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Brakke Consulting's
Animal Health News & Notes for October 30, 2009
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IN THE NEWS:

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Eco
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Vedco

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NOW AVAILABLE!
BRAKKE CONSULTING, INC.
2009 CANCER IN DOGS AND CATS

In 2002, Brakke Consulting published an overview of the treatment of cancer in dogs and cats. We are pleased to announce that an update of this highly regarded report is now available.

The 2009 Cancer Study includes up-to-the-minute information on the incidence, diagnosis, and treatment of the common veterinary cancers, including treatment cost estimates. The study includes a survey of over 200 general veterinary practitioners as well as interviews with veterinary oncologists. Reviews of new and developing veterinary cancer chemotherapeutics are included in the report as well.

The report is now available for $8,500. For more information, please visit our website at www.BrakkeConsulting.com or contact Dr. Lynn Fondon at lfondon@brakkeconsulting.com .

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COMPANY EARNINGS RELEASES

> Sanofi-Aventis reported results for the third quarter of 2009. Animal health division **Merial**'s third-quarter sales were flat, falling by 0.5% (or by 4% on a reported basis) to $626 million. *(company website)*

> Bayer reported results for the third quarter of 2009. Sales of the Animal Health Division rose by 5.5% to EUR 251 million ($366 million). This performance was based primarily on growth in the Drontal product line. *(company website)*

> ABAXIS, Inc. reported financial results for the second fiscal quarter ended September 30, 2009. Veterinary market revenues were $21.7 million, an increase of 9% compared to the comparable period in the prior year. *(company press release)*

> Heska Corporation reported financial results for its third quarter ended September 30, 2009. Total revenue was $19.6 million, a decline of 10% from the third quarter of 2008. Net income was $743,000, an increase of 29% compared to the comparable period in the prior year. *(PRNewswire)*

> Colgate-Palmolive Company reported results for the third quarter 2009. **Hill's Pet Nutrition** sales grew 1.5% to $531 million during the quarter as unit volume decreased 2.5%. *(company press release)*

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COMPANY NEWS RELEASES

> Merck & Co., Inc. and **Schering-Plough** Corporation announced that they have received clearance from the US Federal Trade Commission (FTC), the Swiss Competition Commission and the Canadian Competition Bureau for their proposed merger. The transaction remains subject to approval from other regulators, including China and Mexico. Merck and Schering-Plough continue to expect the transaction to close in the fourth quarter of 2009. *(company website)*

> Pharma Chemie announced it is launching a proprietary brand of Phycox Soft Chews, a highly palatable joint supplement for dogs containing Phycocyanin blue-green algae extract. The company is partnering with **Vedco** as its exclusive third party logistics provider to supply Phycox Soft Chews through US veterinary distributors. *(company press release)*

> Agrilabs announced it has added three cattle vaccines formerly marketed by **Boehringer Ingelheim Vetmedica** to its line of animal health products. It has acquired exclusive rights to sell, market and distribute the vaccines Pulmo-Guard PHM-1, Pulmo-Guard PH-M and the combination product Express 5-PHM. *(Animal Pharm)*

> Animal Element, a division of Ankh Health, LLC, announced the launch of Performance Detox, a line of detoxification supplements for dogs, cats and horses. Performance Detox formula includes: Zeolite, diatomaceous earth, kelp, hawthorne leaf, turmeric root, raspberry leaf, MSM, and hyaluronic acid. *(PR Newswire)*

> TR BioSurgical announced it will officially launch a new, patented veterinary glaucoma device called TR-ClarifEYE at this year's American College of Veterinary Ophthalmology meeting. TR-ClarifEYE is made of a unique biomaterial and is implanted completely within the eye to restore fluid outflow. *(company press release)*

> CANADA **Modern Veterinary Therapeutics**, LLC announced that the Veterinary Drugs Directorate has approved Cepesedan (detomidine hydrochloride) in Canada. Cepesedan is

indicated for use as a sedative and analgesic to facilitate minor surgical and diagnostic procedures in mature horses and yearlings. *(company press release)*

> GERMANY **Intervet/Schering-Plough Animal Health** introduced Zylkène, its stress management product for dogs and cats, to the German market. The product is a dietary supplement containing alpha-casozepine, a peptide produced by the trypsin hydrolysis of the milk protein casein. *(Animal Pharm)*

> UK **Eco Animal Health** has received a positive opinion from the European scientific committee for veterinary medicines, the CVMP, to market its antibiotic, Aivlosin (tylvalosin), as a treatment for respiratory disease *Mycoplasma gallisepticum* in farmed pheasants. It will sell the product directly to specialist poultry veterinarians in the UK which, along with France, produces the majority of intensively reared pheasants in the EU. *(Animal Pharm)*

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ANIMAL HEALTH NEWS

> VETERINARY STANDARDS The director general of the World Organization for Animal Health (OIE) stated at an OIE conference that a worldwide network of veterinarians that is capable of providing animal care to a global standard is the only way to guarantee efficient surveillance, prevention and detection of animal diseases. Dr Vallat explained that, currently, the accreditation of veterinarians around the world is made by veterinary statutory boards with only a national reach. The OIE proposes the adoption of minimal requirements for accreditation by all these bodies, higher than the current ones, so it can guarantee a minimum standard of education and quality of vets globally. *(Animal Pharm)*

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BRAKKE CONSULTING VIEWPOINT

Thanks to those that attended our Due Diligence Seminar in Kansas City earlier this week. As we mentioned to the group attending, this is the first of a number of training seminars we hope to conduct in the KC area over the next year. I was reminded during the seminar that it's never too late to revisit and learn new techniques in important management areas. We continue to believe at BCI that it's important to provide professional training to the staff and management of client companies.

As it relates to industry news, it now appears the that integration process is in full swing for the Pfizer, Fort Dodge and Boehringer Ingelheim Vetmedica organizations as a result of the various final closings that occurred the past few days. Good luck to all involved!! Is there going to be another major transaction in the industry in the next six months?

I can't help but mention the one story in the newsletter related to an approval for an antibiotic approval for farm raised pheasants. Since I'm in the middle of my annual pheasant harvest in South Dakota, I can't help but wonder if some of these wild birds could use this product. Currently the score in South Dakota is hunters 43 and pheasants 64, so I'm not sure the pheasants need additional assistance.

We hope those of you in the US have a successful Halloween and that you don’t eat too much candy. Have a great weekend!!

Ron Brakke

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