**MARKET & SUPPLY UPDATE**

**Tetanus Diphtheria Vaccine (Td)**

**CONTEXT**

- Tetanus can be prevented through immunization with tetanus-toxoid-containing vaccines (TTCV), which are included in routine immunization programmes globally and administered during antenatal care contacts. To be protected throughout life, WHO recommends that an individual receives 6 doses (3 primary plus 3 booster doses) of TTCV.

- The UNICEF/WHO/UNFPA partnership and Strategic Plan 2018–2020 sought to achieve that at least 59 countries were validated as having eliminated maternal and neonatal tetanus (MNT) by 2020. Since the launch, MNT has been eliminated in 47 countries out of 59 countries at risk, leaving 12 countries yet to eliminate MNT.

- UNICEF procures Tetanus Toxoid and Diphtheria Containing Vaccine (Td) for children above 4 years of age, adolescents and adults to be used in routine immunization and campaigns, primarily in support of maternal and neonatal tetanus elimination (MNTE).

- Td vaccine is WHO pre-qualified in 1-, 10- and 20-dose presentations and is a relatively affordable vaccine with a 2023 projected Weighted Average Price (WAP) of $0.12/dose for the 10-dose presentation and $0.11/dose for the 20-dose presentation.

**SUPPLY & DEMAND**

- The Td vaccines market is a healthy market with five WHO pre-qualified vaccines in various presentations. Four of these manufacturers actively supply through UNICEF, with aggregated capacity exceeding global demand.

- The demand through UNICEF over the past decade has fluctuated between 130-150 million doses. The demand decreased in 2020 and 2021 due to the impact of COVID on immunization campaigns and supplementary activities, which were either cancelled or delayed. In 2022 the demand recovered slightly and in 2023 demand is expected to reach over 135M.

- UNICEF expects the demand for Td vaccine though UNICEF to stabilize between 130-140 million doses in the period of 2023-2027. This forecast has to be understood in the context of previous low forecast accuracy.

**ISSUES & CHALLENGES**

- Poor forecast accuracy, in terms of volume as well as timing of demand materialization, has presented challenges in supply planning. The forecast accuracy, specially for Td-20, is key as this presentation is manufactured only for UNICEF and mainly for campaign activities.

- As the Td vaccine and its vaccination programmes are primarily self-funded by countries, availability and allocation of resources are challenged, especially for outbreaks.

- Countries’ regulatory requirements limit access to multiple products and can put vaccine security at risk.

- 80% of the supply of Td vaccines to UNICEF is coming from India, which creates a high dependency on Indian NRA.

- There is enough production capacity in the market to respond to peaks of supply due to diphtheria outbreaks. However, the lead times for suppliers to increase production can be several months, which is a challenge for a rapid outbreak response.

**LOOKING AHEAD**

- In 2023 UNICEF made awards for supply of Td vaccine in 2023-2025 and for 50% of the projected demand of 2026-2027. In Q2, 2025 UNICEF will re-assess demand for 2026-2027 and additional volumes may be awarded in line with the updated forecast.

- UNICEF has been advocating with countries to consider applying expedited registration procedures (WHO collaborative procedure) for WHO pre-qualified vaccines.

- Countries are also further advised to register more than one manufacturer per vaccine, to improve access and ensure greater vaccine security.

**FURTHER QUESTIONS OR ADDITIONAL INFORMATION? PLEASE CONTACT:**

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