



Ecosystem Assessment: Antibiotic Resistance in Poultry

Case Study

Case study: Ecosystem Assessment: Antibiotic Resistance in Poultry

Client	A leading poultry-based products producing company
Industry	Food production and agriculture
Products	Whole poultry and processed poultry products

Context

- The client wanted to understand the following:
 - Trends in antibiotic usage and alternative solutions to reduce antibiotic usage in poultry
 - Competitive landscape on the Antibiotic Resistance in Poultry (ARP) and various solutions offered by leading competitors to avoid antibiotic resistance
 - Identify the unmet needs in ARP and current technologies addressing them
 - Market size of the antibiotic consumption in poultry and potential for future growth

Key Business Questions

- What is the state-of-the-art related to antibiotic consumption worldwide and which countries are leading?
- What are the alternate approaches adopted by major players to avoid antibiotic resistance in poultry?
- Which are the leading corporates, start-ups, and research institutes working in this space?
- What are the unmet needs in the space and which technologies are addressing these unmet needs?
- What are the major challenges and potential opportunities in prevention of poultry's infection?

Engagement Scope

1

Technology Overview

- What is the state-of-the-art related to antibiotic consumption in poultry?
- Which are the most commonly used antibiotic in poultry care?
- Which are the top antibiotics that have shown resistance in poultry care?
- What are the innovative solutions alternate to antibiotic in poultry farming?
- What are the unmet needs in mitigating antibiotic resistance in poultry care?

2

Market Overview

- How is the antimicrobial sale in terms of geography (the US, EU-5, and APAC)?
- How is the antibiotic resistance spread across these geographies?
- What is the antibiotic consumption rate in poultry - turkeys, broilers, and ducks?
- Which are the top selling products (non-antibiotic) based on volume and value?
- What is the potential market opportunity area in ARP?

3

Competitive Intelligence

- Who are the major players providing alternate solutions to antibiotics?
- Which companies and research institutes are working in collaboration?
- What are the major focus areas of these competitors?
- What are the drivers and challenges in ARP?
- What could be the future trend in short, mid, and long-term?

4

Key Findings and Conclusions

- Promising novel solution alternate to antibiotic in poultry care
- Ranking of players owning to these solutions
- Comparative ranking of ARP based on application, market, and potential
- IP strength of leading companies
- Future outlook of ARP
- ARP addressing poultry care challenges

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Research Methodology

Secondary Research

- Desk research conducted to study company websites, annual reports, press releases, etc.
- Public & proprietary databases, market report, blogs etc.

Patent Research

- Orbit, USPTO, Espacenet, and Patentscope

Literature Research

- Web of Science, VetCare Journals, Research Journals, and Health/Poultry Research Journals
- ScienceDirect, Pubmed, Wiley Online Library, etc.

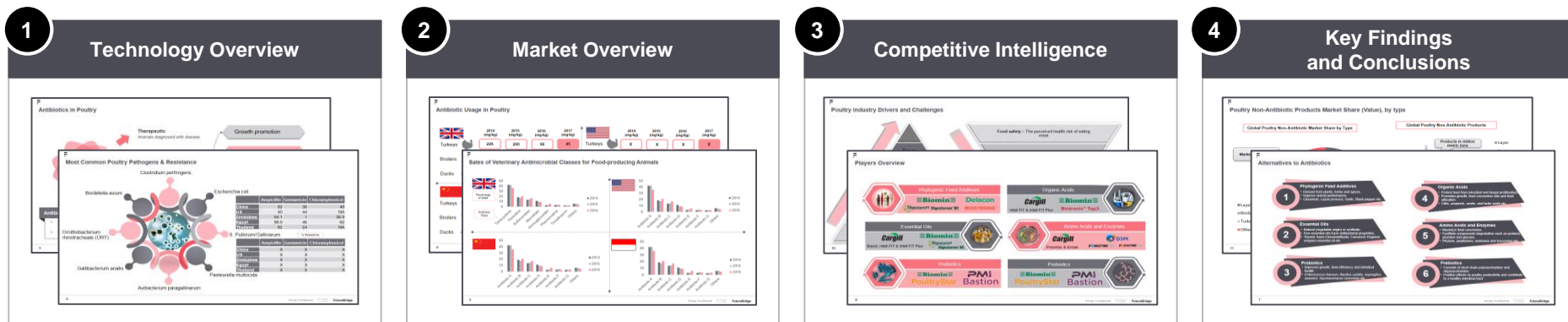
Primary Research

- Detailed 30 interviews – healthcare/nutrition experts, market experts, KOL (poultry) & market participants
- 150 web-surveys

Benefits to Client

- Client received various non-antibiotic solutions for poultry care and farming
- Identification of breakthrough technologies/solutions addressing unmet needs in ARP
- Market size on antimicrobial sales for the US, EU-5, and APAC
- Competitive landscape on ARP – value, volume, and stakeholders
- Regulatory challenges and bottlenecks for upcoming novel ARP solutions
- Future outlook and poultry care challenges due to antibiotic resistance

Sample Analysis



Thank you

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