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**Brakke Consulting's  
Animal Health News & Notes for March 11, 2015**  
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*Editor: Lynn Fondon DVM MBA*

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**BRAKKE CONSULTING, INC.  
COMING IN APRIL:  
2016 PAIN MANAGEMENT PRODUCTS REPORT**

Pain management is one of the leading topics in veterinary medicine today. Brakke Consulting's annual report on Pain Management Products for Dogs and Cats includes such valuable information as:

- overview of acute and chronic pain in small animals
- review of new products
- estimates of US sales and prices of leading products
- pain management products in development
- review of nutritional supplements used for chronic pain
- review of therapeutic diets for joint care
- 2016 survey of 200 small animal veterinarians regarding use of pain management products

Pain Management Products for Dogs and Cats 2016 can be purchased for \$5,500 if ordered by March 25, 2014. The report will be completed in April. Questions about the study can be answered by project manager Lynn Fondon, DVM, MBA at 972-243-4033, or email [Lfondon@brakkeconsulting.com](mailto:Lfondon@brakkeconsulting.com).

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

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## COMPANY EARNINGS RELEASES

> **Ceva Santé Animale** reported results for the full year 2015. Total turnover was EUR 857 million (\$936 million), representing growth of 12% (10% at constant exchange rates). (*company press release*)

> **Krka** reported results for the full year 2015. Annual animal health sales came to EUR 52 million (\$57 million), an increase of 12% compared to the prior year. Animal health sales represented 4.5% of overall Krka group revenues. (*Animal Pharm*)

> **Land O'Lakes** Inc. reported results for the full year 2015. The Feed segment reported 2015 net sales of \$4.2 billion, down from 2014. However, pretax earnings of \$57.8 million in 2015 were up from \$27.8 million in 2014. The core Purina-branded feed lines delivered record-setting performance. (*WattAgNet*)

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## BRAKKE CONSULTING, INC. TRANSACTION ASSISTANCE

Let Brakke Consulting provide assistance for all your transactions.

Brakke Consulting has been the finder of record, agent of record or consultant for a number of successfully completed projects. We assist with valuations and provide due diligence on confidential transactions as well as offering executive counsel on a number of potential transactions.

Brakke Consulting has the experience, insight, ability and contacts to provide clients with the highest quality services in the animal health, pet, veterinary and specialty chemicals markets. Please contact any of our offices for a confidential consultation.

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## COMPANY NEWS RELEASES

> **Zoetis** announced the availability of a new genomic test called GeneSTAR Horn/Polled, which identifies homozygous and heterozygous polled for Brahman, Brangus, Limousin, and Simmental at an early age. The test can be ordered as a stand-alone test or in combination with applicable i50K or SireTrace testing. (*CattleNetwork.com*)

> **Mars Veterinary** announced the launch of a new test for breeders, under the Optimal Selection brand Powered by Genoscooper. Developed in partnership with **Genoscooper Laboratories** of Finland, the new Optimal Selection test includes testing for almost all known genetic mutations causing inherited canine diseases; traits such as size and coat color; and genetic diversity. The results reporting system features a Breeder Tool that enables the identification of potential mates based on a health results score for compatibility. (*company press release*)

> **VetCell Therapeutics** announced that it has begun production of two advanced cell therapies for treating dogs diagnosed with osteoarthritis: ReGen OA and EvoluGen OA. ReGen OA is an autologous stem cell therapy derived from the stromal vascular fraction (SVF) of processed subcutaneous or abdominal adipose tissue. EvoluGen OA is an autologous cell treatment that utilizes platelet rich plasma (PRP) derived from the canine patient's blood. *(PRNewswire)*

> **Patterson Veterinary** and **Vetter Software** have partnered to provide veterinarians with a seamless way to manage inventory in their clinics. Additionally, Patterson Veterinary is partnering with **VetSuccess**, a membership service that provides performance statistics and analytics to veterinary practices, to provide custom practice analytics reports to veterinarians. *(company press release)*

> **Cargill** announced that it is eliminating 20% of shared-class antibiotics — those deemed important for human medicine and farm animals — from its four feedyards in Texas, Kansas and Colorado and four additional feedyards operated by Friona Industries, a strategic business partner that supplies Cargill with cattle. The total number of cattle involved annually is approximately 1.2 million head. *(Feedstuffs)*

> **Intrexon Corp.** announced it has agreed to acquire the business of **EnviroFlight L.L.C.** and form a joint venture with **Darling Ingredients Inc.** EnviroFlight has developed proprietary technologies which enable the rearing of non-pathogenic black soldier fly (BSF) larvae in an industrially scalable manner to provide an environmentally friendly, toxin-free, sustainable source of high-value nutrients for the aquaculture and poultry feed industries. Financial terms were not disclosed. *(WattAgNet.com)*

> **Kroger Co.**, the largest full-service grocery in the US, announced that it has set a goal to transition to a 100% cage-free egg supply chain by 2025. Kroger stores already offer affordable cage-free eggs under Kroger's Simple Truth and Simple Truth Organic brands. In 2015, 15% of the eggs Kroger sold were cage-free. *(Feedstuffs)*

> INDIA **Merial** and **Zoetis** announced that they have entered into an exclusive marketing and distribution agreement wherein Merial will market and sell Zoetis' medicines and vaccines for dairy cattle in India. Zoetis going forward will focus its field force and resources the poultry and companion animal sectors in India. *(Livemint.com)*

> INDIA **Ceva** announced the acquisition of **Polchem**, an Indian veterinary business specializing in the avian and dairy sectors. Polchem currently employs 270 people, including several veterinarians. Financial terms were not disclosed. *(company press release)*

> ITALY **InVivo Animal Nutrition and Health** has acquired **Agrindustria**, an Italian analytical laboratory specializing in research and analysis: agribusiness, animal science, toxicology and pollutants. The analysis laboratories subsidiary of InVivo NSA, InVivo Labs, has three analysis and research laboratories in France and a network of analysis laboratories in other countries including Brazil, China, and Vietnam. Financial terms were not disclosed. *(Feed enews)*

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## **ANIMAL HEALTH NEWS**

> US - ANTIMICROBIAL RESEARCH FUNDING The USDA's Animal Plant and Health Inspection Service (APHIS) is asking Congress to approve \$10 million in funding to study antimicrobial resistance and its possible link to antibiotics in poultry and livestock production. If approved, the funding would be used to help collect data and do sampling at livestock and poultry operations in the US. APHIS had also sought money for the same purpose for fiscal year 2016,

but that request was denied. (*WattAgNet.com*)

> US - PUPPY SALES Boston, Massachusetts has banned pet stores selling dogs, cats, or rabbits from commercial breeders in an attempt to prevent the sale of animals bred in unsafe conditions. There were no pet stores in the city selling puppies or kittens from commercial breeders at the time the ban was enacted. A similar ban has been enacted in more than 120 other cities, including Chicago and Los Angeles, according to the city councilman who proposed the measure. (*Veterinary Medicine Executive Briefing - Boston Globe*)

> US - TUBERCULOSIS RESEARCH A study of people in Nebraska with pulmonary tuberculosis found that *Mycobacterium bovis* infection appears to have been transmitted from person to person through air in at least some cases. *M. bovis* causes bovine tuberculosis, but it can also infect humans, deer and other mammals. The findings were reported in *Morbidity and Mortality Weekly Report*. (*AVMA SmartBrief - Healio*)

> US - VETERINARY ACCREDITATION The American Animal Hospital Association (AAHA) announced a new agreement with Veterinary Study Groups (VSG) through which VSG will be AAHA's provider for study group infrastructure, organization and management. Currently, around 41% of practices in existing VMGs are accredited by AAHA. (*association press release*)

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## **WESTERN VETERINARY CONFERENCE MARCH 6 - 10, 2016**

Veterinarians, technicians, students, exhibitors and others attended the Western Veterinary Conference this week in Las Vegas. The conference offered over 1,000 CE credit hours to choose from, including traditional lectures, workshops, hands-on laboratories, and more.

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## **BRAKKE CONSULTING VIEWPOINT**

It was great seeing many of you in Las Vegas and thanks to all of you that attended our 2016 Animal Health Overview and networking sessions. Both were successful events because of your participation. We again found the Western Veterinary Conference to be one of the most useful and fruitful industry meetings. Congratulations to the WVC management team for another great industry meeting!

Two of the stories this week cover the rapidly developing genetic testing in both food and companion animals. For a number of years we have been forecasting that genetics will play an increasing role in the prevention and detection of animal diseases. The science in this area is just in its infancy but moving rapidly.

There are also stories about some manufacturers, retailers and government agencies related to antibiotic and animal welfare issues in food production. These companies are responding to the concerns and desires of the consuming public in order to protect their brands.

Have a great weekend!

*Ron Brakke*

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