

Poultry Vaccines Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028

Segmented By Application (Broiler, Layer, Breeder), By Product (Attenuated Live Vaccines, Inactivated Vaccines, Subunit Vaccines, DNA Vaccines, Recombinant Vaccines), By Disease Type (Infectious Bronchitis, Infectious Bursal Diseases, Infectious Laryngotracheitis, Egg Drop Syndrome, Adenovirus, Duck Viral Enteritis, Inclusion Body Hepatitis, Salmonella, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Poultry Vaccines Market has valued at USD 1.73 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.90% through 2028. The Global Poultry Vaccines Market is a dynamic and essential segment of the global animal healthcare industry. This market primarily revolves around the development, production, and distribution of vaccines designed to safeguard poultry, including chickens and turkeys, from a range of diseases. Poultry farming is a critical component of the global food supply chain, making the availability of effective vaccines crucial for maintaining the health and productivity of poultry flocks.

Key Market Drivers

Rising Global Poultry Consumption

The global poultry industry is soaring to new heights, fueled by an ever-increasing global demand for poultry products such as chicken and turkey. This growing appetite for poultry is not only a testament to shifting dietary preferences but also a major driver for the expansion of the global poultry vaccines market. Poultry, particularly chicken, has become a staple in diets worldwide due to its affordability, versatility, and lean protein content. As global populations burgeon and urbanization continues, the demand for poultry products has surged. According to industry reports, poultry consumption is on a steady upward trajectory, with no signs of slowing down. This surge in demand directly correlates with the need for a healthy and sustainable poultry industry. The poultry industry is not only a vital source of protein but also a significant contributor to the global economy. However, it is highly susceptible to disease outbreaks that can decimate poultry flocks, disrupt supply chains, and incur substantial economic losses. Diseases such as avian influenza, Newcastle disease, and coccidiosis pose constant threats to poultry farms. Consequently, safeguarding poultry health has become imperative for the industry's sustained growth. Poultry vaccines are a fundamental tool in preventing and managing disease outbreaks. They offer a cost-effective and humane way to protect poultry flocks from various diseases. By vaccinating birds, farmers can reduce the morbidity and mortality rates, ensuring a consistent and healthy supply of poultry products. The reliability of vaccines in preventing disease outbreaks is a driving force behind their increasing adoption in the poultry industry. As global poultry consumption continues to rise, poultry farmers and producers are becoming more conscious of the importance of disease prevention. To meet the growing demand for poultry products and mitigate the risk of disease outbreaks, farmers are increasingly implementing vaccination programs. These programs involve the administration of vaccines to poultry flocks at various stages of their lifecycle, bolstering their immunity and overall health. The surge in poultry consumption has prompted significant investments in research and development within the poultry vaccines industry. Companies are focusing on developing more efficacious and innovative vaccines to combat a broader spectrum of diseases. These advancements include novel vaccine formulations, improved delivery methods, and region-specific vaccines tailored to local disease profiles.

Preventing Disease Outbreaks in Poultry Animals

The global poultry industry is facing unprecedented challenges as it strives to meet the ever-growing demand for poultry products. Disease outbreaks in poultry flocks can be catastrophic, resulting in significant economic losses and disruptions to the supply chain. In response to this threat, the global poultry vaccines market has emerged as a crucial player in safeguarding poultry health. Poultry, including chickens and turkeys,

are highly susceptible to a range of diseases, including avian influenza, Newcastle disease, infectious bronchitis, and coccidiosis. These diseases can spread rapidly within flocks, leading to increased mortality rates, decreased production efficiency, and substantial financial losses for poultry farmers. Preventing these diseases is paramount to ensuring the health and productivity of poultry animals. Poultry vaccines are pivotal tools in preventing and managing disease outbreaks in poultry populations. These vaccines are specifically formulated to stimulate the bird's immune system, equipping them to fend off pathogens. By vaccinating poultry animals, farmers can reduce the risk of disease transmission and minimize the impact of outbreaks, resulting in healthier flocks and a more reliable supply of poultry products. The economic ramifications of disease outbreaks in poultry are profound. Losses can encompass not only the direct costs of bird mortality but also the expenses associated with disease control measures, such as increased medication usage, quarantine procedures, and additional labor costs. Moreover, the disruption in the supply chain can lead to price fluctuations and reduced availability of poultry products in the market. Farmers and poultry producers are increasingly recognizing the value of vaccination programs in preventing disease outbreaks. These programs involve the systematic administration of vaccines to poultry flocks at various stages of their lifecycle. As awareness of the importance of disease prevention grows, more farmers are investing in vaccination programs as a proactive strategy to protect their investments and ensure a consistent supply of poultry products. The global poultry industry is expanding, particularly in emerging markets where urbanization, rising incomes, and changing dietary habits are driving increased poultry consumption. As the poultry industry grows, so does the need for effective disease prevention strategies. Poultry vaccines are an integral part of these strategies, contributing to the overall health and sustainability of the industry.

Advancements in Vaccine Technology

The global poultry vaccines market is undergoing a significant transformation, driven in large part by groundbreaking advancements in vaccine technology. Poultry farming, a cornerstone of the food industry, faces ever-increasing challenges from disease outbreaks and the need to meet the world's growing demand for poultry products. One of the most notable benefits of advancements in vaccine technology is the enhanced efficacy of poultry vaccines. Traditional vaccines have given way to more sophisticated formulations that can provide longer-lasting protection with fewer doses. These next-generation vaccines stimulate a stronger and more sustained immune response in poultry, reducing the likelihood of disease outbreaks and improving overall flock health. Modern vaccine technology allows for the development of highly specific vaccines tailored to target particular diseases or strains of pathogens. This level of precision is

essential in addressing the diverse range of diseases that affect poultry. By targeting specific pathogens, vaccines can offer better protection against a broader spectrum of diseases, including avian influenza, Newcastle disease, and coccidiosis. Advancements in vaccine delivery methods have made vaccination more convenient and efficient for poultry farmers. Traditional injection-based vaccines are being complemented by innovative approaches such as oral vaccines, aerosolized vaccines, and vaccine-laden bait. These methods simplify vaccine administration, reduce stress on birds, and minimize the need for skilled labor, contributing to cost savings and increased adoption rates. New vaccine technologies are designed to stimulate the bird's immune system more effectively. Adjuvants and delivery systems have been refined to trigger a robust and sustained immune response. This ensures that poultry develop strong immunity to diseases, resulting in fewer disease-related losses and more productive flocks. To address region-specific disease challenges, vaccine manufacturers are developing customized regional vaccines. These vaccines take into account the prevalent diseases and strains in a specific geographic area, providing poultry farmers with tailored solutions for their unique disease profiles. This customization allows for more effective disease prevention strategies.

Expanding Poultry Industry in Emerging Markets

The global poultry industry is experiencing a remarkable expansion, and much of this growth is driven by emerging markets in regions like Asia-Pacific, Latin America, and Africa. As these markets witness a surge in poultry production and consumption, the demand for effective disease prevention measures, particularly poultry vaccines, is on the rise. Emerging economies are becoming key players in the global poultry industry due to factors such as rapid urbanization, increasing disposable incomes, and changing dietary preferences. These regions are experiencing a shift towards a higher consumption of protein-rich poultry products like chicken and turkey. As a result, emerging markets are steadily emerging as major contributors to the global poultry industry. The expanding poultry industry in emerging markets is characterized by substantial increases in poultry production. Poultry farms are growing in size and sophistication, adopting modern farming practices and technology. With the goal of meeting the rising demand for poultry products, these farms are managing larger flocks, which in turn increases the potential for disease outbreaks. The rapid growth of the poultry industry in emerging markets is accompanied by new and evolving disease challenges. Poultry diseases, such as avian influenza, Newcastle disease, and coccidiosis, pose significant threats to poultry health and production. These diseases can spread rapidly within densely populated poultry farms, leading to severe economic losses and potential food security concerns. Poultry vaccines are indispensable tools in

preventing and managing disease outbreaks in poultry flocks. They offer a cost-effective and humane means of protecting poultry from a wide range of diseases. As emerging markets grapple with increased disease risks due to intensified poultry production, the importance of vaccines in maintaining flock health and securing food supplies cannot be overstated.

Key Market Challenges

Disease Complexity and Variability

One of the foremost challenges in the poultry vaccines market is the complexity and variability of poultry diseases. Poultry are susceptible to a wide range of pathogens, including viruses, bacteria, and parasites, each with different strains and mutations. Developing vaccines that provide comprehensive protection against these evolving pathogens can be a formidable task.

Regulatory Hurdles

The production and distribution of vaccines are subject to stringent regulatory requirements to ensure safety and efficacy. Meeting these regulatory standards can be a costly and time-consuming process for vaccine manufacturers. Any deviations from these standards can lead to delays in vaccine approval and market entry, increasing the financial burden.

Cold Chain Management

Maintaining the integrity of vaccines throughout the distribution process is critical. Poultry vaccines are often sensitive to temperature fluctuations, and improper storage can render them ineffective. In regions with limited infrastructure and resources, maintaining a reliable cold chain for vaccines can be a significant challenge.

Vaccine Resistance and Compliance

Vaccine resistance, where pathogens develop resistance to vaccines, is a growing concern. Additionally, ensuring that poultry farmers adhere to recommended vaccination schedules and protocols can be challenging. Inconsistent vaccine administration can lead to gaps in protection and disease outbreaks.

Key Market Trends

Precision Vaccination

Precision vaccination is a trend gaining momentum in the poultry vaccines market. This approach involves tailoring vaccination programs to the specific needs of individual flocks or poultry houses. By considering factors such as age, health status, and disease exposure, precision vaccination aims to optimize vaccine efficacy while minimizing costs. Advanced data analytics and monitoring systems are being employed to implement precision vaccination strategies effectively.

Immune-Boosting Adjuvants

Innovations in vaccine adjuvants are on the horizon. Adjuvants are substances added to vaccines to enhance the body's immune response. The development of novel adjuvants can improve the efficacy of poultry vaccines, enabling better protection against a wider range of diseases. These adjuvants may also reduce the need for multiple booster vaccinations, enhancing the convenience and cost-effectiveness of vaccination programs.

DNA Vaccines

DNA vaccines are gaining attention for their potential in the poultry vaccines market. These vaccines use genetic material (DNA) to stimulate the immune system. DNA vaccines are advantageous due to their safety, stability, and potential for rapid development. As research in this area progresses, DNA vaccines may become a viable alternative to traditional vaccines for poultry diseases.

Vaccine Delivery Innovations

Advancements in vaccine delivery systems are set to revolutionize the poultry vaccines market. In addition to traditional injection-based vaccines, novel delivery methods such as oral vaccines, aerosolized vaccines, and vaccine-laden bait are being developed. These methods simplify vaccine administration, reduce stress on birds, and increase the efficiency of vaccination programs.

Segmental Insights

Product Insights

In 2022, the category of attenuated live vaccines secured the largest portion of revenue. These types of vaccines are capable of stimulating the immune system to generate a higher quantity of antibodies compared to other vaccine varieties. Additionally, their protective effects last longer and guard against avian illnesses like infectious bronchitis, infectious bursal disease, and Newcastle disease. Furthermore, the growth of this segment is being boosted by the increasing research and development efforts, particularly in the field of vaccination, to combat outbreaks of the mentioned diseases.

In the upcoming years, the segments of recombinant vaccines and inactivated vaccines are expected to experience rapid growth. This is primarily driven by advancements in product development and the safety advantages offered by inactivated and recombinant vaccines when compared to live attenuated vaccines. For instance, Zoetis has an extensive range of poultry vaccines in its Poulvac brand, with poultry accounting for 18% of the company's livestock revenue in 2020.

Disease Type Insights

In 2022, the segment related to salmonella diseases accounted for the largest portion of revenue. Over the forecast period, the Egg Drop Syndrome (EDS) segment is anticipated to exhibit the most rapid Compound Annual Growth Rate (CAGR). This growth can be attributed to the high prevalence of Salmonella and Egg Drop Syndrome diseases among poultry animals. The predominant type of vaccine for salmonella consists of attenuated Salmonella strains, which function effectively and safely as oral carrier vaccines for preventing necrotic enteritis by expressing foreign antigens.

Market participants are actively engaged in research and development efforts to introduce new vaccines, aiming to expand their presence and market share. For instance, Venkys India offers a range of poultry vaccines, including the Salmonella polyvalent inactivated vaccine, designed to prevent and manage salmonellosis in layers, breeders, and broilers. KM Biologics includes OILVAX EDS-76 in its portfolio, which effectively combats egg drop syndrome.

Regional Insights

In 2022, Europe dominated in terms of revenue share. This can be attributed to several factors, including the presence of major industry players, growing efforts to combat the use of antimicrobial agents in animals, and escalating concerns about zoonotic diseases. The World Health Organization (WHO) has recognized antimicrobial resistance as a significant public health risk. Various public health organizations and

veterinary regulatory bodies, such as the Committee for Medicinal Products for Veterinary Use (CVMP), are responsible for implementing the EU's One Health Action Plan to address antimicrobial resistance. They do this by enacting policies outlined in the Veterinary Medicines Regulation.

On the other hand, the Asia Pacific region is projected to experience the most rapid CAGR during the forecast period. This can be attributed to the increasing awareness about poultry vaccines, a surge in vaccination awareness programs, and other factors such as heightened government initiatives and notable advancements in animal husbandry practices.

Key Market Players

Boehringer Ingelheim GmbH

Zoetis Inc

Elanco LLC

Intervet Inc

Hester Biosciences Ltd

Vaxxinova GmbH

Venky's India Ltd

Laboratorios Calier SA

KM Biologics Co Ltd

Phibro Animal Health Corp

Report Scope:

In this report, the Global Poultry Vaccines Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Poultry Vaccines Market, By Application:

Broiler

Layer

Breeder

Poultry Vaccines Market, By Product:

Attenuated Live Vaccines

Inactivated Vaccines

Subunit Vaccines

DNA Vaccines

Recombinant Vaccines

Poultry Vaccines Market, By Disease Type:

Infectious Bronchitis

Infectious Bursal Diseases

Infectious Laryngotracheitis

Egg Drop Syndrome

Adenovirus

Duck Viral Enteritis

Inclusion Body Hepatitis

Salmonella

Others

Poultry Vaccines Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Poultry Vaccines Market.

Available Customizations:

Global Poultry Vaccines market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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