
**Brakke Consulting's
Animal Health News & Notes for July 12, 2013**
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2013 KC Animal Health Investment Forum
Tuesday, August 27, 2013
Kansas City Convention Center

The fifth annual KC Animal Health Investment Forum will feature more than a dozen presenting companies seeking business partnerships and opportunities. Hear about the latest up-and-coming pharmaceutical, biological and diagnostic innovations, with applications serving the companion animal, livestock, equine markets and more.

The event will be held Tuesday, August 27 from 7:30 a.m. to 5 p.m. at the Kansas City Convention Center Grand Ballroom.

Visit <http://www.kcanimalhealthforum.com/index.php/register-to-attend/> for full details and registration.

www.kcanimalhealth.com

COMPANY EARNINGS RELEASES

> **ECO Animal Health Group plc** reported revenues of GBP 29.0 million (\$43.8 million) for the year ended March 31, 2013, compared to GBP 28.3 million (\$42.8 million) last year. Profit before income tax was GBP 3.3 million compared (\$5.0 million) to GBP 2.3 million (\$3.5 million) last year. (RTT News)

COMPANY NEWS RELEASES

- > **AgriLabs** announced the addition of Agri-Mectin Plus Clorsulon to its range of branded anthelmintics. *(company press release)*

- > **ImmuCell** Corporation announced that First Defense, a USDA-approved scours preventative for newborn dairy and beef calves, has been reviewed by the Organic Materials Review Institute (OMRI) and has been listed with products eligible for use in certified organic production, subject to approval by USDA accredited certifiers. *(company press release)*

- > **SmartVet** announced the launch of VetGun, a precision-engineered CO2-powered application device that delivers a new dosage form called a VetCap. The VetCap is a gelatin capsule filled with a pour-on and purpose-developed for remote delivery using the VetGun. The first VetCap commercially available is the AiM-L (lambda cyhalothrin with piperonyl butoxide) for control of horn flies, face flies, biting lice and sucking lice on beef cattle. *(company press release)*

- > **Simcro Ltd** and private equity firm The Riverside Company announced that Riverside has acquired a controlling interest in Simcro, a New Zealand-based animal health delivery system company. Financial terms were not disclosed. *(company press release)*

- > **Phytobiotics Feed Additives** GmbH announced it has established Phytobiotics North America LLC, with headquarters in Wentzville, MO. The company reports that the regulatory process for its products in the US is reaching the final approval stage. *(Feedstuffs)*

- > **BioChek** announced the launch of the fully automated ThunderBolt Immunoassay Instrument for their entire line of poultry and swine kits. Through an exclusive distribution agreement with Gold Standard Diagnostics, the benefits of a completely automated system have been made available to production animal serology laboratories. *(company press release)*

- > UK **Patterson Companies, Inc.** announced it has agreed to acquire **National Veterinary Services Limited** (NVS), a wholly owned subsidiary of **Dechra Pharmaceuticals PLC**. NVS is the largest veterinary distributor in the UK, providing an array of products and services including reference laboratory offerings. Patterson Companies will acquire all of the outstanding shares of NVS for GBP 87.5 million (\$135 million) in cash. NVS had revenues of more than GBP 315 million (\$485 million) for its year ended June 30, 2013. *(Heraldonline.com)*

- > JAPAN **ASKA Pharmaceutical** announced it has spun off its animal health division to be a standalone subsidiary, re-branded as **ASKA Animal Health**. The animal health division had a turnover of Y3.53 billion (\$35 million) in the fiscal year ended March 31 2013, from the sale of pharmaceuticals, feed and feed additives. *(Animal Pharm)*

- > TAIWAN **Lohmann Animal Health** announced collaborations with the Animal Health Research Institute of Taiwan (AHRI) and Animal Technology Institute Taiwan (ATIT). Lohmann has also established a new subsidiary called Lohmann Animal Health Pingtung. The collaborations are designed to explore two new areas of technology: one area uses silkworm pupae as incubators for the baculovirus expression of subunit vaccines; the second is the use of E coli for the production of highly soluble authentically folded proteins for affordable subunit cocktail vaccines. *(Animal Pharm)*

ANIMAL HEALTH NEWS

> US - PEDV Porcine epidemic diarrhea virus has spread rapidly to 13 states since it was first identified in the US in April. PEDV is an intestinal virus that takes a heavy toll on young pigs; an estimated 250,000 to 300,000 piglets have succumbed to the disease so far in Oklahoma alone. (AVMA SmartBrief - Kansas City Star)

> US - VETERINARY SCHOOLS Lincoln Memorial University's emerging College of Veterinary Medicine announced it has received a letter of reasonable assurance from the American Veterinary Medical Association's Council on Education, the first step in the accreditation process. The University also announced it has become a member of the Association of American Veterinary Medical Colleges (AAVMC). LMU-CVM, in Harrogate, Tennessee, is now recruiting students for the inaugural class, which will begin its veterinary medical education in the fall 2014. (WKYT.com)

> WORLD - AQUACULTURE Global animal protein production from aquaculture in 2012 surpassed the output from cattle and the gap is widening, claims a new report from the Earth Policy Institute. In 2012, world aquaculture had a record output of 66 million tons, compared to 63 million tons of beef. While there is some way to go before farmed fish production overtakes the pig and poultry meat sectors, its rate of growth is ahead of these protein sources. (Animal Pharm)

> US - VETERINARY EDUCATION The Houston SPCA and the Texas A&M College of Veterinary Medicine & Biomedical Sciences have partnered to create a new program which exposes veterinary students to animal cruelty, neglect and trauma cases involving dogs, cats and other animals. Fourth-year students from the Texas A&M College of Veterinary Medicine & Biomedical Sciences will rotate through a required two-week program at the Houston SPCA where they will work alongside experts in cases of animal cruelty, neglect and trauma. The goal of the program is to ensure future veterinarians become more knowledgeable about the full spectrum of shelter medicine and animal welfare including rescue and forensics investigations for all species. (PRNewswire)

**BRAKKE CONSULTING, INC.
MARKET RESEARCH**

Depend on Brakke Consulting to build a market study to meet your company's needs, whether it is

- Assessing the feasibility of a new product or technology
- Identifying the opinions and trends of veterinarians, pet owners or producers
- Determining the current market for products

With our in-house database of veterinarians and the ability to custom-tailor surveys of a wide variety of target audiences, we provide reliable insights into this unique industry. We also produce multi-client reports in a number of high-interest animal health market areas. For more information, see our website, or call our Dallas office at 972-243-4033.

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BRAKKE CONSULTING VIEWPOINT

Even though it's summer and hot in many parts of the US, there are some exciting items in this week's newsletter. The purchase of National Veterinary Services Ltd in the UK by the Patterson Companies now gives the industry three large animal health distributors with international operations. It was just a few years ago that some manufacturers were suggesting that there was a need for international distributors that could cover most of the developed world with professionally managed distributor organizations. It looks like that request is becoming a reality.

Now, will the manufacturers support them?

It's our view that we'll see additional international acquisitions in distribution and manufacturing in the future as the animal health industry continues to consolidate into a reduced number of large players with increasing market shares globally.

Have a great weekend and stay cool!!

Ron Brakke

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