
**Brakke Consulting's
Animal Health News & Notes for June 5, 2015**
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**BRAKKE CONSULTING, INC.
US ANIMAL HEALTH INDUSTRY WEBINAR
JULY 7, 2015**

Brakke Consulting, Inc. will present a two-hour webinar entitled "The U.S. Animal Health Industry" on Tuesday, July 7 from 11 am - 9 pm CDT.

Presented by senior consultants John Volk and David Goodnight, DVM, MBA, the two-hour presentation will include a review of the current issues impacting the U.S. animal health industry and veterinary profession. The webinar will also highlight results of a just-completed study on how pet owners are changing their purchasing patterns for animal health products. Participants will also have the opportunity to ask questions.

The cost of registering for the webinar is \$385 per person. The deadline for registering is Wednesday, July 1.

To register, go to www.BrakkeConsulting.com and scroll down to the "What's new" area.

www.BrakkeConsulting.com

COMPANY EARNINGS RELEASES

> **Hester Biosciences** reported results for the fiscal year ended March 31, 2015. Full-year sales increased by 31% to INR 906 million (\$14 million), supported by strong sales growth from the firm's poultry vaccines. (*Animal Pharm*)

COMPANY NEWS RELEASES

> **Trophogen**, Inc. announced that the company has completed a licensing and purchase agreement granting **Zoetis**, Inc., an exclusive license to develop Trophogen's recombinant modified bovine Follicle-Stimulating Hormone (rbFSH) analog in the field of animal health reproduction. Terms were not disclosed. (*Marketwatch*)

> The FDA announced it has approved **Elanco's** Kavault (avilamycin) medicated feed article for the reduction in incidence and overall severity of diarrhea in the presence of pathogenic *E. coli* in groups of weaned pigs. (*FDA*)

> **Vetoquinol** announced the launch of Zylkene Equine, the only veterinarian-exclusive supplement formulated with alpha-casozepine to help support behavior management. Zylkene Equine is ideal for helping horses maintain a normal disposition during periods of environmental or situational stress including travel, prolonged stall rest, veterinary visits, isolation and new environments. (*company press release*)

> **Pacific Vet Group USA** announced the launch of FloraStart C, a probiotic product designed to mitigate performance setbacks commonly associated with coccidiosis vaccination of neonatal broiler chicks. (*Feedstuffs*)

> **Nuovo Biologics** LLC and Auburn University's Research Initiative in Cancer (AURIC) announced a partnership to develop new therapies for cancer. Initially targeting canine malignant melanoma, the team will be testing Nuovo's innovative anti-cancer peptide drug MMX for its ability to treat these tumors. (*PRNewswire*)

> **OncoSec Medical** announced a collaboration with the University of California, Davis to test its intratumoral cancer immunotherapy in dogs. The collaboration will ascertain the mechanism of action for OncoSec's ImmunoPulse interleukin-12 (IL-12) treatment as an immunotherapy in dogs with soft tissue sarcoma and validate key clinical biomarkers. (*PRNewswire*)

> INDIA **Neogen** Corporation announced that it has acquired the assets of **Sterling Test House**, a leading commercial food testing laboratory based in southwest India, and that the acquired laboratory will serve as a base for the company's new operations in India. Financial terms were not disclosed. (*company press release*)

> TURKEY **Cargill's** animal nutrition business announced an agreement to acquire a majority stake in **Ekol Gida**, a leading company operating in premix and feed additives markets in Turkey. After a transitional period, the business will operate under the global Provimi brand in the market. Financial terms were not disclosed. (*Watt Agnet*)

> AUSTRALIA Quadrant Private Equity announced an agreement to acquire **V.I.P. Petfoods** for AUD410 million (US\$318 million). V.I.P. operates 6 manufacturing sites, employs over 600 staff and produces over 150,000 tons of pet food annually. Quadrant will partner with the founders of V.I.P. to back the existing management team to grow the business domestically and internationally. (*Pet Enews*)

ANIMAL HEALTH NEWS

> BRUSSELS The Brussels-based International Federation for Animal Health, a global association for veterinary product manufacturers, announced that it has changed its name to HealthforAnimals. The name change reflects the mission that the organization has undertaken as an umbrella group for animal health associations across the world. (*FierceAnimalHealth*)

> US - ANTIBIOTIC USE The Obama Administration convened a “White House Forum on Antibiotic Stewardship” to bring together key human and animal health constituencies involved in antibiotic stewardship. As part of the event, more than 150 food companies, retailers, and human and animal health stakeholders will highlight commitments to implement changes over the next five years to slow the emergence of resistant bacteria and prevent the spread of resistant infections. In addition, the President signed a memorandum directing Federal departments and agencies to create a preference for meat and poultry produced according to responsible antibiotic-use. (*Whitehouse.gov*)

> US - VETERINARY FEED DIRECTIVE The FDA announced the Veterinary Feed Directive (VFD) final rule, an important piece of the agency’s overall strategy to promote the judicious use of antimicrobials in food-producing animals. This strategy will bring the use of these drugs under veterinary supervision so that they are used only when necessary for assuring animal health. (*FDA*)

> US - AVIAN INFLUENZA VACCINE The USDA has evaluated the efficacy of current vaccine options for highly pathogenic avian influenza (HPAI) in addition to economic impacts of vaccination and has determined that, as it currently stands, additional criteria must be met before a vaccine can be approved for emergency use. According to the USDA, vaccines currently available are not well matched and do not meet a suitable level of efficacy. (*Feedstuffs*)

> US - PRION RESEARCH Plants may be an environmental source of pathogenic prions, according to research reported in *Cell Reports*. The researchers found evidence of prion uptake in plants, and hamsters that were fed the prion-carrying plants became sick. (*AMVA SmartBrief - FoodSafetyNews*)

**BRAKKE CONSULTING, INC.
MARKET RESEARCH**

Brakke Consulting is a leader in producing timely market research reports on areas of interest in animal health. In addition to our annual reports on the flea and heartworm market and the pain management market, in the past two years we have published reports covering the following topics:

- pet dental market
- small animal cancer market
- pet pharmaceutical market shift
- US equine market
- veterinary drug compounding

Brakke Consulting also publishes biannual benchmarking reports on the US companion animal manufacturer and distributor sales forces, and is currently developing a report on the US food animal sales forces.

For more information about our multiclient reports, go to <http://www.brakkeconsulting.com/multi-client-studies.aspx>

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BRASSE CONSULTING VIEWPOINT

The announcements by various firms this week indicate that out-licensing and cooperative research projects are alive and well. It appears that companion animal oncology continues to be the focus of several organizations. We've lost count on the number of research projects in process in this developing area of veterinary therapy. While we agree that this is a promising area for growth in the industry, we're not sure there is a sufficient market opportunity to support all of the research activities. When some of these new technologies reach the marketplace we'll then learn how large the market will be for this emerging area of veterinary medicine. In the meantime, if you're looking to invest in this area, consider purchasing our 2014 report on the small animal cancer market to gain a better understanding of the landscape.

We would like to remind our readers that Brakke Consulting has just completed a significant study in the area of the shifts occurring in the veterinary pharmacy area. This study indicates that a high percentage of pet owners prefer having options related to where they purchase their veterinary prescriptions and products. We believe that the veterinarian can maintain their pharmacy business and even expand it if they are proactive in understanding what their client's needs are in this area. In the near future we will be announcing new webinars and seminars for veterinarians in this area.

Hopefully you noted earlier in this newsletter that on July 7th we will be presenting our Animal Health Industry Overview via a webinar. This two hour presentation will be presented by John Volk and Dr. David Goodnight. We look forward to having many of you who missed the Overviews at NAVC and WVC or are new to the industry joining us for this mid-year overview.

Have a great weekend!!

Ron Brakke

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