
**Brakke Consulting's
Animal Health News & Notes for April 18, 2014**
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**BRASSE CONSULTING, INC.
2014 PAIN MANAGEMENT PRODUCTS REPORT
NOW AVAILABLE**

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
- 2014 survey of 200 small animal veterinarians regarding use of pain management products

Pain Management Products for Dogs and Cats 2014 is now available for a purchase price of \$5,500. For more information, contact Lynn Fondon, DVM, MBA at 972-243-4033, or email Lfondon@brakkeconsulting.com

www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> **Boehringer Ingelheim** reported financial results for the full year 2013. Animal Health net sales in 2013 were EUR 1,070 million (\$1,475 million), an increase of 1% compared to 2012 (+5% currency-adjusted). The largest contribution to growth came once again from the emerging markets in the Asia/Australia/Africa region. (*company website*)

> **Virbac SA** reported financial results for the first quarter of 2014. Consolidated sales were EUR 181 million (\$250 million), a decline of 1% compared to the first quarter of last year. Growth at constant exchange rates was 5% for the quarter. (*company website*)

> **Vetoquinol** reported financial results for the first quarter of 2014. Sales were EUR 73 million (\$100 million), a decline of 3% compared to the first quarter of the prior year. At constant exchange rates, sales were unchanged. (*company website*)

> **Nestle** reported results for the first quarter of 2014. Petcare sales were CHF 2,702 million (\$3,045 million), a decline of 1% from the comparable quarter in the prior year. Organic growth for the quarter was 5%. (*company press release*)

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

> **Elanco** announced that the USDA has issued a Veterinary Biologics License for Titanium 5 + PH-M bovine respiratory disease (BRD) vaccine. Titanium 5 + PH-M provides protection against bovine viral diarrhoea (BVD), types 1 and 2, bovine respiratory syncytial virus (BRSV), infectious bovine rhinotracheitis (IBR), parainfluenza3 (PI3), *Mannheimia haemolytica*, and *Pasteurella multocida* bacteria, and is safe for cattle at all stages of production. (*company press release*)

> **Sparhawk Laboratories** and **Clipper Distributing** announced that SparMectin-E (ivermectin) Liquid for Horses, the only FDA-approved liquid ivermectin horse dewormer, is now available. (*company press release*)

> **Clipper Distributing** announced the launch of AniSet Anti-Kink IV fluid sets from **Millpledge Veterinary**. The AniSet IV fluid set has been designed and developed specifically for the veterinary industry. *(company press release)*

> **Vetnique Labs LLC** and **First Veterinary Supply** announced the availability of Glandex anal gland and digestive support supplement for dogs and cats. Glandex works by producing bulky and firm stools to help the anal glands empty naturally and also contains key ingredients to target the underlying inflammation and allergies that trigger anal gland problems. *(company press release)*

> **Nexvet** announced that it has completed a milestone capital raise of \$31.5 million. This sum will enable the company to progress lead products through clinical development, expand its research and development efforts and further build its US presence. *(company press release)*

> **Premune**, a Sewdsh animal health company focused on the development of new therapeutics for companion animals, announced the formation of Premune Inc., a wholly-owned US subsidiary. Premune's first product is expected to launch in the US in 2015. *(Globe Newswire)*

> JAPAN **ASKA Animal Health** announced it has begun trading as a standalone company effective April 1, 2014. The company is the former animal health division of ASKA Pharmaceuticals. ASKA Animal Health makes veterinary pharmaceuticals, feeds and feed additives, and is among Japan's top 10 animal health companies, with 2012/13 sales of Yen 3.5 billion (\$35 million). *(Animal Pharm)*

ANIMAL HEALTH NEWS

> JAPAN - PEDV Porcine epidemic diarrhea virus (PEDV) is continuing to spread in many areas of Japan, according to figures from the Japanese Ministry Agriculture, Forestry and Fisheries (JMAFF). The disease has now been diagnosed on pig farms in half of Japan's prefectures in the last six months. The virus first appeared in the country in October 2013, the first outbreak in Japan since 1996, and had been confirmed on 93 farms by early March. *(Animal Pharm)*

> JAPAN - AVIAN INFLUENZA Japan has restricted shipments of almost 400,000 chickens in Kumamoto prefecture after the nation's first outbreak of avian influenza in three years. Local authorities have culled about 112,000 chickens in two farms in the prefecture on the southern island of Kyushu following the discovery of the H-5 avian influenza virus. *(AVMA SmartBrief - Arizona Daily Wildcat)*

> US - VETERINARY SCHOOLS The Arizona Senate has voted against providing the \$4.2 million needed for the University of Arizona to embark on a proposed veterinary school. Midwestern, a private veterinary school in Glendale, Arizona, is already starting its first class in the fall. *(AVMA SmartBrief - Arizona Daily Wildcat)*

> US - METRITIS VACCINE Cornell University scientists have created the first vaccines that can prevent metritis in cattle. The new vaccines prevent metritis infection of the uterus from taking hold and reduce symptoms when it does. Cornell, in collaboration with **Merck Animal Health**, is working to move the vaccines toward USDA licensing. *(news.cornell.edu)*

BRAKKE CONSULTING VIEWPOINT

The results from the first companies to report for the first quarter of 2014 are not very encouraging. Currency was a key factor and will probably continue to be as other companies report revenues compared to 2013.

In our discussions with various industry managers we've found that most believe the difficult weather conditions were a negative factor on revenues up and down the supply chain the first quarter. It will be interesting to see if these lost revenues are recaptured during the balance of the year. We are hearing of some significant price reductions (deals) in some of the leading categories that may stimulate unit volume but will not help in recovering revenue. As we've indicated in our industry overview and in other venues, we believe 2014 is going to be a challenging growth year for the industry.

We want to wish all of you a pleasant and safe Easter Holiday!!

Ron Brakke

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