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**Brakke Consulting's  
Animal Health News & Notes for December 16, 2016**  
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IN THE NEWS:

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NutriQuest  
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PetNV  
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Veterinary Naturals  
Voyce  
ZIVO Bioscience  
Zoetis

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

Brakke Consulting is pleased to announce that our 2016 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 new flea and tick products, including Frontline Gold, Simparica, Bravecto topical solution, and the generic imidacloprid products
- 2016 survey of 300 veterinarians
- 2016 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](mailto:lfondon@brakkeconsulting.com) to

order the report, or for more information visit our website at:

[www.BrakkeConsulting.com](http://www.BrakkeConsulting.com)

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### COMPANY EARNINGS RELEASES

- **Eco Animal Health** reported its results for the six months to September 30, 2016. Revenues increased 25% to GBP 26.9 million (\$33.6 million); adjusted EBITDA increased 46% to GBP 6.3 million (\$7.9 million). (*Digitallook.com*)

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### COMPANY NEWS RELEASES

- **Parnell Pharmaceuticals Holdings** Ltd announced that it will seek to move from the NASDAQ OMX Global Market to the OTC Pink Open Market. This decision has been made to facilitate substantial cost savings consistent with previously stated goals of becoming profitable in 2017. (*ITbusinessnet.com*)
- **Jaguar Animal Health**, Inc. announced that it has signed a distribution agreement with **Henry Schein**, Inc. for exclusive distribution of Jaguar's Neonorm Foal product to all segments of the US equine market. (*company press release*)
- Intersections Inc. announced that its Board of Directors approved the closure of its Pet Health Monitoring business, known as **Voyce**, an innovative animal health monitoring device that was marketed to pet owners and veterinarians. (*Vet Advantage*)
- **Veterinary Naturals**, a natural and organic based line of pet supplements, announced the launched its first product, Veterinary Naturals Hip & Joint Supplement. The product is available exclusively on Amazon.com. (*PRNewswire*)
- **ZIVO Bioscience**, Inc. and **NutriQuest** LLC announced the execution of a Letter of Intent to jointly develop and test animal nutrition products derived from the proprietary ZIVO algae strain. Both firms have committed to enter into a definitive agreement that grants NutriQuest a worldwide license to market the products under its brand name. (*Finance.yahoo.com*)
- **BuddyRest** announced it has acquired the **PetNV** brand from Envision, Inc. PetNV brand features innovative reflective technology on leashes, collars and human companion belts that helps ensure dogs and their owners are more visible. Financial terms were not disclosed. (*Pet Age*)
- **Link AKC** announced the launch of its smart collar and app for pets. The collar, which is convex-shaped smart device to conform to the shape of a dog's neck, is endorsed by the American Kennel Club. (*Pet Business*)
- In preparation for expanded Veterinary Feed Directives (VFDs) on January 1, 2017, **GlobalVetLINK** announced that current and transition FDA-approved VFD drugs are now active in its FeedLINK Electronic VFD System. Several drugs and combinations are still under evaluation by the FDA and/or drug manufacturers, so as those are finalized the system will be updated. (*company press release*)
- **MedVet Medical & Cancer Centers for Pets** announced its expansion into Texas with the addition of Emergency Animal Clinic, Inc. which includes three emergency veterinary hospitals in the greater Dallas area. In addition to Dallas, MedVet operates a network of

eleven medical centers in Ohio, Indiana, Illinois, Kentucky, Louisiana, and Alabama. Financial terms were not disclosed. (*Finance.yahoo.com*)

- EU The European Medicines Agency's Committee for Medicinal Products for Veterinary Use (CVMP) adopted by consensus a positive opinion for an initial marketing authorization of **Zoetis'** Stronghold Plus (selamectin/sarolaner), a new antiparasitic product for cats. (*Animal Pharm*)
- UK EQT VI announced an agreement to acquire **Independent Vetcare Limited (IVC)**, the third largest vet services provider in the UK, from Summit Partners. IVC has more than 290 sites and an online pet pharmacy. Financial terms were not disclosed. (*PRNewswire*)
- EU Europe's Committee for Medicinal Products for Veterinary Use (CVMP) adopted by consensus a negative opinion for the initial marketing authorization application of **IDT Biologika's** Respiorc FLUpan H1N1, an inactivated viral vaccine for active immunization of pigs against swine influenza. The CVMP said it considered the benefit-risk balance for Respiorc FLUpan H1N1 was not demonstrated to be favorable by the quality, safety and efficacy data submitted by IDT. (*Animal Pharm*)
- UK National veterinary group **CVS** announced it has raised GBP 30 million (\$37.5 million) through a share placing. The price of 1,000p per share was at a discount of 3.85% to the closing price on December 12. The company said the placing was approximately 2.4 times oversubscribed. (*insidermedia.com*)
- SWEDEN **Intervacc** announced it has secured SEK 10.8 million (\$1.2 million) through a recent oversubscribed rights issue to new and existing investors. The capital will be used to fund the final stages of clinical trials for Strangvac, a recombinant vaccine against strangles (equine distemper). (*Animal Pharm*)
- AUSTRALIA 1ST Group announced it has diversified into the pet care market with the launch of **PetYeti**, a new portal for pet services, starting with veterinary practices. The company states that PetYeti is Australia's first online appointment portal that enables pet owners to find a local veterinarian and book online appointments 24/7 on any Internet-connected device. (*itwire.com*)

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## ANIMAL HEALTH NEWS

- US - FDA The FDA announced the selection of Steven M. Solomon, DVM, as the new leader of the agency's Center for Veterinary Medicine (CVM). Dr. Solomon will assume the directorship in January 2017. Dr. Solomon practiced large animal veterinary medicine for 10 years before joining the agency in 1990 as a Veterinary Medical Officer. He has steadily progressed through key positions in the agency and was most recently the Deputy Associate Commissioner for Regulatory Affairs in FDA's Office of Regulatory Affairs. (*FDA*)
- US - POULTRY MEAT SAFETY Salmonella and Campylobacter prevalence in US retail chicken continues to decline according to the 2014 Integrated National Antimicrobial Resistance Monitoring System (NARMS) report released by the FDA, and both are at their lowest levels since NARMS testing began. Most (82%) of human Salmonella isolates tested were not resistant to any of the tested antibiotics. (*Vet Advantage - WorldPoultry.net*)
- US - MILK QUALITY Researchers at Virginia Tech have found that new LED lights that are being installed in milk display cases across the country do more than just reduce energy bills; they also help milk taste better. The exposure to certain light changes the flavor profile of

milk. When people describe milk that was exposed to conventional fluorescent lights, they used words like “cardboard,” “stale,” and “painty;” the new LED lights reduce those negative profiles. (*Vet Advantage - Dairy Herd*)

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**BRAKKE CONSULTING, INC.  
STRATEGIC PLANNING**

Brakke Consulting is an excellent resource for your company’s strategic planning. Some of the services we offer include:

- Reviewing revenue estimates and success probability of your product pipeline
- Reviewing the timing of various new product introductions and estimate the impact of various scenarios
- Benchmarking various functions against company competitors in the larger markets

Through strategic planning, Brakke Consulting can help improve the likelihood of success for your company’s future endeavors.

Contact us for professional assistance in any of these areas.

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**BRAKKE CONSULTING VIEWPOINT**

This week and last week’s stories include some examples of how challenging it is for early-stage companies to enter into the animal health market. The time-to-market, and the critical mass needed to commercialize technologies even after development is completed, seem to have been overlooked by some start-up companies. It is a competitive marketplace and unless the product being introduced has a significant point of difference in an underserved disease category, it is often difficult to obtain meaningful penetration and market share. In addition, some of the new products being introduced are entering markets where the market potential is much less than the business plan suggested or was planned. In the 30 years Brakke Consulting has been in business, we have assisted with a number of successful new product and brand introductions. We’d love the opportunity to apply our expertise and market insights to your marketing and sales programs.

We also noted that the FDA announced the selection of Steven M. Solomon, DVM, as the new leader of the Center for Veterinary Medicine (CVM). This position has been open for some time and hopefully this appointment will clarify and speed up the decision-making process in this organization. We want to wish Dr. Solomon the best in his new position. The industry needs a responsive partner in CVM to assist in the speedy introduction of new technologies and products into the marketplace.

Have a great weekend and stay warm!

*Ron Brakke*

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