
**Brakke Consulting's
Animal Health News & Notes for January 16, 2015**
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IN THE NEWS:

[Brakke Consulting news](#)
[Pet Dental Market Study](#)
[Animal Health Industry Overview](#)
[Strategic planning](#)

earnings news
[Animalcare](#)
[Virbac](#)

other news
[AgriLabs](#)
[AmerisourceBergen](#)
[Aratana](#)
[Elanco](#)
[GlobalVetLINK](#)
[Henry Schein Animal Health](#)
[MWI](#)
[Novartis](#)
[Nutramax Labs](#)
[Q Core Medical](#)
[Patterson](#)
[Putney](#)
[Trupanion](#)
[VCA](#)

**BRAKKE CONSULTING, INC.
PET DENTAL MARKET STUDY NOW AVAILABLE**

A comprehensive new study of the pet dental market has just been published by Brakke Consulting and Ipsos Agriculture and Animal Health.

“Pet Dental Market Syndicated Report” quantifies pet owners’ awareness of the need for pet dental care, as well as their purchases of dental products and services in both the professional and OTC channels. The study also analyzes the role of dental care products and services in veterinary practice.

The 116-page study is based on nationally representative surveys of both pet owners and veterinarians.

Copies of the report are now available for \$12,000. For more information contact John Volk at (773) 327-4941 or john@volkonline.com.

www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> **Virbac S.A.** reported results for the full year 2014. Total 2014 sales reached EUR 773 million (\$940 million), an increase of 5% compared to the prior year. At constant exchange rates, growth would have reached 7%. (*company website*)

> **Animalcare** reported results for the six months ended December 31, 2014. Sales reached GBP 6.93 million (\$10.5 million), an increase of 7% compared to the comparable period in the prior year. (*Animal Pharm*)

BRAKKE CONSULTING, INC. 2014 INDUSTRY OVERVIEW

Brakke Consulting will present the 2014 US Animal Health Industry Overview twice this winter - once at the North American Veterinary Conference in Orlando, Florida and once at the Western Veterinary Conference in Las Vegas, Nevada. These dates are:

- NAVC: Monday, January 19, 2:00 – 4:00 pm, Gaylord Palms.
- WVC: Tuesday, February 17, 2:00 – 4:00 pm, Four Seasons.

Online registration for the Industry Overview at the NAVC is now closed; please register on-site. Online registration for WVC is open. Seating is very limited this year, so register early!

To register for WVC, go to www.brakkeconsulting.com and scroll down to the "What's New" box. The price is \$385 per person for online registration; late registration is \$425.

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COMPANY NEWS RELEASES

> **Nutramax Laboratories Veterinary Sciences, Inc.**, introduced Dasuquin Advanced Joint Health Supplement for Dogs. Dasuquin Advanced adds *Boswellia serrata* extract, NMXCC95TM *Curcumin longa* extract, and alpha-lipoic acid to the formula of Dasuquin. (*Vet Advantage*)

> **Putney** announced that it has received FDA CVM approval for its Enrofloxacin Antibacterial Injectable Solution, a generic of Baytril Antibacterial Injectable Solution. (*company press release*)

> **AgriLabs** introduced the newly reformulated Colostrx. The next generation of Colostrx CS and Colostrx CR has a USDA dual-claim to aid in the treatment of FPT of immunity and to aid in the prevention of death associated with *Escherichia coli* K99 in colostrum-deprived neonatal calves. (*company press release*)

> **Aratana Therapeutics** announced it was awarded full USDA licensure for AT-004, a monoclonal antibody used as an aid in the treatment of B-cell lymphoma in dogs. The product will be commercialized by **Elanco** in the US and Canada (as a result of its acquisition of **Novartis**), while Aratana retains development and commercial rights for AT-004 in other geographies. (*Animal Pharm*)

> **AmerisourceBergen** Corp, a pharmaceuticals distributor, announced it has agreed to acquire **MWI Veterinary Supply** for \$2.5 billion. The \$190-a-share offer represents a 7.3% premium to MWI's closing price on January 9. (*Wall Street Journal*)

> **Henry Schein Animal Health** announced that Fran Dirksmeier has joined Henry Schein Animal Health as President, North America replacing Kevin Vasquez, who will become Chairman, North America. Dirksmeier joins Henry Schein with more than 30 years of commercial and leadership experience. (*Vet Advantage*)

> **Patterson Veterinary** announced that it has partnered with **Q Core Medical Ltd.**, an innovation leader in infusion delivery systems, to become the exclusive provider of the IVVet Veterinary Infusion Pump. (*company press release*)

> **Trupanion, Inc.** and **VCA** announced a new partnership, naming Trupanion the preferred vendor for medical insurance for cats and dogs across VCA's veterinary hospitals throughout the United States. (*Vet Advantage*)

> **GlobalVetLINK** announced the launch of the new MyVetLINK owner portal. The web-based software makes animal travel easier for owners and veterinarians. Health documents, including eCVIs, EIA (Coggins) certificates and GoPass 6-month equine passports and itineraries are available to animal owners and agents, any time from any place with an internet connection. (*company press release*)

ANIMAL HEALTH NEWS

> **US - TUBERCULOSIS** The Texas Animal Health Commission (TAHC) has confirmed cattle tuberculosis (TB) in two Texas Panhandle dairies located in Castro County. The infected herds are under quarantine and will remain so until the herds meet all requirements for quarantine release. Texas had TB-free status from USDA since October 2006. (*Dairyherd.com*)

> **US - AVIAN INFLUENZA** The avian influenza virus strain H5N8 was confirmed by the National Veterinary Services Laboratory in an American widgeon duck in Utah. Several other wild birds taken by hunters near the Great Salt Lake are also undergoing tests. (*Salt Lake Tribune*)

> **US - VESICULAR STOMATITIS** Two cases of vesicular stomatitis have been confirmed in horses in Arizona. One animal was moved to its owner's nearby property before the formal investigation, resulting in three properties and all the animals on them being placed under quarantine. (*Horsetalk.co.nz*)

> **TAIWAN - AVIAN INFLUENZA** Taiwanese officials ordered the slaughter of 7,500 ducks at a farm in Pingtung and 8,500 geese at five farms in Yunlin and Chiayi, two counties also in the south, after a new variant of H5N2 as well as the H5N8 strain of avian influenza were detected. The H5N8 strain has not previously been discovered in Taiwan. (*Yahoo news*)

> **CHINA - POULTRY BAN** The Chinese government announced that it will ban all imports of US poultry and egg products because of recent detections in the US of highly pathogenic avian influenza (HPAI) in backyard poultry and wild birds in the Pacific Northwest. For China to impose a nationwide ban in response to isolated incidents of HPAI goes against international guidelines established by the World Organization for Animal Health (OIE). In its Terrestrial Animal Health Code, the OIE recommends that countries adopt a regionalized approach to HPAI incidents to minimize the impact on trade. (*Worldpoultry.net*)

> **US - ANIMAL TRANSPORT** ARK Development LLC announced it has signed a 30-year lease with the Port Authority of New York and New Jersey to develop, finance, construct, operate and manage The ARK at JFK, a \$48-million, 178,000-square-foot state-of-the-art animal handling and intelligent air cargo facility. It will be divided into three complementary sections: the air cargo wing, a central administrative and business center with 24-hour veterinary hospital, and the main

animal handling facility with pet boarding, animal import and export center, and livestock export handling system. (*Feedstuffs*)

**BRASSE CONSULTING, INC.
STRATEGIC PLANNING**

Brakke Consulting is an excellent resource for your company's strategic planning. Some of the services we offer include:

- Reviewing revenue estimates and success probability of your product pipeline
- Reviewing the timing of various new product introductions
- Benchmarking various functions against company competitors

Through strategic planning, Brakke Consulting can help improve the likelihood of success for your company's future endeavors.

Contact us for professional assistance in any of these areas.

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BRASSE CONSULTING VIEWPOINT

This week we saw another large acquisition in the industry with the proposed purchase of MWI by AmerisourceBergen. This is one more example of the interest in the animal health space by companies and investors from outside the industry. Currently, animal health is one of the places where investment is being encouraged. In this case it appears that the acquiring company has expertise and capabilities that will bring new and improved services to the industry. Congratulations to the MWI management team for their success in building a distribution company that has a market value of \$2.5 billion. Well done!

The NAVC meeting in Orlando, which is beginning today and running through next Wednesday, is always a nice kick-off to a new year in animal health. It allows us all an opportunity to brag to our peers about our successes in 2014 and provide some insights on our planned activities in 2015. We hope to see many of our readers there and wish you a successful meeting. Travel safe!

Ron Brakke

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