
**Brakke Consulting's
Animal Health News & Notes for December 11, 2015**
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**BRAKKE CONSULTING, INC.
US FLEA CONTROL AND HEARTWORM MARKETS
NOW AVAILABLE**

Brakke Consulting's 2015 report on the US Flea Control and Heartworm Markets is now available. The report includes valuable information on the US market for small animal parasiticides including:

- Product descriptions, prices, and sales for the leading veterinary flea and heartworm products
- an overview of the veterinary and OTC flea control markets
- discussion of the impact of new oral flea and tick products
- 2015 survey of 300 veterinarians
- 2015 survey of 500 pet owners

The report on the US Flea Control & Heartworm Markets is available for a purchase price of \$7,500.

Please contact Dr. Lynn Fondon at (972) 243-4033 or lfondon@brakkeconsulting.com to pre-order the report, or for more information visit our website at www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> **Central Garden & Pet** Company announced financial results for its fourth quarter ended September 26, 2015. Sales for the Pet segment increased 8.5% to \$236 million from the same period a year ago. The Pet segment's operating income on a GAAP basis for the fourth quarter was \$18.2 million compared to \$21.1 million in the fourth quarter of 2014. On an adjusted basis, excluding a \$7.3 million non-cash intangibles impairment charge, the Pet segment's operating income increased \$4.4 million to \$25.5 million. (*company press release*)

> **Eco Animal Health** reported results for the six months ended September 30, 2015. Revenues increased 27% to GBP 21.5 million (\$33 million); EBITDA increased by 26% to GBP 4.3 million (\$6.5 million). (*BusinessWire.com*)

2016 INDUSTRY OVERVIEW ONLINE REGISTRATION FOR NAVC NOW OPEN

Brakke Consulting will present the 2016 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, March 8, 2:00 – 4:00 pm, Four Seasons.

Registration for the Industry Overview at the NAVC is now open (WVC registration will open shortly). Seating is very limited this year, so register early!

To register, 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 NEWS RELEASES

> **Nutreco** announced the acquisition of US trace mineral specialist **Micronutrients**, which is part of the Indiana-based **Heritage Group**. The acquisition enables Trouw Nutrition, Nutreco's animal nutrition business, to further strengthen its Selko Feed Additives portfolio. Financial terms were not disclosed. (*Animal Pharm*)

> The FDA announced it has granted a Minor Use Minor Species designation to **EirGen Pharma Ltd** for oral chlorambucil for the treatment of chronic lymphocytic leukemia (CLL) in dogs. (*FDA*)

> The FDA announced it has granted a Minor Use Minor Species designation to **Rhizen Pharmaceutical SA** for oral RV1001, a PI3Kd inhibitor, for the treatment of lymphoma in dogs. (*FDA*)

> The FDA announced it has granted a Minor Use Minor Species designation to **Veiove Animal Health, Inc.** for injectable Substance P & Saporin for the control of pain associated with bone cancer in dogs. (*FDA*)

> The FDA announced it has granted a Minor Use Minor Species designation to **Assisi Research Laboratories** for injectable Asparaginase for the induction of remission of multicentric lymphoma in dogs. (*FDA*)

> **Genus** announced it has developed pigs resistant to Porcine Reproductive and Respiratory Syndrome Virus (PRRSv) in collaboration with the University of Missouri. By using precise gene editing, the team from the University of Missouri was able to breed pigs that do not produce a specific protein necessary for the virus to spread in the animals. Their research was published in journal *Nature Biotechnology*. (*AVMA SmartBrief - Reuters*)

> **INDIA Novartis India** announced that **Elanco India**, an affiliate of Eli Lilly, has received Competition Commission of India's approval to acquire Novartis' animal health business. Financial terms were not disclosed. (*Business-Standard.com*)

> **JAPAN Sumitomo Chemical** announced plans to increase its manufacturing capacity for methionine feed additives. The firm will increase methionine feed additive production at its Ehime factory as well as constructing an additional plant with capacity of manufacturing methionine of 150,000 tons per year. (*Animal Pharm*)

BRAKKE CONSULTING, INC.
New Technical Services Study
Early Order Discount ends Dec. 20

A new national study among companion animal veterinarians will evaluate the veterinary technical services support provided by animal health and nutrition companies.

This study is designed to determine companion animal practitioner's expectations for veterinary technical services and to compare how each company's teams deliver on those expectations. Included are field education and support, problem solving and pharmacovigilance. In addition, each company's veterinary technical service team will be compared to those of peer competitors, with breakouts by region and size of practice.

The study will be launched in early 2016, with reports customized to each subscriber available by March 31. Companies that order by Dec. 20, 2015 and pay in full by Jan. 20, 2016 will receive an early order discount.

For more information or to order the study, contact Dr. Cary Christensen, crychris123@gmail.com, (913) 205-6578.

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ANIMAL HEALTH NEWS

> **US - ANTIBIOTICS** The FDA published its annual report summarizing sales and distribution data for antimicrobial drugs approved for use in food-producing animals. The report shows increases in antimicrobial sales and distribution from calendar year 2013 to 2014: an increase of 4% for all antimicrobials and an increase of 3% for antimicrobial classes considered medically important in human medicine. The summary report can be read at <http://www.fda.gov/downloads/ForIndustry/UserFees/AnimalDrugUserFeeActADUFA/UCM476258.pdf>. (*FDA*)

> **NORTH AMERICA - COOL** The World Trade Organization (WTO) has authorized Canada and Mexico to place tariffs on over \$1 billion of American-made goods in retaliation for the country of origin labeling law being in compliance with WTO standards. COOL law, first authorized in the 2002 Farm Bill and amended in the 2008 Farm Bill, requires meat labels detailing where livestock were born, raised and slaughtered. This announcement is the final step in a WTO dispute that has been ongoing for over seven years. (*Feedstuffs*)

> WORLD - RABIES ERADICATION The World Health Organization and World Organization for Animal Health are launching a global campaign to eliminate rabies by 2030. Health experts agree a comprehensive and coordinated national approach is needed to run a successful mass dog vaccination campaign. (VOAnews.com)

> US - TEST TUBE PUPPIES Researchers at Baker Institute for Animal Health at Cornell University's College of Veterinary Medicine announced the birth to seven half-pound puppies, the first dogs ever conceived in a test tube. The puppies, born July 10, are a mix of beagle, Labrador and cocker spaniel and are now healthy 5-month-olds. A paper describing the Cornell litter as "the first live births from in-vitro fertilized embryos in the dog" appeared in the *PLOS ONE* journal. (Seattlepi.com)

> US - VETERINARY SCHOOLS Texas Tech University announced plans to develop a veterinary school and veterinary medicine doctoral program in response to student demand and industry needs. Texas Tech University System will continue discussions throughout 2016 and will seek appropriate approvals by the Texas Legislature and Texas Higher Education Coordinating Board. (today.ttu.edu)

> US - EDUCATION FUNDING The Texas A&M College of Veterinary Medicine & Biomedical Sciences (CVM) and the Institute for Infectious Animal Diseases, a Department of Homeland Security (DHS), have been awarded a \$1.2 million contract to develop and implement a nationwide scientific business development and management educational program. The award comes from the DHS Science and Technology Directorate which invited submission of proposals with innovative approaches to develop training programs for preparing next-generation trans-boundary animal disease (TAD) scientists to respond against these diseases. (Vet Advantage - Vet Practice News)

> US - USDA PROCESS VERIFIED PROGRAM USDA's Agricultural Marketing Service (AMS) announced improvements to strengthen the USDA Process Verified Program (PVP). For almost 20 years, AMS has administered the PVP to help agricultural suppliers differentiate their products. For details, go to <http://www.ams.usda.gov/press-release/usda-announces-strengthened-process-verified-program> . (USDA.gov)

> US - DRUG APPROVAL The FDA announced that it has approved Kanuma (sebelipase alfa) as the first treatment for patients with lysosomal acid lipase (LAL) deficiency, also known as Wolman disease. The approval involved approvals from two centers at FDA. The Center for Veterinary Medicine (CVM) approved an application for a recombinant DNA (rDNA) construct in chickens that are genetically engineered (GE) to produce a recombinant form of human lysosomal acid lipase (rhLAL) protein in their egg whites; The Center for Drug Evaluation & Research (CDER) approved the human therapeutic biologic (Kanuma), which is purified from those egg whites. (Feedstuffs)

**BRAKKE CONSULTING, INC.
EXECUTIVE, SALES FORCE and TECHNICAL SERVICES RECRUITING**

At Brakke Consulting we find the right person to fit your company's needs. We have an unequalled network in animal health, and unique insights into what veterinarians value in an animal health professional, including the sales rep attributes that correlate to higher sales volume.

As part of our executive recruiting services, we manage the entire process of identifying and recruiting top candidates, including:

- Developing metrics to help rank candidates
- Scheduling interviews and arranging for travel

- Maintaining communications with candidates throughout the process

For more information about our recruiting services, visit our website or call one of our consultants:

- John Mannhaupt at 972.243.4033
- David Goodnight at 830.285.1259

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BRAKKE CONSULTING VIEWPOINT

The reduced number of press releases from companies this week in the newsletter probably reflects the holiday season. We'd expect this trend to continue into the New Year.

We do want to call attention to some of our current studies mentioned in this newsletter. The annual flea/tick/heartworm study is now available for the 2015 season and should be a must-buy for any company currently participating, or expecting to participate, in these important product categories. The New Technical Services Study is an evaluation of technical services quality as perceived by veterinarians for companies participating in the companion animal area. The study will provide useful insights and benchmarking on how companion animal practitioners think each company's technical services groups are performing.

Finally, we are in full swing creating our 2016 Animal Health Industry Overview. The 2016 Overview will provide our analysis and impact of key drivers and changes in the industry in 2015. We will have sections on the key trends in both the companion animal and food animal areas presented by specialists in each of the species areas. Both the NAVC and WVC presentations normally sell out so we'd recommend that you register early. NAVC registration is already open; WVC registration will be open soon.

Have a great weekend participating in various holiday activities!!

Ron Brakke

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