Elanco

HTSi™ ANNUAL REPORT 2026

HTSi

Elanco

HTSi

PROACTIVE INSIGHTS OPTIMISING DECISIONS AT ALL LEVELS.

WHAT IS HTSi?

Developed to enable poultry businesses to make informed decisions towards future improvements, Elanco's Health Tracking System (HTSi) is an established, independently verified[1] and data-led broiler benchmarking platform.

Report created from 2025 data

GLOBALLY RECOGNISED

HTSi monitors the health and performance of birds, incorporating multiple lesions to assess intestinal health, respiratory stability, locomotor function and bird welfare.

ALL KEY AREAS OF BIRD HEALTH ANALYSED
A full assessment that recognises the importance of gastrointestinal health, enabling informed decisions

PROVEN BUSINESS BENEFITS
Profitability, bird health, welfare and environmental

BESPOKE INTESTINAL INTEGRITY (I^2) INDEX
Offering consistent and easy to compare intestinal health data

IN-PERSON EXPERTISE
Farm visits by the knowledgeable HTSi team guarantees ready access to the best expertise and individualised advice

ESTABLISHED
Improving poultry production for 30 years

UNRIVALLED BREADTH AND DEPTH OF DATA
Providing meaningful benchmarking information, at any level of detail, for accurate predictive modelling

For poultry industry leaders who seek to continuously improve their business, HTSi is a data management platform that enables better understanding of flock health to drive timely, data-based decisions and robust benchmarking, leading to improved performance and profitability.

BEST PRACTICE

HTSi enables producers to monitor the general health of their birds. Establishing trends requires consistent HTSi sessions, as well as a selection of birds that represent the company. This means including birds with a wide age range and from a variety of farms, to ensure that data captured is representative of the whole flock health.

HTSi IS:

- A valuable tool to help poultry producers monitor trends, opportunities and focus areas
- A way to identify and overcome challenges at a granular level
- A robust benchmarking system, allowing meaningful conclusions to be drawn and more insightful business decisions to be made

HTSi IS NOT:

- A diagnostic tool
- A replacement for a vet
- A way to investigate clinical disease

FAQ: WHY DO WE LOOK AT "HEALTHY" BIRDS?
HTSi is not a diagnostic tool and should be used to assess the health of average birds in a shed. When used continuously, this creates a pool of data that represents the standard birds in a region, or company, which in turn allows us to use predictive modelling to work out what is "normal" for the region or company. HTSi can then identify when any flock of birds are outside of what is expected.

UNDERSTANDING INTESTINAL INTEGRITY

INTESTINAL INTEGRITY (I^2)

Developed to consistently and reliably assess intestinal health, the Intestinal Integrity (I^2) index has been twice independently validated.[1,2] It assesses 23 different intestinal health lesions via a unique weighted algorithm to give a score out of 100.

For every increase of one unit of I^2:

- **ADG** increases by **0.04g**[1]
- **EPEF** increases by **0.52**[1]
- **FCR** decreases by **0.13pts**[1]
- **liveability** increases by **5%**[2]

PROVEN BUSINESS BENEFITS

At current feed prices[3], a poultry company producing 100 million broilers a year, partnering with Elanco to improve the I^2 score by 5 points could mean an income boost of:

£480,480[4]

By understanding the current challenges and seasonal trends, proactive intervention can reduce potential losses. Using HTSi can help identify opportunities to improve ADG, FCR, EPEF and percent liveability.

- Healthier intestinal tract
- Decreased feed costs
- More efficient absorption of dietary nutrients
- Reduction in waste excretion

"The I^2 index, combined with information contained in the HTSi database could be used to identify the yield gaps in production and suggest possible interventions to close these gaps."

Alexandra L. Swirski et al., Novometrix Research Inc.

2025 IN THE UK

NUMBERS BEHIND THE TRENDS

As part of Elanco's value adding HTSi, the team continued to travel around the UK, collecting meaningful data to provide customers with trusted expertise and information to make better business decisions.

6,144 birds
necropsied

180 farms
446 houses

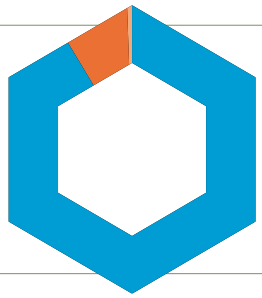
8 broiler companies
covered

By a team of
7 Technical Experts

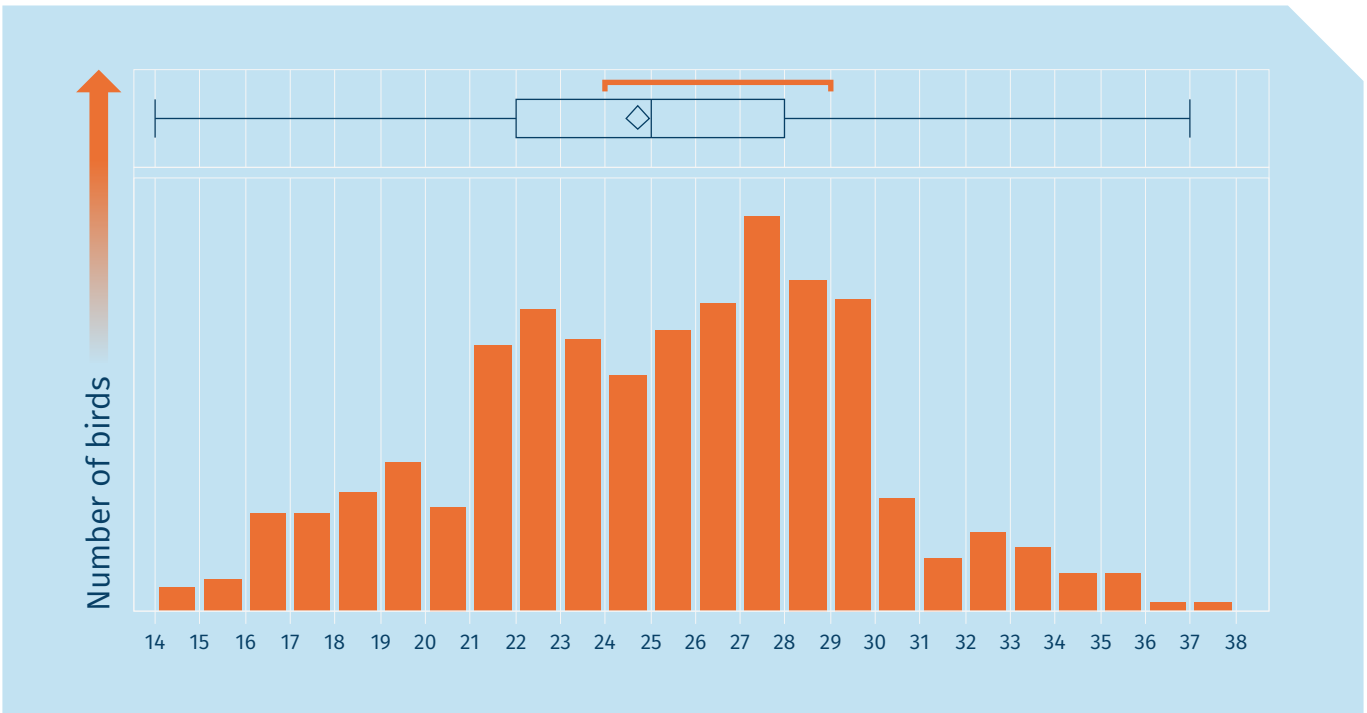
POSTINGS BY AGE

Birds included in the 2025 HTSi sessions ranged from 14 to 37 days of age, averaging 24.7 days. Most sessions were held between 21 and 29 days. Our extensive database ensures a wide range of bird ages can be covered, allowing insights into intestinal health at most ages.

Ross - 91.4%
Hubbard - 8.2%
Cobb - 0.4%

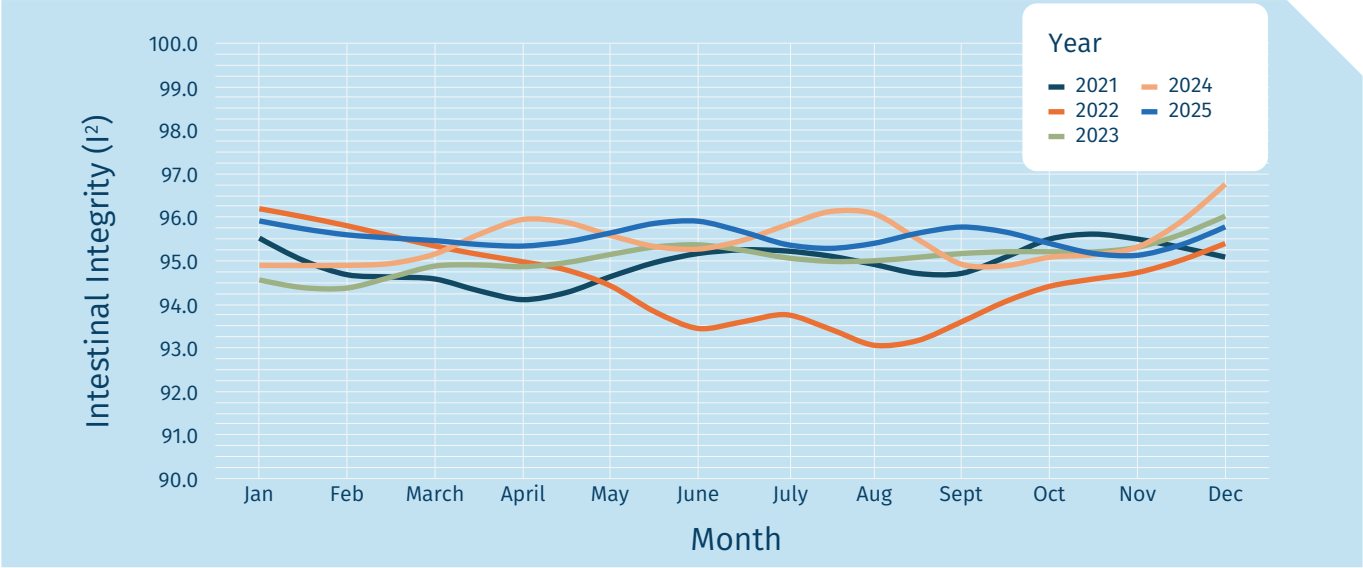


A slight increase in Hubbard breed birds was seen compared to data collected in 2024.



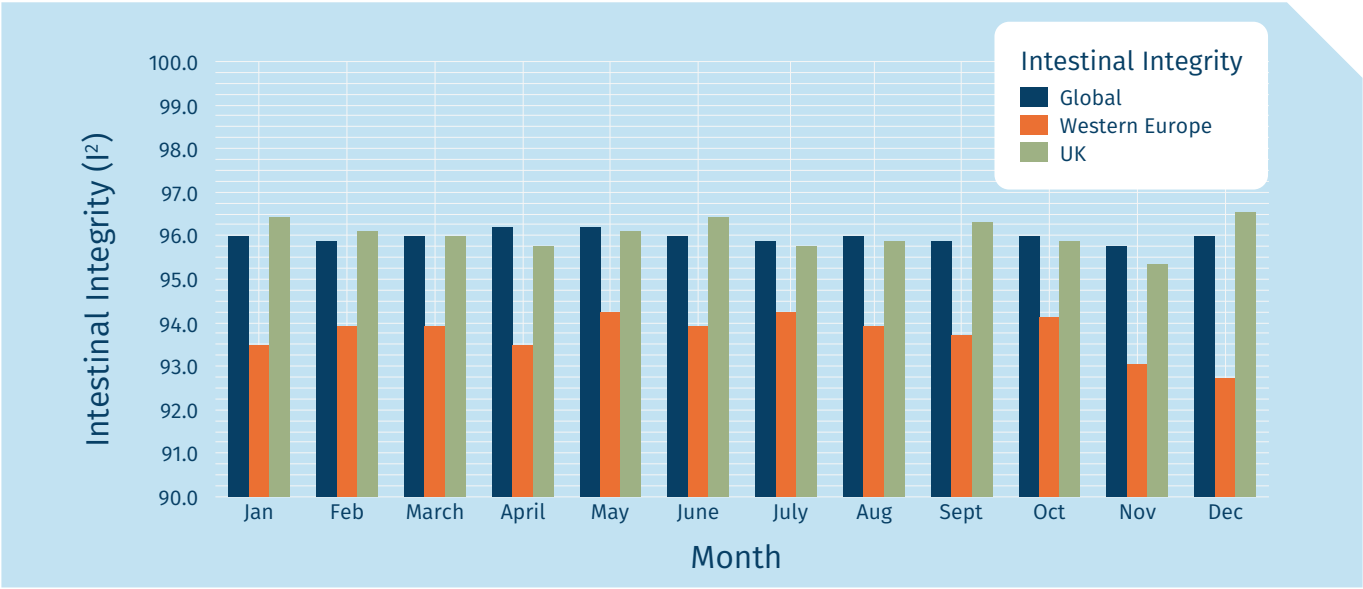
INTESTINAL INTEGRITY

KEY TRENDS OVER TIME



The I² score for 2025 averaged 95.56, the highest average of the past five years. Whilst there were some minor fluctuations throughout the year, the range of 0.88 suggests a stable year for intestinal health in the birds sampled. Where I² decreased slightly over the spring and summer months, the main contributor was *E. acervulina*, followed by enlarged proventriculi that were most prevalent in July. However, where slight decreases to I² were detected in winter, gizzard erosions, excessive watery content and excessive intestinal mucus impacted the most.

I² ACROSS EUROPE



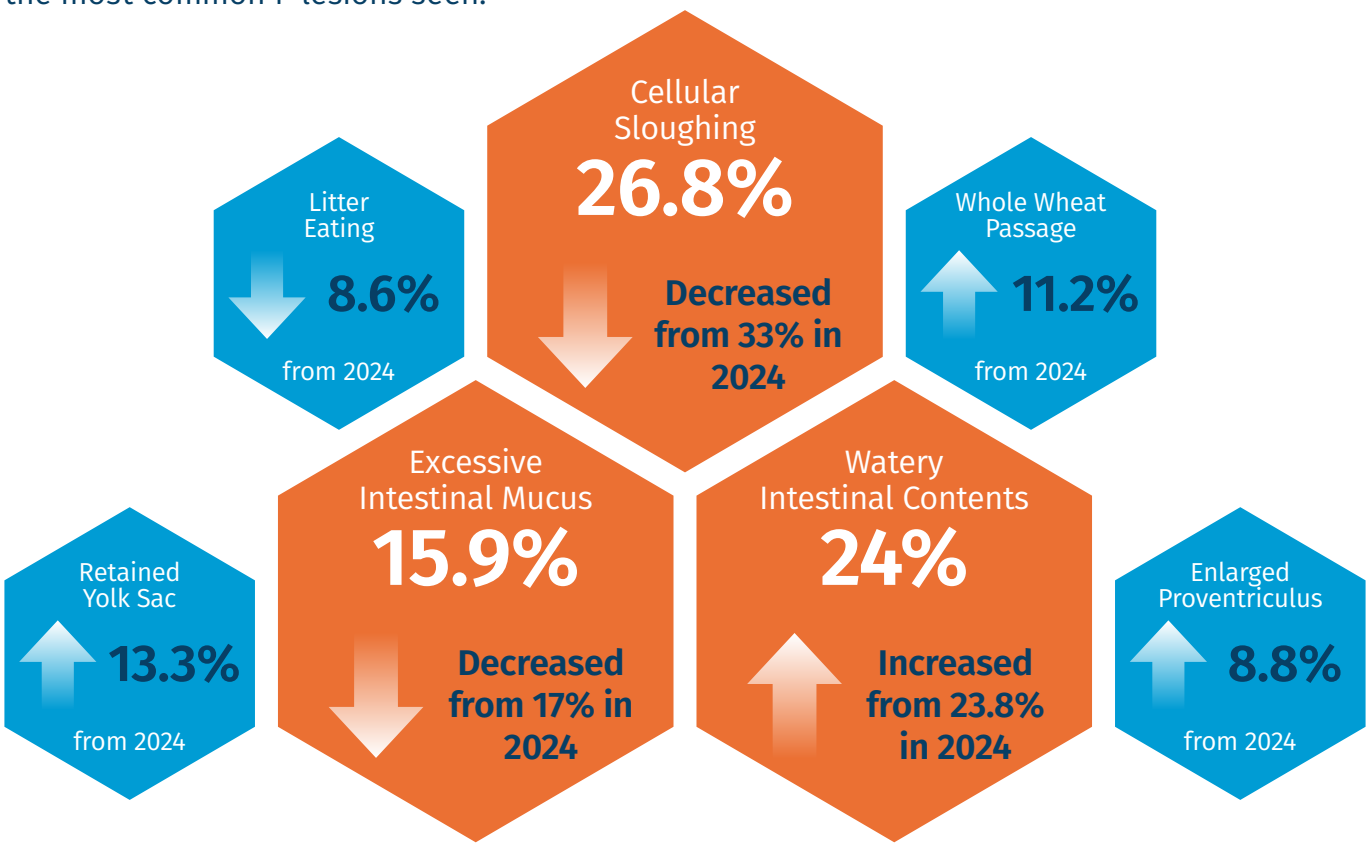
The I² score across the UK is on average higher than the total global index, as well as western Europe's average. Globally, I² is stable, similar to the UK, with only slight fluctuations. Although still relatively high, western Europe's average is consistently below that of the UK, experiencing poorer intestinal health during the winter months. This data includes all HTSi birds, including various breeds, anticoccidial programmes and market types.

INTESTINAL INTEGRITY

A total of 23 different lesions sit behind the Intestinal Integrity score. The data below show the most common lesions, aside from coccidiosis, seen in HTSi sessions in 2025.

KEY CONTRIBUTORS

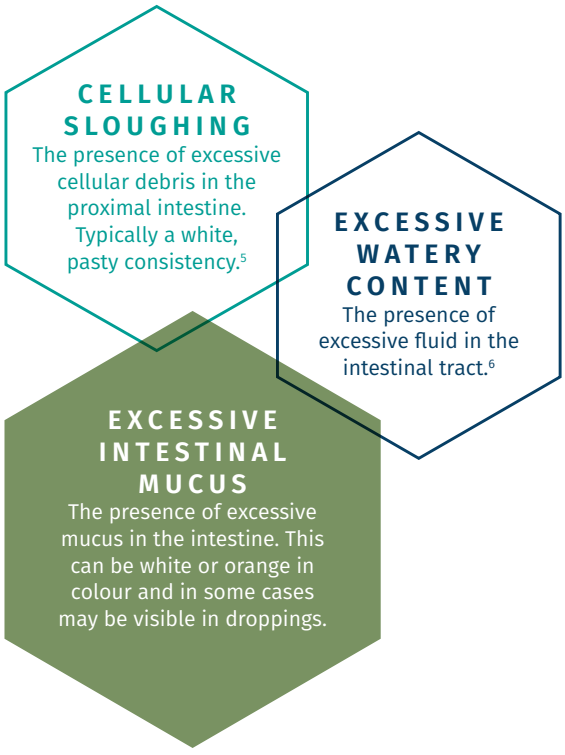
Excessive intestinal mucus, cellular sloughing and watery intestinal content remained the most common I[2] lesions seen:



Closely linked, cellular sloughing, excessive intestinal mucus and excessive watery content are critical indicators of intestinal health.

Cellular sloughing reflects increased cell turnover, which can lead to decreased absorption and compromised gut microbiome.[5] Whilst mucus production is a normal digestive function, certain diseases and feed toxins can stimulate excessive production, which can feed *Clostridium perfringens* – the leading cause of necrotic enteritis. Excessive watery content can signal electrolyte or mineral imbalances in the diet, as well as secondary intestinal damage. This may result in an accelerated feed transit time, hindering nutrient uptake.[6]

Preventing intestinal disease, ensuring quality feed ingredients and feed storage on farm can reduce the risk.[5]

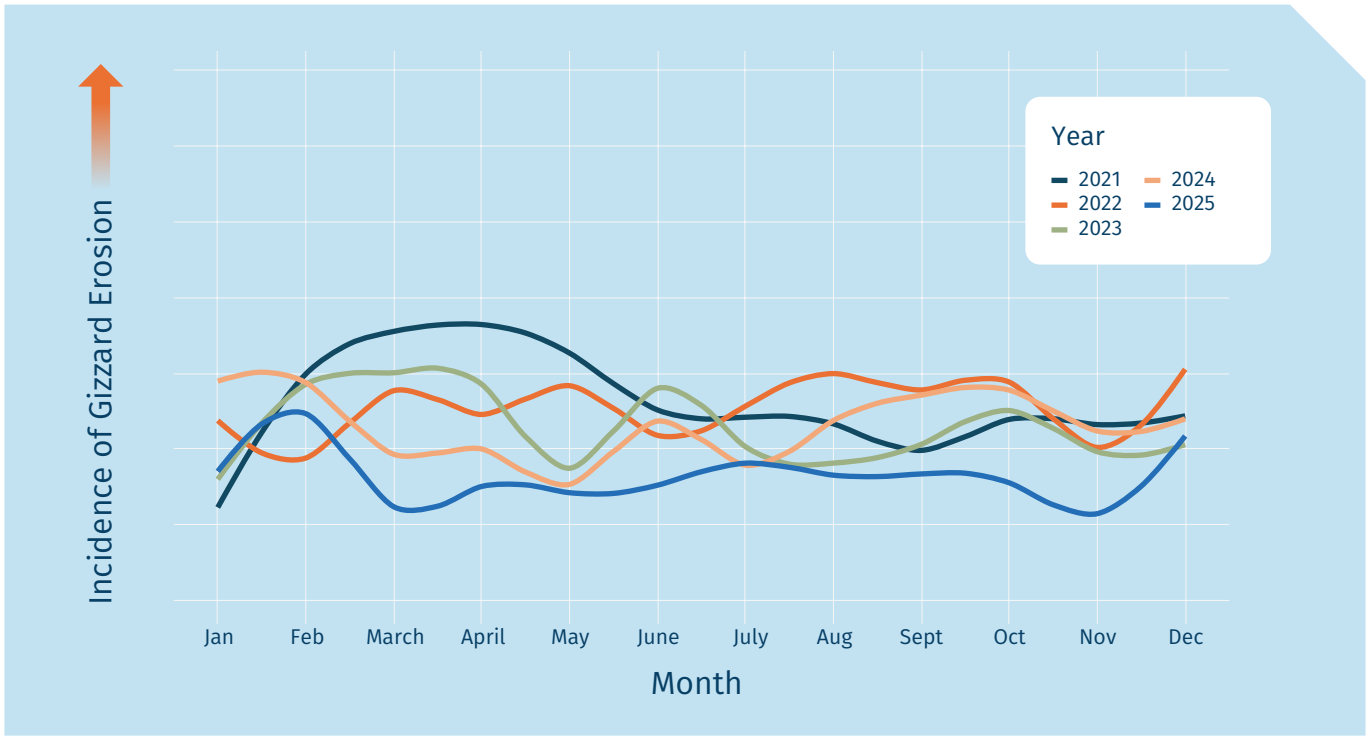


INTESTINAL INTEGRITY

GIZZARD HEALTH

In 2025, gizzard health has further improved, with prevalence of erosions of 15.2%, down from 21% in 2024, where the number of birds affected had also decreased from 26% in 2023.

INCIDENCES OF GIZZARD EROSIONS



The number of gizzard erosions seen in the generally healthy birds included in the HTSi dataset has steadily declined year on year, with incidences seen in 2025 the lowest yet. Whilst February and December saw slight fluctuations, there is no significant seasonal correlation.

Out of the affected birds,

94.1%
were mild (score 1)

4.6%
were moderate (score 2)

1.3%
were severe (score 3)

Whilst there was a slight tendency for gizzard erosions to increase with bird age, analysis suggests the correlation is not strong enough to suggest a direct influence.

DEEP DIVE: COCCIDIOSIS IN 2025

WHAT IS COCCIDIOSIS?

Coccidiosis is the disease caused by coccidia, an obligate, intracellular parasite.

Restricted to a particular function – coccidia only affect the **intestinal** cells.

They replicate **inside** the cells.

An animal which lives in (endoparasite) or on (ectoparasite) another animal (the host). Almost always a different species from the host.

Depends on the host for food or energy/resources and usually causes some degree of injury or damage.

ALL COCCIDIA HAVE THE SAME BASIC LIFECYCLE

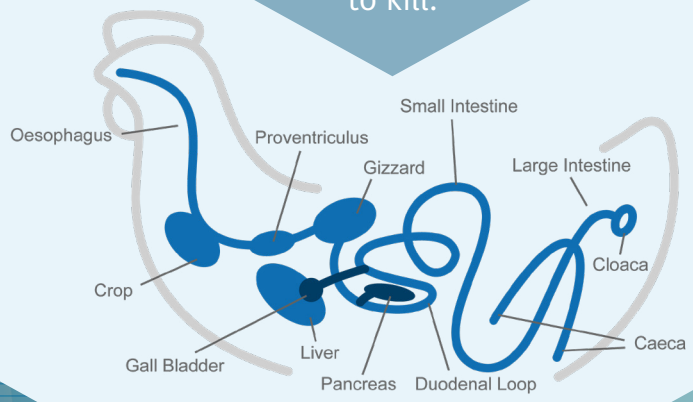
1. Oocyst ingested

2. Oocyst wall broken down and parasites released into gut

3. Parasites reproduce in host cells

4. Oocysts excreted in faeces

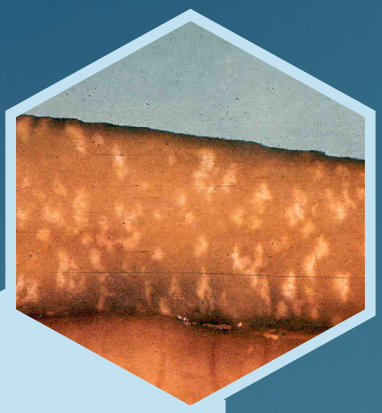
Oocysts are the stage of the coccidia's lifecycle that exists outside of the animal - hardy, thick walled and tough to kill.



DEEP DIVE: COCCIDIOSIS IN 2025

THREE MAIN SPECIES

Each coccidia (*Eimeria*) species produces distinctive lesions that are used in diagnosis and assessment of the severity of infection.



EIMERIA ACERVULINA

The duodenum

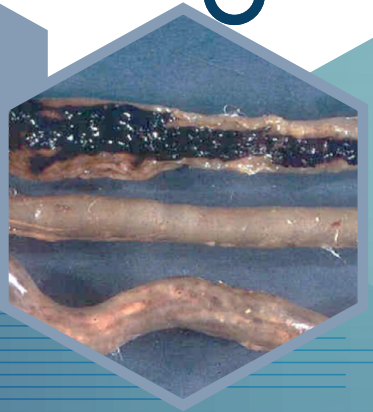
Petechiae (red pin pricks)

EIMERIA MAXIMA

The jejunum

EIMERIA TENELLA

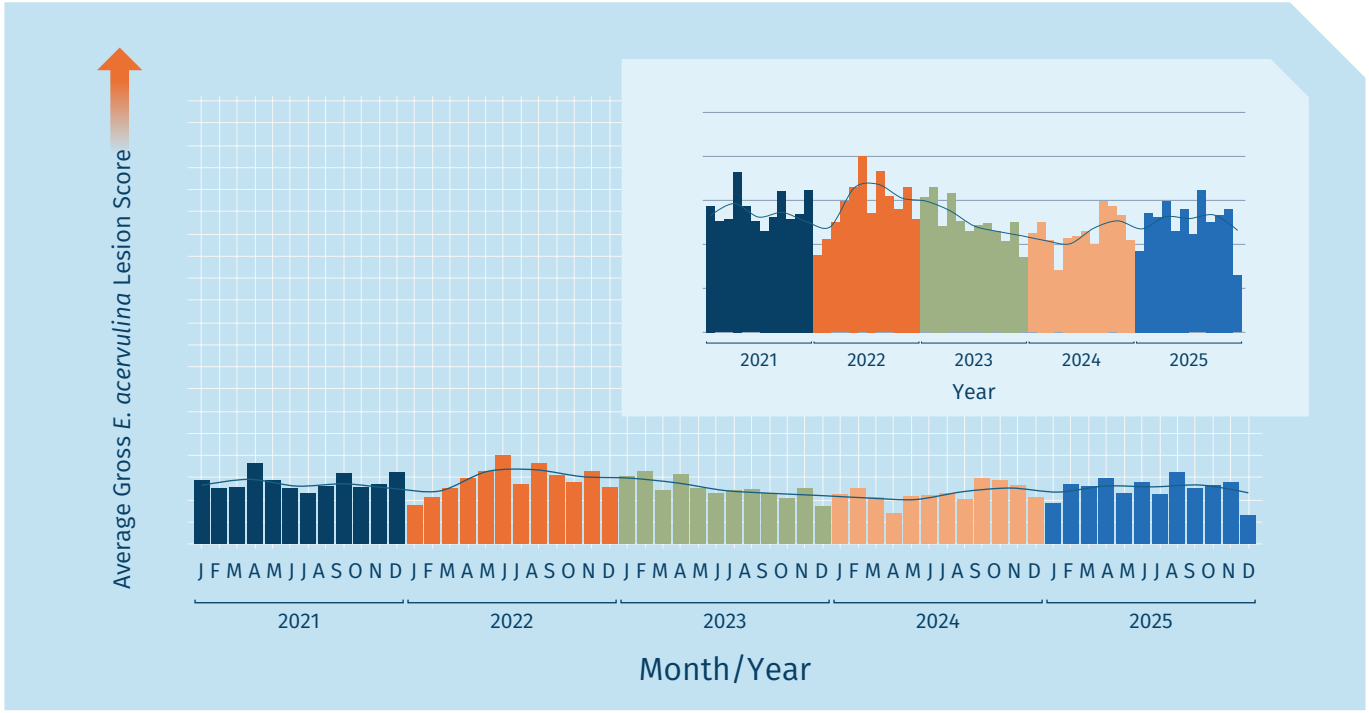
The caecum



COCCIDIOSIS – *E. ACERVULINA*

A coccidia species that leads to malabsorption, *E. acervulina* is characterised by white scars on the inside of the intestine, commonly in the duodenal loop.

In 2025, **37.3% of birds were affected** by this species, an increase from 32.5%.



E. acervulina scores were relatively stable throughout 2025. Looking back, levels in 2021 were steady, followed by a significant increase mid-2022, generally improving after this, with a decline through 2023 and 2024.

Previous years have shown higher average values in spring or summer months, but whilst there are some minor fluctuations, there is no clear seasonal trend in 2025.

Of the 1,176 birds showing *E. acervulina* lesions;

69% were mild (score 1)

26% were moderate (score 2)

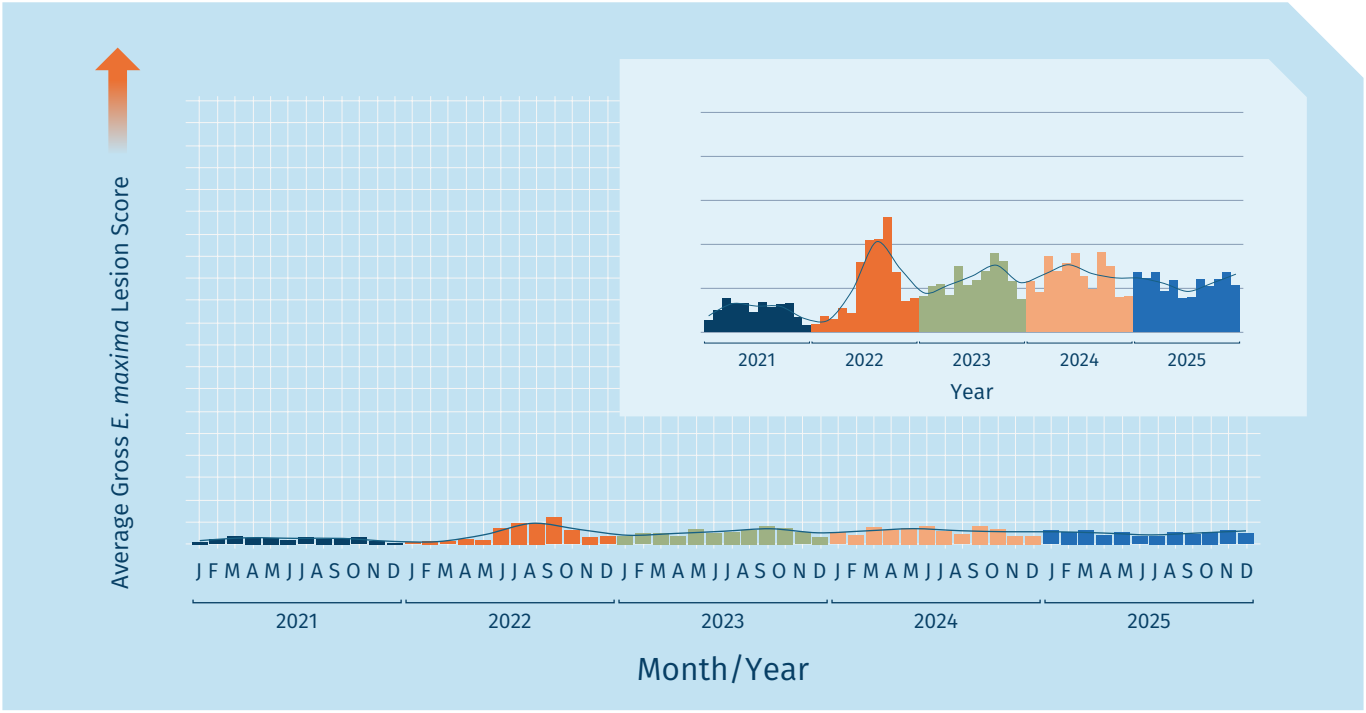
5% were severe (scores 3/4)

This is the same percentage split as 2024 data.

COCCIDIOSIS – *E. MAXIMA*

The most detrimental coccidia species to a farm's performance and profits, *E. maxima* damage causes red petechiae on the outside of the intestinal tract.

In 2025, **8.7% of birds** were seen to have gross lesions, confirmed with microscopy. This is a **decrease from 11.2% in 2024**.



Levels of recorded *E. maxima* in 2025 remain elevated, whilst decreasing compared to 2024. Previous years have followed a similar trend to *E. acervulina* averages with more lesions noted in the summer months as opposed to winter, but 2025 bucks that trend with the lowest number of gross lesions in June and July.

Of the 274 birds showing *E. maxima*;

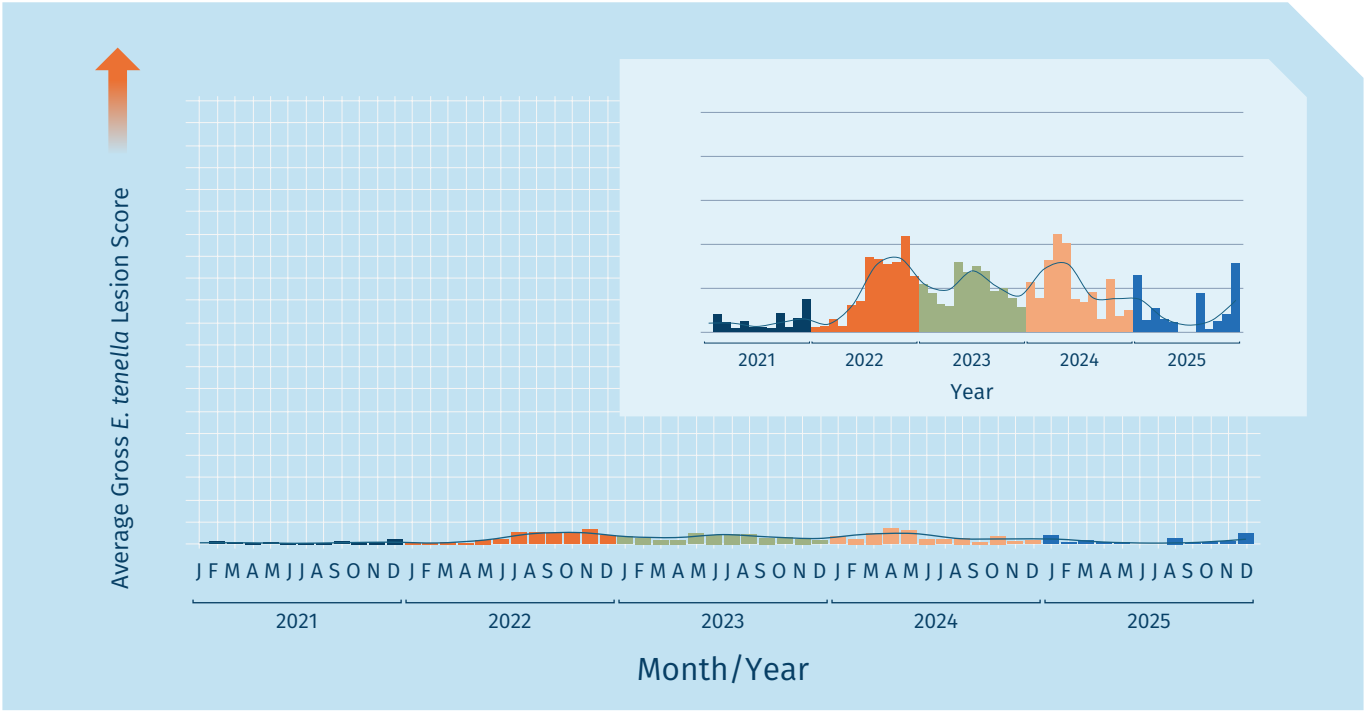
76% were mild (score 1)

22.5% were moderate (score 2)

1.5% were severe (scores 3/4)

COCCIDIOSIS – *E. TENELLA*

Whilst clinical cases are rarely seen on farm as part of HTSi surveillance, **1.4% birds in 2025** presented with gross *E. tenella* lesions, **reduced from 5.1% in 2024, and from 10.6% in 2023**. This is the only common coccidia species that will cause bird mortality.



Whilst incidence of *E. tenella* has become more prevalent since 2022, the overall average remains on the same scale as previous *E. acervulina* and *E. maxima* graphs and continues to have minimal impact on UK flocks in this data set. The year started with a slight increase in January, however levels declined through summer before an increase towards December.

Of the 47 birds showing *E. tenella* lesions;

89.5% were mild (score 1)

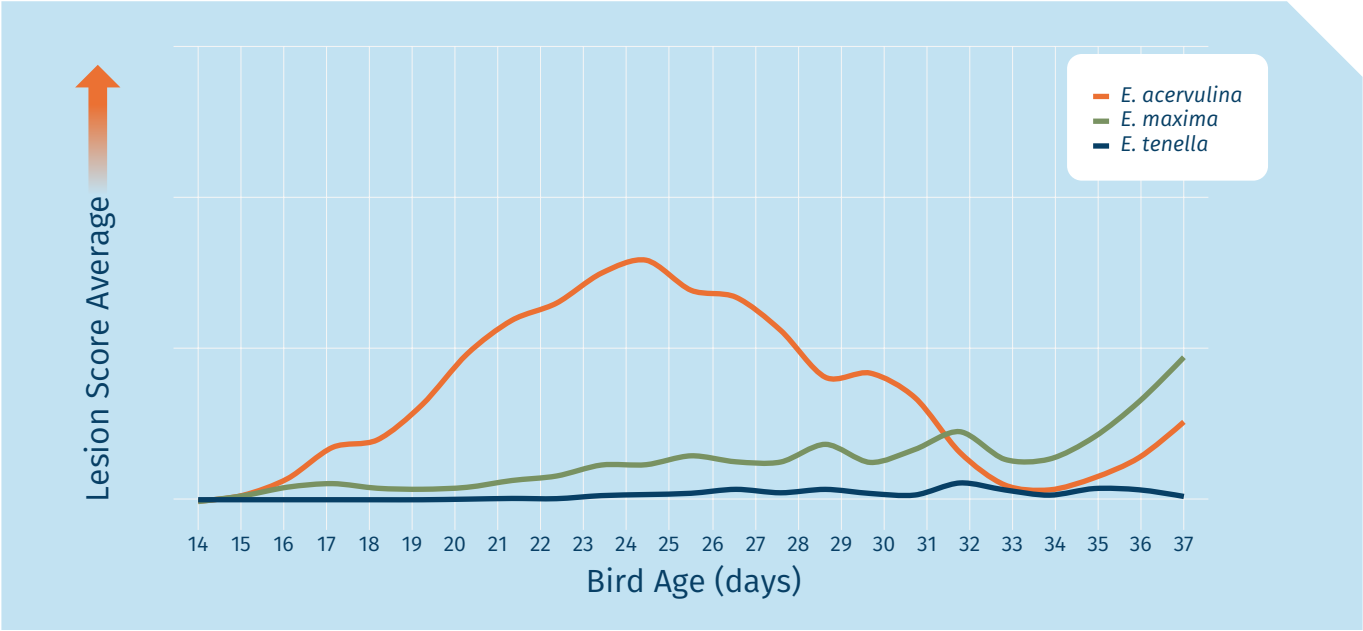
6.5% were moderate (score 2)

4% were severe (scores 3/4)

Less moderate and severe lesions were noted this year compared to 2023.

COCCIDIOSIS

2025 COCCIDIOSIS TRENDS BY SPECIES



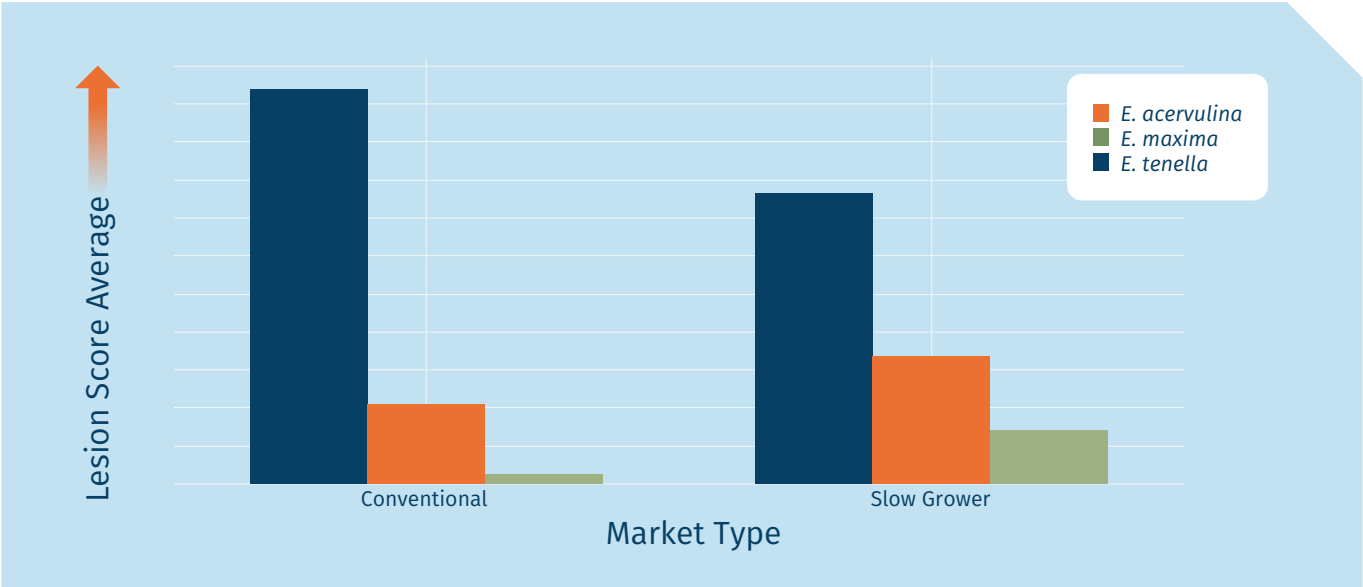
The age at which birds were most commonly affected by *E. acervulina* has remained the same as 2024, at 24.5 days.

E. maxima was noted in low levels from 20 days onwards, the most common age was 37 days.

Similar to 2024, minimal *E. tenella* was recorded in 2025, with no obvious peak age.

2025 COCCIDIOSIS PEAKS BY MARKET TYPE

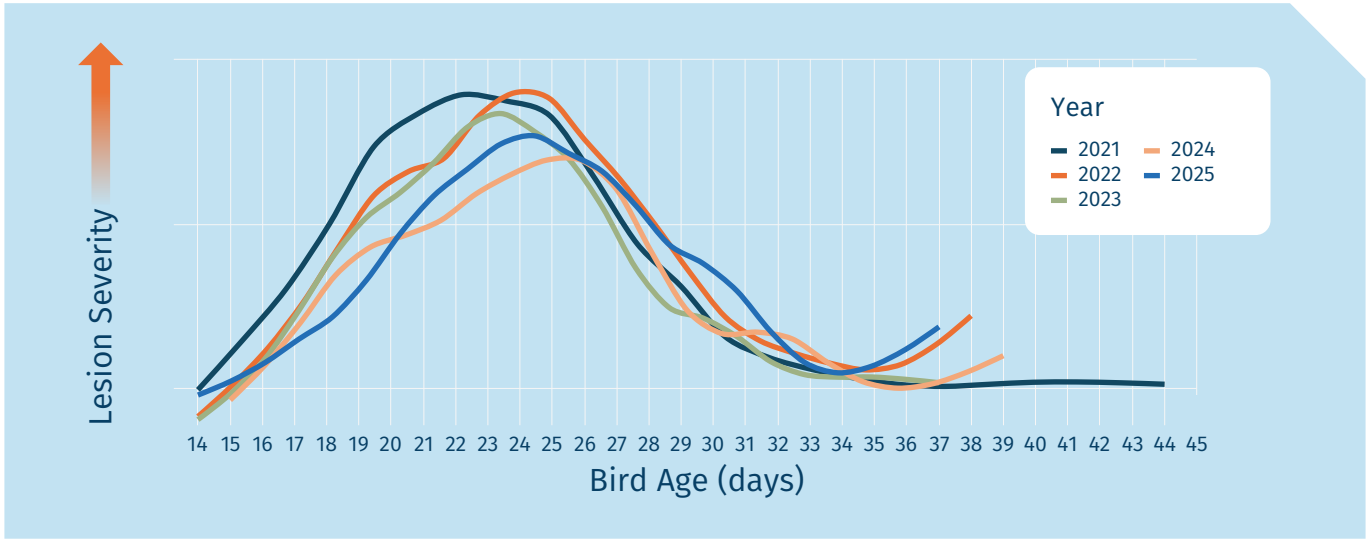
A significant difference was noted between average coccidiosis lesion score and the market type of bird in the data set, taking bird age into consideration. Slower growing birds presented with more gross *E. maxima** and *E. tenella***.



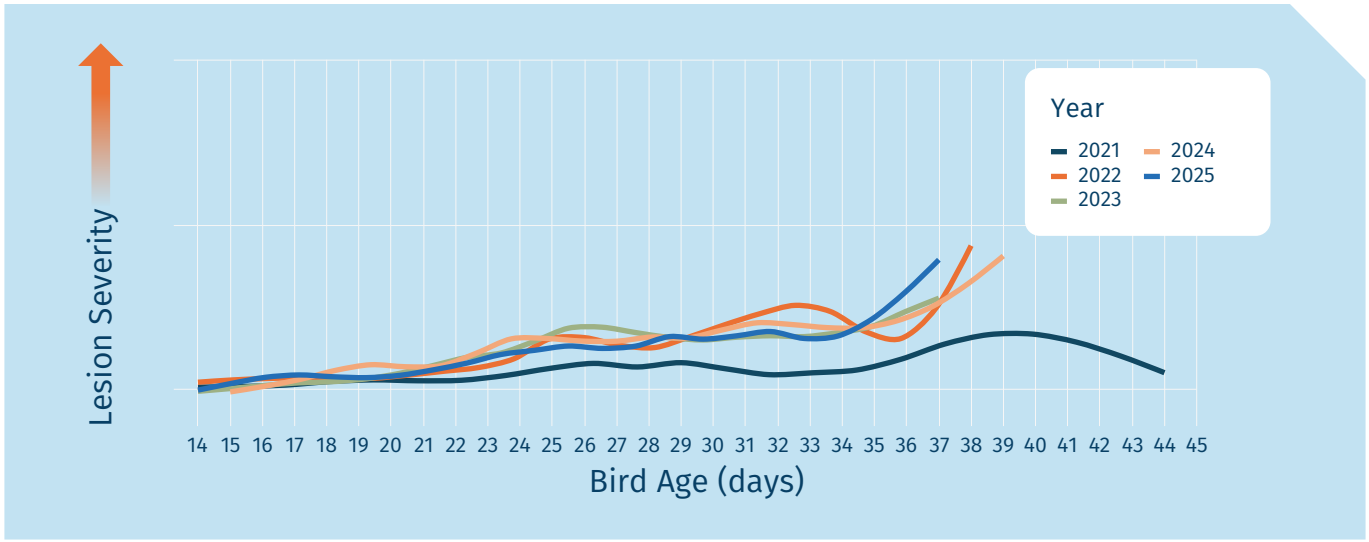
*P-value= <0.01, **P-value= <0.0001

COCCIDIOSIS – YEAR ON YEAR

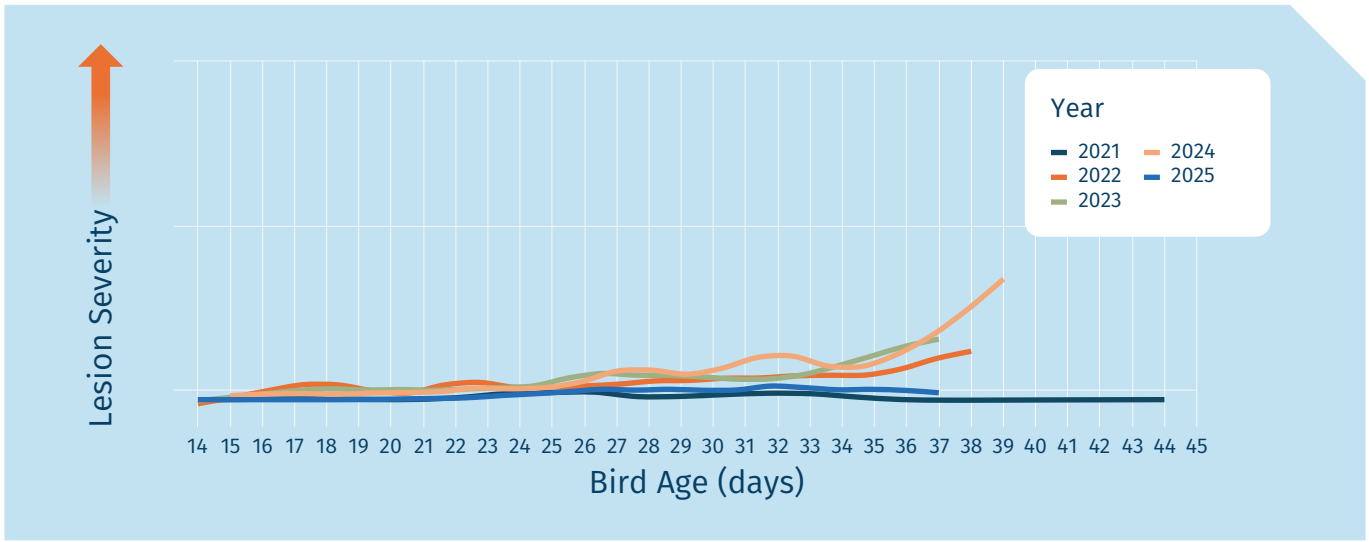
E. ACERVULINA VS BIRD AGE



E. MAXIMA VS BIRD AGE

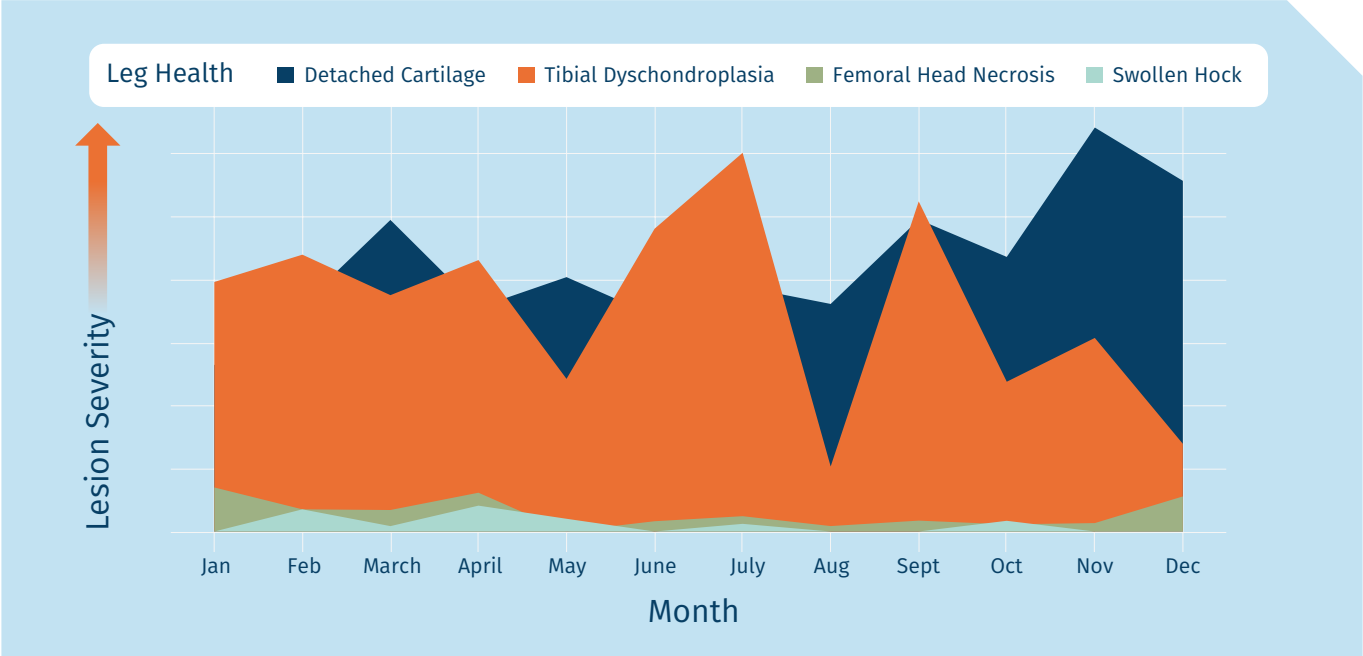


E. TENELLA VS BIRD AGE



BEYOND I²: LOCOMOTOR HEALTH

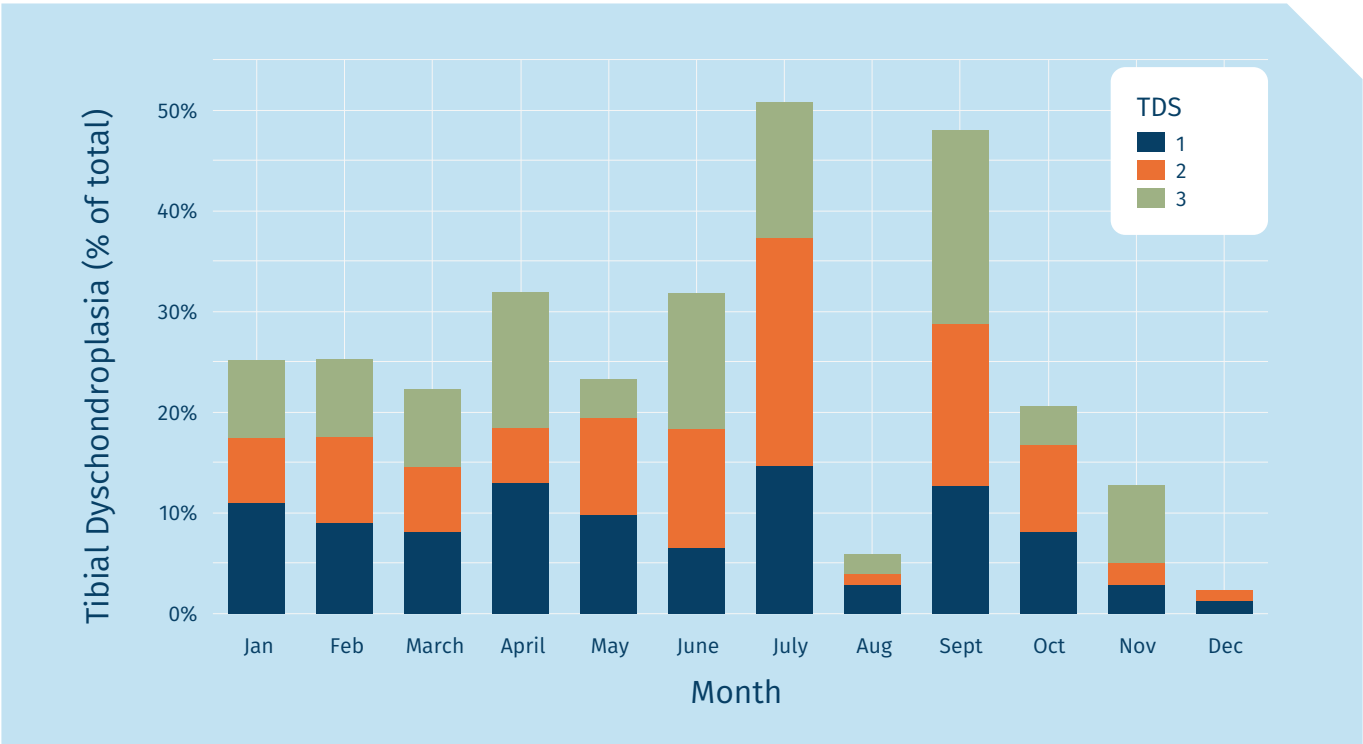
LEG HEALTH OVER TIME



The most prevalent leg heath lesion seen was detached cartilage, incidences of which increased throughout the year. Femoral head necrosis and swollen hocks remained minimal.

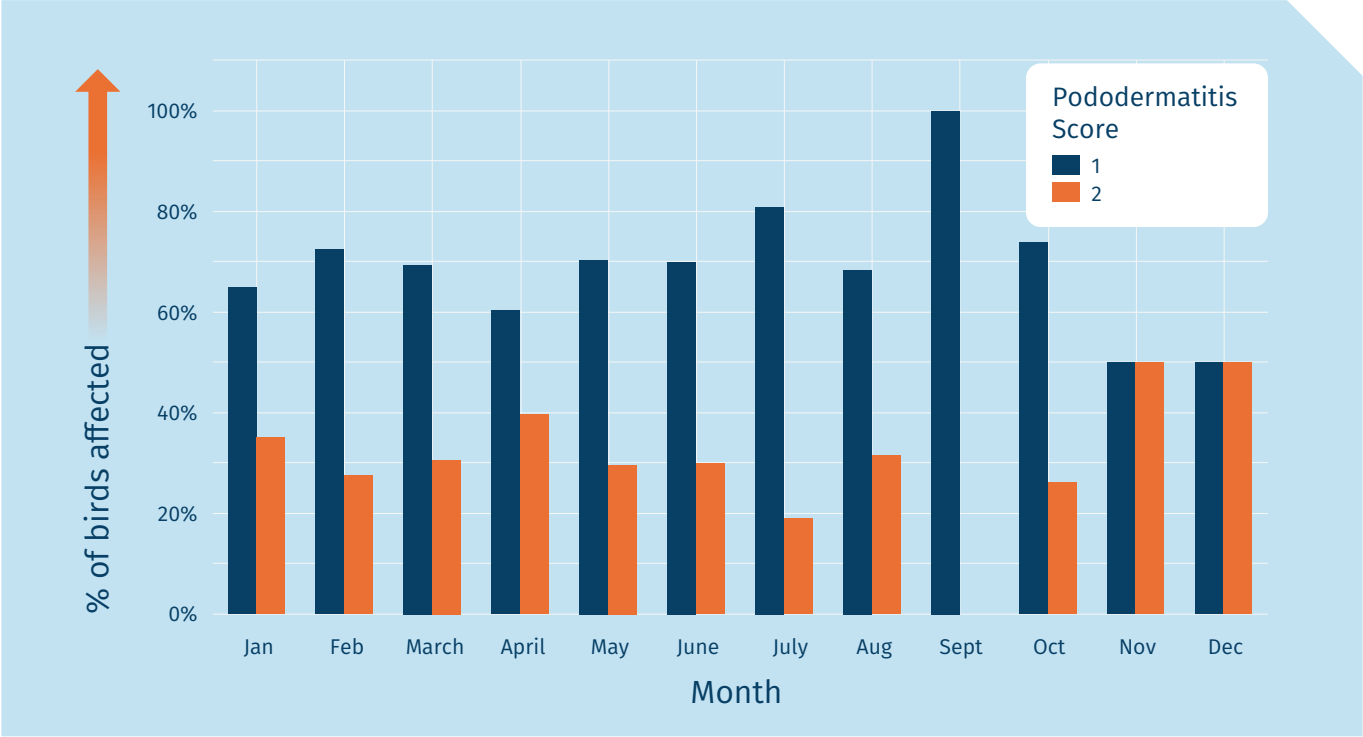
TIBIAL DYSCHONDROPLSIA: AN INSIGHT

In Elanco's 2025 Mid-Year HTSi Report, an increase in tibial dyschondroplasia (TDS) from January to June was identified, compared to previous years. With August as an anomaly, incidences of the condition peaked in July, affecting over 50% of birds sampled. However, levels have sharply decreased towards the latter end of the year.



BEYOND I²: WELFARE INDICATORS

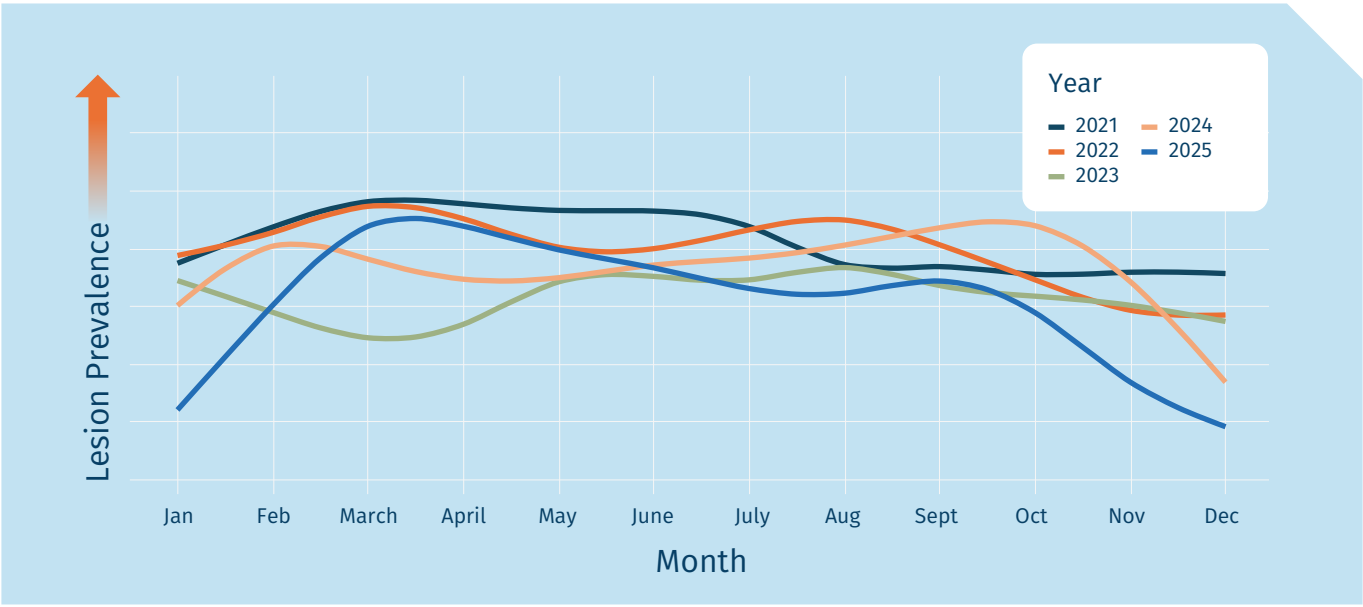
PODODERMATITIS



Levels of pododermatitis follow a strong seasonal trends, with fewer lesions seen over the summer months, as expected. Levels in 2025 were on average, lower than the previous five years.

Of the birds that presented with pododermatitis, between 60 and 80% were score 1 for eight months of the year. November and December saw an even split of scores of 1 and 2 in affected birds.

SCRATCHES



In 2025, 16.4% of birds in the dataset had prominent scratches, a slight reduction compared to 2024, but in line with 2023 levels. This is further reduced from 2021 and 2022 averages. There is no significant seasonal trend, yet prevalence is lower in the winter months.

HTSi POULTRY PORTAL

MONITOR, OPTIMISE AND ANALYSE WITH HTSi

Gain deeper insights into the health of your flock with real-time data and predictive analytics, allowing you to make well-informed decisions that will benefit both your birds and your business.

Contact the Elanco Team to find out more: poultry@elancoah.com

HTSi

DATA-DRIVEN FLOCK INSIGHTS FOR SMARTER BUSINESS DECISIONS

Data from **52** COUNTRIES

30 YEARS OF HISTORICAL DATA

Data from over **11,220** PRODUCERS GLOBALLY

Data splits available for **ALL TYPES** OF BROILER ENTERPRISE

ELANCO SOLUTIONS TO SUPPORT I²

IONOPHORES

Used since the 1970's, ionophores remain an effective and efficient tool to improve Intestinal Integrity, with evidence of resistance to these compounds in the field being fundamentally non-existent. Ionophores are classified as antimicrobials and have a wide-spectrum effect against several micro-organisms, however, they are not used in human medicine and there is currently no scientifically proven association between bacterial resistance and ionophores.

Elanco Maxiban™

Use Maxiban™ in combination with Monteban™ for stable coccidiosis population control. Consistently trusted by poultry producers to protect against the effects of coccidiosis for over 25 years.

Elanco Monteban™

WANT TO ACHIEVE STABLE & CONTINUOUS COCCIDIOSIS CONTROL?

Reduced complexities → Low labour requirements → Stable coccidial population control

Using Maxiban in combination with Monteban provides...

Consistent performance improvements that last → FCR improvements of 5.46[7] → Stable Intestinal Integrity (I²) scores[8] → Over 25 years of successful coccidiosis control for poultry producers worldwide

The development of acquired immunity → Adding another layer of protection

Good coccidiosis management can reduce antibiotic usage by up to **5x**[9,10]

The impact of poor coccidiosis control costs approximately **£10.5 BILLION** per annum worldwide[11]

Want to learn how the active ingredients in Maxiban and Monteban effectively control coccidiosis?

Watch how they work inside the bird

ELANCO SOLUTIONS TO SUPPORT I²

HEMICELL™

Beta-mannans are anti-nutritional factors (ANFs) in the diet and indigestible for monogastric animals:

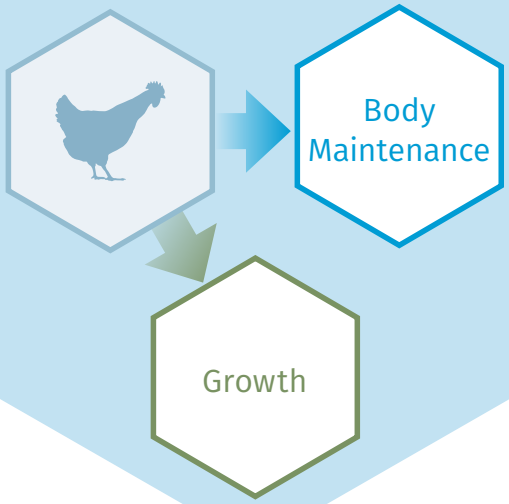
Found in most vegetable feed ingredients

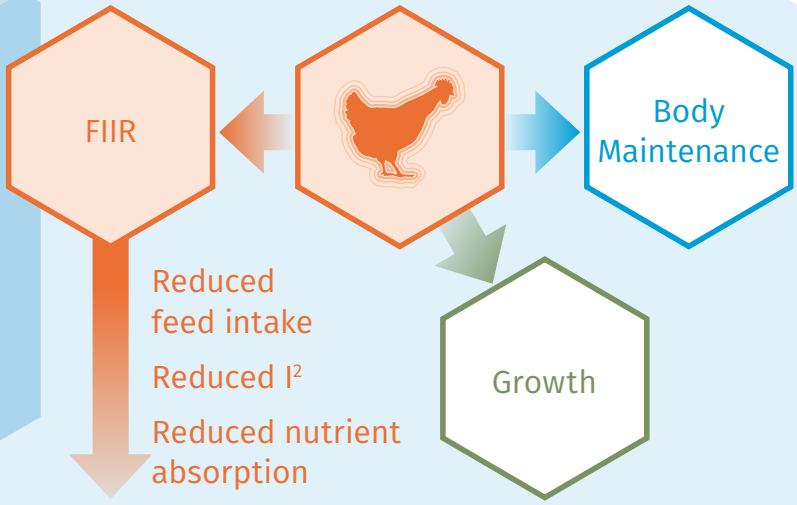
Soluble so easily distributed throughout the GI tract

Not affected by feed processing

As **similar mannose structures** are found in **cell surfaces of many pathogens**, animals **mistake β-mannans as a pathogen** and initiate a wasteful **feed induced immune response (FIIR)**

A healthy bird will utilise the energy gained from feed for body maintenance or growth.





In the average broiler shed, birds will divert some energy to the FIIR, with detrimental effects on feed conversion.

Elanco Hemicell™-XT

Hemicell XT stops the expensive effects of β-Mannans. The patented energy sparing enzyme, breaks down β-Mannans to completely prevent the FIIR and waste of energy that they cause.[12,13]

The I² index is a pivotal part of HTSi – a unique, independently validated composite scoring system that provides a comprehensive assessment of Intestinal Integrity in broilers. It allows easy comparison between birds of different ages, breeds, seasons and years.

ELANCO SOLUTIONS TO SUPPORT I²

GalliPro® Fit

The easy choice.

A probiotic with a unique triple strain *Bacillus* combination, that positively influences the gut microbiome and promotes Intestinal Integrity.

UNIQUE COMBINATION OF *BACILLUS* STRAINS

Three naturally occurring strains work together to positively influence the intestinal microbiome.

***Bacillus subtillis* (DSM32324):**
Competes with Gram negative and positive microbes;[14] improves protein availability[15]

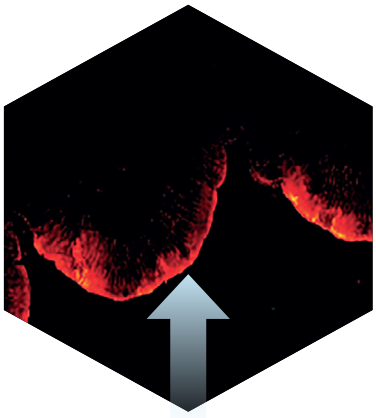
***Bacillus subtillis* (DSM32325):**
Competes with Gram negative and positive microbes[14]

***Bacillus amyloliquefaciens* (DSM25840):**
Improves energy availability from non-starch polysaccharides;[15] improves protein digestibility[15]

MULTIPLE ACTIONS, TO MAXIMISE BENEFITS

Proven colonisation capability[16]

The *Bacillus* strains in **GalliPro® Fit** have been shown to form a beneficial biofilm in the gut. This means that they can successfully colonise and form a healthy proportion of the gut microbiome, exerting their positive effects exactly where they are needed.[16,17]



Colonies of *B. subtillis* coating the microvilli of the gut

GALLIPRO® FIT -PERFORMANCE

GalliPro® Fit has been shown to improve productivity in broilers, under commercial conditions

Mortality: Reduced by up to 1% on average[18]

FCR: Reduced by an average of 3 points[19]

Bodyweight: Improved by 58 g[18]

ELANCO SOLUTIONS TO SUPPORT I²

GALLIPRO® FIT - CHALLENGE

GalliPro® Fit has been shown to maintain a positive microbiome during times of challenge

Utilising multiple mechanisms, the *Bacillus* strains in GalliPro® Fit can successfully compete against undesirable bacterial species, helping to prevent them colonising the gut and compromising Intestinal Integrity. [14,15,20]

THE *BACILLUS* STRAINS IN GALLIPRO® FIT

have superior siderophore activity[21]; meaning undesirable bacterial species don't have the essential iron that is needed for survival

produce lipopeptides (Surfactins and Fengycins) known to be inhibitory to some undesirable bacterial species[22,23]

form a biofilm which acts as a physical barrier to undesirable bacterial species[16]

COMPETING AGAINST THE 'BIG 5'

GalliPro® Fit has been shown to successfully inhibit key undesirable bacterial species:

- ***SALMONELLA*** [24]
- ***CLOSTRIDIUM*** [26,27]
- ***CAMPYLOBACTER*** [22]
- ***E. COLI*** [25,26]
- **VARIOUS PATHOGENIC *E. CECORUM*** (known to contribute towards osteomyelitis and arthritis in broiler chickens)[23]

VETERINARY COMMENTS

EXPERT OPINION BY ELANCO'S POULTRY TECHNICAL CONSULTANT DR TOM DUTTON CertAVP(ZM) DipECZM(avian) MRCVS.

The UK poultry sector was presented with a multifaceted change and challenge in 2025. Implementation of lower stocking densities, significant drought conditions starting in May and culminating with a challenging start to the influenza season, with significant numbers of widespread cases. The HTSi data emphasizes the way the UK industry has responded to the challenge, ensuring birds are living with good gut health, high welfare, and providing affordable protein for consumers.

Elanco's Intestinal Integrity (I^2) metric encompasses a broad range of bird health measurements that enable objective comparisons over time. **The one word that best describes the I^2 for 2025 is stable.** The I^2 score for 2025 averaged 95.56 – the highest average over the past five years (page 6). Growers maintained effective, stable coccidia control strategies which are key to maintaining stable I^2. As seen in recent years cellular sloughing, excess intestinal mucus (both decreased from 2024) and watery intestinal content (increased from 2024) were the most prevalent findings (page 7). Gizzard health has improved again, with year-on-year improvement and the incidence of gizzard erosion is at the lowest level yet with prevalence of 15.2%. This is not a trend seen universally across Europe – and continued monitoring through 2026 will allow early detection of any shift away from this positive trajectory.

Coccidia lesion scores remain at low levels, with HTSi data confirming that disease was well managed throughout 2025. Both *E. maxima* and *E. tenella* levels fell in comparison to 2024 with a small increase in incidence of gross *E. acervulina* lesions (page 11-13). The severity of *E. tenella* lesions was also reduced compared to 2024. While a significant challenge for the UK arable farmers, the extended periods of warm, dry weather would have been favourable for coccidia management on farm. As seen in 2024 the same trend of a higher incidence of gross *E. maxima*, and *E. tenella* lesions was seen in slower growing breeds. One uncertainty going into 2025 was how the change in stocking density may affect coccidial disease, and in particular coccidia peaks. For *E. acervulina*, the lesion score average peaked at 24.5 days which is no change from 2024. No significant change in either *E. maxima* or *E. tenella* peaks were seen. This will continue to be monitored through 2026 as we collect ever more data from 30kg/sqm farms.

Looking forward to 2026, we hope the peak of avian influenza cases has passed and growers can quickly recover from the disruption of a challenging winter. Where pressures are seen in other part of the system ensuring stable farm management and maintaining proven effective disease management strategies is imperative in optimising disease control. It is unlikely (but not impossible) that we will have a repeat of 2025 weather patterns and ensuring effective and consistent drying time of sheds during turnaround is vital. The protozoa thrive in moist, damp conditions – and the ability to dry sheds fully during turnaround significantly aids in disease control.

I look forward to working with you and wish your business a prosperous 2026.

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HTSi

For further information or queries on anything in the HTSi Annual Report, please contact the Elanco team on the following email address: poultry@elancoah.com

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