Bacillus Calmette-Guérin Vaccine (BCG)
Market update
Historically: relatively stable demand, around 120 million doses annually.

2013-2016: increase in demand through UNICEF due to constrained availability from manufacturers on the global market.

2017: demand through UNICEF peaked, to reach up to 160 million doses, to replenish depleted country stocks, resulting in 30-35% decrease in 2018 procurement through UNICEF.

2019-2023: demand through UNICEF is anticipated to balance around 150-160 million doses.

Sources: UNICEF Supply Division
WHO pre-qualified BCG vaccine is available from five active manufacturers with buffer capacity for supply of BCG vaccine, globally and through UNICEF.

Global demand for BCG vaccine is estimated to be approximately 300 million doses a year, of which UNICEF procures up to 50 per cent on behalf of around 70 countries.

UNICEF concluded its recent 2019-2023 BCG vaccine supply tender in 2018, awarding five manufacturers to secure improved vaccine supply by diversifying its source base.

- Volume for 2023 supply year is left unawarded and will be finalized early 2022, when more visibility on demand is obtained.
- UNICEF anticipates to issue its next tender for supply of BCG vaccine in 2023.

Weighted Average Price (WAP) for 2019-2023 increased by 22%, reaching USD 0.128 per dose. UNICEF considers these increases brought the price of BCG to sustainable levels, and does not expect further price increase.

Countries prioritise the support for their TB immunization programme and historically forecasted their BCG vaccine needs relatively accurately (variance of less than 15 %), still there is high variability in timing of vaccine demand and periodic concentration of demand in July – Sept.

**Demand is predominantly self financed by countries, with no donor support.**

**Price affordability will remain a priority for BCG Vaccine**
Despite having 5 active manufacturers with some buffer capacity, BCG market still remains fragile.

- **Accommodating countries preference**: limited flexibility from countries to receive vaccine from multiple sources due to:
  - Registration requirements
  - Programmatic preference (eg. ampules vs vials)

- **Individual Supplier Risk**: reoccurring production issue with some manufacturers.

- **NRA risk**: high dependency on Indian NRA.

- **Long Term Competition**: no new entrants for current formulation of vaccine.

- **Total System Effectiveness**:
  - overall limited health impact,
  - large vial presentation resulting in high wastage,
  - relatively high cost of universal vaccination comparing to the expected benefit cost.

- **Product Innovation**: delays in development of a new anti-TB vaccines and other diagnostics and treatments.
Thank You