
**Brakke Consulting's
Animal Health News & Notes for December 31, 2013**
Copyright © Brakke Consulting, Inc.

Editor: Lynn Fondon DVM MBA

**ANIMAL HEALTH NEWS & NOTES CELEBRATES
14 YEARS OF INDUSTRY NEWS**

We hope each of you has had a successful and prosperous 2013, and that 2014 will be full of new opportunities for you and your companies. Thanks to our many clients for utilizing our services during the year and making 2013 another successful year for Brakke Consulting.

In this last newsletter of 2013, we've listed some of the key events that occurred during the year for your review and files. In summary, industry consolidation continued at an accelerating pace and there was a significant number of new product and services added to company portfolios. We expect to see much of the same in 2014. Enjoy the eggnog!

Ron Brakke

BRAKKE CONSULTING, INC.
Serving the Worldwide Animal Health and Pet Care Industries

Providing a complete range of consulting services, including:

- > **INFORMATION:** Industry insights, data, market research, competitive intelligence
- > **RECRUITING:** Executive Search, AnimalHealthJobs.com
- > **TRANSACTIONS:** Merger, acquisition, divestiture, licensing, due diligence
- > **SOLUTIONS:** Management problem solving and consulting services
- > **GENERAL CONSULTING:** Executive consultation, business and strategic plan development and implementation assistance
- > **PRACTICE MANAGEMENT**

Brakke Consulting, Inc.

- headquartered in Dallas, Texas
- US offices in Chicago, St. Louis, Kansas City, Omaha, Stuart, Florida and Kerrville, Texas

www.BrakkeConsulting.com

Selected news events from the past 12 months of Animal Health News & Notes

ACQUISITIONS, MERGERS, NEW COMPANIES:

December

- Ceva and Sogeval announce a merger
- Pethealth acquires VetMedsDirect

November

- PBI-Gordon acquires PetAg Inc.
- Elanco acquires the Titanium and Master Guard cattle vaccine lines from AgriLabs
- Henry Schein acquires Poland's Medivet SA
- Manna Pro acquires Cut-Heal

- The Riverside Company acquires Kyjen Company

October

- Aratana Therapeutics acquires Vet Therapeutics Inc.
- Del Monte Foods sells its consumer products business to focus on its pet food and snack business
- Bimeda acquires UK's Telsol Ltd
- Zoetis acquires Advanced Food Technologies LLC
- Animal Supply Company acquires Pet Food Wholesale; RFG Distributing; and Elf Pet Products
- Neogen acquires Prima Tech Inc.

September

- Genus acquires Genetiporc from Aliments Breton Foods Group

August

- Pet Food Experts acquires Zeus & Company
- knoell acquires Shotwell & Carr
- Gardiner Smith Labs acquires Animal Reference Pathology
- IDEXX acquires Brazil's Madasa do Brasil Ltda
- DSM acquires New Zealand's Unitech Industries
- MWI acquires IVESCO Holdings

July

- Neogen acquires SyrVet Inc.
- DSM acquires industrial custom premix business from Bayer Philippines
- The Riverside Company acquires a controlling interest in Simcro Ltd
- Patterson acquires the UK's National Veterinary Services Ltd from Dechra Pharmaceuticals
- ASKA Pharmaceutical spins off animal health business as ASKA Animal Health
- BC Partners acquires Allflex Holdings from Electra Partners
- Novozymes acquires TJ Technologies
- InVivo Animal Nutrition & Health acquires Mexico's Vipresa
- Cargill acquires Thailand's Siamakme Aquatic Feeds
- Innovacyn introduces Reptile Wound & Skin Care Spray

June

- Nestle Purina acquires Petfinder online pet adoption website from Discovery Communications
- Permira acquires Pharmaq
- Phillips Pet Food and Supplies acquires PFX Pet Supply, Pet Food Limited and Pet Food Limited Colorado
- Animal Supply acquires Wholesome Pet Distributing
- VitalPet acquires 4 veterinary hospitals in Texas
- Elanco acquires assets for production of bovine and feline vaccines from Heska
- Huvepharma acquires OptiPhos phytase feed enzyme from JBS United
- Ruff Dawg acquires Astro Manufacturing

May

- DW Healthcare Partners announces an investment in Med-Pharmex
- Ares Life Sciences acquires parent company of Greer labs
- Del Monte acquires Natural Balance Pet Foods

April

- Pethealth acquires PurinaCare Insurance Services
- Royal DSM acquires Tortuga
- Elanco acquires minority stake in China Animal Healthcare Ltd

- Thermo Fisher Scientific acquires Life Technologies

March

- Manna Pro Products acquires the Start to Finish equine treats and supplements and Advance Small Pack product lines from Milk Specialties Global

February

- Zoetis begins trading publicly as a stand-alone company
- Novozymes acquires Iogen Bio-Products
- Patterson acquires Universal Vaporizer Support
- Animal Health International acquires Turnkey Computer Systems
- Radio Systems acquires Pup-Pee Solutions
- Petmate acquires JW Pet Co. and Canine Hardware
- I-5 Publishing acquires assets of BowTie
- Sogeval acquires Alstoe Ltd Animal Health
- Phelps Industries is acquired by management and Wafra Partners
- Heska acquires Cuattro Veterinary USA
- ProbioticSmart acquires the American Livestock and Pet Supply catalog business from Animal Health International

January

- Bayer completes Teva Animal Health acquisition
- Neogen acquires Scidra Genomics (formerly Metamorphix)
- MWI acquires PCI Animal Health
- Animal Supply acquires Lone Star Pet Supply; Summit Pet Product Distributors; and the California operations of Zeus & Company
- IDEXX acquires Sneakers Software, maker of DVMAX practice management software; SHADOWSMITHS Teleradiology; and VetRadiologist
- Lallemand acquires Microbial Developments Ltd., maker of Aviguard
- Creative Science LLC announced its company launch
- Perrigo Company acquires Velcera
- Bimeda acquires Praziquantel Injection from Teva

PRODUCT LAUNCHES, APPROVALS, LICENSING DEALS:

December

- Bioniche receives FDA approval for NexHA hyaluronate sodium for use in horses
- Neogen launches NeoFilm microbial tests
- VetriMax Veterinary Products launches AtopiCream therapeutic skin repair
- IDEXX launches EliteVision Digital Imaging System for equine veterinarians
- Sogeval introduces SAMeLQ 225 Snap Tablets liver support supplement
- Animal Health International launches Udder Calm Spray and Udder Calm Lotion
- Hygeiea Biological Labs receives USDA licensure for a multivalent poultry vaccine
- CardioVet launches a wireless ECG device
- MedaNext launches MedaVet technology
- Merial receives EU marketing authorization for Broadline (fipronil, eprinomectin, praziquantel, s-methoprene) topical parasiticide for cats
- Merck receives positive opinion for EU marketing authorization for Bravecto (fluralaner) chewable 12-week flea and tick medication for dogs
- Merial announces the EU launch of Oncept IL-2 immunotherapeutic treatment for fibrosarcoma in cats
- Zoetis announces the re-launch of D-Tec CB test for detection of canine brucellosis in dogs
- DRE Veterinary launches the DRE SLS 9000 LED Surgery Light

- Bayer receives FDA approval for additional indications for Advantage Multi: for treating circulating microfilaria in dogs, and for treating heartworms and fleas in ferrets

November

- Zoetis introduces Draxxin 25 (tulathromycin) injectable for use in nursery pigs; Excenel RTU EZ (ceftiofur HCl); and Fostera PVC MH swine vaccine
- Norbrook receives FDA approval for Tandem Pen (penicillin G benzathine and pen G procaine) for use in beef cattle
- G Shepherd Animal Health launches Yolk-Ay Calf Paste
- Cargill launches Nutrena SafeChoice Senior horse feed
- Zoetis and Antech Diagnostics launch the Pet Wellness Report
- Boehringer Ingelheim introduces Vetera XP line of equine influenza vaccines
- GlobalVetLINK launches the EquusLINK Digital EIA Certificates and Lab Submission System
- Regeneus announces the USDA approves commercialization of its autogenous canine cancer vaccine
- IDEXX introduces the SNAP Pro Mobile Device
- Phibro and Etipix announced a partnership to commercialize biological products for chickens
- Compan Pharma earns Minor Use Minor Species designation for piroxicam for treatment of transitional cell carcinoma of the bladder in dogs
- Vireo Systems introduces CanineActiv NSAID alternative for dogs

October

- Vetalis and Zoetis announce an agreement for Zoetis to distribute Vetalis' products in Europe, Africa and the Middle East
- Elanco launches Cheristin (spinetoram) topical flea treatment for cats
- Elanco receives USDA approval for Viralign 6 BVD vaccine for cattle
- Pacific Vet Group USA launches FloraStart probiotic for neonatal chicks
- Lambert Kay launches Petivia and Prozyme digestive supplements
- Ceva announces an agreement with Jinyu Baoling to produce brucellosis vaccines in China
- Ceva receives FDA approval for Meloxidyl (meloxicam) oral suspension for use in dogs
- Phibro receives FDA approval for Boviprol (amprolium) 9.6% Oral Solution for use in calves
- Advanced Animal Diagnostics launches QScout Farm Lab on-farm rapid diagnostic technology
- Bimeda launches MeloxiMed (meloxicam) injectable for use in dogs and cats
- MAI Animal Health launches Transition Calcium Boluses for dairy cows
- PuriCore launches NovaZo Animal Health Wound Irrigation Solution
- Desert Veterinary Concepts launches Healthy Cat Litter
- Aurora Pharmaceutical introduces Balance Stress & Dehydration Aid for livestock
- Abaxis and LamdaGen announce an R&D agreement to integrate LamdaGen's technology into Abaxis equipment
- Harrisvaccines expands its license agreement with AlphaVax to include all companion animal diseases

September

- Merial and Global Green announce an agreement to evaluate Global Green's vaccine technology
- Novartis receives FDA approval for Zobuxa (enrofloxacin) tablets for use in dogs and cats and Florvio 2.3% Concentrate (florfenicol) for use in swine
- Putney receives FDA approval for Mupirocin Ointment for use in dogs
- Piedmont Animal Health receives FDA approval for Librevia (carprofen) chewable tablets
- Ogenx Therapeutics earns Minor Use Minor Species designation for geroxane to treat lymphoma and mast cell tumors in dogs
- Boehringer Ingelheim receives EU marketing authorization for Semintra (telmisartan) for use in cats with chronic kidney disease
- Merck launches Circumvent PCV G2 vaccine for use in pigs
- Bimeda launches ClindaMed (clindamycin) Oral Drops for use in dogs and cats

- DermaZoo launches its GlycoZoo line of dermatology products
- Elanco launches Recuvyra (transdermal fentanyl) for use in dogs
- Heska launches Element POC handheld blood analyzer
- Luitpold announces shipment of Adequan IM
- Vetnique launches Glandex nutritional supplement
- Merial receives FDA approval for NexGard (afloxolaner) Chewables for treatment of fleas and ticks in dogs
- Boehringer Ingelheim introduces FLEXcombo 250 Doses HSB swine vaccine
- IDEXX launches its Visual Pregnancy Test for cattle
- First Priority and Cornerstone Animal Health announce a partnership to commercialize First Priority's generic drugs
- SmartTag introduces the Mini-Microchip
- Mg Biologics introduces RTLR rattlesnake bite therapy
- Jorgensen Labs introduces the Vetexos CCL Brace for dogs

August

- Bayer receives FDA approval to market Teva's ProstaMate (dinoprost tromethamine) and Ovacyst (gonadorelin diacetate tetrahydrate) for use in livestock
- Ceva announces a strategic alliance with hatchery equipment manufacturer Ecat
- Jorgensen Labs introduces a line of veterinary ophthalmic implants
- Zoetis receives USDA approval for Bovi-Shield Gold One Shot for IBR, BVD and Mannheimia haemolytica in cattle
- Novartis and TyraTech Inc. announce a distribution partnership for TyraTech's biocide products
- VetDC acquires rights to Pathway Therapeutics' anti-cancer molecules
- Merck temporarily suspends sales of Zilmax in the US and Canada
- Vetoquinol launches Flexadin joint supplement
- IDEXX introduces the Greer Aller-g-detect Preliminary Panel and Greer Aller-g-complete Drops
- Novartis and Okapi Sciences announce an agreement to develop and commercialize an antiviral treatment for cats
- Kemin introduces Feline Urinary Tract Support, Feline Immune System Support and Protegrity GI supplements
- HomeoPet launches UTI+ remedy for cats

July

- Zoetis receives FDA approval for Factrel (gonadorelin HCl) for use with Lutalyse to synchronize estrus in lactating dairy cows
- Sergeant's launches Vetscription PetSTOP Behavior Correction Spray for dogs and cats
- AgriLabs launches Agri-Mectin Plus Clorsulon
- SmartVet launches VetGun application device for VetCap
- BioChek launches ThunderBolt Immunoassay Instrument for its line of poultry and swine kits
- Valneva signs research agreement with Boehringer Ingelheim to develop vaccines
- Dechra Veterinary Products introduces MiconHex-Triz Shampoo, Spray and Wipes
- Ceva Sante Animale and Sichuan Hengtong Animal Pharmacy Co. form a joint venture named Ceva Hengtong
- Shasun Pharmaceuticals and SeQuent Scientific sign a letter of intent to produce veterinary products
- Vets Plus launches Soft Chews for Dogs to its PetsPrefer line of supplements
- Aurora Pharmaceutical receives FDA approval for Equisul-SDT (sulfadiazine/trimethoprim) for use in horses
- Vets Plus and Ashish Life Science announce a partnership to develop veterinary pharmaceuticals
- Animart introduces Feed-O-Meter for cattle
- Nanochip ID launches a lost pet recovery service

June

- Cross VetPharm receives FDA approval for ClindaMed Oral drops for use in dogs and cats
- Braasch Biotech announces a patent for a vaccine to treat obesity in dogs and cats
- Orabrush announced two new Orapup supplements
- Neogen develops Igenity Dairy Heifer Program genomic test
- Diamond V launches SynGenX swine feed additive
- IDEXX introduces Milk Pregnancy Test

May

- Karyopharm Therapeutics earned a Minor Use Minor Species designation for KPT-335 for treatment of canine lymphoma
- Pathogenes arned a Minor Use Minor Species designation for levamisole for treatment of EPM in horses following antiprotozoal therapy
- CP Medical launches the PLUS line of antibacterial sutures
- Velcera launches VetTrust line of OTC pet health products
- Ceva introduces Feliway Wipes
- Neogen develops GeneSeek Genomic Profiler for beef cattle
- Huvepharma receives FDA approval for five generic medicated feed additives for cattle and swine
- Kinetic Technologies launches EquiShield CK Rinse and EquiShield IBH Salve
- Zoetis receives FDA approval for Apoquel (oclacitinib) tablets for the control of pruritus in allergic and atopic dermatitis in dogs
- Bayer introduces several former Teva dermatology products to the market
- VetIQ introduced a line of pet medications and flea & tick products in the OTC market
- AgriLabs receives USDA approval for Pulmo-Guard PH-M bovine respiratory disease vaccine
- Purina Animal Nutrition introduces Ampli-Calf Warm Weather Starter feed
- Jazz Medical and Derma Sciences sign license agreement for Derma Sciences' wound care products
- Virbac and NovaBay Pharmaceuticals announce licensing agreement for NovaBay's auriclosene antimicrobial
- Biogal Galed Labs and Lumora announce licensing agreement to develop veterinary tests

April

- Norbrook receives FDA approval for Enroflox 100 (enrofloxacin) for multi-day use in cattle and swine
- Alltech launches LifeForce range of equine supplements
- Boehringer Ingelheim Vetmedica receives EU marketing authorization for Pexion (imepitoin) canine epilepsy treatment
- Aribex launches NOMAD Pro 2 handheld X-ray system
- Zoetis launches enhanced Witness HW Heartworm Antigen Test
- Novartis resumes production of Sentinel Flavor Tabs
- Lorus Therapeutics and Elanco announce a research agreement to investigate novel cancer therapeutics
- Velcera launches PetArmorPro Advanced spot-on flea and tick prevention for dogs
- BASF launches Novasil Plus feed additive
- Merck receives FDA approval to re-introduce Vetsulin in the US market
- Merck announced the launch of SE Guard poultry vaccine
- Abaxis announced the launch of the color HM5 veterinary hematology system
- Mars Veterinary launched the Wisdom Panel 2.0 breed test
- Elite Veterinary Products introduces ORGreens surgical clothing and drapes for veterinarians

March

- Dechra introduces EpiTreats Healthy Canine Snacks and Gentacalm Topical Spray
- PSPC introduces Phycox Max supplements
- Life Vantage introduces Canine Health pet supplement
- Vidisco launches BlazeX Pro DR System for equine use

- VetSource launched eConnect veterinary prescription approval software
- Kinetic Vet launches Complete Soft Chew supplement for dogs and Optimend Corneal Repair Drops
- AgriLabs introduces StressMate colostrum-based treatment for calves
- Iams introduces Shakeables Soft & Chewy Dog Treats
- IDEXX receives USDA approval for M. bovis Ab Test for detection of bovine tuberculosis

February

- Vets Plus introduces Kla Tox Gel for digestive support in large and small animals
- Accord Healthcare receives FDA approval for generic meloxicam injection for use in dogs and cats
- Putney receives FDA approval for generic cefpodoxime proxetil tablets for use in dogs
- PRN Pharmacal introduces Collasate Silver gel
- Parnell launches Synchronization Pack for dairy and beef cows
- Sergeant's launches Pronyl fipronil spray
- Iams introduces Senior Plus diets for dogs and cats
- Docsinnovent introduces v-gel veterinary airway devices
- Pet King Brands introduces Zymox Brushless Enzymatic Oral Care Therapy
- Biolase launches Epic V-Series veterinary soft-tissue diode laser

January

- Merial and Imaxio sign licensing agreement to develop vaccines
- Norbrook launches Loxicom (meloxicam) injectable for use in dogs and cats
- Novus launches Avimatrix feed solution for broilers
- Bayer receives FDA approval for Veraflox (pradofloxacin) oral antimicrobial for use in cats
- Abbott receives FDA approval for OroCAM (meloxicam) transmucosal spray for use in dogs
- Abbott and Oasmia Pharmaceuticals sign agreement for global distribution rights to Oasmia's Paccal Vet and Doxophos Vet products
- Dechra and ArthroDynamic Technologies sign agreement for US distribution rights to AT's A-Cyst, Polyglycan-SA, and Polychews
- Bayer launches Seresto (imidacloprid/flumethrin) 8-month flea collar for dogs and cats
- Ceva launches Altresyn (altrenogest) for use in horses
- Hill's launches Prescription Diet Metabolic Advanced Weight Solution for dogs and cats
- Sogeval launches TriCOX joint supplement and Clenz-A-Dent Esteri-Caps dental supplement
- Phoenix launches Omega 3 Mega Gel Caps for dogs and cats
- Veterinary Transplant Services launches Fusion osteoinductive bone putty
- Veterinary Products Laboratories launches Ovitrol X-Tend Flea & Tick Spot-on for dogs or cats
- MinXray launches a new series of digital radiography systems for the veterinary market

**BRASSE 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

Trouble viewing this newsletter? You can view it online at www.BrakkeConsulting.com

*This electronic newsletter is the sole property of Brakke Consulting, Inc.
Any use of the contents herein should be approved by and appropriately attributed to Brakke Consulting, Inc.*

For more information about Brakke Consulting's services and syndicated studies, visit our website at www.brakkeconsulting.com.

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