

Poultry Vaccines Market Report by Disease (Infectious Bronchitis, Avian Influenza, Newcastle Disease, Marek's Disease, and Others), Product (Recombinant Vaccine, Live Attenuated Vaccine, Inactivated Vaccine, Subunit Vaccine, and Others), Dosage Form (Liquid Vaccine, Freeze Dried Vaccine), Application (Breeder, Broiler, Layer), End User (Veterinary Hospitals, Poultry Firm, Poultry Vaccination Center), and Region 2024-2032

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Report description:

The global poultry vaccines market size reached US\$ 1.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5.6% during 2024-2032. The growing awareness of disease prevention among poultry, the increasing demand for safe and disease-free poultry products, and the continuous technological advancements in vaccine development to ensure sustainable production are major factors driving the market growth.

Poultry vaccines are biological products specifically designed to protect domestic birds, such as chickens, ducks, and turkeys, from infectious diseases. It is formulated to trigger an immune response in birds, enabling them to develop immunity against specific pathogens, including viruses and bacteria. The vaccination process can be administered through different routes, such as injection, aerosol, or in the drinking water of the birds. Vaccination programs are customized to the specific disease risks prevalent in a region, and they are an integral part of biosecurity measures on poultry farms. Additionally, farmers can effectively mitigate disease outbreaks and ensure the sustainable and safe production of poultry products, by utilizing appropriate poultry vaccines. Nowadays, poultry vaccines are essential in maintaining the health and welfare of poultry populations. The market is primarily driven by the rising demand for biological products. In addition, the escalating demand for poultry

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products, including meat and eggs led to increased poultry production, thus influencing the market growth. In line with this, the growing poultry populations are necessitating the use of vaccines to protect the birds and maintain production levels, thus contributing to market growth. Moreover, the growing awareness among poultry farmers and producers about the importance of preventive healthcare measures, including vaccination, to ensure the well-being and productivity of their flocks represents another major growth-inducing factor. Along with this, vaccination is considered a cost-effective and efficient method to control and prevent the spread of infectious diseases, reducing the need for antibiotics and other treatments, thus propelling market growth. Besides this, the implementation of several government policies emphasizing the importance of food safety and animal welfare are accelerating the market growth. Furthermore, advancements in vaccine technology and research led to the development of more effective and targeted vaccines, improving their efficacy and safety profiles, thus creating a positive market outlook.

Poultry Vaccines Market Trends/Drivers:

The increasing poultry consumption

The rising demand for poultry products, such as chicken, meat, and eggs is influencing the market growth. In addition, the growing population, rapid urbanization, busy lifestyles of individuals are escalating the demand for poultry products, thus contributing to the market growth. Moreover, poultry farmers are turning to vaccination as a preventive measure to protect their flocks and ensure a steady supply of safe and disease-free products representing another major growth-inducing factor. Besides this, vaccines offer an effective and efficient way to protect poultry from infectious diseases, reducing the likelihood of outbreaks and associated production losses, thus accelerating market growth. Along with this, farmers can enhance bird health and productivity, leading to improved efficiency and profitability in the poultry industry by immunizing their flocks, thus propelling market growth. Apart from this, the rising poultry consumption has led to increased international trade of poultry and poultry products, thus propelling market growth.

The growing awareness regarding disease prevention

The growing incidences of infectious diseases in poultry populations are resulting in the widespread adoption of vaccines by farmers and producers to implement preventive measures to protect their flocks, thus influencing market growth. Moreover, farmers are increasingly investing in vaccination programs to safeguard their investments, control disease, and help reduce the incidence and severity of infectious diseases in poultry representing another major growth-inducing factor. Besides this, farmers can prevent disease spread and minimize production losses, ensuring a consistent supply of healthy poultry products to meet consumer demands by immunizing their flocks, thus accelerating market growth. Along with this, the increasing health-conscious and escalating demand for safe and high-quality food products is contributing to the production of safe and wholesome poultry products with the help of vaccines, thus propelling market growth. Furthermore, the growing awareness among consumers about the benefits of vaccinated poultry further drives the demand for poultry vaccines, encouraging producers to prioritize vaccination as a critical aspect of their disease prevention strategies.

The emerging technological advancements in vaccine development

The development of modern vaccines allows the production of vaccines with improved efficacy and longer-lasting immunity, providing better protection against numerous poultry diseases, thus contributing to market growth. Moreover, the continuous development in biotechnology, innovative approaches, and techniques are leading to the creation of more effective, safe, and targeted poultry vaccines representing another major growth-inducing factor. Besides this, the extensive advancements in vaccine delivery systems, such as adjuvants and vector-based vaccines, poultry vaccines can now trigger a more robust and specific immune response thus accelerating the market growth. Along with this, these breakthroughs led to the development of customized vaccines that can address the specific needs of various poultry species and regional disease challenges, thus propelling market growth. Furthermore, advancements in vaccine formulation led to the creation of more stable and temperature-tolerant vaccines, enhancing their shelf life and reducing the need for cold chain storage and transportation leading to easier distribution and accessibility of vaccines to poultry farmers, especially in remote or resource-constrained regions, thus creating a positive market outlook.

Poultry Vaccines Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global poultry vaccines market report, along with

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forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on disease, product, dosage form, application, and end user.

Breakup by Disease:

- Infectious Bronchitis
- Avian Influenza
- Newcastle Disease
- Marek's Disease
- Others

Newcastle disease represents the most common disease

The report has provided a detailed breakup and analysis of the market based on the disease. This includes infectious bronchitis, avian influenza, newcastle disease, marek's disease, and others. According to the report, Newcastle disease accounted for the largest market share.

Newcastle disease (ND) is a highly contagious viral disease that affects various avian species, including chickens, turkeys, and pigeons, leading to severe economic losses in the poultry industry. In addition, newcastle disease is a primary concern for poultry farmers and producers due to rapid transmission and devastating impact on poultry flocks, thus influencing the market growth. Also, outbreaks of ND can result in high mortality rates, reduced egg production, and decreased feed conversion efficiency, leading to substantial financial losses for the poultry industry, thus augmenting market growth. Along with this, vaccination is essential for preventive measures for poultry producers, to help build immunity against the virus, reduce the severity of infections, and minimize the spread of the disease among flocks, thus propelling the market growth. Besides this, the regular and timely vaccination of poultry populations is essential to protect against ND outbreaks and maintain flock health, thus accelerating market growth. Apart from this, poultry farmers are relying on these vaccines to ensure the well-being of their flocks, secure their investments, and maintain a steady supply of disease-free poultry products to meet consumer demands, thus providing a positive thrust to the market growth.

Breakup by Product:

- Recombinant Vaccine
- Live Attenuated Vaccine
- Inactivated Vaccine
- Subunit Vaccine
- Others

Live attenuated vaccine represents the most popular product

The report has provided a detailed breakup and analysis of the market based on the product. This includes recombinant vaccine, live attenuated vaccine, inactivated vaccine, subunit vaccine, and others. According to the report, live attenuated vaccines accounted for the largest market share.

Live attenuated vaccines are developed from weakened forms of pathogens that retain their ability to induce an immune response in the host without causing severe disease, thus contributing to market growth. Additionally, live attenuated vaccines have superior efficacy in providing long-lasting immunity against numerous poultry diseases, thus influencing market growth. These vaccines elicit humoral and cell-mediated immune responses, offering robust protection to poultry flocks. Moreover, live attenuated vaccines mimic natural infections, leading to a comprehensive and sustained immune defense, and can address several poultry diseases, including avian influenza, Newcastle disease, and infectious bronchitis representing another major growth-inducing factor. Besides this, live attenuated vaccines' ability to confer cross-protection against different strains of pathogens adds to their appeal among poultry farmers and producers, thus accelerating the market growth. Apart from their efficacy, live attenuated vaccines are generally cost-effective, making them an attractive choice for large-scale poultry production, thus propelling the market growth.

Breakup by Dosage Form:

- Liquid Vaccine

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-□Freeze Dried Vaccine

Liquid vaccine presently accounts for the largest market share

The report has provided a detailed breakup and analysis of the market based on the dosage form. This includes liquid vaccines and freeze-dried vaccines. According to the report, liquid vaccine accounted for the largest market share.

Liquid vaccines are known for their ease of administration and can be delivered through drinking water or by subcutaneous or intramuscular injection, making the vaccination process more straightforward and efficient. In addition, the ease of administration is particularly essential when vaccinating large flocks, as it minimizes the time and effort required for vaccination procedures, thus augmenting the market growth. Moreover, liquid vaccines offer better homogeneity and consistency in dosing, which are well-mixed in the vaccine solution, ensuring that each bird receives an accurate and uniform dose of the vaccine representing another major growth-inducing factor. This consistency is essential for achieving optimal immunization levels across the entire poultry population and maximizing the vaccine's efficacy.

Besides this, liquid vaccines can be more cost-effective than other dosage forms, as it involves lower manufacturing costs, and their efficient administration reduces the need for specialized equipment or additional labor, further accelerating the market growth. Furthermore, the convenience and reliability of liquid vaccines are contributing to their widespread adoption in the poultry industry as poultry farmers seek practical solutions to protect their flocks from diseases thus creating a positive market outlook.

Breakup by Application:

-□Breeder

-□Broiler

-□Layer

Broiler holds the leading position in the market

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes breeder, broiler, and layer. According to the report, broilers accounted for the largest market share.

Broilers are chickens that are specifically raised for meat production thus accelerating the market growth. In addition, the escalating demand for broiler meat due to its affordability, versatility, and nutritional value is contributing to the market growth. As the global population continues to grow, there is a higher need for efficient and sustainable protein sources, making broiler meat an attractive option for consumers and food industries. Moreover, the intensive nature of broiler farming, with large-scale commercial production, necessitates a strong focus on disease prevention and biosecurity representing another major growth-inducing factor. Along with this, broilers raised in confined spaces are more susceptible to infectious diseases due to high stocking densities, making vaccination an essential aspect of their health management is propelling the market growth. Besides this, broilers have a shorter production cycle compared to other poultry species, such as layers (egg-laying hens). This means that a larger number of broilers are produced and processed within a shorter timeframe, leading to an escalating demand for poultry vaccines to protect these birds from potential disease outbreaks that could impact production and profitability, thus creating a positive market outlook.

Breakup by End User:

-□Veterinary Hospitals

-□Poultry Firm

-□Poultry Vaccination Center

A detailed breakup and analysis of the market based on the end-user has also been provided in the report. This includes veterinary hospitals, poultry firm, and poultry vaccination center.

Veterinary hospitals are essential in the distribution and administration of poultry vaccines. They are essential in providing medical care and advice to poultry farmers and producers. In addition, they offer expertise in diagnosing diseases, prescribing suitable vaccines, and administering vaccinations to poultry flocks, thus contributing to the market growth. These establishments act as trusted sources of information and are pivotal in promoting the adoption of vaccination practices among poultry farmers. Moreover, poultry firms, including commercial poultry farms and integrated poultry companies, are significant consumers of

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poultry vaccines. These firms manage large-scale poultry operations and are highly invested in ensuring the health and productivity of their flocks. Along with this, vaccination is an integral part of their disease prevention and biosecurity strategies, as it helps protect the entire poultry population from infectious diseases, thus providing a positive thrust to the market growth. Poultry firms procure vaccines in bulk to immunize their vast flocks and minimize the risk of disease outbreaks that could lead to substantial production losses, thus influencing the market growth.

Besides this, poultry vaccination centers are specialized facilities dedicated to administering vaccines to poultry. These centers may be operated by private entities or government agencies. They cater to the needs of small-scale poultry farmers and backyard poultry keepers who may not have access to veterinary hospitals or lack expertise in vaccination procedures, thus accelerating the market growth. Poultry vaccination centers provide convenient access to vaccines, offer vaccination services, and assist in implementing proper vaccination schedules to ensure the health and well-being of the birds.

Breakup by Region:

- North America
 - o□United States
 - o□Canada
- Asia-Pacific
 - o□China
 - o□Japan
 - o□India
 - o□South Korea
 - o□Australia
 - o□Indonesia
 - o□Others
- Europe
 - o□Germany
 - o□France
 - o□United Kingdom
 - o□Italy
 - o□Spain
 - o□Russia
 - o□Others
- Latin America
 - o□Brazil
 - o□Mexico
 - o□Others
- Middle East and Africa

North America exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America is driven by the presence of advanced poultry farming practices, robust biosecurity measures, and a high level of awareness about disease prevention among poultry farmers, thus influencing market growth. In addition, the United States and Canada are the major contributors to the escalating demand for poultry vaccines, as these countries boast well-established poultry industries with a focus on modern production techniques and stringent biosecurity standards, thus accelerating market growth. Moreover, the widespread adoption of advanced vaccination programs is essential in protecting poultry flocks from infectious diseases, ensuring a continuous and reliable supply of poultry products to meet consumer demands, representing

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another major growth-inducing factor.

Besides this, in Europe market, countries such as the United Kingdom, Germany, France, and the Netherlands have well-developed poultry industries that prioritize disease prevention through vaccination, thus augmenting market growth. Along with this, in the Asia Pacific market, countries such as China, India, and Brazil are witnessing substantial growth in poultry production and consumption. As these regions experience an increase in poultry farming activities, there is a growing demand for poultry vaccines to mitigate disease risks and ensure the health and productivity of poultry flocks, thus creating a positive market outlook.

Competitive Landscape:

Nowadays, key players in the market are implementing various strategies to strengthen their position and gain a competitive edge in the industry. They are investing in research and development (R&D) to develop advanced and more effective poultry vaccines and exploring new technologies and innovative approaches to enhance vaccine efficacy, safety, and duration of immunity. Moreover, companies are forming strategic collaborations and partnerships with other industry stakeholders, such as research institutions, universities, and poultry associations, allowing companies to stay at the forefront of vaccine development and stay ahead of the competition. Besides this, key players are catering to a broader range of poultry diseases and species and expanding their product portfolios by introducing new vaccines targeting specific pathogens and adopting a more personalized approach to address regional disease challenges.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

- [] AniCon Labor GmbH (SAN Group) Biovac Ltd.

- [] Boehringer Ingelheim International GmbH

- [] Ceva Sante Animale

- [] Elanco

- [] Hester Biosciences Limited

- [] Merck & Co. Inc.

- [] Phibro Animal Health Corporation

- [] Venkys India

- [] Zoetis Inc.

Recent Developments:

- [] In January 2020, Boehringer Ingelheim International GmbH introduced the VAXXITEK HVT+IBD+ND vaccine to protect poultry against Newcastle disease, Marek's disease, and infectious bursal disease (classic and variant types). They produce VAXXITEK HVT+IBD+ND from its site which develops more than 60 billion doses of poultry vaccine a year for use in the U.S. and over 60 other countries.

- [] In October 2022, Zoetis Inc. launched Poulvac Procerta HVT-IBD-ND, a recombinant vector vaccine that offers early/robust protection against infectious bursal, Marek's, and Newcastle disease viruses with one dose, while expanding its poultry vaccine portfolio.

- [] In April 2022, Elanco, in collaboration with Ginkgo Bioworks, introduced a new animal healthcare company called BiomEdit to develop nutritional products, drugs, and disease-monitoring methods for livestock which aim to address antibiotic resistance and improve sustainability.

Key Questions Answered in This Report

1. What was the size of the global poultry vaccines market in 2023?
2. What is the expected growth rate of the global poultry vaccines market during 2024-2032?
3. What has been the impact of COVID-19 on the global poultry vaccines market?
4. What are the key factors driving the global poultry vaccines market?
5. What is the breakup of the global poultry vaccines market based on the disease?
6. What is the breakup of the global poultry vaccines market based on the product?

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7. What is the breakup of the global poultry vaccines market based on the dosage form?
8. What is the breakup of the global poultry vaccines market based on the application?
9. What are the key regions in the global poultry vaccines market?
10. Who are the key players/companies in the global poultry vaccines market?

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