VACCINES IN THE US COMMERCIAL POULTRY INDUSTRY

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### US COMMERCIAL POULTRY INDUSTRY

- Broilers: 8,600,000,000
- Commercial Layers: 305,000,000
- Broilers Breeders: 54,000,000
- Layer Breeders: 3,560,000
- Commercial Turkeys: 235,000,000
- Turkey Breeders: 3,000,000
# Poultry Vaccines - Doses 2014

1,000's 1K Doses

<table>
<thead>
<tr>
<th>Type</th>
<th>Doses Sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>MLV</td>
<td></td>
</tr>
<tr>
<td>Viral</td>
<td>32,955</td>
</tr>
<tr>
<td>Bacterial</td>
<td>2,225</td>
</tr>
<tr>
<td>INACTIVATED</td>
<td></td>
</tr>
<tr>
<td>Viral</td>
<td>517</td>
</tr>
<tr>
<td>Bacterin</td>
<td>223</td>
</tr>
<tr>
<td>PROTOZOAAL</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>36,516,000,000</td>
</tr>
</tbody>
</table>
US POULTRY VACCINE SALES - US DOLLARS X1000

- AUTOGENOUS $12,500
- INACTIVATED 35,000
- MLV 140,000
- TOTAL $187,500

A $187.5 Million Business
ISSUES WITH POULTRY VACCINES

- HIGH VOLUME/LOW COST
  - 1K, 10K, 25K dose vials

- MASS APPLICATION
  - Water
  - Spray

- DILUTING (CUTTING) VACCINES
  - MLVs
  - RECOMBINANTS

- ADJUVANTS
  - OIL BASED
  - WOW
  - BACTERINS-ANTIGEN LEVELS/ENDOTOXINS
  - TESTING- SPF
ISSUES WITH POULTRY VACCINES

- AUTOGENOUS
  - EXTENSIVE USE
  - EMERGING PATHOGENS
  - IN HOUSE VACCINE PRODUCTION

- EFFICACY
  - DISEASE v. INFECTION

- COST v. RISK
  - ECONOMICS VERY CRITICAL
  - SMALL PROFIT MARGINS
  - LARGE NUMBERS
  - VERY COMPETITIVE
  - INDUSTRY DECIDES HOW TO USE PRODUCT