

# Canadian Blood Services' Plasma Program

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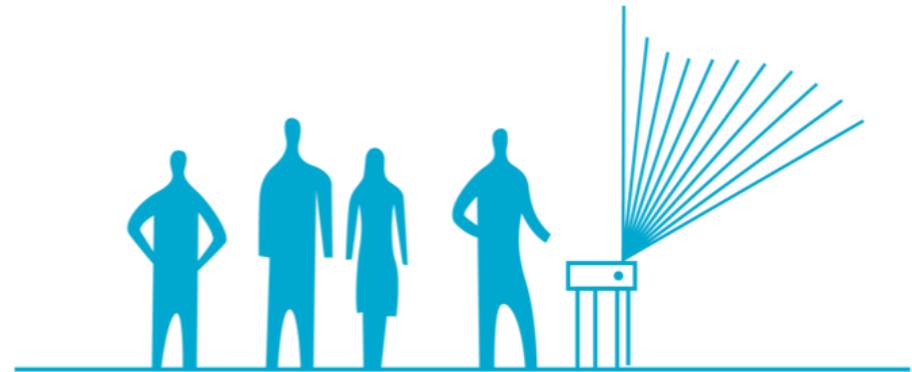
*September 29, 2015*



**Canadian Blood Services**  
*it's in you to give*

# Agenda

- Overview of Canadian Blood Services
- Overview of our plasma program
- Our environment
- Future direction



# Overview of Canadian Blood Services



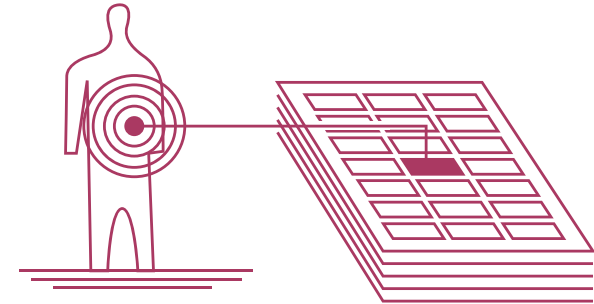
## Overview of Canadian Blood Services

# Unique organization in Canadian health care

- Independent, non-profit, charitable corporation
- Arm's length from governments
- National, integrated service
- Biologics manufacturer regulated by Health Canada
- Collaborative, pan-Canadian, cost-shared model

## Overview of Canadian Blood Services

# The heart of our strategy



### **Manufacture biological products**

*Red blood cells, platelets, plasma, stem cells*

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### **SUPPLY CHAIN MANAGEMENT**

Planning, collection, manufacturing, testing and distribution of biologics products

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### **RECRUITMENT**

Attracting donors for all products and services, from blood to stem cells to organs

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### **Provide clinical services**

*Registries, medical services, knowledge, tools, expertise*

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### **CLINICAL AND MEDICAL SERVICES**

From registry management to diagnostic services to hospital relationships

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### **INNOVATION**

Research, knowledge creation/exchange, education and new product development

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## Overview of Canadian Blood Services

# Our business by the numbers

### Operations

- 41 permanent collection sites
- 2 testing sites; 9 processing sites
- 21,000 blood donor clinics
- 700 hospitals served

### Budget

~ \$1B annually

### People

- 4,400 employees
- 17,000 volunteers

### Fresh blood components

**847K**

Whole blood units  
2014-2015 forecast

**412K**

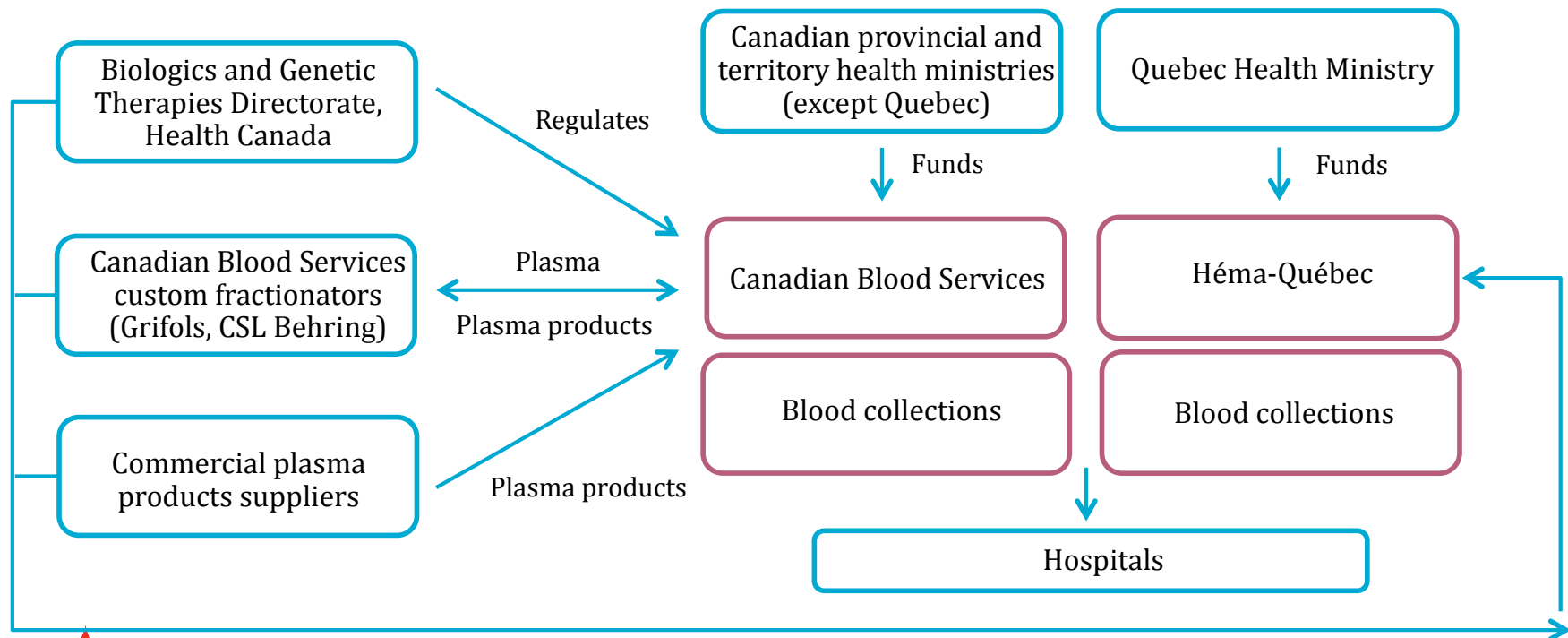
Active blood donors

# Overview of our plasma program



## Overview of our plasma program

# Blood and plasma supply system in Canada





## Overview of our plasma program

# Current system: Plasma demand/usage

### Plasma for transfusion

- 100% self-sufficient
- Hospital demand softening due to changes in clinical indications and introduction of new plasma products
- Collections adjusted downward to align supply and demand

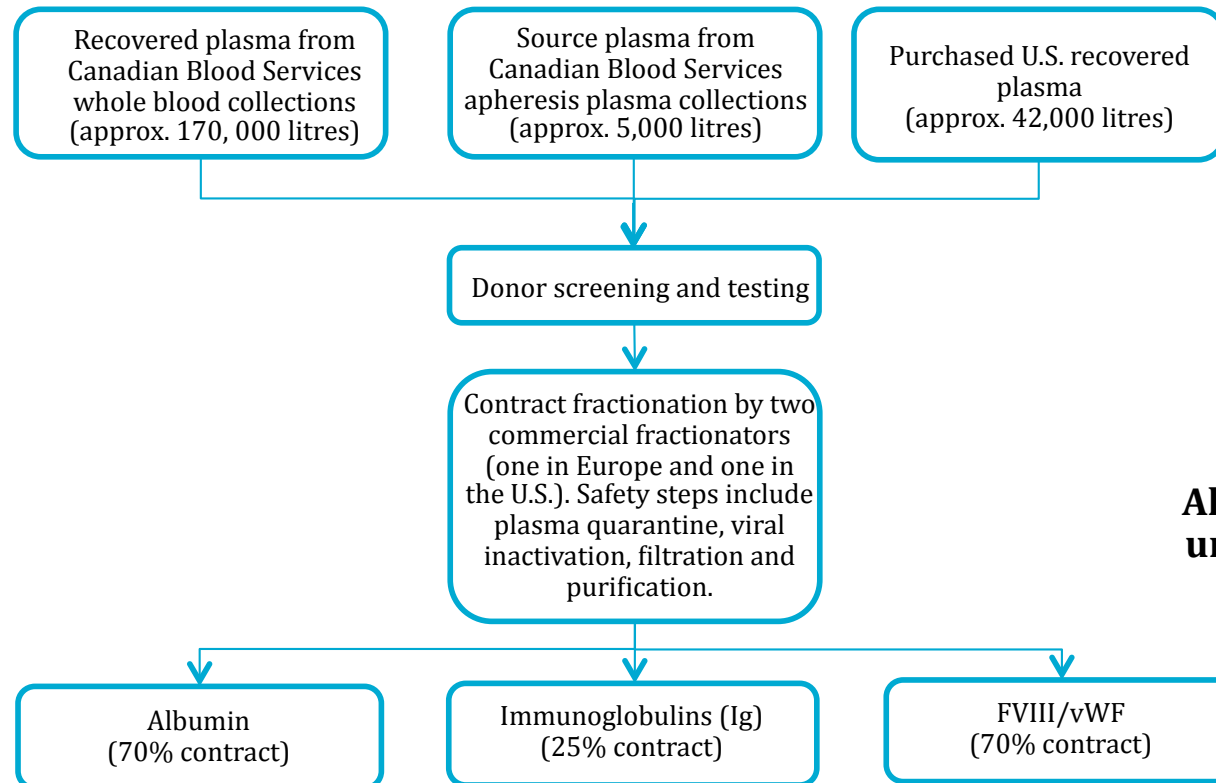


### Plasma for fractionation

- Not self-sufficient
- 25% for Ig
- Ig growth is rising
- Limited global supply of PPPs
- Increase supply to meet demand

## Overview of our plasma program

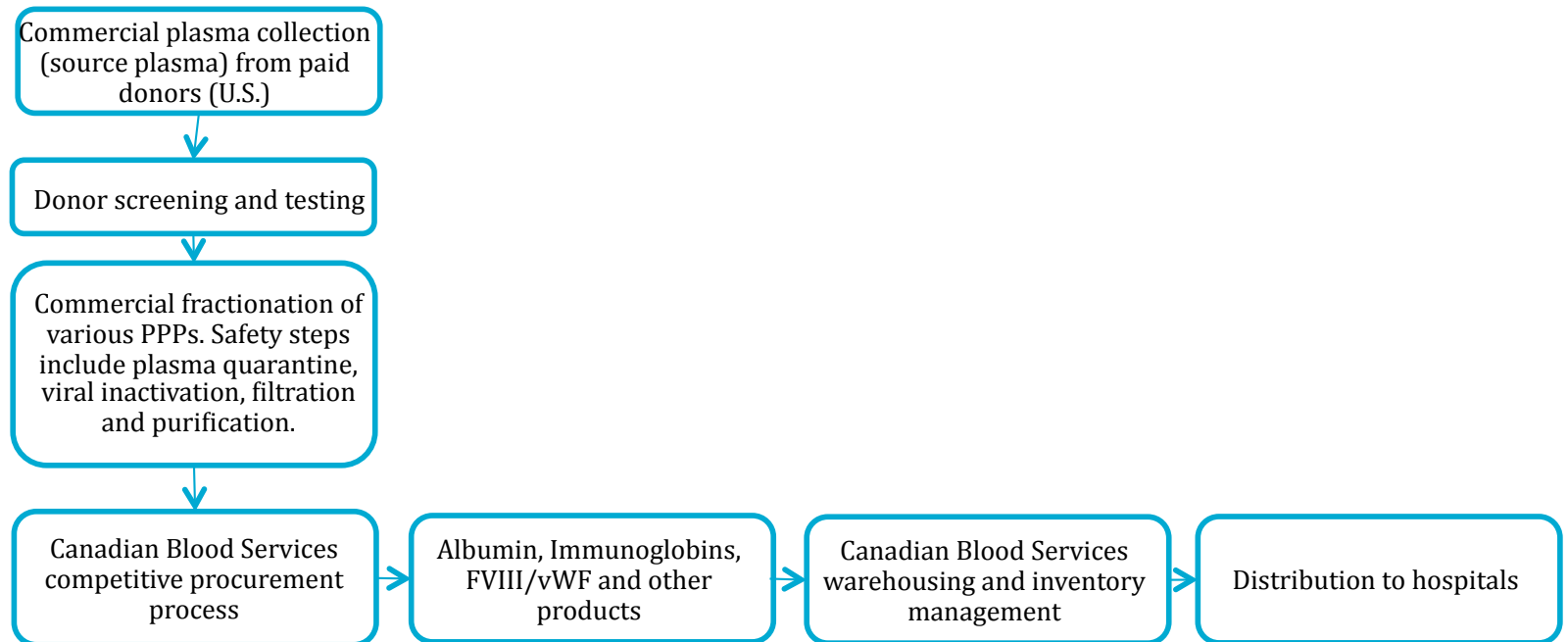
# Contract fractionation to make plasma protein products



**All donors are unpaid in this process**

## Overview of our plasma program

# Purchase of PPPs made from commercial plasma collections (paid donors)



# Our environment



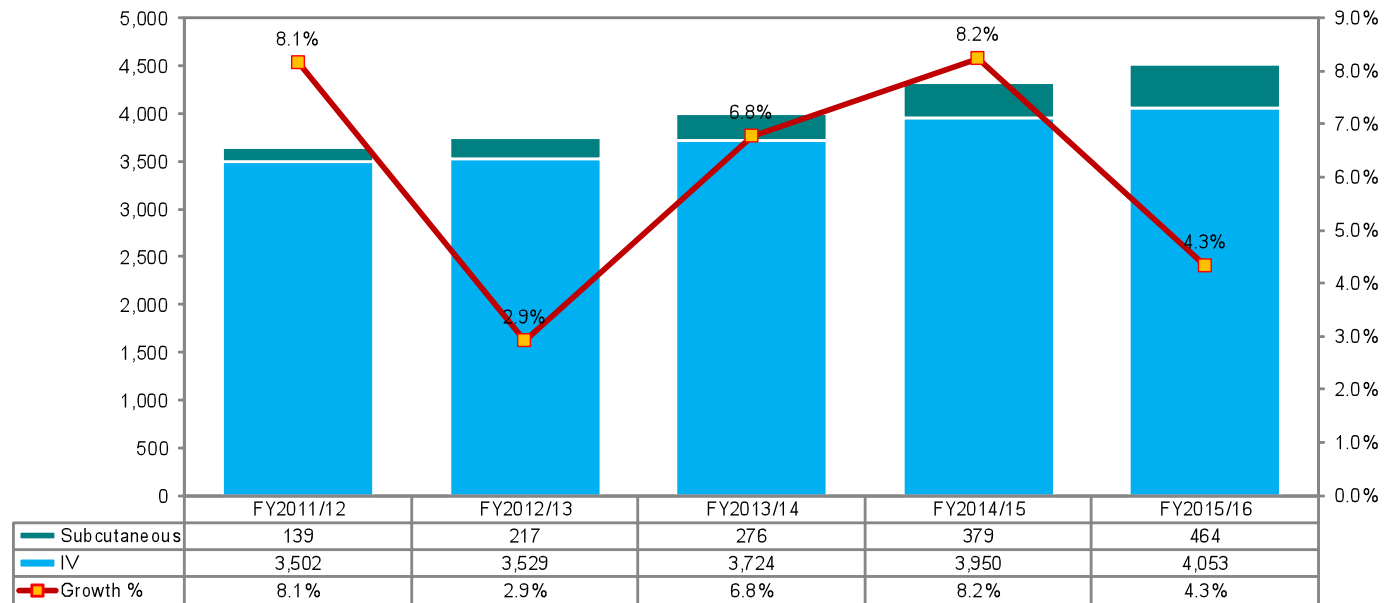
## Our environment

# Demand for Ig

Immune Globulin 5 year trend by grams

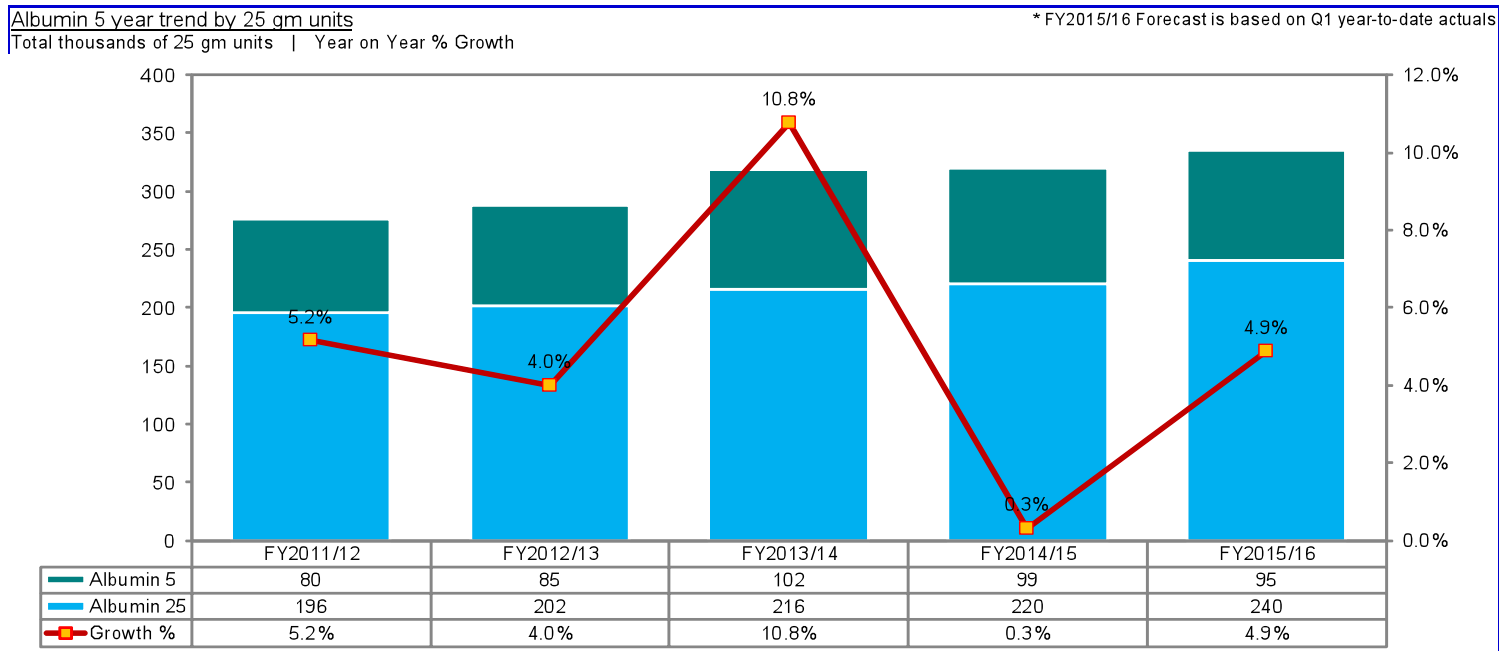
Total thousands of grams | Year on Year % Growth

\* FY2015/16 Forecast is based on Q1 year-to-date actuals



## Our environment

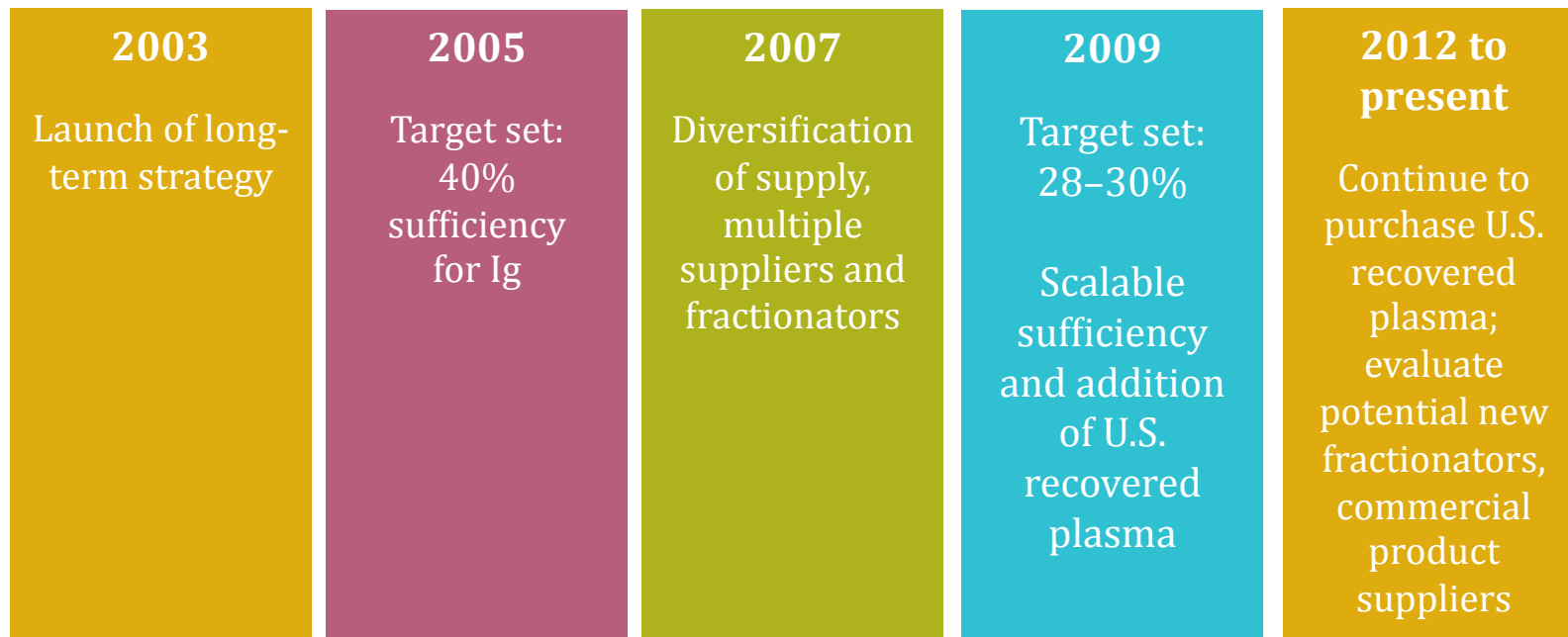
# Demand for Albumin



**Ig sufficiency rate = percentage of  
Canada's demand for Ig that can be  
derived from plasma collected or  
purchased by Canadian Blood Services**

## Our environment

# Plasma sufficiency at Canadian Blood Services





## Our environment

# Ig sufficiency

- Canada is not self-sufficient in Ig
- Sufficiency has eroded from 29.4% in 2012–2013 to 25.6% in 2014–2015
- Decline in demand for whole blood has kept amount of plasma we ship for fractionation fairly flat year over year
- Availability of more U.S. recovered plasma is limited due to lower whole blood collections in U.S.
- Need to increase our plasma for fractionation to maintain sufficiency

## Our environment

# Demand for blood is changing

- Demand for whole blood and transfusable plasma is declining, while demand for platelets is flat
- But need for plasma protein products continues to grow exponentially

## Our environment

# Emerging commercial market in Canada

- Plasma collection
  - Héma-Québec setting up new source plasma clinics
  - Canadian Plasma Resources, a private for-profit company, is considering setting up operations in Western Canada
  - Prometic has bought former Cangene specialty paid plasma collection centre in Winnipeg to use as a blueprint for future centres
- Plasma fractionation
  - Green Cross (Québec) and Therapure (Ontario)

## Our environment

# International perspective

- **New revenues:** U.S. blood centres seeking new revenues by increasing plasma collections
- **Growing market:** Patient need for plasma protein products is significant; market for source plasma growing at about seven per cent per year
- **Infrastructure investments:** Companies in plasma industry are expanding with significant investments in their fractionation infrastructure
- **Voluntary donations:** Many blood operators (Australia, Quebec, France, New Zealand) continue to seek Ig self-sufficiency through voluntary donations

# Future Direction



## Future direction

# Case for change

To ensure we continue to meet patient demand, we need to revisit our long-term goals for our plasma program to:

- Continue to be stewards of the blood system by providing safe, relevant, quality products for Canadians, and by playing a role in collecting plasma in Canada to be a stronger health partner
- Reposition our business to meet changing needs of industry
- Increase our Ig sufficiency by collecting in Canada so we can better mitigate against global market risks that may affect our security of supply
- Provide cost-effective plasma protein products by fractionating Canadian plasma

## Future direction

# Options for consideration

- To increase plasma volumes for fractionation when recovered plasma available from whole blood is flat or declining, we need to **expand our supply of source plasma** for fractionation by increasing apheresis collections and collection volumes per donation
- Sample options: Optimize our current apheresis plasma program within Canadian Blood Services' current footprint or new dedicated plasma collection facilities, developed on our own or with a partner.

## Future direction

# **Paid versus unpaid plasma collection**

- We are not for, nor against pay-for-plasma operators being licensed in Canada
- Not for us to decide
- Not a question of safety; moral/ethical debate
- We remain committed to voluntary donation
- We are confident our donor base will not erode



# Questions

