
**Brakke Consulting's
Animal Health News & Notes for December 13, 2013**
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Editor: Lynn Fondon DVM MBA

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**BRAKKE CONSULTING, INC.
2014 INDUSTRY OVERVIEW
ONLINE REGISTRATION NOW OPEN**

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 20, 2:00 – 4:00 pm, Gaylord Palms.
- WVC: Tuesday, February 18, 2:00 – 4:00 pm, Four Seasons.

Registration for the Industry Overview at the NAVC and WVC is now open. **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 EARNINGS RELEASES

> **Central Garden & Pet Company** reported financial results for the fourth quarter of fiscal 2013 ended September 28, 2013. Reported net sales for the Pet segment were \$220 million, a decline of 7% over the fourth quarter of 2012, which includes the impact of an extra week in the fourth quarter of the prior year. (*company website*)

> **Del Monte** reported financial results for the second quarter of fiscal 2014 ended October 27. Pet Products net sales grew 11% to \$552 million during the quarter, primarily driven by volume from the recently acquired Natural Balance brand. Pet Products operating income increased 21% to \$84.1 million. (*Business Wire*)

> **ECO Animal Health Group** reported financial results for the first six months of 2013. Revenues rose by 34% to GBP 15.3 million (\$25 million). Earnings before interest, tax, depreciation, amortization, share based payments and foreign exchange movements, increased by 45% to GBP 3.0 million (\$4.9 million). (*stockmarketwire.com*)

COMPANY NEWS RELEASES

> **Heska** announced that it has amended and extended its Supply and License Agreement with **Merck Animal Health** related to the supply of Heska's canine heartworm preventive. Merck Animal Health has the exclusive right to market and sell Heska's canine heartworm preventive in the US and Canada. Financial terms were not disclosed. (*company press release*)

> **Ceva Santé Animale** and **Sogeval** (a subsidiary of Sofiprotéol) announced they have entered into exclusive merger negotiations. Financial terms were not disclosed. (*company press release*)

> **IDEXX Laboratories, Inc.** announced the launch of the EliteVision Digital Imaging System designed specifically for equine veterinarians. EliteVision is wireless and includes state-of-the-art cesium technology and ImageSuite software. (*company website*)

> **Sogeval Laboratories** announced the release of SAMeLQ 225 Snap Tablets, an innovative nutritional supplement for liver support in canines and felines. Ingredients in SAMeLQ 225 Snap Tablets include S-adenosyl methionine, glycyrrhizinate ammonium (extract from licorice root) and quercetin. (*company press release*)

> **Animal Health International** announced the launch of Udder Calm Spray and Udder Calm Lotion to help maintain udder health in dairy cattle. The products are available under the company's Aspen Veterinary Resources brand. (*Vet Advantage*)

> **Animal Health International** announced the formation of a Sales and Customer Service team dedicated exclusively to the Equine market. (*Vet Advantage*)

> **Tyson** announced that beef producers will have to follow on-farm requirements for animal treatment next year if they want to work with the major meat processor. Tyson already requires its hog producers to follow specific guidelines and will now enforce its higher animal welfare standards on beef and poultry producers. (*company press release*)

> **Hygieia Biological Laboratories** announced it has received a USDA license for a unique freeze-dried live virus vaccine that contains Avian Encephalomyelitis, Fowl Pox and Pigeon Pox viruses in a single preparation. The company has also filed for a US patent on this product. (*company press release*)

> **CardioVet**, a subsidiary of PetRays Telemedicine, announced the launch of the new CardioVet wireless ECG device. The CardioVet device is designed to allow veterinary clinics and hospitals to rapidly acquire ECG's on their veterinary patients and submit the data to the CardioVet secure servers wirelessly. (*PRWeb*)

> **MedaNext** announced the launch of its MedaVet product, an interactive cloud based technology platform for veterinarians and animal welfare organizations. The MedaVet platform delivers a web and mobile based health path to veterinary clients, containing prescribed tasks, educational material and appointments. (*PRWeb*)

> CHINA **China Animal Healthcare** (CAH) announced that it has obtained the production rights to produce a new foot and mouth vaccine from the Xinjiang Academy of Animal Science and the Xinjiang Tecon Animal Husbandry Biotechnology Company. The FMD trivalent vaccine is a new type of vaccine researched by the company as a result of emerging FMD virus strains and epidemics in China and neighboring countries. (*Animal Pharm*)

ANIMAL HEALTH NEWS

> US - ANTIMICROBIAL USE The FDA announced it is implementing a plan to help phase out the use of medically important antimicrobials in food animals for food production purposes, such as to enhance growth or improve feed efficiency. In a final guidance issued this week, the FDA lays out a road map for animal pharmaceutical companies to voluntarily revise the FDA-approved use conditions on the labels of these products to remove production indications. The plan also calls for changing the current over-the-counter (OTC) status to bring the remaining appropriate therapeutic uses under veterinary oversight. The proposed VFD rule is open for public comment for 90 days starting on Dec. 12, 2013. To electronically submit comments on the proposed VFD rule, go to www.regulations.gov and insert docket FDA-2010-N-0155. (*FDA*)

> CHILE - ISA Chile has reported a large outbreak of infectious salmon anemia (ISA) at a salmon farm in central eastern Chile. 44,518 salmon were destroyed on a fish farm; In total 362,691 were susceptible to the disease. Quarantine has been imposed and the complex disinfected. A vaccination strategy has not been employed. (*Animal Pharm*)

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BRAKKE CONSULTING VIEWPOINT

For the second time in a few months Tyson, one of the leading processors of animal protein, has established some guidelines for animal welfare and treatment for their beef suppliers. Another story regarding animal welfare occurred in the dairy segment recently, when several major customers discontinued the use of cheese in their products from a large dairy operation after a video showing animal abuse at the dairy went viral. The processors of animal protein products

are responding to the growing concern of consumer on how animals and poultry are being treated at the grower level. While this is not new, we believe pressure will continue to increase from consumers related to animal welfare and use of chemicals in the growth of animal protein.

As the year is rapidly coming to an end we're in the development phase of our 2014 Animal Health Industry Overview. This year we will be adding a section on the potential impact of pet health insurance and wellness programs on the practice of companion animal medicine. We believe that you'll find our insights in this area useful as you plan and implement your marketing program in 2014.

Have a great weekend and stay warm!! Winter is here!!

Ron Brakke

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Brakke Consulting, Inc.
12005 Ford Rd., Suite 530
Dallas, TX 75234 USA