
**Brakke Consulting's
Animal Health News & Notes for December 31, 2014**
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**ANIMAL HEALTH NEWS & NOTES CELEBRATES
15 YEARS OF INDUSTRY NEWS**

We hope each of you has had a successful and prosperous 2014, and that 2015 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 2014 another successful year for Brakke Consulting.

In this last newsletter of 2014, we've listed some of the key events that occurred during the year for your review and files. Yes, it's been a busy year and we see more of the same in 2015. Remember, be careful whose shoes you are stepping on because you might be polishing them next year. 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
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- headquartered in Dallas, Texas
- US offices in Chicago, St. Louis, Kansas City, Omaha, Stuart, Florida and Kerrville, Texas

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

ACQUISITIONS, MERGERS, NEW COMPANIES:

December

- Allflex acquires Israeli SCR Engineers Ltd.
- Phillips Pet Food and Supplies acquires Dizzy Dogg
- Investors led by BC Partners acquire PetSmart
- Merial acquires Legend/Hyonate and Marquis equine products from Bayer
- Merial acquires Puerto Rican manufacturing plant from Merck
- Animal Supply Company acquires PETNET
- Neogen acquires Beijing Anapure BioScientific
- Church & Dwight acquires VI-COR

- Nutreco acquires Brazilian Fatec and BRNova

November

- Abaxis acquires UK-based QCR & Trio Diagnostics
- Zoetis announces plans to acquire Abbott Laboratories
- Petco acquires Drs. Foster and Smith
- Tractor Supply launches HomeTown Pet stores
- Shore Capital Partners forms Southern Veterinary Partners animal clinic chain

October

- Virbac acquires Novartis products Sentinel and Sentinel Spectrum from Elanco
- IDEXX acquires Dutch firm Animana
- SHV acquires Nutreco
- InVivo acquires Brazil's Total Alimentos
- Japan's Kanematsu acquires NorthPet
- Pharmgate acquires Pennfield Animal Health
- Garmon Corp acquires Kemlin's companion animal supplements line
- Vetlocity announces its company launch
- Quad-C Management announces the formation of Veterinary Specialists of North America
- Akorn Animal Health acquires from Lloyd, Inc. AnaSet, Tolazine, Yobine, Butorphanol, and VetaKet injectable drugs
- Neogen acquires Biolumix

September

- Alltech acquires Leinert Australia
- Spectrum Brands acquires Procter & Gamble's European pet food holdings (Iams & Eukanuba foods)
- Agrolimen forms joint venture with Nature's Variety
- InVivo acquires Swiss feed additive manufacturer Pancosma
- Indian Alivira Animal Health acquires 60% stake in Turkey's Provect Veterinary Products
- PetSmart acquires Pet360 online pet retailer
- Kansas State University, Bicknell Family Holding, and Michael Helmstetter found TechAccel private capital to fund research and business development in animal health, agriculture and food science
- MWI acquires UK-based Vetspace Ltd
- Fairfax Financial acquires Pethealth pet insurance

August

- Ouro Fino launches IPO in Brazil
- GlobalVetLINK acquires Health Information Management System software from Carthage Veterinary Service
- Phillips Pet Food and Supplies acquires Gardner Distributing
- VCA acquires Camp Bow Wow

July

- Tyson Foods announces the sale of its Mexico and Brazil poultry businesses to JBS
- Trupanion launches IPO
- Ares Management acquires National Veterinary Associates
- Intrexon acquires Trans Ova Genetics
- Pet-Ag acquires Cat-Sip Real Milk Treats from AKPharma

June

- Parnell launches IPO
- Medtronic acquires Covidien
- Animart acquires Michigan Veterinary Supply

- J.H. Whitney Capital acquires C.J. Foods from Trinity Hunt Partners
- TOPIGS and Norsvin merge their international swine breeding businesses

May

- Plumblin Life acquires VGX Animal Health assets from Inovio Pharmaceutical
- Select Sires acquires GenerVations
- Henry Schein acquires SmartPak
- Dechra acquires PSPC
- Precision Sciences acquires Bio-Nutrition's soft chew formulation capabilities
- Phillips Pet Food and Supplies acquires Wolverton
- aniMedica acquires Industria Italiana Integratori Trei
- Provetis is formed

May

- JBS United acquires JLM Enterprise
- Elanco agrees to acquire Novartis Animal Health

May

- Mars acquires Procter & Gamble Pet Care's Iams/Eukanuba/Natura brands in North America, Latin America, and Australasia

April

- Intervacc merges with Nordvacc Lakemedel
- Phibro launches IPO
- Kindred Biosciences launches IPO
- Three Dog Bakery is acquired by unnamed equity group
- Henry Schein acquires Medivet (Poland)

March

- Huvepharma acquires Viridus Animal Health from Novus
- Cargill acquires Pet Carousel
- Sorrento Therapeutics forms Ark Animal Therapeutics
- Thermo Fisher acquires Prionics
- Akorn forms Akorn Animal Health
- WG Critical Care acquires Quartermaster (penicillin) from West Agro
- Cooperative Resources acquires Minitube of America
- Shasun Pharmaceuticals and SeQuent Scientific form joint venture
- IMI Global acquires Global Animal Management assets from Merck

February

- Elanco acquires Lohmann Animal Health
- Vetoquinol acquires Bioniche Animal Health
- Benchmark acquires aquaculture vaccines from Zoetis
- Big Heart Pet Brands (formerly Del Monte Pet Products) launches as stand-alone business
- ALK acquires Bio-Medical Services
- Blackstone Holdings acquires veterinary division of ImageWorks

January

- Nestle Purina acquires Zuke's Performance Pet Nutrition
- Phibro acquires AquaVet aquaculture assets
- Aratana Therapeutics launches IPO
- Bimeda acquires Zootech from Provimi
- Aratana acquires Okapi Sciences
- Neogen acquires Chem-Tech

- Lallemand acquires Aquapharm Bio-Discovery

PRODUCT LAUNCHES, APPROVALS, LICENSING DEALS:

December

- Putney launches Carprofen Chewable Tablets
- IDEXX Laboratories, Inc. launches the CardioPet ECG Device
- Zoetis launches WITNESS FeLV-FIV FeLV Antigen and FIV Antibody Test Kit
- Zoetis receives FDA approval for Trimulox (generic tiamulin) for use in swine
- Novartis receives FDA approval for Osumnia otitis externa treatment for dogs
- Putney receives FDA approval for generic dexmedetomidine injection for use in dogs and cats

November

- Zoetis re-launches Zoamix (zoalene) anticoccidial for poultry
- Zoetis licenses anti-midkine technology from Cellmid
- Neogen develops NeoFill for Mastitis Treatment Decision on-farm diagnostic test
- Putney receives FDA approval for Carprofen Sterile Injectable Solution for use in dogs
- Cross VetPharm receives FDA approval for Flunazine (flunixin meglumine) oral paste for use in horses
- Purina Animal Nutrition introduces Equine Senior and Equine Senior Active horse feed
- Rysurg introduces BlephEx for treatment of blepharitis
- Boehringer Ingelheim launches Equisolon (oral prednisolone) for treating RAO in horses
- PRN Pharmacal launches PetVisionPro eye drops for reducing lens opacity in dogs

October

- Nestle Purina launches Just Right by Purina personalized dog food
- DairyMaster launches the Moo-Monitor+
- Merck launches Finadyne (flunixin) Transdermal Pour-on for cattle
- Quincy Animal Health launches Neutricks for Cats
- Bayer launches Dermoscent line of pet skin care products
- VetriScience launches Express Ease support for stool consistency and anal gland health
- Aratana licenses Atopix Therapeutics' oral CRTH2 antagonist for animal health indications
- Petplan announces a partnership with the AARP
- Animal Oralectrics introduces the Zumby oral health device
- IDEXX launches the Sarcoptes Antibody ELISA test and the Ringworm RealPCR Panel
- Zoetis re-launches Terramycin (oxytetracycline) Ophthalmic Ointment with Polymyxin B
- Putney receives FDA approval for Meloxicam Solution for injection in dogs and cats
- DermaZoo introduces EPAZoo Omega-3 Liquid
- BioMane Products launches Equine Pellets nutritional supplement

September

- Veterinary Transplant Services launches Fusion Xpress bone putty
- Zoetis launches SERELISA ParaTB Ab Mono Indirect test to screen for Johne's disease
- Bimeda launches Griseofulvin Powder for horses
- Dechra launches Levocrine (levothyroxine) Chewable Tablets
- Vetzlife launches Feline Oral Care Gel for Stomatitis
- Veterinarian Recommended Nutraceuticals launches Fatty Acid Target Score test
- Merial launches Prime Pac PRRS+ vaccine
- Benchmark Holdings and HypoPet announce a partnership to develop a cat allergy vaccine
- Zoetis receives conditional USDA approval for PEDv vaccine
- Biogal Galed Labs launches PCRrun technology-based test kits for Canine Ehrlichia, Canine Leptospira, Canine Leishmania, and Feline Mycoplasma

August

- Zoetis receives full USDA licensure for Poulvac Bron GA 08 infectious bronchitis vaccine for poultry
- Patterson Veterinary introduces Sirona Heliodont Plus intraoral X-ray unit
- PetFirst and Safeway announce an agreement for Safeway to promote PetFirst's insurance plans
- HSS Global and Agri-Pro Enterprises announce a partnership with Equilume to introduce Light Mask equine breeding technology in North America
- Dechra launches Eicosa3FF SnipCaps Omega 3 Fatty Acid Capsules
- Bimeda launches GentaMed-P (gentamicin) for Poultry Injection
- Merial receives FDA approval for Duocare (ivermectin/pyrantel) for OTC use in horses
- Dechra receives FDA approval for Osphos (clodronate) for treating navicular syndrome in horses
- Bioniche receives FDA approval for Folltropin (FSH) for use in beef and dairy heifers and cows
- Norbrook receives FDA approval for Carprieve (carprofen) injection for use in dogs
- Jurox launches Alfaxan (alfaxalone) injectable anesthetic for use in cats and dogs
- Bimeda launches XylaMed (xylazine) for use in horses and cervidae
- Vets Plus and PetsPrefer launch KaNoodles dental hygiene chews
- DRE Veterinary launches Hippo Manager Veterinary Practice Management software
- IDEXX launches RealPCR BVDV RNA Test
- AgriLabs and Epitopix launch autogenous Klebsiella pneumoniae mastitis vaccine for dairy cattle
- Sergeant's launches Sentry Petrodex Advanced Dental Care Calming Kit

July

- Merial launches Purevax feline Rabies 3 YR
- Ceva launches Salmune TEK poultry vaccine
- Abbott receives FDA approval for Simbadol (buprenorphine injection) for use in cats
- Parnell licenses regenerative compounds from CIMTECH
- Vetrin Medical launches Oralade oral critical care solution
- Veterinarian Recommended Nutraceuticals launches Canine Omega Benefits supplement
- Bayer relauches Rompun (xylazine) 100 injectable
- DermaZoo Pharma launches KC Oto-Pack gel, GlyChlorK Shampoo and Gly4Chlor Shampoo
- Merial relauches Heartgard Tablets
- IDEXX launches Whipworm Antigen ELISA test
- Neogen launches Havoc Attack rodenticide
- Avivagen licenses a permanent non-surgical pet sterilization technology from University of Saskatchewan
- Bayer launches quellin (generic carprofen) soft chews
- Norbrook Labs launches Enroflox (generic enrofloxacin) injection for Dogs
- Bimeda launches Sulfamed (generic sulfadimethoxine) Injection for cattle
- Abaxis receives USDA approval for the VetScan Canine Ehrlichia Antibody Test Kit
- Buckeye Nutrition launches EQ8 Senior Horse Feed

June

- IDEXX receives USDA approval for Swine Influenza Ab Test
- PRN Pharmacal launches Cameo Otic once-weekly otitis treatment
- Novartis launches Florvio (florfenicol) Concentrate Solution for use in swine
- Harrisvaccines receives USDA conditional licensure for its PEDv vaccine
- Hill's launches Prescription Diet Stews
- Neogen signs licensing agreement with SenesTech to manufacture and market a rodent fertility control product
- Aratana licenses allogenic stem cell therapy from Vet-Stem
- Preventia Diagnostics launches Spaychek Plus neutering detection test
- Phibro licenses poultry vaccine technology from Vaccibody
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May

- Boehringer Ingelheim Vetmedica launches Ultra Fel-O-Vax vaccines
- Royal Canin launches Genetic Health Analysis test
- PuriCore launches NovaZo Hydrogel
- Merck launches Bravecto (fluralaner) 12-week oral flea and tick control
- DermaZoo launches TrisOphtho Eye Wipes
- Kinetic Technologies launches Kinetic Vet EquiShield IBH Spray
- Centaur Animal Health launches QuikCal Calcium Boluses
- DRE Veterinary launches DRE Waveline VS vital signs monitor
- Hallmarq Veterinary Imaging launches PetVet MRI
- PetPace launches a monitoring collar
- Elanco receives FDA approval for Pulmotil AC (tilmicosin) for use in swine
- Ceva receives FDA approval for Tildren (tiludronate) for treatment of navicular syndrome in horses
- Cross VetPharm receives FDA approval for GentaMed-P (gentamycin) for use in chickens and Xylamed (xylazine) for use in horses and cervidae
- Dechra receives FDA approval for Vetropolycin and Vetropolycin-HC veterinary ophthalmic ointments
- Purina Animal Nutrition launches Super-Sport equine supplement

April

- Zoetis launches Hoof-Tec dairy footbath products
- Novartis launches TyraTech's Natunex insect control products
- iM3 launches Revolution 4DC dental radiography system
- Scanostics launches Petnostics urine collection cup
- Integrated Environmental Technologies receives EPA approval for Excelyte VET disinfectant
- Equashield launches SU-1 cancer syringes
- Med-Vet launches HemoHold hemostatic hydrogel
- Elanco receives USDA licensure for Titanium 5+PH-M bovine respiratory disease vaccine
- Sparhawk launches SparMectin-E (ivermectin) liquid for horses
- Clipper launches AniSet Anti-Kink IV fluid sets
- Vetnique Labs launches Glandex anal gland and digestive support supplement
- Merck launches Mildvac-Ma5 IBV poultry vaccine
- Kemin launches Re-Flex Ultra joint supplements
- OPTMIZERx launches VoucherDVM technology
- Kindred Biosciences licenses companion animal antibody technology from X-Body Biosciences
- DRE Veterinary launches DRE RCX Digital Wireless Veterinary Dental X-Ray System
- VetriScience launches vet-only Immuno DMG Pro supplement
- Merial launches Schmallenberg vaccine in the UK

March

- Vedco re-launches Boehringer's Acaress (ivermectin) miticide
- Dechra launches Orthokine vet irap 10
- DermaZoo launches GlycoBenz Shampoo
- Aratana Therapeutics licenses Advaxis' ADXS-cHER2 canine osteosarcoma treatment
- Zoetis launches One Shot BVD vaccine
- Merck receives FDA approval for VetPen insulin pen for use in dogs and cats (to be used with Vetsulin)
- Bayer launches 8 OTC flea and tick shampoos and premise treatments
- Sergeant's launches PetArmor Plus IGR and FastCaps flea treatments
- Innovacyn launches Vetericyc Feline Hydrogel Wound & Skin Care spray
- Bock VetPharma launches ConSeal-AIH (aluminum hydroxide) easy chews for cats
- Oasmia Pharmaceutical receives conditional FDA approval for Paccal Vet-CA1 (paclitaxel) for treatment of canine mammary adenocarcinoma and squamous cell carcinoma, to be marketed by Abbott

- VetriScience launches vet-only VetriFLEX supplement

February

- Novartis launches Sentinel Spectrum (milbemycin, lufenuron, praziquantel)
- Ark Sciences launches Zeuterin nonsurgical sterilization drug for dogs
- Midmark launches Cardell Touch Veterinary Anesthesia Monitor
- Sergeant's launches Sentry Clean Up stain & odor remover
- PetSafe launches Indigo Fresh dental treats
- Zoetis receives USDA conditional licensure for Georgia 08 IBR variant vaccine for poultry
- Merck launches Once PMH IN intranasal cattle vaccine

January

- Zoetis launches Apoquel (oclacitinib) tablets for the treatment of canine pruritus
- Bayer launches Annihilator Polyzone (deltamethrin) premise spray
- AgriLabs and SmartVet announce agreement to launch VetGun drug delivery system
- Harrisvaccines receives USDA licensure for Rotavirus C swine vaccine
- Aratana Therapeutics receives conditional USDA licensure for canine-specific monoclonal antibody AT-005 to treat canine T-cell lymphoma
- Clipper launches Phoenix Select sutures
- Merck launches Circumvent PCV-M G2 porcine circovirus vaccine
- Merial launches NexGard (afoxolaner) Chewable flea and tick treatment
- Bayer launches Remend line of products
- Neogen launches PEDV test
- Hill's launches Prescription Diet c/d Multicare Urinary Stress diet for cats
- Del Monte launches Milk-Bone Brushing Chews
- Life Technologies launches VetMAX-Gold Trich Detection Kit for cattle
- Sound Eclin launches Vivid E9 Vet and LOGIQ E9 Vet ultrasound equipment
- Diagnostic Imaging Systems launches Versa-View All-in-One True Mixed Animal x-ray system
- Neogen licenses cattle genomic patents from Cargill and Branhaven
- IDEXX launches Catalyst One Chemistry Analyzer
- Vetoquinol launches Zylkene vet-only behavior management nutraceutical
- DermaZoo launches DermaFlush Premixed Saline Packets
- TriLogic Pharma launches Ketocort Otic

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