
**Brakke Consulting's
Animal Health News & Notes for December 15, 2017**
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**BRAKKE CONSULTING, INC.
2017 US FLEA CONTROL AND HEARTWORM MARKETS REPORT**
NOW AVAILABLE

Are you on top of the trends in the largest market segment in companion animal health?



Brakke Consulting's 2017 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, tick and heartworm products
- an overview of the veterinary and OTC flea control markets
- discussion of new flea and tick products
- 2017 survey of 300 veterinarians
- 2017 survey of 500 pet owners

The report on the US Flea Control & Heartworm Markets is available for a purchase price of \$7,750.

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

- **Norbrook Laboratories** reported results for its fiscal 2017 year ended July 31, 2017. Revenues of GBP 272 million (\$366 million). Operating profit for 2017 increased 30% to GBP 50.2 million for the year. (*Animal Pharm*)

BRAKKE CONSULTING, INC. INDUSTRY OVERVIEWS AT VMX AND WVC REGISTRATION FOR VMX OVERVIEW IS NOW OPEN

Brakke Consulting is pleased to announce the 2018 Industry Overview. The 2018 US Animal Health Industry Overview will be presented twice this winter - once at the VMX (formerly NAVC) in Orlando, Florida and once at the Western Veterinary Conference in Las Vegas, Nevada. These dates are:

- VMX: **Monday, February 5, 2018**, 2:00 – 4:00 pm, Rosen Plaza Hotel
- WVC: **Tuesday, March 6, 2018**, 2:00 – 4:00 pm, Four Seasons.

Registration for the VMX Industry Overview is now open; registration for the WVC Industry overview will open in January. Seating is 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 \$400 per person for online registration; late registration is \$450.

www.BrakkeConsulting.com

COMPANY NEWS RELEASES

- **Zoetis** announced the launch of Vanguard CIV H3N2/H3N8 canine influenza virus (CIV) vaccine. The new bivalent vaccine helps protect dogs against the two strains of the virus known to be circulating in the US: CIV H3N2 and CIV H3N8. (*company press release*)

- **MWI Animal Health**, a part of AmerisourceBergen, announced the acquisition of **Northeast Veterinary Supply Co. (NEVSCO)**, an independent, regional distributor of veterinary pharmaceuticals and medical supplies servicing primarily the northeast region of the US. Financial terms were not disclosed. (*Business wire*)
- **Premier Veterinary Group** announced that its subsidiary Premier Vet Alliance has signed a co-operation agreement with **MWI Animal Health**. Through the partnership, Premier's preventative healthcare program for pets would be made available to MWI's client hospitals across the Midwest and Southeast regions of the US. (*Stockmarketwire.com*)
- **Bluestar Adisseo Co.** announced the acquisition of **Nutriad**. Nutriad, a multinational company headquartered in Belgium, operates four laboratories and five plants located in Belgium, Spain, the U.K., China and the U.S. The business generates gross sales of about \$100 million per year. Financial terms were not disclosed. (*Feedstuffs*)
- **Vetanco** (Argentina) and **Dr Bata** (Hungary) announced they have jointly formed a new US subsidiary. Located in St Louis, Missouri, **BV Science** will join the research, marketing and technical support departments of both firms. Vetanco provides a range of products for both pets and livestock, while Dr Bata is focused on pigs, poultry and ruminants. (*Animal Pharm*)
- **Fuzzy Pet Health**, a subscription-based pet healthcare company, announced the close of \$4.5 million in seed round financing, along with the launch of its mobile app and expanded in-home vet care options. The company's all-inclusive memberships cover in-home checkups, medications, vaccines and telemedicine. The financing will enable the company to continue expanding its veterinary services and geographic markets. (*Businesswire.com*)
- **FetchMyVet.com** announced that it is now providing at home veterinary services for those in Miami-Dade, Broward and Palm Beach areas of Florida. (*PRNewswire*)
- **EU Panion Animal Health AB** announced it has received the European Medicines Agency's acceptance of the classification as MUMS (Minor Use Minor Species) for its epilepsy product for both dogs and cats. (*NBHerard.com*)
- **TAIWAN** Spanish firm **Laboratorios Hipra** has officially launched its new subsidiary in Taiwan to support its swine vaccine sales. For over 20 years, Hipra sold its swine vaccines in the country through a nationwide distribution system; the new subsidiary will promote and develop its swine vaccine business directly. (*Animal Pharm*)

ANIMAL HEALTH NEWS

- **NETHERLANDS - AVIAN INFLUENZA** The Netherlands confirmed an outbreak of highly contagious H5N6 avian influenza on a duck fattening farm that led to the culling of nearly 16,000 ducks. A 3-kilometer surveillance zone and a 10-kilometer protection zone were established around the farm. The ministry added that the H5N6 sub-type was not linked to the Asian zoonotic H5N6 which has been found in South Korea, Japan and elsewhere in Asia. (*Reuters*)
- **US – HEARTWORM DISEASE** A drug-resistant strain of heartworm was discovered in a dog in Metairie, Louisiana, which contracted heartworm while on a monthly preventative. University of Georgia College of Veterinary Medicine confirmed that the heartworms were drug-resistant, and established the strain for research purposes, naming it Metairie-2014.

Louisiana hosts “by far the most cases” of suspected drug-resistant heartworm strains, according to Louisiana State University. (*Veterinary Practice News*)

- US - ANTIBIOTIC USE The FDA published its annual report summarizing sales and distribution data for all antimicrobial drugs approved for use in food-producing animals. The 2016 report shows that antimicrobial sales decreased from 2015 to 2016, with domestic sales and distribution of all antimicrobials decreasing by 10% and domestic sales and distribution of medically important antimicrobials decreasing by 14%. The full report can be read online at <https://www.fda.gov/downloads/ForIndustry/UserFees/AnimalDrugUserFeeActADUFA/UCM588085.pdf> . (FDA)

BRASSE CONSULTING, INC. MARKET RESEARCH REPORTS

Brasse Consulting is an industry leader in timely market research on topics of high interest to stakeholders in the animal health, pet and veterinary markets. Reports published in the past year include:

- US Flea Control and Heartworm Markets (now available)
- Distributor Effectiveness Study (now available)
- Equine Mega Study IV (coming in January 2018)
- US Companion Animal Veterinary Technical Services Study (coming in March 2018)
- Pain Management Products for Dogs and Cats (annual report)
- New Strategies for Health and Performance in US Livestock and Poultry Production
- Manufacturer Sales Force Effectiveness Study (biannual report)
- US Veterinary Generic Drugs Market
- Changing Pet Ownership Study

Prices for reports vary. For more information about these or other reports, visit our website at <http://www.brasseconsulting.com/multi-client-studies.aspx> or contact us at info@BrasseConsulting.com.

BRASSE CONSULTING VIEWPOINT

Earlier in this newsletter we announced our Animal Health Industry Overview presentations at VMX and WVC in early 2018. This year we plan to focus our overview on several industry trends that are occurring and how these activities could alter various company marketing and sales practices now and in the future.

One of the areas will be the Companion Animal Veterinary Practice Consolidation. Our firm has had extensive experience in supporting consolidators and equity funds in purchasing and integrating clinics, which provides us with some unique insights and understanding of this trend. This section will be handled by Senior Consultant John Volk. The Overview will also include our perspective on industry growth in 2017 and our expectations for 2018 and beyond. This section will be handled by Senior Consultant Robert (Bob) Jones. We look forward to seeing you and your senior managers in our upcoming sessions. You'll be glad you attended.

As we head into year-end, we want to take this opportunity to wish all of you and your families an enjoyable and safe holiday season. Come back refreshed in the new year ready to continue the growth of the industry!

Ron Brasse

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