

# FOUNTAINREPORT

MARKET INTELLIGENCE FOR LEADERS IN ANIMAL HEALTH  
SINCE 2002

AUGUST 1, 2025

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The *Fountain Report* is a weekly subscription service provided by Antelligence. Its comprehensive in-depth news and quantitative data have been guiding decision making for executives in the business of animal health since 2002.





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## Antelligence Offers Commercial Options that Break Through the Clutter

Through our three publications, the Fountain Report, the Veterinary Student Insider, and Pet Care Weekly, we can connect your brand with the audience you are targeting. We reach 64,000 people every week including **veterinarians, technicians, practice managers, shelters, veterinary students, independent retailers, groomers, and more.** And they're engaged, with open rates north of 60%. To find out more, call Marty Comer at (678) 848-1681 or email him at [marty.comer@antelligence.com](mailto:marty.comer@antelligence.com).



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# UPDATED AND EVOLVING! The Enterprise Practice Database

Antelligence just dropped one of its most powerful updates to date, giving you sharper insights, cleaner data, and smarter tools to accelerate your growth, save time and reduce cost.

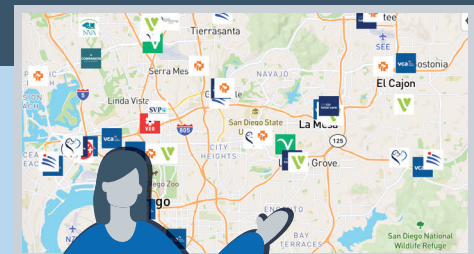
Since January, we've added 750+ practices, including 100+ locations from newly identified groups and 50 brand-new openings.

We've also removed 500 outdated listings due to closures or improved data accuracy, ensuring you're always working with the cleanest, most current intel.

-  Google ratings + review counts for every clinic
-  Number of veterinarians at each location
-  Searchable services by practice (dental, surgical, rehab, etc.)
-  Filter by practice type (GP, ER, Specialty, Mobile, etc.)
-  500+ newly discovered group-owned locations
-  12 newly added enterprise groups
-  Tags for every change (New Group, Closed, Duplicate, etc.)

We've also reintroduced non-vet services like boarding and grooming—but only when run by veterinary groups—giving you broader insight without the noise.

Are you tracking emerging groups? Trying to understand how Google ratings tie to closures? Quantifying corporate market share and opportunity? Or still attempting to do all this in-house, given there hasn't been a resource?



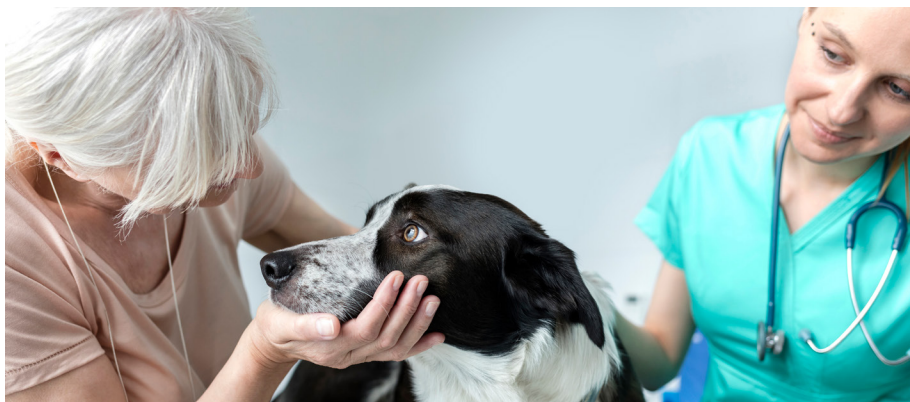
## LET US DO THE HEAVY LIFTING.

Click [HERE](#) for a demo and see how the EPD can transform your business and enterprise strategy!

Monica Tarantino

# Bridging the Gap: Communicating with Senior Dog Pet Parents

**Editor's note:** This is the third and final part of a series by Dr. Tarantino on the care of senior dogs. In May she explored why senior dogs represent one of the most underleveraged yet emotionally meaningful demographics in veterinary medicine. In June, she discussed how to build a senior dog care program and why doing so can elevate patient outcomes, client satisfaction, team morale and practice revenue. This month Dr. Tarantino focuses on how to build trust with owners of senior dogs through informed, empathetic client communication.



## Highlights:

- For veterinary practice managers and those guiding hospital strategy, it's not enough to manage the medical side of care for senior dogs. Our teams may need help connecting with the unique needs of the people who love them.
- During interactions with clients who have lost their dog, communication breakdowns can occur easily, leading to mistrust, missed care opportunities or frustration directed at the veterinary team.
- Words hold immense weight with clients who are already under stress. Managers can share best practices on communication with their teams.
- Frequent calls, long emotional consults and after-hours emails can lead to emotional exhaustion on the part of the veterinary team.

Veterinary professionals already know that senior dogs are complex medical cases. But for veterinary practice managers and those guiding hospital strategy, it's not enough to manage the medical side well. We must also help our teams connect with the unique needs of the people caring for these dogs.

Senior dog pet parents are not a passive demographic. Many are deeply bonded to their pets, overwhelmed by decisions, and often isolated in their grief. As a result, communication breakdowns can occur easily, leading to mistrust, missed care opportunities or frustration directed

at the team. Following are three common emotional patterns to train your team to recognize.

- **Anticipatory grief.** Fear of making the wrong decision is common, especially around end-of-life choices. Research has shown that caregivers of seriously ill pets often experience elevated anxiety and distress, particularly when dealing with terminal diagnoses or cancer [Spitznagel et al., 2021].
- **Caregiver burden.** Long-term medical management at home can exhaust owners, especially when physical support, emotional bandwidth or financial resources are

limited. Caregivers who perceive treatments as ineffective are more likely to experience increased emotional burden [Spitznagel et al., 2021].

- **Information overload.** Clients often arrive at the practice after researching forums, Googling symptoms and absorbing misinformation. (This is not a judgment; it's a reflection of how desperate they are for clarity and comfort.) Providing your team with the tools and language to respond effectively to each of these states can help prevent burnout while enhancing client satisfaction.

## Common missteps and how to avoid them

Veterinary team members often unintentionally worsen communication with senior dog parents when they:

- › Skip goal-setting conversations early on.
- › Overwhelm owners with lists of problems.
- › Fail to provide clear plans and timelines.
- › Use vague or overly clinical language when discussing diagnoses.
- › Avoid hard conversations about quality of life or prognosis.

Practice managers should create protocols for:

- › Regularly scheduled wellness visits (at least twice yearly) for seniors.
- › Standard phrases or scripts for goal-setting. ("Our focus is creating the happiest life for your dog for as long as possible.")
- › Euthanasia-prep SOPs that include emotional support language.
- › Encouraging the team to offer options, even when uncertain owners need time,

Words hold immense weight with clients who are already under stress. Managers can share best practices on communication with their teams, such as:

- › **Say:** "We found cancer on your pet's diagnostics; let me tell you what we know," rather than, "We saw some concerning findings;

maybe we'll refer."

- › **Say:** "It's common for older pets to have multiple things happening at once. Let's talk about the big picture," instead of, "There's a lot going on here."
- › **Say:** "Here's what we're watching for. If X happens, we'll Y," instead of, "We'll see how it goes."

These small refinements build client confidence and improve retention.

## Supporting your team while supporting clients

Frequent calls, long emotional consults and after-hours emails often stem from the emotional load clients are carrying. Studies show that caregiver burden is associated with increased clinic contact and emotional exhaustion among the team [Spitznagel et al., 2021]. Practice managers can support their teams by:

- › Implementing nurse appointments or telehealth check-ins to reduce doctor overload.
- › Assigning client liaisons for complex senior cases.
- › Offering written handouts and FAQs to reinforce in-room conversations.
- › Encouraging clear timelines for rechecks and medication reviews.

The practice can refer families to outside grief support resources (such as Pet Loss Community or local counselors) when appropriate. This validates the client's emotional

experience and gives the team breathing room.

Your senior pet program doesn't end with diagnostics and treatment. It extends into exam room conversations, follow-up care, and how your team makes senior dog parents feel. With strong communication systems in place, you'll not only support better outcomes, you'll also build deep loyalty and trust, which fuel lasting success.



**Monica Tarantino, DVM,** is a veterinarian with over 10 years of experience. She formerly served as chief of staff at a busy general practice in Charlotte,

North Carolina, and is co-founder of the **Senior Dog Veterinary Society**, an organization dedicated to advancing the care of senior and geriatric canine patients. Dr. Tarantino runs *Senior Dog Revolution* (@seniordogdoc), a social media platform that helps pet parents navigate the unique challenges of caring for aging dogs. She is the coauthor of two books designed to support recent graduates in their transition into practice – *New Vet Jumpstart Guide: GP Edition* and *ER Edition*. A passionate rescue advocate, she shares her home with four rescue dogs, two rescue cats and the occasional foster pet.

### Want your vet team certified to care for senior dogs?

Visit [seniordogvets.com](https://seniordogvets.com) and use code **FOUNTAIN25** for \$25 off per team member. Or email [info@seniordogvets.com](mailto:info@seniordogvets.com) for group rates.

### References:

- Spitznagel MB, Cox MD, Mehler SJ, et al. Development and psychometric validation of the Pet Caregiver Burden Questionnaire. *J Vet Intern Med.* 2019;33(6):2737–2745.
- Spitznagel MB, Jacobson DM, Cox MD, et al. Caregiver Burden in Owners of a Sick Companion Animal. *J Vet Intern Med.* 2021;35(2):793–802.
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Matt Albrecht

# Good Intentions Aren't Enough

**Culture isn't what people claim it is. It's what they do.**

**Editor's note:** In June, Dr. Matt Albrecht made the case that a healthy culture can serve as an antidote to stress, guilt, burnout and grief. This month he talks about defining and creating a culture and, more important, staying true to it.

Veterinary medicine isn't just about medicine; it's about purpose. Most people enter the profession because they value animal welfare, integrity and trust. But what happens when the culture of the clinic doesn't match those values?

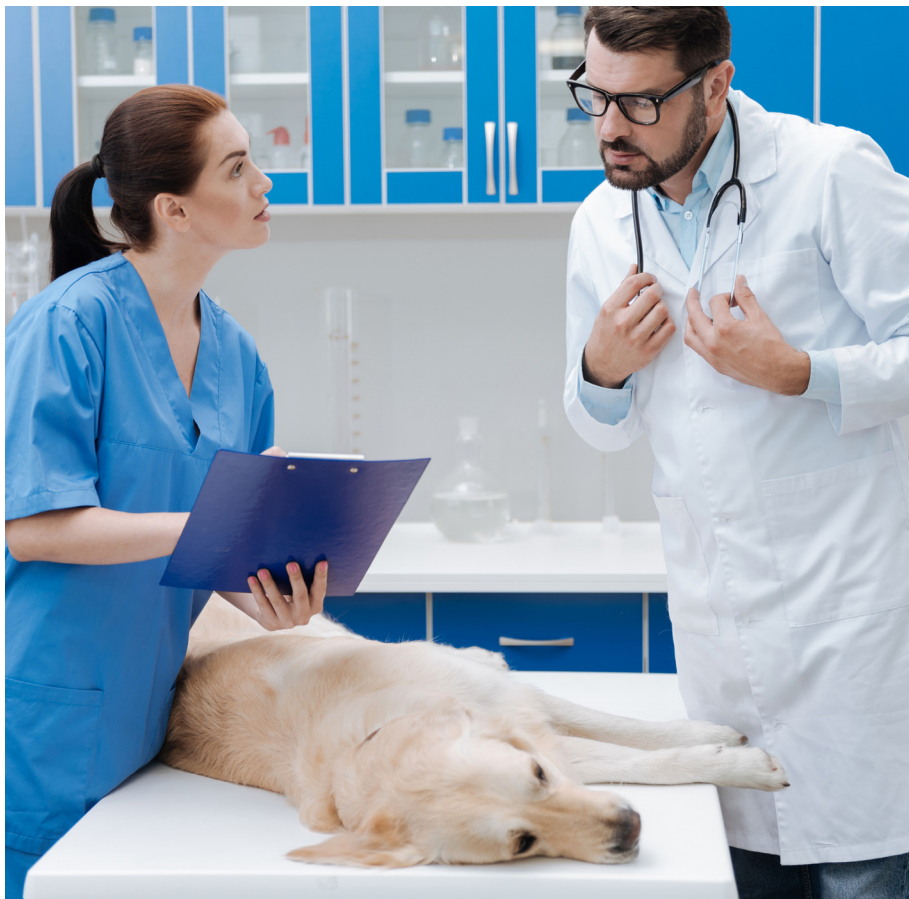
Research shows that when organizational priorities clash with individual values, burnout skyrockets, engagement plummets

and turnover rises. In both human and veterinary medicine, misaligned values are a top predictor of moral distress. Cultural alignment – the degree to which an organization's stated values match daily behaviors, practices and decision-making processes – represents more than aspirational thinking.

The unique challenge of veterinary medicine is that

## Highlights:

- Cultural misalignment rarely announces itself. Instead, it hides in everyday decisions that don't feel quite right.
- Subtle contradictions can chip away at the sense of purpose that keeps teams going. Over time, moral stress accumulates.
- Talk to your team, but not like an evaluator or boss. Ask curious, non-judgmental questions about the gaps, but make them authentic.
- The best conversations come from real moments you witness and genuine interest in how people experience their work.



practitioners must constantly navigate the contested moral status of animals while serving multiple stakeholders with potentially conflicting interests. It's a dynamic that creates inherent tension even under the best circumstances.

These competing interests can cause values conflicts in even the most well-intentioned teams, but the challenge is that cultural misalignment rarely announces itself. Instead, it hides in everyday decisions that don't feel quite right. Maybe productivity metrics reward speed over thoroughness, financial pressures drive upselling, or leadership claims "patient-first" while scheduling ten-minute appointments.

These subtle contradictions chip away at the sense of purpose that keeps teams going. Over time, moral stress accumulates, and if left

unaddressed, evolves into moral injury, i.e., a deep, lasting toll that comes from repeatedly feeling forced to compromise your values.

Addressing cultural misalignment requires systematic intervention targeting the disconnect between organizational culture and individual values. The great part is that you have all the tools you need to begin – you and your team.

Instead of guessing what your culture is, watch it in action and talk about it honestly. Before launching surveys or structured interviews, cultural anthropologists spend months embedded in communities learning culture from those who live it, because culture isn't what people claim, it's what they say, do, think and believe. Practice owners don't need months, but they do need a method.

## Define, observe, talk

First, define your values in specific behaviors. Start with what you already claim to value. Most clinics talk about patient-first care, compassion, integrity or teamwork. Write down your stated values, then define what these look like in practice. If you value "compassionate care," does that mean extra time with anxious pets? Flexibility with payment plans? Comfort measures even when treatment isn't possible? If "integrity" matters, does that mean transparent pricing? Honest prognoses even when they're difficult? Declining unnecessary procedures?

Get specific about behaviors. "Compassion" might mean, "We spend at least five minutes explaining procedures" or "We don't

rush euthanasia appointments." "Integrity" might mean, "We discuss all treatment options, including doing nothing" or "We're transparent about costs." Then observe whether these behaviors actually occur. Does that five-minute explanation become two minutes when you're behind schedule? Are team members encouraged and given time to check in with each other, process difficult cases together, or offer practical support after emotionally challenging situations? These behavioral benchmarks give you something concrete to measure against your stated values.

Finally, talk ... but not like an evaluator or a boss. Ask curious, non-judgmental questions about the gaps, but make them authentic. If you noticed time pressure affecting patient interactions, ask, "When you feel rushed, what gets compromised? What would you do differently if you had more time?" If you saw reluctance to discuss certain treatment options, ask, "When you're weighing what to recommend, what factors pull you in different directions?" If you observed team members processing difficult cases alone, ask, "After emotionally hard cases, what helps you most? What makes it harder?"

In my experience, if you ask questions guided by keen observation, genuine curiosity and interest, people respond positively. Don't ask questions because you feel obligated to. People see through that. It's disingenuous and they will perceive it as a waste of their valuable time. Follow your observations and your instincts.

The best conversations come from real moments you witnessed and genuine interest in how people experience their work.

## Keeping culture aligned

Culture drifts unless you anchor it. Just as anthropologists don't study a community once and call it understood, practice owners can't assess culture once and assume it stays static. Culture shifts constantly, through new hires, policy changes, stress periods and evolving client demands. Sustaining alignment means returning regularly to the same observe-and-talk cycle. Revisit your behavioral definitions periodically. When you notice drift, respond with the same authentic questioning approach. Make course corrections based on what you learn.

Cultural alignment isn't about perfection. It's about creating an environment in which doing the right thing isn't the hardest thing. In veterinary medicine, that's not optional, it's the foundation for protecting your team's well-being and preserving the purpose that brought them there.



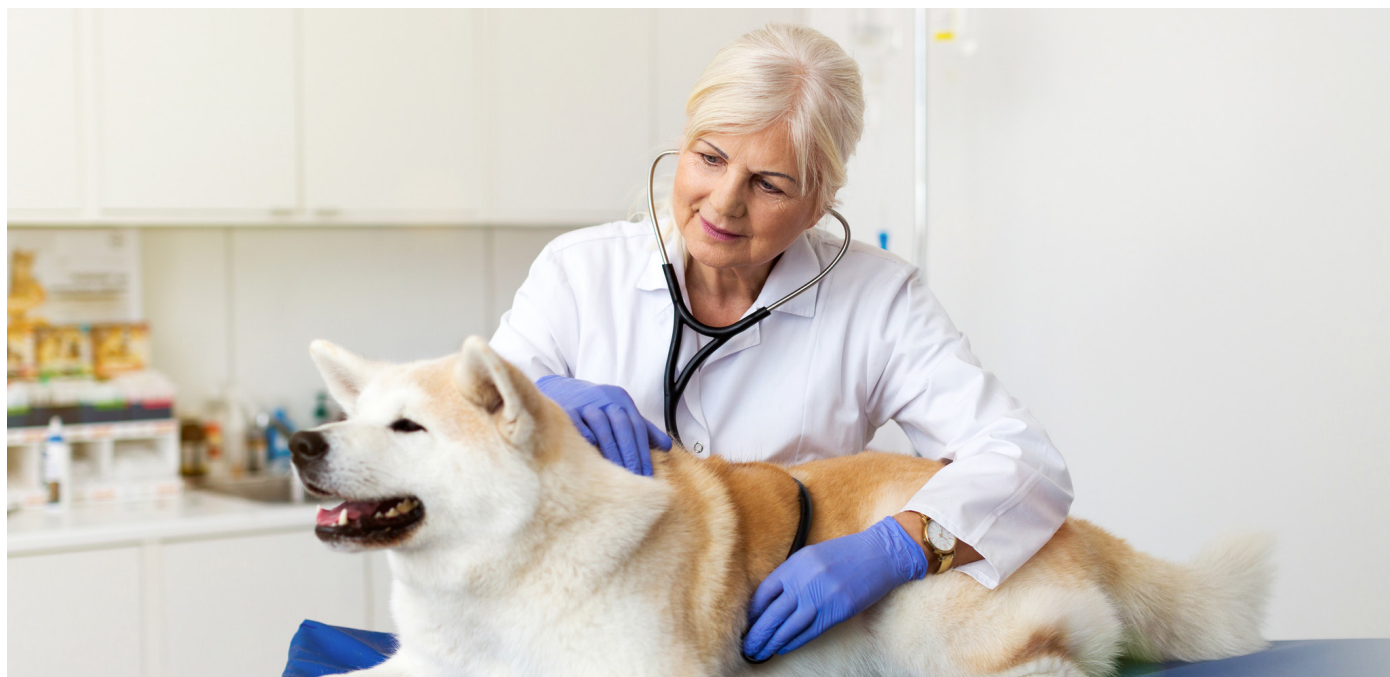
**Dr. Matt Albrecht** is a cultural anthropologist and co-founder of Eudaimonia Consulting, where he helps veterinary organizations uncover

and strengthen the cultural foundations of thriving teams. Drawing on over a decade of research in cognitive and organizational culture as well as early roots in his father's veterinary clinics, Matt brings deep insight and practical tools to support workplaces where people feel seen, supported and able to do their best work.



Liz Barton

# Menopause: The Silent Big Issue in Veterinary Medicine



With welldocumented mental health challenges in our field, outsiders often assume veterinarians are thriving professionally. Yet on another critical issue – perimenopause, defined as the approximate eight-year period around menopause – the public seems more aware than the veterinary profession itself. In fact, despite veterinary medicine being overwhelmingly female-led, we remain under-informed and under-supported when it comes to this life stage.

**Why is the profession overlooking perimenopause? Is it less relevant in veterinary medicine?** Sadly, no. Data from the

2020 Survey on Menopause and the Veterinary Profession in the UK showed a correlation with human physicians. However, in-depth research and funding to better understand and quantify more fully the impacts across the veterinary sector are lacking.

While some may consider perimenopause a physiological phenomenon, it puts women at significantly increased risk of cardiovascular disease, pathological fractures, urogenital problems and dementia, even for those who do not experience symptoms. All would be wise to take proactive, preventative measures to live healthily in their later years.

## Highlights:

- In-depth research and funding to better understand the impacts of menopause across the veterinary sector are lacking.
- Dealing with menopause in the workplace can contribute to staff retention, improved mental health and even practice revenue.
- The veterinary profession can serve as an exemplar to other industries and demonstrate how people can support others in achieving happy, healthy, thriving careers through every stage of life.

### Are we reluctant to talk about it?

Since starting my own mission to raise awareness of the impacts of perimenopause, willingness to engage has grown from scant to significant. Society is waking up to that fact that a cultural acceptance of women's suffering serves no one. From menstrual challenges to menopause, the tide is turning from leaving women to get on with their 'hormonal problems' to providing support for the benefit of the individual and friends, family, workplaces and society at large.

## It's immensely frustrating to face a barrage of unhelpful symptoms at a time when our caring responsibilities are typically diminishing and our careers should be experiencing a second wind of growth.

### Do we shy away because it's

**personal?** Certainly, most of us don't relish talking about our personal "issues." We just want to crack on with life and work, especially in an industry with entrenched hero culture. It's immensely frustrating to face a barrage of unhelpful symptoms at a time when our caring responsibilities are typically diminishing and our careers should be experiencing a second wind of growth. In addition, most people in the profession are endlessly compassionate to their clients, colleagues, patients and loved ones, yet don't show ourselves much self-compassion.

And here's the rub: If we raise awareness about a phase of life

where a vast array of symptoms can affect the physical, psychological and emotional health of an older, female demographic, we risk inadvertently increasing bias through gendered ageism. We may overlook or be overlooked for career advancement opportunities because we're worried about, or deemed to be, at that stage of life.

### Are we not heard when we speak

**up?** Perimenopause symptoms are commonly brushed off not only by managers and leaders at work, but

also by medical professionals. When we're brave enough to seek help, we need to be met with empathy and understanding to access effective support.

### What we need to do now

Regardless of the reasons, the profession should be talking about menopause and taking action. Doing so can contribute to:

- **Retention.** Supporting experienced veterinary team members sustains longer careers.
- **Mental health.** Perimenopause sees a rise in suicidal ideation, depression and anxiety. It is also the peak time for women to die by suicide. This alone is reason enough to act.

- **Long-term health.** Encouraging proactive management of perimenopause reduces the likelihood of multiple and significant short and long-term health issues.
- **Revenue.** The Mayo Clinic estimates \$1.8 billion in lost work time every year in the U.S. alone.

Everyone in the profession should equip themselves with the knowledge to support anyone affected by what can be the life-changing and life-threatening changes of perimenopause. Share this knowledge with your team and colleagues. The veterinary profession can serve as an exemplar to other industries and demonstrate how people can support others in achieving happy, healthy, thriving careers through every stage of life. A suite of free veterinary-specific menopause resources is a great place to start, [Click here.](#)



**Liz Barton, MA, VetMB, MCIPR, FRCVS,** is a veterinarian with 17 years of broad clinical experience spanning species and practice

type, before diversifying into a career in communications with teleradiology company, VET.CT. Having set up wellness and support initiatives - including the Vet Mums community and the not-for-profit WellVet - she has explored some of the challenges and created solutions to meet the needs of the veterinary community. This included publishing a report on the impact of menopause in the veterinary profession in 2020 and subsequently creating a series of free resources to mitigate the impacts of perimenopause in practice and beyond.

## FINANCE

The Vet Watch® Weekly Insight Report offers updates each week on revenue growth, vaccine purchases and other metrics reported across the more than 32,000 practices and shelters in the Animalytix Marketplace.

Metrics are compiled by Tim Witt, commercial director at Animalytix/DVMetrics.

Full commentary for the month is available at [vetwatch.com](https://vetwatch.com).

### Key findings for the week ending July 26, 2025

#### Weekly YTD Hospital Client & Patient Trends

For Year to Date through week ending **July 26, 2025**, revenue growth is at +1.0% YTD net growth versus YTD 2024 for the ~3,000 reporting practices. Reported YTD revenue growth is positive for 8 of 9 census divisions.

For more detailed information on your specific geography, please go to [vetwatch.com](https://vetwatch.com).

#### Year to Date January - July 26, 2025

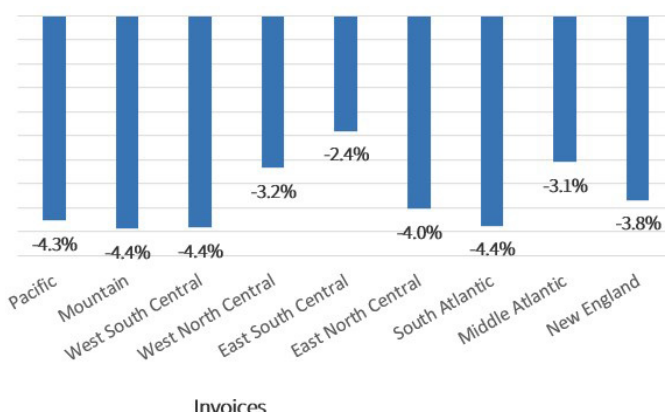
↓ **-2.8%**  
Clients  
YoY (YTD)

↓ **-3.9%**  
Invoices  
YoY (YTD)

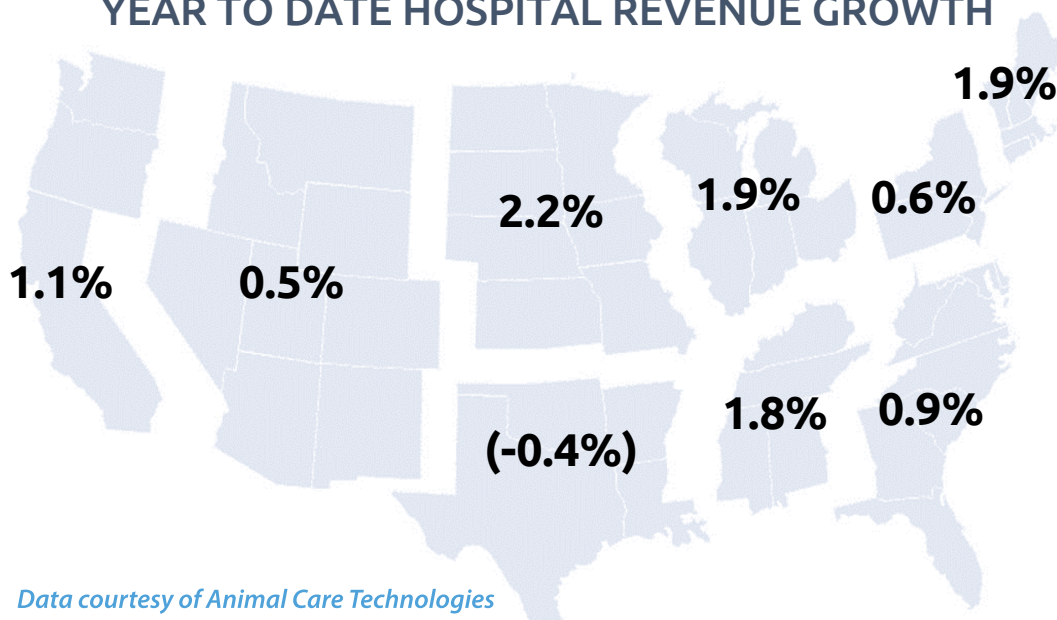
↓ **-3.3%**  
Patients  
YoY (YTD)

↑ **1.0%**  
Revenue  
YoY (YTD)

Growth % CY vs PY

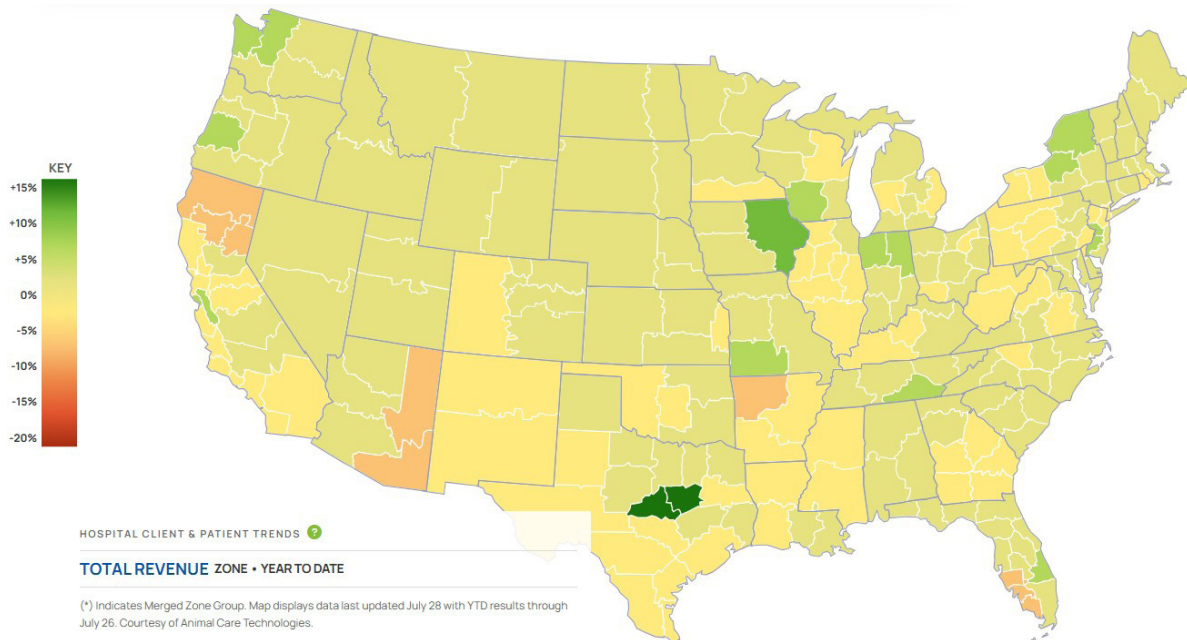


### YEAR TO DATE HOSPITAL REVENUE GROWTH



Data courtesy of Animal Care Technologies





**HOSPITAL CLIENT & PATIENT TRENDS** ⓘ

**Total invoices**

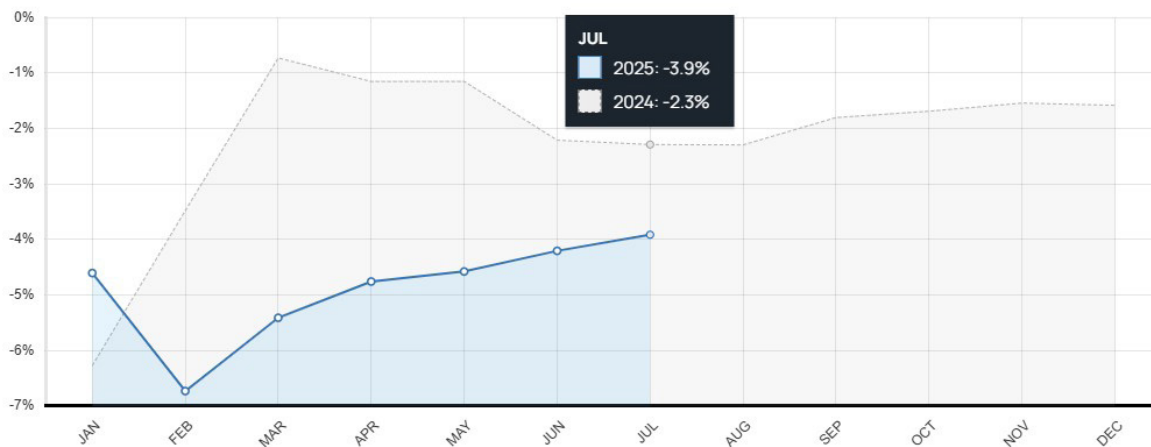
YTD growth in the actual number of invoices being issued by the veterinary practice.

● YEAR TO DATE

2 YEARS IN COMPARISON

■ 2024 ■ 2025

**YEAR TO DATE** ⓘ



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2025	-4.6%	-6.7%	-5.4%	-4.8%	-4.6%	-4.2%	-3.9%	n/a	n/a	n/a	n/a	n/a
2024	-6.3%	-3.5%	-0.7%	-1.2%	-1.2%	-2.2%	-2.3%	-2.3%	-1.8%	-1.7%	-1.5%	-1.6%

**Note:** Vet Watch<sup>®</sup> YTD Weekly Insight Report uses Sun-Sat week endings for the data presented above and months generally follow a 4-4-5 calendar of weeks.

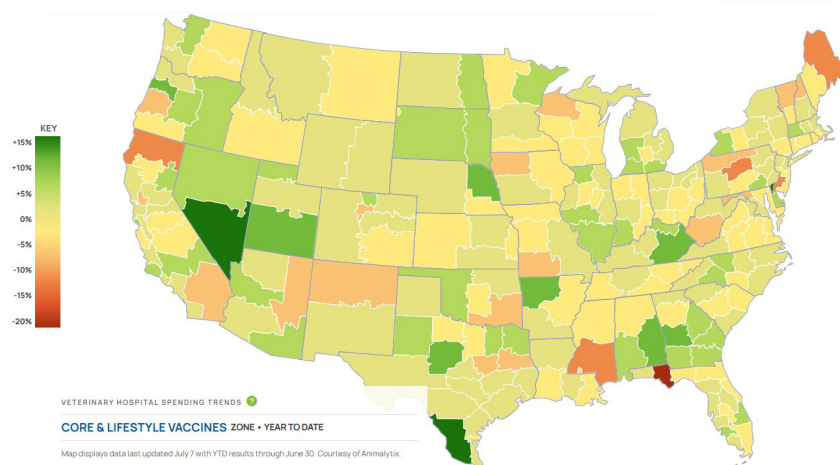
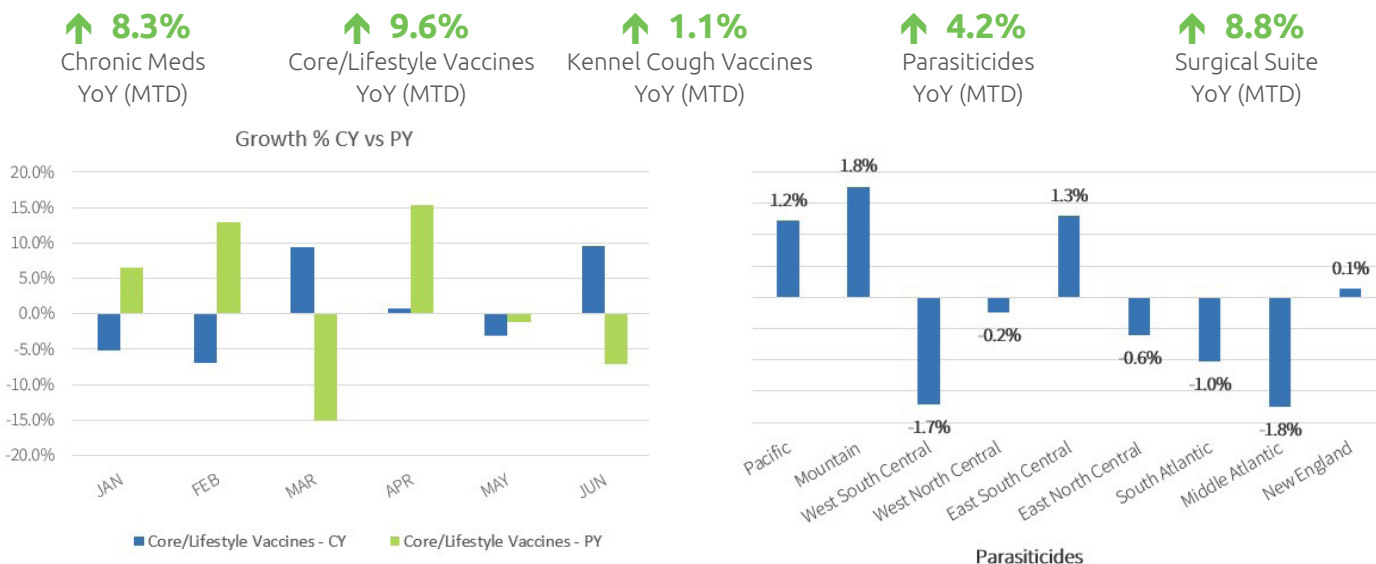
## Monthly Hospital Vaccine, Supplies and Parasiticides Purchasing Trends

For the month ending **June 30, 2025**, year over year reporting showed mixed results among the respective categories across the 32,000+ practices and shelter locations in the Animalytix Marketplace.

For more detailed information on your specific geography, please go to [vetwatch.com](https://www.vetwatch.com).

Core & Lifestyle Canine & Feline Vaccine practice purchase spending indices were at +1.1% growth YTD nationally through the end of the month. Purchases of Surgical Suite consumables, which serve as a proxy for the incidence of surgical procedures, were at (-0.1%) growth YTD. Chronic Care products were +3.0% growth YTD. Growth in Kennel Cough vaccine purchases were at +0.3% YTD. Overall spending growth for Parasiticide were at (-0.5%) growth YTD.

### Month to Date June 30, 2025



### Year to Date January - June 30, 2025



DVMetrics™ – VetWatch® was launched in May 2020, led by Animalytix, which has teamed up with Animal Care Technologies, M/A/R/C Research, Packaged Facts and USVA along with our sponsors. The goal of VetWatch® is to deliver the critical information needed by practices and those supporting the veterinary profession to better assess the scope, velocity and significance of developments in the veterinary care sector across the United States. For the full VetWatch®, please visit [www.vetwatch.com](https://www.vetwatch.com).

# Stock Tracker

Company	Close 12-31-24	Close 7-31-25	YTD
<b>S&amp;P 500</b>	5,881.63	6,339.39	\$457.76
<b>Dow Jones Industrial Average</b>	42,544.22	44,130.98	\$1,586.76
<b>NASDAQ</b>	19,310.79	21,122.45	\$1,811.66

Company	Symbol	Exchange	Close 12-31-24	Close 7-31-25	YTD
<b>Amazon</b>	AMZN	NASDAQ	219.39	234.11	\$14.72
<b>Beyond Meat</b>	BYND	NASDAQ	3.76	3.04	\$(0.72)
<b>Butterfly Network, Inc.</b>	BFLY	NYSE	3.12	1.71	\$(1.41)
<b>Cencora</b>	COR	NYSE	224.68	286.08	\$61.40
<b>Central Garden &amp; Pet</b>	CENT	NASDAQ	38.80	39.02	\$0.22
<b>Chewy</b>	CHWY	NYSE	33.49	36.70	\$3.21
<b>Colgate</b>	CL	NYSE	90.91	83.85	\$(7.06)
<b>CVS Group</b>	CVSG.L	London	840.00	1228.00	\$388.00
<b>Elanco</b>	ELAN	NYSE	12.11	13.68	\$1.57
<b>Freshpet</b>	FRPT	NASDAQ	148.11	68.32	\$(79.79)
<b>General Mills</b>	GIS	NYSE	63.77	48.98	\$(14.79)
<b>IDEXX</b>	IDXX	NASDAQ	413.44	534.31	\$120.87
<b>ImmuCell</b>	ICCC	NASDAQ	5.15	6.20	\$1.05
<b>Inspire Veterinary Partners</b>	IVP	NASDAQ	0.19	0.78	\$0.59
<b>JM Smucker</b>	SJM	NYSE	110.12	107.34	\$(2.78)
<b>Merck</b>	MRK	NYSE	99.48	78.12	\$(21.36)
<b>Neogen</b>	NEOG	NASDAQ	12.14	4.65	\$(7.49)
<b>Nordhealth AS</b>	NORDH.OL	Oslo	44.40	38.60	\$(5.80)
<b>Petco</b>	WOOF	NASDAQ	3.81	3.01	\$(0.80)
<b>PetMed Express</b>	PETS	NASDAQ	4.82	3.12	\$(1.70)
<b>Phibro</b>	PAHC	NASDAQ	21.00	26.50	\$5.50
<b>Pilgrim's Pride</b>	PPC	NASDAQ	45.39	47.39	\$2.00
<b>ProShares Pet Care ETF</b>	PAWZ	NASDAQ	54.44	54.99	\$0.55
<b>Spectrum Brands Holdings, Inc.</b>	SPB	NYSE	84.49	53.51	\$(30.98)
<b>SRx Health Solutions Inc.</b>	SRXH	NYSE	1.74	0.40	\$(1.34)
<b>Tractor Supply</b>	TSCO	NASDAQ	53.06	56.95	\$3.89
<b>Trupanion</b>	TRUP	NASDAQ	48.20	47.41	\$(0.79)
<b>Tyson</b>	TSN	NYSE	57.44	52.30	\$(5.14)
<b>Walmart</b>	WMT	NYSE	90.35	97.98	\$7.63
<b>Zoetis</b>	ZTS	NASDAQ	162.93	145.79	\$(17.14)
<b>Zomedica</b>	ZOMDF	OTCQB	0.12	0.04	\$(0.08)
<b>Vetoquinol</b>	VETO.PA	Paris	74.90	77.20	\$2.30
<b>Virbac SA</b>	VIRP.PA	Paris	316.50	347.50	\$31.00



# First Half FY 2025 Revenues

**NOTE:** Upcoming reports: IDEXX Laboratories (August 4), Zoetis and Pet Valu Holdings Ltd. (August 5), Elanco Animal Health (August 7), Trupanion Inc. (August 14), Petco Health and Wellness Co., Inc. (August 21).

**Sales revenue tracking of first half fiscal year 2025 for animal health product supplier companies, distributors and retailers that report (US\$M – Ex manufacturer level)**

Company	First Half 2025	% change 2024
<b>Regulated products</b>		
Merck Animal Health	\$3,234	8%
Boehringer Ingelheim Animal Health	\$2,880	4%
Central Garden & Pet Company, Pet Products segment	\$887	0% (2Q FY2025 ended March 29, 2025)
Virbac SA	\$804	6%
Phibro Animal Health & Nutrition	\$534	18% (2Q FY2025 ended Dec. 31, 2024)
Spectrum Brands, Global Pet Group	\$529	7% (2Q FY2025 ended March 30, 2025)
Neogen Corporation	\$448	2% (2Q FY2025 ended Nov. 30, 2024)
Benchmark Holdings plc*	\$44	(17%)
ImmuCell	\$15	14%
<b>Pet food</b>		
Nestle Purina PetCare*	\$10,827	1%
General Mills, Blue Buffalo Unit	\$1,172	2% (2Q FY2025 ended Nov. 24, 2024)
The J.M. Smucker Company, US Retail Pet Foods segment	\$845	7% (2Q FY2025 ended Oct. 31, 2024)
<b>Retail, vet services and distributors</b>		
Tractor Supply Company	\$7,907	4%
Patterson Animal Health	\$2,037	0% (2Q FY2025 ended Oct. 26, 2024)
BARK Inc.	\$242	2% (2Q FY 2025 ended Sept. 30, 2024)
Swedencare*	\$130	7%
PetMed Express Inc.	\$128	(14%) (2Q FY2025 ended Sept. 30, 2024)

Sales revenues are based on weighted average foreign currency translation rates (estimate) to US\$ when the reporting is in a foreign currency and not US \$s and/ or the estimate is made on business allocations when the animal health component is not disclosed by the parent company but an estimate can be made. Companies operating with a non-calendar year fiscal year are noted and the Qtr ending date is noted in parenthesis ( ).

**Source:** Antelligence LLC

# Animal Health M&A

JULY

Laboratory informatics firm **Clinisys** announced its acquisition of **Orchard Software** from **Francisco Partners**. Orchard's lab systems are said to be used by more than 2,000 laboratories in the US, including veterinary clinics. [Clinisys](#)

Czech pet food maker **VAFO Group** acquired **AZAN**, a Polish distributor and 30-year business partner. VAFO Group ranks among Europe's five largest pet producers with reported 2024 revenues of US\$660 million. [Petfood Industry](#)

Poultry producer **Wayne-Sanderson Farms** acquired fellow Georgia producer **Harrison Poultry**. The transaction includes transfer of all Harrison Poultry assets, including live production, hatchery, feed mill, manufacturing, production and transportation facilities and equipment. [Wayne-Sanderson Farms](#)

**Tractive**, an Austrian-based maker of technologies for GPS tracking and pet health insights, acquired **Whistle**, the connected pet wearable brand owned by **Mars Petcare**. Tractive's smart trackers are said to enable pet owners to locate their animals in real time and monitor comprehensive health metrics including activity, sleep, barking behavior, resting heart rate and respiratory rate. [Tractive](#)

Seattle-based **Rover**, an online marketplace for pet care, announced its intent to acquire **Mad Paws**, an

Australian company that supports 300,000 active pet owners and 70,000 registered pet care providers. Rover is already active in 16 countries, including the U.S., Canada and 14 European countries. [Rover Group](#)

Cricket Hill Inc., doing business as **Archway Pet Food** (formerly Arch), announced on July 10 its acquisition of plant-based pet treat brand **Bright Planet Pet**, whose product line will continue to be sold under its existing brand name. [Petfood Processing](#)

**Neogen Corp.** completed the divestiture of its cleaners and disinfectants business to **Kersia Group**, a biosecurity and food safety company, for \$130 million in cash. Neogen provides products and services for the food processing, animal protein and agriculture industries. [Neogen Corporation](#)

**Walgreens Boots Alliance** shareholders approved the previously announced acquisition of the company by **Sycamore Partners Management LP**, a New York-based private equity firm specializing in consumer, distribution and retail investments. Walgreens expects to close the transaction in the third or fourth quarter of calendar year 2025. [Walgreens Boots Alliance](#)

African private equity fund manager **Phatisa** has agreed to sell its interest in **Deltamune**, a South Africa-based vaccine manufacturer, to **Vaxxinova**

International, part of the Germany-based EW Group. Deltamune develops and manufactures vaccines for production animals, with a focus on poultry and an expanding presence in the ruminant segment, including cattle and sheep.

[Africa Private Equity News](#)

New Zealand-based rural services company **PGG Wrightson** is expected to acquire local animal health company **Nexan Group** for NZD\$20 million (US\$12 million). PGG's wholesale trading division Agritrade has been the exclusive distributor of Nexan Group's animal health remedies, including veterinary and livestock pharmaceuticals, for more than a decade. [RNZ](#)

UK-based **Inspired Pet Nutrition**, a pet food company controlled by CapVest Partners LLP, and investment firm **Parquest** have agreed to terms on the acquisition of Sopral, a branded pet food company serving the European market with manufacturing operations in France. [Inspired Pet Nutrition](#)

Chinese pork processor **WH Group** has struck an acquisition in pet food by acquiring Poland-based Pupil Foods. **Pupil Foods** produces wet and dry pet foods for cats and dogs. [msn](#)

Brazilian online retailer **Petlove** has appealed the recent decision by the country's regulatory authority granting unconditional approval for the merger of pet retailers **Petz** and **Cobasi**. The merger would create Brazil's largest pet retailer with

combined revenue of R\$6.9 billion (\$1.32B/€1.15B) and a network of nearly 500 stores. [GlobalPETS](#)

**Fredun Pharmaceuticals Ltd.**, an India-based human pharmaceutical company, acquired **One Pet**

**Stop Private Ltd.**, a pet wellness company providing grooming and health services. Fredun says it is a "significant step toward expanding its consumer-centric portfolio."

[Equity Bulls](#)

## JUNE

**Chewy Inc.** announced the commencement of an underwritten public offering of almost 24 million shares of its Class A common stock by **Buddy Chester Sub LLC.**, an entity affiliated with funds advised by BC Partners PE, LP, Chewy's largest shareholder.

**C&S Wholesaler Grocers** has agreed to acquire **SpartanNash** for \$1.77 billion. C&S supplies more than 7,500 independent supermarkets, chain stores and other facilities. SpartanNash operates two complementary businesses – food wholesale and grocery retail. [C&S Wholesale Grocers](#)

**Advent**, a private equity investor, announced that funds managed by Advent have signed a definitive agreement to invest USD \$175 million for a significant minority stake in Dublin-based **Felix Pharmaceuticals Pvt Ltd**, a developer and manufacturer of off-patent medicines for companion animals. [Advent](#)

UK-based **Animalcare Group** acquired a 25% equity stake in **InVetro Pty Ltd.**, a development-stage Australian veterinary pharmaceutical company. Animalcare Group is focused on bringing new products to market

through its own development pipeline, partnerships and via acquisition. [Animalcare Group PLC](#)

Private equity firm **Partners Group** agreed to acquire UK-based **MPM Products**, maker of wet cat food, from 3i. "We believe there is a significant growth opportunity in the premium cat food segment," said Thomas Clark, managing director, Partners Group. MPM brands include Applaws, Reveal and Encore. [Partners Group](#)

The **Groan Group**, a Netherlands-based trading company in agricultural raw materials, announced it has established financial participation in **Aminola**, a supplier of plant-based ingredients for pet food, food and aquafeed. Aminola, also based in The Netherlands, has a portfolio of proteins and carbohydrates for the petfood sector, including pea protein, rice protein, tapioca starch and sweet potato pellets. [Groan](#)

Swedish pet food company **The Nutriment Company** acquired Germany-based **Graf Barf**, a raw pet food producer, as TNC aims to establish a new frozen logistics hub to serve the European market. It is TNC's fifth European acquisition this year. [GlobalPETS](#)

Pet care provider **Inspire Veterinary Partners Inc.** acquired 100% ownership interest in **DeBary Animal Clinic** in DeBary, Florida. The acquisition marks the company's fifth in the state and is projected to add up to \$1.8 million in annualized revenue to Inspire's veterinary clinic network, which includes hospitals in California, Colorado, Florida, Indiana, Massachusetts, Maryland, Ohio and Texas. [Inspire Veterinary Partners](#)

Logistics provider **Ultrack Systems Inc.** acquired a 60% controlling interest in **Better Pets**, Canadian-based maker of pet wellness products. "Better Pets' dedication to science-based, natural formulations fits perfectly with our mission to invest in innovation and capitalize on emerging consumer trends," said Ultrack CEO Reno Calabrigo. [Ultrack Systems](#)

Brazil's antitrust body Cade approved the merger of pet product retailers **Cobasi** and **Petz**. The cash and share swap deal, which will join Brazil's two largest pet product retailers, was first announced in April 2024. [Reuters](#)



Egg producer **Cal-Maine Foods** closed its \$230 million acquisition of **Echo Lake Foods**, a producer, marketer and distributor of ready-to-eat egg products and foods. Cal-Maine said the acquisition allows it to enter “the large, growing and high stable value-added food portion of

the egg category” and expand its relationships with retail, quick-service restaurants and other food-service customers. [Cal-Maine Foods](#)

**Palehorse Capital** has acquired **HorsePrerace.com**, an online retailer of equine health products. The acquisition coincides with the

consolidation of veterinary and pharmaceutical-related domain names into the Vetr.com platform, including Coccidia.com, Giardiasis.com, Toltrazuril.com, Amprolium.com, Moxidectin.com, Hookworms.com, and Pinworms.com. [Vetr](#)

## NEWS

# 1.0 – Enterprise Practice

## 1.1 Heart + Paw VP named National Unsung Hero by AVMA

Charlene Wandzilak, vice president of people and culture for veterinary network Heart + Paw, was named AVMA’s National Unsung Hero at this year’s AVMA and World Veterinary Association awards

ceremony in Washington. Heart + Paw has 29 locations in 10 states. Heart + Paw. [Heart + Paw](#)

## 1.2 Heritage Vet Partners welcomes Postville Vet Clinic

Heritage Vet Partners has welcomed Postville (Iowa) Vet Clinic into its

network. The clinic cares for both small and large animals in Northeast Iowa. Heritage Vet Partners is a veterinary partnership with close to 30 mixed/large animal practices. [Heritage Vet Partners](#)

# 2.0 – Company

## 2.1 Bow Wow Labs expands into brick-and-mortar with Pet Supplies Plus

Bow Wow Labs, maker of safety chewing devices for dogs, announced it will expand beyond e-commerce into brick-and-mortar locations. Beginning in August, the company’s Bow Wow Buddy and SafeFit Bully Sticks will be available at approximately 780 Pet Supplies Plus corporate and franchise locations. [Bow Wow Labs](#)

## 2.2 Brenntag expands distribution to include US pet food market

Brenntag Specialties expanded its distribution agreement with international farmer cooperative

Royal Avebe to include the U.S. market, making the Dutch cooperative’s potato starch and protein ingredients available to North American pet food manufacturers for the first time. The agreement extends a partnership that began in 2023 in Turkey and has since grown to cover Benelux and several Nordic and Baltic countries. [Petfood Industry](#)

## 2.3 Clinisys acquires Orchard Software

Laboratory informatics firm Clinisys announced its acquisition of Orchard Software from Francisco Partners. Orchard’s lab systems are said to be used by more than 2,000

laboratories in the US, including veterinary clinics. [Clinisys](#)

## 2.4 Hill’s Pet Nutrition adoption report reveals why pets still wait in shelters

Hill’s Pet Nutrition released its third annual State of Shelter Pet Adoption Report, intended to offer insights into the forces driving down adoptions and pushing animal shelters to their limits. Among the findings: Nearly two-thirds (63%) of Americans report they would likely choose a shelter when ready to welcome a new pet. However, most acquired current dogs (33%) and cats (23%) from family or friends.

[Hill’s Pet Nutrition](#)

### **2.5 HT Vet reports its cancer detection tool leads to more mass removal surgeries**

HT Vet, developer of HT Vista, a noninvasive, first-line cancer detection tool for dogs, reported that 10 veterinary practices in the U.S., UK and Israel experienced a 40% increase in mass removal surgeries following its implementation. The company tracked the number of lumpectomies performed three to six months before and after the introduction of HT Vista. Despite consistent caseloads, all clinics reported an increase in mass removals and biopsies. [VetriScience](#)

### **2.6 IDEXX releases 2024 Corporate Responsibility Report**

In its 2024 Corporate Responsibility Report, IDEXX reported it donated over 21,000 SNAP tests for disaster response, education and outreach; provided the equivalent of \$5.5 million in continuing education credit offerings to veterinary professionals; and created “Mindful May” webinars to encourage self-care and resilience in the profession. [IDEXX](#)

### **2.7 IQI appoints Brooke Eiler sales manager**

IQI Trusted Petfood Ingredients, based in The Netherlands, appointed Brooke Eiler as sales manager North America, reflecting the company’s interest in strengthening its North American market. IQI supplies ingredients to pet food manufacturers and processors in 60 countries. [Petfood Industry](#)

### **2.8 Mars appoints new general managers for European pet care businesses**

Mars, Inc. appointed Nicholas Foster general manager of Mars Pet Nutrition UK, Ireland and Nordics; and James McGrath general manager of Royal Canin UK and Ireland, in addition to his role as general manager of Royal Canin Nordics. Foster began his career at Mars Food in 2006 before moving to Petcare in 2008. McGrath joined Royal Canin in September 2024 as general manager for the Nordics. [European Supermarket Magazine](#)

### **2.9 Merck gets EC approval for NUMELVI (atinvicitinib) Tablets for Dogs**

Merck Animal Health announced that the European Commission (EC) approved NUMELVI (atinvicitinib) Tablets for Dogs. It is a once-daily, first-line treatment, and is the only second-generation Janus kinase (JAK) inhibitor indicated for the treatment of pruritus associated with allergic dermatitis including atopic dermatitis and treatment of clinical manifestations of atopic dermatitis in dogs. [Merck Animal Health](#)

### **2.10 Odie Pet Insurance and Purina partner to encourage wellness care**

Odie Pet Insurance announced a partnership with Nestlé Purina PetCare intended to change how pet insurance evaluates risk and supports preventative care. The initiative leverages Petivity powered by Purina, a system that combines technology and pet

health data to encourage pet parents to proactively manage their pets’ health through smart devices, health kits and an AI-powered assistant. [Odie Pet Insurance](#)

### **2.11 VetriScience, Senior Dog Veterinary Society to collaborate on educational initiative**

Nutritional supplement company VetriScience announced a partnership with the Senior Dog Veterinary Society (SDVS), in which the two will collaborate to educate veterinarians and pet owners on the benefits of nutritional supplements for their dogs. [VetriScience](#)

### **2.12 Zenex Animal Health exploring stake sale**

Owners of Zenex Animal Health, an Indian pharmaceutical company, were reported to be exploring a stake sale that could value the company at over \$1 billion. The company invited bankers in June to prepare an exit plan through a sale or listing, sources said on the condition of anonymity. [mint](#)

## 3.0 – Earnings/Investments/Economy

### 3.1 Petflation slowed in May

Petflation slowed to 2.1% from 2.2% in May. Services had higher rates while products deflated. June prices rose 2% from May, driven by all but supplies. Pet CPI slowed from 2.2% to 2.1%. A key factor in the drop was that prices rose 0.3% in May/June 2024, compared to a 0.2% lift in 2025. [Pet Business Professor](#)

### 3.2 Central Bark reports 13% sales increase in Q2 2025

Dog care franchise Central Bark concluded the second quarter of 2025 with a 13% systemwide sales increase and the opening of new locations in Rochester, Michigan; Paradise Valley, Arizona; Fox Valley, Illinois; and Danbury, Connecticut. The company, which operates under the name Barkley Ventures Franchising, has 43 locations across 16 states. [Central Bark](#)

### 3.3 Elita, Australian genetic startup, completes pre-Seed raise

LaunchVic's sidecar fund for women founders, the Alice Anderson fund, has completed a pre-Seed \$1.1 million raise for Melbourne, Australia, pet health startup Elita, which is building a stem cell bank for Australian pets. Founded by Paloma Newton and Jackson Gritchling, Elita launched publicly last December with backing from Startmate, Side Stage Ventures, Archangel Ventures, M8 Ventures, and Google alumni-founded XA Network in its first Australian investment.

[Startup Daily](#)

### 3.4 Mars to invest \$2 billion in US manufacturing through 2026

Mars Inc. announced plans to grow its U.S.-based manufacturing by investing an estimated \$2 billion into its operations across the country by the end of 2026. Earlier this year Mars opened a \$450 million Royal Canin dry pet food facility in Lewisburg, Ohio – the brand's largest dry pet food factory globally. [Mars Incorporated](#)

### 3.5 Merck Animal Health Q2 sales up 11%

Merck reported its Q2 2025 Animal Health sales were \$1.6 billion, up 11% from the prior year. Livestock sales were \$961 million (up 16%) and companion animal sales \$685 million (up 6%). Growth in livestock was primarily driven by higher demand across all species and inclusion of sales from the Elanco aqua business acquired in July 2024. The increase in companion animal sales was primarily due to higher pricing. The company approved a "multiyear optimization initiative" intended to produce \$3 billion in annual cost savings, including elimination of administrative, sales and R&D positions. [Merck](#)

### 3.6 Pet Service Holding achieves 1H 2025 revenue growth of 14%

The Netherlands-based Pet Service Holding achieved a 14% revenue growth in the first half of 2025 compared to the same period in 2024, reaching €7 million in revenue. Combining veterinary pharmacies, wholesalers, online shops and digital platforms, the company addresses pet nutrition,

health and smart technology.

[Pet Service Holding](#)

### 3.7 Pets at Home reduces profit guidance as pandemic pet boom fades

UK pet retailer Pets at Home told shareholders it expected an annual underlying pre-tax profit of between £110 million and £120 million, down from the £133 million profit reported the previous year and May guidance of £115 million to £125 million. The revised guidance follows a comment in May by Chief Executive Lyssa McGowan pointing to "normalizing levels of new pet ownership" following a massive COVID-driven increase. [msn](#)

### 3.8 PetVivo Holdings to trade on OTCQX

PetVivo Holdings has been upgraded to trade on the OTCQX Best Market and will trade under the symbol "PETV." OTC Markets Group Inc. operates regulated markets for trading 12,000 U.S. and international securities. [OTC Markets](#)

### 3.9 Symrise reports 3.1% organic growth in first half of 2025

Pet food maker Symrise AG reported H1 2025 organic growth of 3.1% and total revenues of €2,554 million (\$USD 2,944 million), but the Pet Food division maintained flat organic sales. Citing "a more challenging than expected global demand environment and transformation efforts," the company moderated its organic growth outlook for the full year 2025 to 3%-5% versus the prior expectation of 5%-7%. [Symrise AG](#)



## 4.0 – General Industry

### 4.1 UC Davis sets fundraising record

The UC Davis School of Veterinary Medicine announced that it raised \$118 million in the fiscal year 2024-25, a new record for the school. Philanthropic partners provided momentum to the school's efforts to expand its facilities, including a new Veterinary Medical Complex and the expansion of veterinary care in Southern California with the Janice K. Hobbs UC Davis Veterinary Medical Center, Southern California, set to open next year. [UC Davis School of Veterinary Medicine](#)

### 4.2 VOA celebrates inaugural year championing independent practice

Veterinary Ownership Advocates (VOA), a nonprofit initiative dedicated to empowering veterinary professionals to achieve practice ownership, celebrated its first anniversary, citing the success of two practices: Olive Animal Hospital, Danville, Illinois (Drs. Shelly and Michael Hanlon), and Monarch Veterinary Clinic, St. Charles, Illinois (Drs. Andrea and Charlie Benson). [Veterinary Ownership Advocates](#)

### 4.3 UC Davis to launch two-day CE veterinary conference

The UC Davis School of Veterinary Medicine's Center for Continuing Professional Education announced the launch of AggieVET 2026, a two-day veterinary conference designed to deliver continuing education for the entire veterinary community. The inaugural event will be held May 30–31, 2026, both in-person at UC

Davis and virtually. Focused tracks are offered in small animal, equine, technician, behavior, and business & wellness (tentative).

#### [UC Davis Veterinary Medicine](#)

### 4.4 Genetic test detects predisposition to feline kidney disease

A genetic test that detects predisposition to progressive feline chronic kidney disease has been developed by veterinarians at Washington State University's College of Veterinary Medicine. The test, known as Feline Apoptosis Inhibitor Macrophages, or FAIM, is available to veterinarians and cat owners. About 30% to 50% of cats older than age 11 have some form of the disease. [Mirage](#)

### 4.5 NAVTA releases first DEIB survey report

The National Association of Veterinary Technicians in America released its first Diversity, Equity, Inclusion, and Belonging (DEIB) Landscape Survey Report, which offers a look at how credentialed veterinary technicians view DEIB in their workplaces and within the veterinary community. Among the findings: Younger and LGBTQIA+ respondents were more likely to view DEIB as highly important. NAVTA says the data will serve as a benchmark for future studies. [National Association of Veterinary Technicians in America](#)

### 4.6 FDA announces FY 2026 Animal Drug User Fee rates

The U.S. Food and Drug Administration announced in the

Federal Register the fiscal year 2026 fee rates and payment procedures for animal drugs subject to user fees under the Animal Drug and Animal Generic Drug User Fee Amendments of 2023. [Federal Register](#)

### 4.7 FDA warns against certain lots of Darwin's pet food

The FDA has cautioned that a sample of Darwin's Natural Pet Products beef dog food, made by Arrow Reliance Inc., tested positive for *Escherichia coli* (E. coli) that is associated with a human illness. The agency reports that a dog in the household that exclusively ate Darwin's pet food began vomiting one day before a four-year-old child in the house fell ill. The FDA recommended that Arrow Reliance recall the product lots that tested positive for E. coli O157:H7 and Salmonella. [U.S. Food and Drug Administration](#)

### 4.8 How will NIH cuts affect medical innovation?

Cutting NIH research grants could have a negative impact on medical innovation, conclude researchers from MIT and Massachusetts General Hospital in JAMA Health Forum. "NIH funding supports not only drug development but also innovations in medical devices, screening tools, clinical protocols, surgical procedures and public health interventions across the translational, disease and age spectrums," they write.

#### [JAMA Health Forum](#)

#### **4.9 UC Davis technicians protest staffing crisis**

Animal health technicians at the UC Davis Veterinary Medicine Teaching Hospital rallied on Aug 29 to bring attention to staffing shortages which they say are leading to the death of animal patients, a charge denied by UC Davis. The University of California and the University Professional Technical Employees union have been in contract negotiations since June 2024. [FOX40](#)

#### **4.10 High schoolers in Laredo can earn veterinary assistant certification**

Students in Laredo, Texas, can get a head start in animal care with a new course that results in certification to become veterinary assistants after four years. Program courses are principles of agriculture; small animal management, equine and livestock science; veterinary medical applications; and practicum in veterinary assisting. [Laredo Morning Times](#)

#### **4.11 Texas A&M Veterinary Emergency Team completes mission in Central Texas**

The Texas A&M Veterinary Emergency Team (VET) returned home following a 23-day deployment providing care for

nearly 100 search and rescue dogs working along the Guadalupe River following the flooding there. Twelve VET members were joined by three Texas A&M AgriLife Disaster Assessment & Recovery agents and 10 Texas A&M DVM students.

[Texas A&M University](#)

#### **4.12 NYC to invest \$1 million to increase shelter capacity**

New York City Mayor Eric Adams announced a \$1 million investment to Animal Care Centers of New York City (ACC) to increase capacity to better care for the shelter populations in Manhattan and Queens and to support the hiring and training of 14 additional staff for those locations.

[NYC Office of the Mayor](#)

#### **4.13 Washington law requires local governments to plan pet shelters for disasters**

Under a law that took effect this month in Washington state, local governments must ensure there is shelter for people with pets in natural disasters or extreme weather. The American Society for the Prevention of Cruelty to Animals says most evacuation non-compliance is because of pet ownership; it estimates 80% of people who re-enter an evacuation zone do so to rescue a pet. [KREM2](#)

#### **4.14 Black soldier fly larvae in dog food not a perfect substitute for poultry fat**

Black soldier fly larvae fat offers some advantages, such as a high lauric acid profile and environmental claims, but it may not be a perfect replacement for poultry fat, according to research from Selçuk University in Turkey. The inclusion of black soldier fly larvae fat in dry dog food formulations reduced nutrient digestibility and palatability, but it had no adverse effects on the health status of the dogs, the researchers wrote.

[Petfood Industry](#)

#### **4.15 Fermented pea starch can boost microbiome in dog food**

Research continues to show that pea-based ingredients can be a healthy part of dogs' and cats' diets, researchers wrote in *Frontiers in Veterinary Science*. Fermented pea starch may even be more beneficial and healthier than standard peas and other ingredients. That said, both pea-based diets – fermented and unfermented – led to lower plasma triglycerides, cholesterol and leptin in dogs and cats versus the corn diet. [Petfood Industry](#)

## **5.0 – Production Animal**

#### **5.1 Prefeedlot respiratory vaccination improves cattle health**

A review article in the August special issue of *Applied Animal Science* reports that current vaccination strategies for bovine respiratory

disease are fragmented across production phases, with insufficient coordination between cow-calf operations and subsequent sectors, limiting the overall effectiveness of BRD prevention efforts. The review

also highlighted what the literature says about intranasal vaccination and preconditioning programs that separate vaccination from high-stress periods. [Beef](#)

## **5.2 Research reveals heightened JEV threat to global pork industry**

A study funded by the Swine Health Information Center underscores the threat Japanese encephalitis virus poses to the global swine industry. The study, led by Natalia Cernicchiaro at Kansas State University in collaboration with the USDA Agricultural Research Service found that at least nine additional mosquito species can be potential vectors for JEV, nearly half of the mosquitoes exposed to JEV became infected, and one in four infected mosquitoes can transmit JEV to hosts. [National Hog Farmer](#)

## **5.3 Livestock sector offers plenty of opportunities for sustainability**

The livestock sector represents 40% of global agricultural output and 12% of emissions, yet the World Bank has found that livestock production receives only 0.1% of global climate finance, reports Health for Animals, a global animal health association. In addition, the Food and Agriculture Organization (FAO) of the United Nations has found animal health combined with related innovations can reduce livestock emissions by 23%.

[Health for Animals](#)

## **5.4 Settlement could be near in pork price-fixing lawsuit**

Plaintiffs in a pork price-fixing lawsuit are seeking final approval of their settlement agreements with Tyson Foods, Clemens Food Group and Triumph Foods. Tyson would pay \$50 million, Clemens \$10 million and Triumph \$4 million, bringing the total amount recovered by the plaintiff class to over \$180 million.

The plaintiffs, a group of individuals or companies who directly or indirectly purchased pork products from one of the processors, filed the antitrust class-action lawsuit in 2018. [National Hog Farmer](#)

## **5.5 Immigrant worker reform needed: Dairy Farmers of America**

Dairy Farmers of America has joined other food industry associations, including the American Association of Meat Processors, in urging President Trump to provide new work authorization paths for immigrant workers. "Failures of the past are not corrected by creating even greater problems in the present, or worse, by using rhetoric intended to eliminate any path forward," wrote DFA President and CEO Dennis Rodenbaugh.

[Dairy Processing](#)

## **5.6 Wayne-Sanderson Farms acquires Harrison Poultry**

Poultry producer Wayne-Sanderson Farms announced its acquisition of Harrison Poultry. No financial details were disclosed. The transaction includes transfer of all Harrison Poultry assets, including live production, hatchery, feed mill, manufacturing, production and transportation facilities and equipment in association with Harrison's Georgia locations in Bethlehem and Crawfordville.

[Wayne-Sanderson Farms](#)

## **5.7 World Mycotoxin Survey identifies most vulnerable regions in the world**

In North America, livestock is at high risk of exposure to deoxynivalenol (DON) and zearalenone (ZEN) in

feed ingredients, with occurrence rates of 78% and 83%, respectively, according to the World Mycotoxin Survey from dsm-firmenich. Globally, the highest regions of mycotoxins were found in the Americas, South Asia, China and Taiwan. Mycotoxins are naturally produced by fungi and can contaminate feed raw materials in the field and during storage.

[Bovine Veterinarian](#)

## **5.8 Idaho state animal health lab joins national diagnostic network**

The Idaho State Department of Agriculture Animal Health Laboratory has been accepted as a member of the National Animal Health Laboratory Network, a designation that state officials expect will benefit the state's dairy and cattle industries. NAHLN is a coordinated system of over 60 federal, state and university-affiliated laboratories providing disease surveillance and quick response to disease events.

[Capital Press](#)

## **5.9 Meat exporters applaud South Korea trade deal**

The U.S. Meat Export Federation applauded the Trump administration's trade deal with South Korea, which will eliminate tariffs on U.S. products. "As the largest export destination for U.S. beef and a critical market for U.S. pork, Korea provides a great example of what the U.S. red meat industry can achieve in the global marketplace," said USMEF President and CEO Dan Halstrom in a statement. [USMEF](#)