
**Brakke Consulting's
Animal Health News & Notes for December 5, 2014**
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Editor: Lynn Fondon DVM MBA

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**BRAKKE CONSULTING, INC.
US FLEA CONTROL & HEARTWORM MARKETS
2014 UPDATE
NOW AVAILABLE**

Brakke Consulting has published our 2014 report on the US Flea Control and Heartworm Markets. The report includes valuable information on the US market for small animal parasiticides including:

- discussion of the impact of generic fipronil products
- an overview of the veterinary and OTC flea control markets
- Product descriptions, prices, and sales for the leading veterinary flea and heartworm products
- New and developing products for flea, tick and heartworm control
- 2014 survey of 350 veterinarians
- 2014 survey of 500 pet owners

The report on the US Flea Control & Heartworm Markets will be available for a purchase price of \$7,500. Please contact Dr. Lynn Fondon at (972) 243-4033 or lfondon@brakkeconsulting.com to order the report, or for more information visit our website.

www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> **ECO Animal Health Group** reported results for the half-year ended September 30, 2014. Revenues increased 11% to GBP 17.0 million (\$26.6 million). EBITDA increased 14% to GBP 3.4 million (\$5.3 million). (*Businesswire.com*)

> **Trupanion** reported financial results for the third quarter of 2014. Total revenue was \$30 million, an increase of 37% compared to the third quarter of 2013. The company reported a 30% increase in enrollments. (*Veterinary Practice News*)

BRASSE CONSULTING, INC. EXECUTIVE AND SALES FORCE RECRUITING Recruiting Means More than Resumes

At Brasse Consulting we find the right person to fit your company's needs. As part of our executive recruiting services, we manage the entire process of identifying and recruiting top candidates, including:

- Developing metrics to help rank candidates
- Scheduling interviews and arranging for travel
- Maintaining communications with candidates

Our involvement in every step of the process helps maintain communications with candidates, allowing them to ask questions and get another perspective on the company.

For more information about our recruiting services, visit our website or call one of our consultants:

- John Mannhaupt at 972.243.4033
- Ken Berkholtz at 772.223.3079
- Jay Lockhart at 314.821.3368

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COMPANY NEWS RELEASES

> The FDA announced approval of an Abbreviated New Animal Drug Application (ANADA) for **Zoetis'** Triamulox (tiamulin hydrogen fumarate) generic oral liquid for treatment of swine dysentery. (*FDA*)

> The FDA announced approval of a New Animal Drug Application (NADA) for **Novartis'** Osurnia (florfenicol, terbinafine, betamethasone) otic gel for treatment of otitis externa in dogs. (*FDA*)

> **Nexvet Biopharma** announced the signing of a ten year collaboration and distribution agreement with **Virbac** to distribute NV-01, Nexvet's most advanced product, in territories outside the U.S. and Canada. NV-01 is an anti-nerve growth factor monoclonal antibody (mAb) for the control of pain associated with osteoarthritis in dogs. (*company press release*)

> The FDA announced approval of an Abbreviated New Animal Drug Application (ANADA) for **Putney's** Dexmedetomidine injection for use in dogs and cats as a sedative and analgesic. (*FDA*)

> **Vedco, Inc.** announced a multi-year distribution agreement with **Jaguar Animal Health**, for the distribution of Jaguar's first-in-class gastrointestinal products indicated for use in companion and

production animals. Included are Jaguar brands Canalevia for dogs and Neonorm for preweaned dairy calves. *(company press release)*

> **Kindred Biosciences**, Inc. announced that it has re-assessed its atopic dermatitis program and the atopic dermatitis market and has decided to discontinue its AtoKin study in favor of directing resources toward other programs in its portfolio. *(PRNewswire)*

> **Church & Dwight** announced that it has signed an agreement to acquire the assets of **Varied Industries Corp. (VI-COR)**, a manufacturer and seller of feed ingredients for dairy cows, beef cattle, poultry and other livestock. The VI-COR products are yeast-based feed ingredients for improving livestock digestive health and performance that will complement Church & Dwight's existing dairy nutrition business. Annual sales of the VI-COR brands are approximately \$25 million. Financial terms were not disclosed. *(Feedstuffs)*

> BRAZIL **Nutreco** announced it has acquired **Fatec** and **BRNova**, two animal nutrition companies in Brazil, growing revenues from the country by almost 70%. Fatec and BRNova make a range of premixes, feed specialties and animal health products for chicken, pigs and dairy cows. Financial terms were not disclosed. *(Reuters)*

ANIMAL HEALTH NEWS

> US - PEDV A quarantine order has been issued in Hawaii after an outbreak of porcine epidemic diarrhea virus (PEDv). The quarantine order in place will prevent the movement of pigs on the island of Oahu, after a confirmed outbreak at a Waianae Valley farm. Out of the farm's 150 animals, around 25% died in the week prior to the issue of the quarantine order. It is unknown how PEDv reached Hawaii, as no pigs have been imported to the farm. *(Animal Pharm)*

> CANADA - AVIAN INFLUENZA Two poultry farms in British Columbia have been placed under quarantine after the Canadian Food Inspection Agency confirmed an outbreak of H5N2 avian influenza. At a turkey farm in Abbotsford, B.C., half of the barn's 11,000 birds have already died from the disease. At a second farm about eight kilometres away in Chilliwack, B.C., 1,000 of the farm's 7,000 birds have died. The remaining birds will be euthanized and both premises will be disinfected. *(CTVnews.ca)*

> INDIA - AVIAN INFLUENZA A large outbreak of highly pathogenic avian flu has been reported in southern India, according the World Organization for Animal Health (OIE). The H5 outbreaks on several chicken farms in Kerala have so far killed 15,500 birds out of a susceptible flock of 242,000. The whole flock is expected to be culled by local animal health officials. The so far unspecified H5 strain has resulted in premises being sprayed and quarantine controls being employed in a 10-kilometer radius round the farms. A vaccine strategy has not been employed. *(Animal Pharm)*

> US - VESICULAR STOMATITIS The Nebraska Department of Agriculture reported that Vesicular Stomatitis (VS) has been diagnosed in cattle on two farms in north-central Nebraska. The two herds that are affected will be quarantined until the symptoms disappear. *(Vet Advantage)*

BRAKKE 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 19, 2:00 – 4:00 pm, Gaylord Palms.
- WVC: Tuesday, February 17, 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

BRAKKE CONSULTING VIEWPOINT

The news this week includes several new ANADA approvals and one NADA approval. While we appreciate the new generic drug approvals, we would like to see more new drugs and innovative products being approved to create new revenue for the industry.

Each year the animal health industry sees a growing share of the market moving to generic drugs. Is this good for the industry in the long term? We continue to believe that innovation of new drugs, vaccines and other products are important for a sound growing industry.

It is important to note that the regulatory agencies, consumer attitudes and shareholders interested in quarterly financials are driving forces in the reduced number of new innovative product approvals. Should we not be concerned about the future of an industry that is surviving on old technology? How long is that likely to last?

Have a great weekend!

Ron Brakke

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