
**Brakke Consulting's
Animal Health News & Notes for December 14, 2012**
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IN THE NEWS:

Brakke Consulting news
[US Flea Control & Heartworm Markets](#) - now available!
[2013 Industry Overview](#)

earnings news
[Central Garden & Pet](#)
[Del Monte](#)
[ECO Animal Health](#)

other news
[Bimeda](#)
[Butler Schein Animal Health](#)
[IDEXX](#)
[InstantLabs](#)
[LifeLearn](#)
[MWI Veterinary Supply](#)
[Webster Veterinary](#)
[Yissum Research and Development](#)

**BRAKKE CONSULTING, INC.
US FLEA CONTROL & HEARTWORM MARKETS
2012 UPDATE
NOW AVAILABLE**

Brakke Consulting has published our 2012 report on the US Flea Control and Heartworm Markets. The report includes valuable information on the US market for small animal parasiticides including:

- discussion of the impact of generic fipronil products
- an overview of the veterinary and OTC flea control markets
- Product descriptions, prices, and sales for the leading veterinary flea and heartworm products
- 2012 survey of over 200 veterinarians
- 2012 survey of 500 pet owners

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

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

www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> **ECO Animal Health Group** reported financial results for the six months ended 30 September 2012. Revenue was GBP 11.46 million (\$14.9 million), a decline of 4% compared to the comparable period in the prior year. Gross profit increased 15% to GBP 5.1 million (\$6.6 million). *(Business wire)*

> **Central Garden & Pet** Company reported financial results for the fourth quarter ended September 29, 2012. Reported net sales for the Pet segment were \$238 million, a gain of 12% over the fourth quarter of 2011, benefitting from higher animal health sales and strength in its pet distribution business as well as the inclusion of an extra week in the quarter versus the prior year. *(company website)*

> **Del Monte Foods** reported net sales in the second quarter fiscal 2013 ended October 28, 2012. Pet Products net sales were \$497 million, an increase of 6% from net sales in the prior year period. The increase in Pet Products net sales was driven by new product volume growth, primarily in dry cat food and pet snacks. *(Business Wire)*

COMPANY NEWS RELEASES

> **IDEXX Laboratories** announced it has signed a Consent Agreement to resolve the FTC's investigation into whether the company engaged in unfair methods of competition. Under the Consent Agreement, IDEXX cannot have exclusive distribution agreements with all three of **MWI Veterinary Supply, Butler Schein Animal Health, and Webster Veterinary**; IDEXX may maintain exclusive distribution agreements with two of these three distributors. IDEXX's non-exclusive agreement with MWI, effective January 1, 2013, brings the Company into compliance with the terms of the Consent Agreement, which expressly states that the Company admits no wrongdoing. *(company website)*

> **Bimeda** announced a 12,000-foot expansion of its existing 28,000-square foot manufacturing facility in Minnesota. The new plant is expected to begin operations by the end of the first quarter of 2013. *(Southernminn.com)*

> **LifeLearn, Inc.** launched a new video production service called WebDVM4 Media. This service produces short, high quality veterinary videos – company profiles, scripted ads, client testimonials, and even professional news stories – to help veterinarians expand their marketing to pet owners and attract more clients. *(company press release)*

> **InstantLabs Medical Diagnostics Corp.** announced it is entering the animal health/veterinary medicine field next year, with plans to develop a variety of tests for the detection and diagnosis of pathogens in animals. The tests will be based on its general purpose molecular diagnostic test kits, which can be refined for different markets. *(bmoremedia.com)*

> ISRAEL **Yissum Research and Development Company** of the Hebrew University of Jerusalem, introduced a vaccine against Canine monocytic ehrlichiosis (CME), proven effective in an experimental study in dogs. Yissum is currently looking for commercial partners for further development and commercialization purposes. *(Business Wire)*

ANIMAL HEALTH NEWS

> BRAZIL - BSE Brazil has notified international animal health regulators of its first case of bovine spongiform encephalopathy. The cow died two years ago from unrelated causes having never developed the disease. An initial histopathological test indicated the cow was negative for

the disease, but a second test was performed 18 months later at the National Reference Laboratory in Brazil, at which point it tested positive for BSE. (*ens-newswire.com, reuters.com*)

> US - EPIZOOTIC HEMORRHAGIC DISEASE Nebraska deer are in the throes of the worst outbreak of epizootic hemorrhagic disease in decades, according to the Nebraska Game and Parks Commission, with some 6,000 carcasses reported this year, compared with about 10 in 2011 and a 10-year high of several hundred. The disease is transmitted to deer via biting midges, which are thriving amid the state's severe drought. (*AVMA SmartBrief - Lincoln Journal Star*)

**BRAKKE CONSULTING, INC.
2013 INDUSTRY OVERVIEW
ONLINE REGISTRATION NOW OPEN**

Brakke Consulting will present the 2013 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 21, 2:00 – 4:00 pm, Gaylord Palms.
- **WVC:** Tuesday, February 19, 2:00 – 4:00 pm, Four Seasons.

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

BRAKKE CONSULTING VIEWPOINT

You know it's getting close to the end of the year when you see our annual industry overviews scheduled for Orlando and Las Vegas. We've been developing these presentations since mid-October and believe those attending will be pleased with the information and insights that we've generated. Below are a few of the industry trends that we'll be discussing in detail in the presentations:

- Impact of current business climate and consumer attitudes on the animal health industry in 2013
- Changes in industry ownership and how this could drive changes in your business
- Veterinary profession challenges and opportunities
- Industry sales estimates
- Additional insights and thoughts that will impact your business

We look forward to seeing many of you at these presentations. Have a great weekend and a pleasant and safe holiday season!!

Ron Brakke

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