

Global BCG Vaccine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global BCG Vaccine Market size is estimated at USD 159.05 million in 2024, and is expected to reach USD 215.58 million by 2029, growing at a CAGR of 6.27% during the forecast period (2024-2029).

The COVID-19 pandemic had a substantial impact on the BCG vaccine market initially. The strict lockdowns and government regulations intended to slow down the spread of COVID-19 resulted in a decrease in demand for the BCG vaccine due to the lack of visits to healthcare facilities such as hospitals and clinics. The outbreak of the pandemic also resulted in a shortage of support staff for pediatric vaccination, which includes BCG vaccination as well. Moreover, the vaccine manufacturing companies prioritized manufacturing COVID-19 vaccines instead of other vaccines, which in turn created a shortage of BCG vaccines as well.

For instance, a modeling study was conducted to evaluate the impact of COVID-19 on global BCG vaccine coverage and was published in October 2021 in the journal of the National Center for Biotechnology Information (NCBI). The results of the study showed that there was substantial variation in the impact of COVID-19 on routine BCG vaccination programs; some African countries showed average BCG coverage, while others showed lower rates from January to June 2020. It also found that there was a 50 percent decline in BCG coverage in India during the pandemic period. Furthermore, as per an article titled 'Impact of COVID-19 on routine immunization in South-East Asia and Western Pacific: Disruptions and Solutions,' published in the journal The Lancet in April 2021, fear of infection, restriction of movement, and limited access to healthcare were the main reasons for COVID-related disruption to immunization services which includes BCG vaccination as well. Thus, the COVID-19 outbreak affected the market's growth adversely in its preliminary phase; however, the market is expected to gain traction due to the significant increase in the use of BCG vaccines globally.

Further, the rising prevalence of tuberculosis, technological advancement in vaccine research and development, and rise in

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government initiatives for vaccination programs are among the significant factors driving the studied market growth. Poverty, homelessness, and HIV infections are the main causes of tuberculosis and the BCG vaccine is the only vaccine that prevents infection by the mycobacterium tuberculosis bacteria.

Moreover, according to World Health Organization (WHO), 1.5 million died from tuberculosis in 2020. Tuberculosis is the 13th leading cause of death worldwide, and it's also the second leading infectious disease after COVID-19. Additionally, in 2020 an estimated 10 million people fell ill due to tuberculosis worldwide. It's also stated that tuberculosis is present in all countries and can infect all age groups. Therefore, the rising prevalence of tuberculosis and increasing death due to it is expected to boost the BCG vaccine market globally, driving the need for BCG vaccine and thereby fueling the growth of the studied market over the forecast period.

In addition, the BCG vaccine is also used to treat patients who have bladder cancer. According to the American Cancer Society, it is the most common intravesical immunotherapy for treating early-stage bladder cancer. It is used to help keep cancer from growing and to help keep it from coming back. BCG is an inactivated germ that is used as a vaccine to prevent tuberculosis, but in the case of bladder cancer, this germ is put directly in the bladder through a catheter so that it can turn on the immune system of the patient.

Moreover, according to an article titled 'A BCG success story: From prevention of tuberculosis to optimal bladder cancer treatment,' published in the journal of the National Center for Biotechnology Information (NCBI) in August 2021, an observational study was performed to see the effect of BCG vaccine against existing bladder cancer, and it was concluded that BCG vaccine is the most effective drug for the treatment of localized bladder cancer. Thus, owing to the increasing usage of BCG vaccine for treating different diseases, the studied market is expected to have significant growth over the forecast period.

However, the side effects associated with using the BCG vaccine and shortage of supply are likely to impede market growth.

BCG Vaccine Market Trends

The Pediatrics Segment Dominates the BCG Vaccine Market

BCG vaccination is given mostly to babies and young children as it provides consistent protection of up to 80 percent against the most severe forms of childhood tuberculosis, such as TB meningitis. Children have more risk of developing tuberculosis than adults. For instance, according to a report titled 'India TB Report 2022,' published by the Ministry of Health and Family Welfare Government of India in February 2022 in India, childhood tuberculosis was a staggering problem, contributing to approximately 31 percent of the global burden.

Moreover, according to an article published in August 2022 titled 'BCG vaccine prevents tuberculosis in young children, but not adults,' the Boston University School of Public Health said a new study suggested that the BCG vaccine was very effective against tuberculosis in children under five. Still, adults in high-burden countries may need additional protection to maintain immunity beyond childhood. Hence, owing to the increasing BCG vaccination of pediatrics, adopting these vaccines is likely to increase among the target population, ultimately driving market growth.

In addition, according to an article titled 'Pediatric Tuberculosis with a Focus on Indonesia' published by United Nations International Children's Emergency Fund (UNICEF) in June 2022, it was estimated that 7.5 million children aged 0-14 years were infected with TB each year (latent tuberculosis infection (LTBI)), and 1-1.2 million children progress to active TB disease, more than half of whom are aged under five.

Furthermore, continuous government initiatives for tuberculosis vaccination in the market are positively affecting the growth of

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the segment. For instance, in May 2020, the Ministry of Health and Family Welfare, Government of India devised the National Strategic Plan 2020-2025, which outlines approaches to eliminate tuberculosis in India by the year of 2025.

The Asia-Pacific is Expected to Witness Growth Over the Forecast Period

The Asia-Pacific is expected to witness the highest growth in the market owing to factors such as the high prevalence of tuberculosis, increasing susceptibility to tuberculosis due to poverty and homelessness, and the presence of a large number of BCG vaccine manufacturers in the region. An increase in the BCG vaccination of children in countries like India and China is among the key factors contributing to the growth of the studied market in Asia-Pacific.

The rising prevalence of tuberculosis in developing countries like India, Indonesia, and China is the main reason for the growth of the Asia-Pacific region. For instance, according to an article titled 'Pediatric Tuberculosis with a Focus on Indonesia,' published by United Nations International Children's Emergency Fund (UNICEF) in June 2022, Indonesia has the second highest incidence of TB in the world (rate of 312 per 100,000 population) and accounts for 8.5 percent of global cases.

The high concentration of market players or manufacturers' presence in the region is also one of the factors driving the growth of the BCG vaccine market in the region. For instance, an article titled 'Past, Present and Future of Bacillus Calmette-Guerin Vaccine Use in China' published in July 2022 stated that two major BCG production institutions in China produced freeze-dried intradermal BCG vaccines for the scheduled immunization of children: the Shanghai Institute of Biological Products and the Chengdu Institute of Biological Products (a subsidiary of China National Biotec Group CNBG)), with a combined annual supply of no less than 20 million copies.

BCG Vaccine Industry Overview

The BCG vaccine market is fragmented in nature due to the presence of several companies operating globally as well as regionally. The competitive landscape includes an analysis of a few international and local companies that hold market shares and are well known. include AJ Biologics Sdn Bhd, Serum Institute of India Pvt. Ltd., GSBPL, Taj Pharmaceuticals Limited, Japan BCG Laboratory, Merck & Co., Inc., Microgen, Biomed Lublin S.A., BCG Vaccine Laboratory, and China Biotechnology Co., Ltd. among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

- 1 INTRODUCTION
 - 1.1 Study Assumptions and Market Definition
 - 1.2 Scope of the Study
- 2 RESEARCH METHODOLOGY
- 3 EXECUTIVE SUMMARY
- 4 MARKET DYNAMICS
 - 4.1 Market Overview
 - 4.2 Market Drivers

- 4.2.1 Rising Prevalence of Tuberculosis
- 4.2.2 Technological Advancement in Vaccine Research and Development
- 4.2.3 Rise in Government Initiatives for Vaccination Programs
- 4.3 Market Restraints
- 4.3.1 Side Effects Associated with the Use of BCG Vaccine
- 4.3.2 Shortage of Supply
- 4.4 Porter's Five Forces Analysis
- 4.4.1 Threat of New Entrants
- 4.4.2 Bargaining Power of Buyers/Consumers
- 4.4.3 Bargaining Power of Suppliers
- 4.4.4 Threat of Substitute Products
- 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Age Group
 - 5.1.1 Paediatrics
 - 5.1.2 Adults
- 5.2 By Application
 - 5.2.1 Tuberculosis
 - 5.2.2 Bladder Cancer
- 5.3 By Distribution Channel
 - 5.3.1 Hospitals
 - 5.3.2 Clinics
 - 5.3.3 Other Distribution Channels
- 5.4 Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Rest of Europe
 - 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 South Korea
 - 5.4.3.6 Rest of Asia-Pacific
 - 5.4.4 Rest of the World

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles

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- 6.1.1 AJ Biologics Sdn Bhd
- 6.1.2 Serum Institute of India Pvt. Ltd.
- 6.1.3 GSBPL
- 6.1.4 Taj Pharmaceuticals Limited
- 6.1.5 Japan BCG Laboratory
- 6.1.6 Merck & Co., Inc.
- 6.1.7 Microgen
- 6.1.8 Biomed Lublin S.A.
- 6.1.9 BCG Vaccine Laboratory
- 6.1.10 China Biotechnology Co., Ltd.

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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