. 31 receive a \$1,000 discount. Advance purchasers also have an opportunity to review the questionnaire for completeness of brand identities prior to fielding the study.

The research is being conducted by Brakke Consulting, Inc., in cooperation with Market Directions, Inc.

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COMPANY NEWS RELEASES

> Pfizer Inc. announced that Juan-Ramon Alaix has been appointed President of **Pfizer Animal Health** (PAH). Mr. Alaix assumes the leadership of PAH from his position as Regional President, Central/Southern Europe, Pfizer Global Pharmaceuticals, and succeeds Pedro Lichtinger. A native of Spain with a graduate degree in economics from the Universidad de Madrid, Mr. Alaix has 30 years' experience of growing responsibility in finance, sales and management, including 15 in the pharmaceutical industry. (*company press release*)

> **Smithfield Foods** Inc., announced it is acquiring **Premium Standard Farms** Inc. in a cash and stock deal valued at about \$810 million, including the assumption of about \$117 million in debt. Each PSF share will be converted into the right to receive 0.678 Smithfield shares plus \$1.25 in cash. The deal is expected to close in the first quarter of 2007. (*Marketwatch*)

> **Del Monte Pet Products** announced the launch of a new, all-natural Large Breed dry dog food and a new line of dog treat products from Nature's Recipe. The Large Breed dog food is specifically formulated to promote health and vitality in dogs over 50 pounds. (*Petfood Industry Newsletter*)

> **Bio-Medical Services** (BMS) announced its new veterinary Specialty Diet Food Test. This new service was created in response to the recent wave of holistic and alternative ingredients now being introduced into pet foods. The food allergy test detects IgE specific for individual food allergen proteins. (*BusinessWire*)

ANIMAL HEALTH NEWS

> US - MERGER QUESTIONED Iowa Senators Charles Grassley and Tom Harkin have asked the US Department of Justice to take a closer look at the proposed merger between pork processors **Smithfield Foods** and **Premium Standard Farms**. In a letter to the Justice Department's antitrust division, Grassley contended the merger would hurt independent farmers by reducing the number of places they can sell their hogs. The Justice Department could block the merger on antitrust grounds or require the companies to sell off some of their operations. (*Meating Place*)

> US - LIVESTOCK PRICE REPORTING The US Senate passed by unanimous consent a bill to reauthorize the Livestock Mandatory Price Reporting Act for five years. The bill, passed by the House in late 2005, now goes to the White House for President Bush's signature. The bill included provisions supported by the National Cattleman's Beef Association, the National Pork Producers Council, the American Farm Bureau Federation and the American Sheep Industry Association. (*Meating Place*)

BRASSE CONSULTING VIEWPOINT

There is not a lot of news this week, but there's big news.

First, we extend a warm animal health industry welcome to Juan-Ramon Alaix, new president of Pfizer Animal Health. He's taking the reins from the capable hands of Pedro Lichtinger, who has

taken over Pfizer's human pharmaceutical operations in Europe. We wish Mr. Alaix the best in his new position.

Second, the announcement that Smithfield Foods, the largest pork producer in the US, intends to acquire Premium Standard Farms, the second largest producer, is huge news in an industry that has already been rapidly consolidating. Though various groups will challenge this move, our hunch is that it will go through. Smithfield has deep experience in acquisitions and has probably scoped out the situation pretty well. Branded products are the name of the game in the protein industry, and this will strengthen Smithfield's hand in the US as well as in export markets.

Orders are rolling in for the Equine Market Mega-Study from Brakke and Market Directions. Order by Oct. 2 and you save \$1,000. If you want more information about this new research, just give us a call.

Have a great weekend!

John Volk, Chicago

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