

Therapeutic BCG Vaccine Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented by Type (Immune BCG, Therapy BCG), by Demographics (Adults, Pediatrics), by End User (Clinics, Hospitals), By Region and Competition, 2020-2030F

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Abstracts

Market Overview

The Global Therapeutic BCG Vaccine Market was valued at USD 60.29 Million in 2024 and is projected to reach USD 75.68 Million by 2030, growing at a CAGR of 3.86% during the forecast period. The BCG vaccine (Bacillus Calmette-Guérin) remains the only approved vaccine for tuberculosis (TB) prevention. Typically administered at birth in TB-endemic countries, and to high-risk infants in low-incidence regions, it helps prevent TB, which primarily affects the lungs but may spread to other organs. BCG is also incorporated in national immunization schedules due to its effectiveness. Beyond TB, therapeutic applications of the BCG vaccine are expanding to include diseases like bladder cancer, autoimmune disorders, and various cancers, driven by ongoing research. This broader therapeutic scope, along with its established safety and accessibility, continues to support steady growth in the market.

Key Market Drivers

Biotechnology Advancements

Biotechnology advancements involve innovations in utilizing biological systems and organisms to develop new technologies and products that improve human health

and other sectors. In healthcare, progress in genetic engineering—such as the use of CRISPR-Cas9—has enabled precise gene editing, leading to breakthroughs in vaccine development, including therapeutic BCG vaccines. Additionally, the rise of biopharmaceuticals such as monoclonal antibodies and gene therapies is reshaping treatment approaches. Personalized medicine, driven by human genome sequencing and advanced genomics, is also emerging, enabling more targeted and effective treatments. Stem cell research continues to offer promise in regenerative medicine and organ repair. Synthetic biology further supports the creation of engineered organisms for practical uses in health, industry, and the environment. Together, these advancements enhance the development and application of therapeutic BCG vaccines across various disease areas.

Key Market Challenges

Vaccine Shortages

Producing BCG vaccines is a sensitive and intricate process, requiring controlled conditions to culture live bacteria. Any disruption—such as contamination or quality issues—can significantly hamper production. The global supply is dependent on a limited number of manufacturers, making the market susceptible to disruptions if one producer faces setbacks. Strict regulatory and quality control standards, although necessary, can delay production or cause batch rejections. Variability in demand due to disease trends or clinical trial requirements adds to the difficulty in maintaining consistent supply. Furthermore, imbalances in regional distribution and unexpected spikes in demand, such as during outbreaks or new therapeutic applications, can quickly deplete stockpiles and exacerbate shortages.

Key Market Trends

Tuberculosis (TB) Treatment and Prevention

The BCG vaccine has long been used to prevent tuberculosis, especially in areas with a high disease burden, by reducing the risk of infection and severe forms of TB in children. Beyond prevention, BCG is used in immunotherapy to treat non-muscle-invasive bladder cancer (NMIBC), where it activates the immune system to target cancer cells. Research is expanding into new therapeutic areas, exploring its potential in autoimmune diseases, infectious diseases, and other types of cancer. The emergence of drug-resistant TB strains, such as MDR-TB and XDR-TB, has further heightened the relevance of BCG vaccines, prompting investigations into their use

as complementary treatments in drug-resistant TB management.

Key Market Players

Merck & Co., Inc.

Sanofi Pasteur Inc.

Japan BCG Laboratory

China National Biotec Group

Serum Institute of India Pvt. Ltd,

InterVax Ltd

GreenSignal Biopharma Limited

Statens Serum Institute

PowderJect Pharmaceuticals

Biomed Lublin

Report Scope:

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

Therapeutic BCG Vaccine Market, By Type:

Immune BCG

Therapy BCG

Therapeutic BCG Vaccine Market, By End User:

Clinics

Hospitals

Therapeutic BCG Vaccine Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

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 Global Therapeutic BCG Vaccine Market.

Available Customizations:

Global Therapeutic BCG Vaccine 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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