
**Brakke Consulting's
Animal Health News & Notes for December 4, 2015**
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IN THE NEWS:

[Brakke Consulting news](#)
[Strategic planning](#)

earnings news
[DS Pharma Animal Health](#)
[Land O'Lakes](#)
[Purina Animal Nutrition](#)

other news
[Albavet Group](#)
[Animalytix](#)
[CDT Veterinary Therapeutics](#)
[Central Garden & Pet](#)
[Compendium of Veterinary Products](#)
[CVS Group](#)
[Dallas Manufacturing Company](#)
[Designing Health](#)
[Midmark Animal Health](#)
[National Consumers Outdoors](#)
[North American Compendium](#)
[Orion](#)
[The Pet Crematorium](#)
[Vetoquinol](#)
[W. F. Young](#)
[Zenoag](#)

**BRAKKE CONSULTING, INC.
STRATEGIC PLANNING SERVICES**

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
- Benchmarking various functions against company competitors

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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COMPANY EARNINGS RELEASES

> **DS Pharma Animal Health** reported results for the first half of fiscal 2015 ended September 31, 2015. Sales were Yen 6.2 billion (\$51.6 million), an 11% increase compared to the prior-year period. Growth was driven by the recent launch of several products. (*Animal Pharm*)

> **Land O'Lakes** reported results for the third quarter of 2015. Net sales were \$2.62 billion, a decline of 1% compared to the prior-year quarter; net earnings were \$8.2 million, an increase of 30%. Animal feed, including **Purina Animal Nutrition**, saw continued strong performance through the third quarter. (*company website*)

COMPANY NEWS RELEASES

> The FDA announced the approval for **Orion Corp.'s** Sileo (dexmedetomidine) oromucosal gel for the treatment of noise aversion in dogs. (*FDA*)

> **Central Garden & Pet Company** announced that it has purchased the pet bedding business and certain other assets of **National Consumers Outdoors Corp.**, formerly known as **Dallas Manufacturing Company** (DMC), for a cash purchase price of \$61 million. (*Business Wire*)

> **W. F. Young** announced it has purchased the assets of **Designing Health, Inc.**, the manufacturer and marketer of The Missing Link supplements for dogs, cats, birds, small animals and horses. Financial terms were not disclosed. (*company press release*)

> **Midmark Animal Health** introduced the new VetPro CR Digital Dental Radiography Reader, an easy-to-use, compact dental imaging solution. (*company press release*)

> **Animalytix LLC** announced its acquisition of the **Compendium of Veterinary Products** (CVP), the MSDS information system, and related assets formerly held by **North American Compendium**. With this addition, Animalytix expands the company's reach into Canada through the formation of its new affiliate, Animalytix Ltd. Financial terms were not disclosed. (*company press release*)

> Spotlight Innovation Inc. announced that it has formed **CDT Veterinary Therapeutics, Inc.**, a subsidiary company to develop cancer therapeutics for the veterinary market. CDT Veterinary Therapeutics is currently focused on the commercialization of Crotalin, a protein fraction purified from the venom of the tropical rattlesnake *Crotalus durissus terrificus*. (*Marketwired.com*)

> JAPAN **Vetoquinol** and **Nippon Zenyaku Kogyo Co., Ltd.**, also operating under the trade name **Zenoaq**, announced the signature of a joint-venture agreement to develop, register and market a range of animal health products in Japan. The joint-venture company - named Vetoquinol-Zenoaq K.K. - will focus on companion animal products, all selected from Vetoquinol's global reference products. (*Businesswire.com*)

> UK **CVS Group** announced it has acquired the **Albavet Group** and **The Pet Crematorium**. The Albavet Group employs more than 150 staff – including 34 professional vets – across three separate businesses: 11 veterinary surgeries; a veterinary buying group, trading under the name of Vetshare; and an instrumentation business trading under the name of VETisco. In the year to October 31 2014, the Albavet Group reported turnover of approximately GBP 6.6 million. Financial terms were not disclosed. (*insidermedia.com*)

ANIMAL HEALTH NEWS

> FRANCE - AVIAN INFLUENZA France has confirmed a case of highly pathogenic avian influenza (HPAI), its first in more than eight years. An H5N1 strain of the virus was detected in a backyard flock in the Dordogne region. The Agriculture Ministry has asked to activate a national emergency plan following EU and international guidelines. A monitoring zone of up to 10km has been set up around the affected site. (*Animal Pharm*)

> ISRAEL - FMD An outbreak of foot and mouth disease (FMD) has been confirmed on a pig farm in Israel, the first in the country since February last year. The World Organisation for Animal Health (OIE) recorded 172 cases and 120 deaths of FMD out of a susceptible 2300. Vaccination has been implemented although affected animals will not be treated. Quarantine measures and a surveillance and protection zone have been put in place. (*Animal Pharm*)

> WORLD - FELINE GUM DISEASE Two collaborative studies conducted by researchers from the WALTHAM Centre for Pet Nutrition together with expert veterinary dentists and the Forsyth Institute sheds new light on feline gum disease, identifying the most common bacterial species associated with health and disease in cats for the first time. Researchers identified 267 bacterial species present in feline dental plaque and built a database detailing the differences between bacterial populations in healthy cats and those in cats with gum disease. The work was published in *PLOS ONE*. (*perssupport.nl, PLOS ONE*)

> AUSTRALIA - VETERINARY ETHICS Veterinary schools in Australia and New Zealand have created One Welfare, an online portal with resources to help veterinarians and veterinary students navigate ethical dilemmas and other difficult situations involving animal welfare. The site includes hundreds of articles on animal welfare issues and scenarios veterinarians might face in practice. (*AVMA SmartBrief - SMH.com.au*)

> US - ONLINE VETERINARY ADVICE The US Supreme Court rejected an appeal filed by a retired Texas veterinarian who argued that a state law barring him from providing pet-care advice online and over the telephone violated his free-speech rights under the US Constitution. Lower courts had ruled that the veterinarian broke a 2005 state law when he answered questions through an "Ask a Vet" link on his website. Texas law states that a veterinarian must conduct an examination of an animal before offering medical advice. In 2005, the Texas legislature expanded that restriction by passing a measure stating the examination could not be done electronically. (*Yahoo News*)

BRAKKE CONSULTING VIEWPOINT

This week's news once again is mainly various acquisitions, mergers and joint ventures. It is interesting to note that most of these are either services or products not normally considered in the mainstream of animal health. Currently the availability of cash at low interest rates is an important driver of some of these transactions. There appears to be more cash available for consolidation than for innovation to create new technologies and products of high value.

In the animal health news section we continue to report outbreaks of various diseases that the industry has yet to help resolve via preventative products or treatments. So, there are still opportunities for newer and better products.

Have a great weekend!!

Ron Brakke

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