
**Brakke Consulting's
Animal Health News & Notes for January 23, 2015**
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**BRAKKE CONSULTING, INC.
2014 INDUSTRY OVERVIEW**

Brakke Consulting will present the 2014 US Animal Health Industry Overview at the Western Veterinary Conference in Las Vegas, Nevada. The date is:
• WVC: Tuesday, February 17, 2:00 – 4:00 pm, Four Seasons.

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.

www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> The **Vétoquinol Group** posted 2014 sales of EUR 315.3 million (\$383 million), up 5% from the previous year. At constant exchange rates, sales rose by 6%. (*company website*)

> **Hester Biosciences** reported results for its third fiscal quarter of 2015. The company posted sales of INR 218.83 million (\$3.6 million) for the period, an increase of 38%. Net profit for the quarter came to INR 33.71 (\$552,000), an improvement of 32% compared to the same period during 2014. (*Animal Pharm*)

COMPANY NEWS RELEASES

> **Elanco** announced that Interceptor Flavor Tabs are returning to the market. (*Vet Advantage*)

> MSD Animal Health, known as **Merck Animal Health** in the US and Canada, recently announced the introduction of Finadyne Transdermal (flunixin meglumine) Pour-on solution, which has created some confusion among its customers in the US. To clarify, Finadyne Transdermal is not approved or available for sale in the United States; it is approved for use in the UK, France, Ireland, Netherlands, Belgium and Italy. (*company press release*)

> **Neogen** announced the launch of the Prima Marc BMV. The device allows users to inject and mark the animal with a single motion using only one hand. A squeeze of the syringe's handle activates the mounted paint can, and marks each animal as it is serviced. (*company press release*)

> **Phibro Animal Health** Corporation announced it has acquired exclusive North American distribution rights for vaccines using **MJ Biologicals**, Inc.'s vaccine technologies focused on the swine industry, and additional vaccines in development. In addition, Phibro has acquired exclusive development and distribution rights outside North America for vaccine products using MJB technologies. Financial terms were not disclosed. (*Money.cnn.com*)

> **Nestle Purina PetCare** announced that its Purina Veterinary Diets is now branded as Purina ProPlan Veterinary Diets. The name changes but the formulas and veterinary exclusivity remain the same. (*company press release*)

> **IDEXX Laboratories** announced an upcoming kidney test called SDMA that identifies the onset of kidney disease months or even years earlier than traditional methods. The SDMA test is expected to roll out as part of the standard chemistry panel in the North American market this summer. (*company website*)

> **Abaxis**, Inc. announced that the Center for Veterinary Biologicals of the USDA has approved its VetScan FeLV-FIV Rapid Test Kit for the detection of FeLV antigen and FIV antibodies from feline blood samples. (*PRNewswire*)

> **Henry Schein**, Inc. announced that it will acquire **scil animal care company GmbH**. For the 12 months ended September 30, 2014, scil animal care had sales of approximately \$70 million. Subject to regulatory approval, the transaction is expected to close in the second quarter of 2015. Financial details of the transaction were not disclosed. (*TWST.com*)

> **Spectrum Brands** announced that it has acquired privately owned **Salix Animal Health**, LLC, a producer and distributor of premium, natural rawhide dog chews, treats and snacks with annual revenues of approximately \$100 million. Financial terms were not disclosed. (*Streetinsider.com*)

> **VetBiotek**, Inc. announced that it has in-licensed the patent rights and the know-how for developing, marketing and selling products featuring MicroSilver BG, a silver powder made up of micro-sized particles of pure medical-grade silver, from German company Bio-Gate AG for use in the veterinary channel. The products developed by VetBiotek will be used for dermatological applications associated with companion animals. (*company press release*)

> The North American Veterinary Community (NAVC) and the American Animal Hospital Association (AAHA) announced that they will team up in 2015 to present **VetFolio**, as a joint partnership. VetFolio offers veterinary professionals content and subject matter expertise in the veterinary profession 24/7 via an online portal, and also offers a doorway to peer networking. (*press release*)

> **Pet Health App** announced the release of Itchology for iPhone. The app makes it easy for pet owners to track their dog's itch level and record information that can help veterinarians identify possible causes and effective treatments. Itchology imports and charts temperature, humidity, and pollen forecasts for a user's geographic location. The data collected with Itchology can be shared with a veterinarian through the app. (*company press release*)

> EUROPE **Merial** announced that the European Commission has approved NexGard Spectra (afoxolaner and milbemycin), a soft, beef-flavored monthly chew for dogs. NexGard Spectra has been approved in Europe for the treatment of flea and tick infestations, the prevention of heartworm disease and/or the treatment of intestinal worms. (*nasdaq.com*)

NORTH AMERICAN VETERINARY CONFERENCE JANUARY 17-21, 2015

Over 16,000 veterinarians, technicians, students, exhibitors and others from more than 70 countries attended the North American Veterinary Conference this week in Orlando, including over 6,400 veterinarians and 4,000 exhibitors. The conference offered over 1,200 CE credit hours to choose from, including over 30 hands-on laboratories and workshops and dozens of 2-hour Masterclasses led by noted experts in the field.

ANIMAL HEALTH NEWS

> EUROPE - ANIMAL HEALTH FUNDING The European Commission has committed close to EUR 180 million (\$209 million) to help combat animal diseases and zoonoses in 2015 – around 12% up on last year's total. Much of the increase is accounted for by additional funding to tackle Bluetongue – a disease currently causing serious problems for livestock producers mainly in the south eastern parts of the EU. Some EUR 18.5 million has been allocated to tackle Bluetongue in 2015, a tenfold increase on last year's figure. (*Animal Pharm*)

> US - DAIRY WASTE A U.S. District Judge ruled against a Washington state dairy this week, concluding that manure from the farm constitutes solid waste and poses a threat to the environment due to its nitrate content. The ruling marks the first time cow manure has been considered solid waste and the first time the federal Resource Conservation and Recovery Act was applied to waste from farm animals. (*AVMA Smartbrief - Star Tribune*)

> US - SWINE VACCINES Recently published veterinary research at Iowa State University shows that live attenuated influenza vaccines, administered intranasally to swine, provoke a broader immune response than whole inactivated virus vaccines, which are the current standard. That broader immune response provides better cross-protection against variant influenza viruses

circulating in swine. The research was published a paper in the academic journal *Virology*.
(*Phys.org*)

**BRASSE CONSULTING, INC.
UNDERSTANDING THE OVER-THE-COUNTER MARKET**

Whether your business is considering the OTC channels for new business opportunities or you have been distributing in the OTC channels for years, Brakke Consulting's team can provide significant and quality assistance to businesses seeking to learn more about the details of the OTC channels of distribution. If you are looking for meaningful insights into the OTC channels, the trends found there, and the opportunities that exist, contact our Dallas office or Joel Adamson at jadamson@brakkeconsulting.com.

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BRASSE CONSULTING VIEWPOINT

What a great NAVC meeting! It's been a number of years since we've seen such a high level of activity with the introduction of new products and technologies into the animal health industry. A number of these technologies are moving the veterinary profession and pet owner clients into the digital age at a rapid pace. Smart phone and I-pad devices are creating opportunities in animal health that were not even thought of a few years ago. Innovation is alive and well at many companies.

In addition to the normal attendees at the meeting there was an increasing number of investors in attendance seeking opportunities. If they don't have one or more animal health investments in their portfolio, they feel like they are missing out. Let's keep it that way because availability of capital for the industry is a win-win.

Thanks to all of you that attended our sold out animal health industry overview. It was a great group!

Have a great weekend!

Ron Brakke

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