

# POULTRY VACCINES MARKET INDIA

Comprehensive Market Report  
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*Poultry Vaccines | Domestic + Imports*

Base Year  
**FY 2024-25**

Published  
**May 2026**

## 1. Executive Summary

India's poultry vaccines market stands at a pivotal inflection point. Driven by the rapidly expanding poultry segment and at the same time challenged by repeat outbreaks of HPAI / LPAI, the poultry vaccines market presents one of the most compelling growth stories in the global poultry vaccines industry.

## 2. Market Overview & Macro Context

### 2.1 India's Animal Population Landscape

India commands one of the world's most significant animal agriculture sectors. The country is the world's largest milk producer (contributing ~24% of global production), houses the largest bovine population globally, and has the third-largest poultry layer sector in the world while 5<sup>th</sup> largest in broiler meat production. These fundamentals create a structurally large and growing demand base for preventive veterinary healthcare specifically vaccines.

Species / Sector	Population / Scale	Significance
Cattle & Buffalo	~19.3 Cr cattle + ~11 Cr buffalo	World's largest bovine herd; FMD/Brucella vaccine demand
Sheep	~7.4 Crore	PPR, FMD, BQ vaccine demand
Goats	~14.9 Crore	PPR, FMD vaccine demand; fastest-growing ruminant segment
Swine / Pigs	~90 Lakh	CSF, FMD, Brucella in pigs
Poultry (Commercial)	~8+ Billion birds/year	World's 3rd largest; intense vaccine use
Dogs (Pet + Stray)	~35 Crore (incl. strays)	Anti-rabies drives; growing pet care market
Cats	~15 Million+	Fastest-growing companion animal segment

## 3. Poultry Vaccines Market

### 3.1 Market Size & Growth

Metric	Data
Market Size (2024)	USD 190–200 Million ( 1 USD = INR 90)
Market Size (2023)	USD 180 -185 Million (AHI Estimates)
Projected Market (2030)	USD 280 - 285 Million (AHI Estimates)
CAGR (2025–2030)	~7% (AHI Estimates)
India's Global Poultry Vaccine Share	~9% (2023)

Metric	Data
India CAGR vs Global	India expected to register highest CAGR among all countries
Dominant Vaccine Type	Live Attenuated (largest); Inactivated fastest-growing, strong growth expected in LPAI H9N2

### 3.2 Key Poultry Diseases & Vaccine Demand

Disease	Causative Agent	Vaccine Type	Market Significance
Newcastle Disease (ND)	Paramyxovirus	Live (Clone, La Sota, B1) + Killed and combinations	Largest segment ~25% of poultry vaccine revenue; mandatory in commercial flocks
Infectious Bursal Disease (IBD/Gumboro)	Birnavirus	Live attenuated + Inactivated + Vectored (fast growing)	High priority; affects broilers and layers; Immune-suppressive disease
Infectious Bronchitis (IB)	Coronavirus	Live attenuated; multi-serotype, variant vaccines	Growing threat; Ceva launched Cevac IBird (India, 2022)
Marek's Disease	Herpesvirus	HVT-based vectored (in ovo)	Standard in hatcheries; MSD/Zoetis/BI in dominant positions
Avian Influenza (AI)	Influenza A H5/H9	Inactivated; vectored is not approved yet but significant attempts to get approvals	Emerging; Merck launched AI vaccine (Nov 2025); regulatory challenge
Coccidiosis	Eimeria spp.	Live oocyst vaccine	Growing with shift from anticoccidials; BI launched Vaxxilive Cocci 3 (Jan 2024)
Fowl Pox	Poxvirus	Live attenuated	Standard in layers
Avian Encephalomyelitis (AE)	Picornavirus	Live vaccine	Breeder flocks
Salmonellosis	Salmonella spp.	Inactivated polyvalent	Food safety driver; Venky's leads in India
Infectious Laryngotracheitis (ILT)	Herpesvirus	Live attenuated	Niche; growing awareness
Reovirus	Orthoreovirus	Inactivated	Tenosynovitis / broiler mortality; Breeder vaccination
Mycoplasma	Mycoplasma gallisepticum	Live as well as Inactivated	MSD / Zoetis dominate the segment – breeder vaccines

### 3.3 India's Poultry Industry Context

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- India is the world's 3rd largest egg producer and one of the top 5 broiler producers globally.
- India has ~ 350 million layers with more than 65% replacement
- Broiler population is 4.8 – 5.0 billion
- Poultry meat production: ~4.23 million tonnes (2019); egg consumption grew from 34 billion (2000) to 106 billion (2020).
- Intensive commercial farming (integrators: Suguna, Venky's, IB Group, Skylark and Srinivasa Hatcheries) drives high vaccine uptake.
- India is expected to register one of the highest CAGRs globally in the poultry vaccines market through 2030 (AHI estimates).

### 3.4 Recent Industry Developments (2024–2026)

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- December 2025: Zoetis announced a partnership with a leading Indian agricultural university to develop next-generation vaccines for local poultry breeds.
- November 2025: Merck Animal Health (MSD) launched a new vaccine targeting avian influenza in India, reinforcing its position in the growing AI segment.
- October 2025: Hester Biosciences expanded its distribution network through a strategic alliance with veterinary clinics across multiple states.
- February 2025: Boehringer Ingelheim launched VAXXITEK HVT+IBD+H5 — a trivalent vaccine protecting against Marek's, IBD, and H5 avian influenza in a single dose (globally; India rollout pending/ being evaluated basis regulatory hurdle for H5 vaccine).
- April 2022: Ceva launched Cevac IBird for Infectious Bronchitis disease control in India — reflects multinationals' increasing local product launches.

## 4. Companies: Manufacturers & Marketers in India

### 4.1 Domestic Manufacturers

#### A. Hester Biosciences Limited

Attribute	Details
Founded	1997 by Rajiv Gandhi (CEO & MD); publicly traded (BSE/NSE)
HQ	Ahmedabad, Gujarat; Plants in Gujarat (Kalol) and Nepal (Africa unit)
Position	2nd largest poultry vaccine manufacturer in India; Asia's leading animal vaccine exporter
Key Products	ND vaccines (La Sota, B1, Clone 30), IBD (Intermediate, Classic), IB, Fowl Pox, Marek's, Salmonella
Livestock Portfolio	Brucella (>60% India market share historically), PPR, FMD, HS, BQ vaccines
Companion Animal	Anti-rabies; expanding into companion care products
Africa Expansion	Set up Africa manufacturing unit in 2021; major exporter to Tanzania, Kenya, other African nations
R&D	Collaborated with IIT Guwahati on COVID-19 vaccine; active partnerships with international organizations
Recent (April 2025)	Announced expansion of poultry vaccine manufacturing facilities for domestic & export demand

#### B. Venkys (India) Limited — VH Group

Attribute	Details
HQ	Pune, Maharashtra
Group Profile	One of India's largest poultry integrators (Venkateshwara Hatcheries Group)
Vaccine Focus	Poultry vaccines for own flock + commercial market; Salmonella polyvalent inactivated vaccine
Key Products	ND, IBD, IB, Marek's, Salmonella polyvalent vaccine (layers, breeders, broilers)
Vertical Integration	Unique captive demand via own broiler/layer operations

## C. Indovax Private Limited

Attribute	Details
HQ	Hisar, Haryana
Focus	Livestock vaccines; technical collaboration with research institutions
Key Products	FMD vaccines, HS, PPR vaccines
Background	Technology transferred from IVRI, Mukteshwar; licensed manufacturer

## Multinational Companies Operating in India

### A. Zoetis India Limited

Attribute	Details
Global Rank	#1 animal health company globally (~22% global vaccine market share)
India Operations	Zoetis India Limited; HQ Mumbai; commercial + regulatory presence
Livestock Products	FMD vaccines (under licensing), cattle respiratory vaccines
Poultry Products	Poulvac series (ND, IB, IBD, Marek's); Poulvac Procerta HVT-IBD
Companion Products	Vanguard (canine combo vaccines), Defensor 3 (rabies), Canine parvovirus vaccines
Recent (May 2025)	Enhanced companion animal vaccine portfolio with advanced recombinant solutions for urban vet clinics
Recent (Dec 2025)	Partnership with Indian ag university for next-gen poultry vaccines for local breeds
Technology	HVT-vectored, recombinant, mRNA platform investment ongoing

### B. Boehringer Ingelheim Animal Health India

Attribute	Details
India Presence	Boehringer Ingelheim Animal Health India Pvt. Ltd; strong regulatory & commercial operations
Livestock	FMD formulations; ruminant health portfolio
Poultry	VAXXITEK HVT+IBD (Marek's/IBD combo); VAXXITEK HVT+IBD+H5 (trivalent, 2025); next-gen cocci vaccines
Companion Animals	EURICAN L4 (Leptospirosis); Purevax (feline, recombinant)
Technology	Vectored vaccines, recombinant platform, in-ovo delivery systems

### C. MSD Animal Health India (Merck Animal Health)

Attribute	Details
India Operations	Merck Limited / MSD Animal Health; significant commercial presence
Poultry Portfolio	Nobilis series (ND, IBD, IB, Marek's, AI); Poulvac (through partnership), NOBILIS MULTRIVA RT+IBm+ND+Gm+REOm+EDS
Companion Animals	Nobivac canine & feline range: DHPPI, L4, Rabies, KC, FeLV; globally NOBIVAC NXT Rabies launched (2024)
AI Vaccine (Nov 2025)	Launched new vaccine targeting avian influenza in India — significant market development
Distribution	Strong vet clinic and distributor network across India

### D. Ceva Animal Health India Pvt. Ltd

Attribute	Details
India Operations	Ceva Animal Health India; offices in Mumbai/Pune
Poultry Focus	Strong poultry portfolio; India poultry market a strategic priority
Key Products	Cevac IBird (IB — launched in India April 2022), Cevac ND K (Newcastle), IBD formulations, Marek's
Livestock	Select ruminant and swine vaccines
Strategy	Deep commercial partnerships with Indian poultry integrators; local market customization

### E. Elanco India Private Limited

Attribute	Details
India Operations	Elanco Animal Health; offices in Mumbai
Poultry Products	AviPro series (ND, IB, IBD vaccines); presence in layer, broiler, breeder segments
Farm Animals	Ruminant vaccines, swine health including Maxiban (poultry coccidiostat)
World Vaccine Congress 2026	Elanco senior leadership presented vaccine pipeline at World Vaccine Congress 2026 (April 2026)
Products	Credelio, Zenrelia (companion) — expanding companion animal portfolio globally

## F. Other Notable Players in India

Company	Type	Key Focus	Notable Products/Activities
Phibro Animal Health (via ZENEX ANIMAL HEALTH)	MNC	Poultry nutrition & health	Erstwhile ABIC of Israel, Poultry vaccines; excellent distributor network in India, well established IBD Vaccines franchise
HIPRA India Pvt. Ltd	MNC (Spain)	Companion + Poultry	Companion rabies; poultry vaccines; ambient-stable technologies
Globion India Pvt. Ltd	Domestic	Poultry	ND, IBD, IB vaccines for commercial poultry
Biomed Healthcare	Domestic	Livestock + Poultry	HS, BQ, FMD and poultry biologicals

## 5. Sales / Revenues of Leading Poultry Vaccine Companies (FY 2024-25) EST.

Company	Domestic Mfg / Imports	Revenues	Comments
Venkys India – Ventri Biologicals	Domestic Manufacturing	~ Rs. 430 Cr	Large in-house usage, being a major Vencobb and Cobb Breeding Company
Hester Biosciences	Domestic Manufacturing	~ Rs. 170 Cr	Commercial Broilers and Layers vaccines, small presence in Breeder vaccines
Indovax	Domestic Manufacturing	~ Rs. 120 Cr	Commercial Broilers and Layers vaccines, small presence in Breeder vaccines
GLOBION (acquired by Virbac)	Domestic Manufacturing	~ Rs. 110 Cr	Formerly part of Suguna Poultry group, acquired by Virbbac in Late-2023, large in-house usage
BIOMED	Domestic Manufacturing	~ Rs. 60 Cr	Focussed on a few specialty New Cstle Disease vaccines and vaccines for back-yard chickens
MSD INDIA	Imports	~ Rs. 290 Cr	Very attractive, high value portfolio of poultry vaccines, for breeders, layers and broilers, well established distribution network

Comapny	Domestic Mfg / Imports	Revenues	Comments
ZOETIS INDIA	Imports	~ Rs. 200 Cr	From in-ovo vaccines to breeder vaccines, specialty vaccines portfolio
CEVA SANTE INDIA	Imports	~ Rs. 150 Cr	Extensive services and concepts like Hatchery Vaccination
ZENEX ANIMAL HEALTH (Phibro/ ABIC Vaccines)	Imports	~ Rs. 140 Cr	Well established IBD Vaccines franchise, growing acceptance
BOEHRINGER INGELHEIM INDIA	Imports	~ Rs. 110 Cr	Specialty Marek;s Disease Vaccines, ND and combination vaccines
HIPRA INDIA	Imports	~ Rs. 50 Cr	Newest player, growing portfolio and presence across India

**Sources of data:** Investor reports, stock market filings, MCA Filings, Press reports and Distributors; Feedback

## 6. Regulatory Framework

### 6.1 Regulatory Authorities

Authority	Role
Central Drug Standard Control Organisation (CDSCO)	Licenses veterinary biological products (vaccines); approval for new animal drugs and biologicals under the Drugs & Cosmetics Act 1940
Department of Animal Husbandry & Dairying (DAHD)	Policy, programs (NADCP, LHDCP), procurement of vaccines for government programs
State Animal Husbandry Departments	Procurement at state level; implementation of central vaccination programs
ICAR Institutes (IVRI, NIHSAD, NIFMD, NIVEDI)	R&D, technology development, seromonitoring, disease surveillance, Vaccines Testing
Directorate General of Foreign Trade (DGFT)	Governs import/export of veterinary biologicals

## 6.2 Key Regulatory Requirements

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- All animal vaccines must be licensed under Schedule Y/Biologicals guidelines of the Drugs & Cosmetics Act.
- Imported vaccines require CDSCO approval; some are restricted or require special license.
- Good Manufacturing Practices (GMP) compliance is mandatory for all licensed manufacturers.
- Novel vaccines (recombinant, vectored, mRNA) face extended review timelines but CDSCO has been responsive to NADCP-driven urgencies (e.g., fast-tracking LSD vaccines).
- India has no mRNA-based animal vaccines approved yet; regulatory pathway being developed.

## 7. Key Market Challenges & Restraints

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- Cold chain infrastructure: Temperature excursions affect vaccine efficacy, especially in rural areas; WHO audits noted up to 40% excursion rates in Asia in 2024
- Low awareness in rural areas: back yard farmers often unaware of vaccination schedules – serve as potential reserve pool for spread of diseases to commercial flocks
- Price sensitivity: private market margins under constant pressure
- Disease strain variation: AVIAN INFLUENZA strain diversity as well as virulence requires better vaccines
- Regulatory delays: Novel vaccine technologies (vectored, mRNA, recombinant) face longer approval timelines
- Competition from antibiotic treatment: Some farmers prefer treatment over prevention despite WOAH's AMR warnings

## 8. Emerging Opportunities

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- Avian Influenza vaccines for poultry: As India's H5N1 situation evolves, demand for licensed AI vaccines will grow rapidly
- Thermostable vaccines: Eliminate cold chain requirement; critical for rural India; HIPRA's ambient-stable rabies technology signals future
- Combination/multivalent vaccines: Farmers and flock owners prefer fewer injections; combination products (e.g., HVT+IBD+H5 in one dose) represent strong growth area
- mRNA technology platform: India positioned to leverage its pharma manufacturing base for next-gen poultry vaccines

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*DISCLAIMER: This report is compiled from publicly available market research, company disclosures, government publications, stock market filings, information memorandums and industry news. Market size figures represent a synthesis of multiple research sources and may vary. This report is intended for informational and strategic planning purposes only.*

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