

BCG Vaccines Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Immune BCG, Therapy BCG), By Application (Tuberculosis, Bladder Cancer), By Distribution Channel (Hospitals, Clinics, Others), By Region & Competition, 2020-2030F

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Abstracts

Global BCG Vaccines Market was valued at USD 145.56 million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.90% through 2030. The global BCG (Bacillus Calmette-Guérin) vaccine market plays a crucial role in the realm of public health, primarily as a frontline defense against tuberculosis (TB). With its rich history and widespread usage, the BCG vaccine remains a vital tool in the global fight against TB. Historically, the BCG vaccine was developed in the early 20th century as the first successful vaccine against TB. Since then, it has been administered to millions of individuals worldwide, making it one of the most widely used vaccines in history. TB, a contagious bacterial infection that primarily affects the lungs, continues to pose a significant global health challenge, particularly in regions with limited access to healthcare resources.

One of the key features of the global BCG vaccine market is its inclusion in the immunization programs of many countries. Government-led initiatives and mandates ensure that a substantial portion of the world's population receives the BCG vaccine, often as a birth dose to infants. This early vaccination serves as a crucial preventive measure, offering protection against TB and reducing the risk of severe forms of the disease, particularly in children. In addition to its traditional role in TB prevention, ongoing research and development efforts are expanding the potential applications of the BCG vaccine. Maternal immunization, for example, is being explored as a means to

provide both mothers and infants with protection against various infections beyond TB, such as respiratory illnesses.

Key Market Drivers

Increasing Prevalence of Tuberculosis in Developing and under-developed countries

The increasing prevalence of tuberculosis (TB) in developing and underdeveloped countries is a significant driver for the growth of the Bacillus Calmette-Guérin (BCG) vaccine market. For instance, in February 2022, the Ministry of Health and Family Welfare, Government of India, published the 'India TB Report 2022.' The report highlighted that pediatric tuberculosis remains a significant concern, contributing to approximately 31% of the global TB burden. As a result, the increasing BCG vaccination rate among children is expected to drive higher immunization coverage within the target population. This growing emphasis on BCG vaccination for pediatric TB prevention is anticipated to boost market expansion, supporting efforts to combat tuberculosis more effectively. BCG is a widely used vaccine for the prevention of tuberculosis, and its demand is directly linked to the TB burden in these regions. Here's how the rising TB prevalence contributes to the expansion of the BCG vaccine market: Developing and underdeveloped countries often face higher TB incidence rates due to various factors such as overcrowding, limited access to healthcare, and weakened immune systems among their populations. TB remains a critical public health issue in these regions, making vaccination a crucial strategy for prevention.

Key Market Challenges

Supply chain disruptions

Supply chain disruptions have emerged as a significant challenge for the BCG (Bacillus Calmette-Guérin) vaccine market, impacting the production, distribution, and availability of this critical immunization tool. These disruptions, often stemming from various global factors, have far-reaching consequences for the global efforts to combat tuberculosis (TB) through BCG vaccination. The manufacturing of vaccines like BCG requires a complex supply chain, including the procurement of specific raw materials. Disruptions in the availability of these materials, often due to factors like trade restrictions, natural disasters, or geopolitical tensions, can hinder vaccine production.

The BCG vaccine is produced in select facilities and then distributed globally. Interruptions in transportation networks, such as those caused by the COVID-19

pandemic, can lead to delays in the delivery of vaccines to their intended destinations. These delays can impact vaccination programs and contribute to vaccine shortages. BCG vaccines, like many other vaccines, require strict temperature control throughout the supply chain to maintain their efficacy. Any interruptions or failures in the cold chain, whether due to equipment malfunctions or logistical challenges, can render vaccines ineffective and result in wastage. Ensuring an adequate supply of BCG vaccines relies on the capacity of manufacturing facilities. Disruptions caused by issues such as equipment breakdowns or regulatory obstacles can limit the production volume, leading to supply shortages. Political tensions and trade disputes can affect the movement of vaccines and their components across borders. Export restrictions and tariffs can disrupt the flow of vaccines, exacerbating supply chain challenges.

Key Market Trends

Emerging TB strains

Emerging strains of tuberculosis (TB) have become a concerning trend in recent years, posing a significant challenge to TB control efforts and the Bacillus Calmette-Guérin (BCG) vaccine market. Several factors contribute to the emergence of new TB strains, which are increasingly drug-resistant and harder to treat: The overuse and misuse of antibiotics have led to the development of drug-resistant TB strains. Multidrug-resistant TB (MDR-TB) and extensively drug-resistant TB (XDR-TB) are particularly worrisome. These strains do not respond to first-line TB drugs, making treatment more complex, lengthy, and expensive.

In an interconnected world with increased global travel and population mobility, TB strains can easily cross borders. Infected individuals may carry drug-resistant TB strains with them, introducing these strains to new regions and populations. Immune-compromised individuals, such as those living with HIV/AIDS, are more susceptible to TB and its drug-resistant forms. This population provides fertile ground for the emergence and spread of TB strains that are more resistant to treatment. Weakened TB control programs in some regions may contribute to the persistence and spread of TB. Inadequate diagnosis, treatment, and infection control measures can allow drug-resistant strains to flourish. TB is a genetically diverse bacterium, and its strains can vary in virulence and resistance. The BCG vaccine, derived from a specific strain, may offer limited protection against some of these diverse TB strains. Advancements in genomics and molecular epidemiology have improved our ability to track and analyze TB strains. Researchers can now identify and characterize emerging strains more effectively, enabling targeted responses and treatment strategies.

Key Market Players

Serum Institute of India Pvt. Ltd.

GreenSignal Bio Pharma Ltd

Taj Pharmaceuticals Limited

Japan BCG Laboratory

Merck & Co., Inc.

Microgen LLC

Biomed Lublin S.A.

BCG Vaccine Laboratory

China Biotechnology Co., Ltd.

AJ Biologics Sdn Bhd

Report Scope:

In this report, the Global BCG Vaccines Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

BCG Vaccines Market, By Product:

Immune BCG

Therapy BCG

BCG Vaccines Market, By Application:

Tuberculosis

Bladder Cancer

BCG Vaccines Market, By Distribution Channel:

Hospitals

Clinics

Others

BCG Vaccines Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the BCG Vaccines Market.

Available Customizations:

Global BCG Vaccines market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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