

# GLOBAL PLASMA COLLECTION: IS THERE ENOUGH?

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# OVERVIEW

Plasma Collections from 2010 to 2024 –  
Global look



European Plasma Collections– Deeper  
Dive



Plasma Collections in other Regions

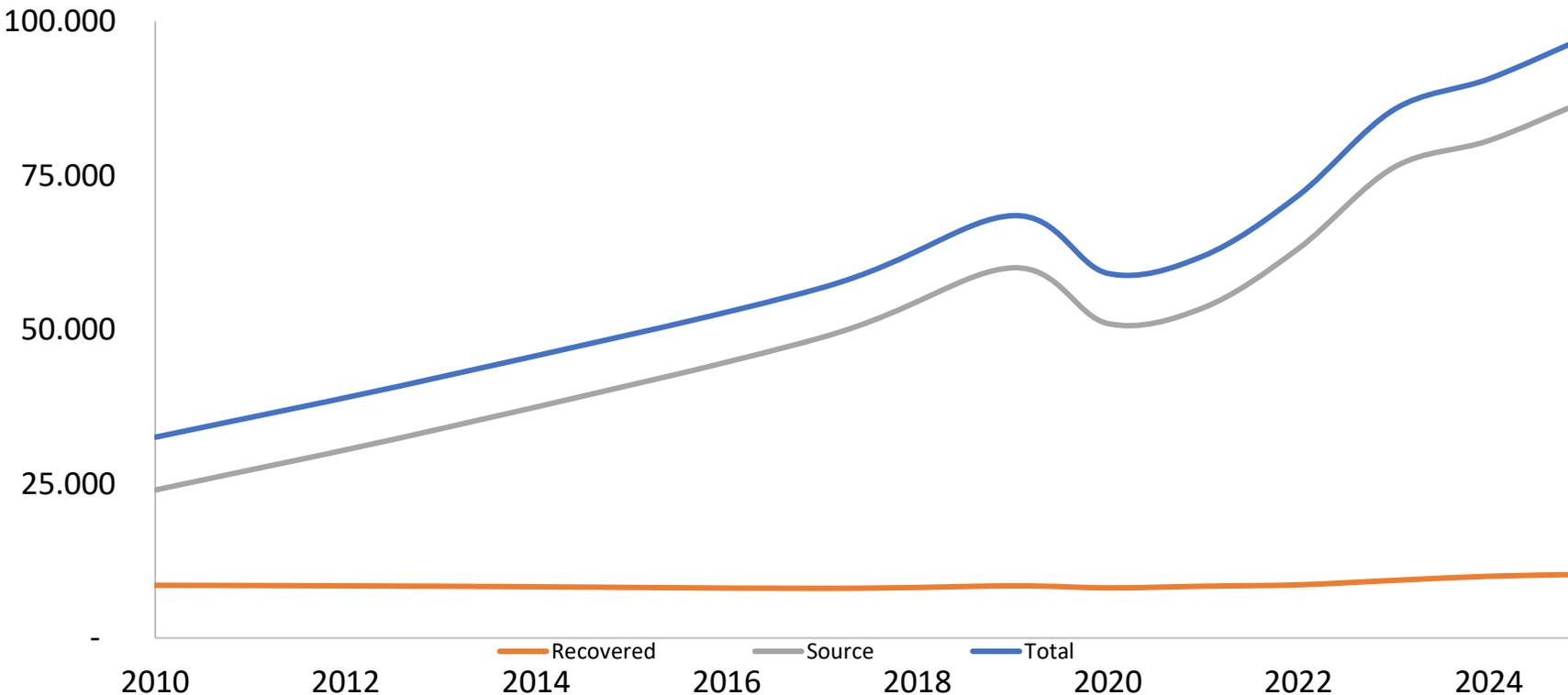


Regional IG Self-Sufficiency based on  
Plasma Collections



In 2024 and 2025, global plasma collections continued to grow inline with estimated Immunoglobulin demand

**Global Plasma for Fractionation  
(Liters X 000)**



Global plasma collection 6-7% over the past two years, equaling total IG sales growth over that period.

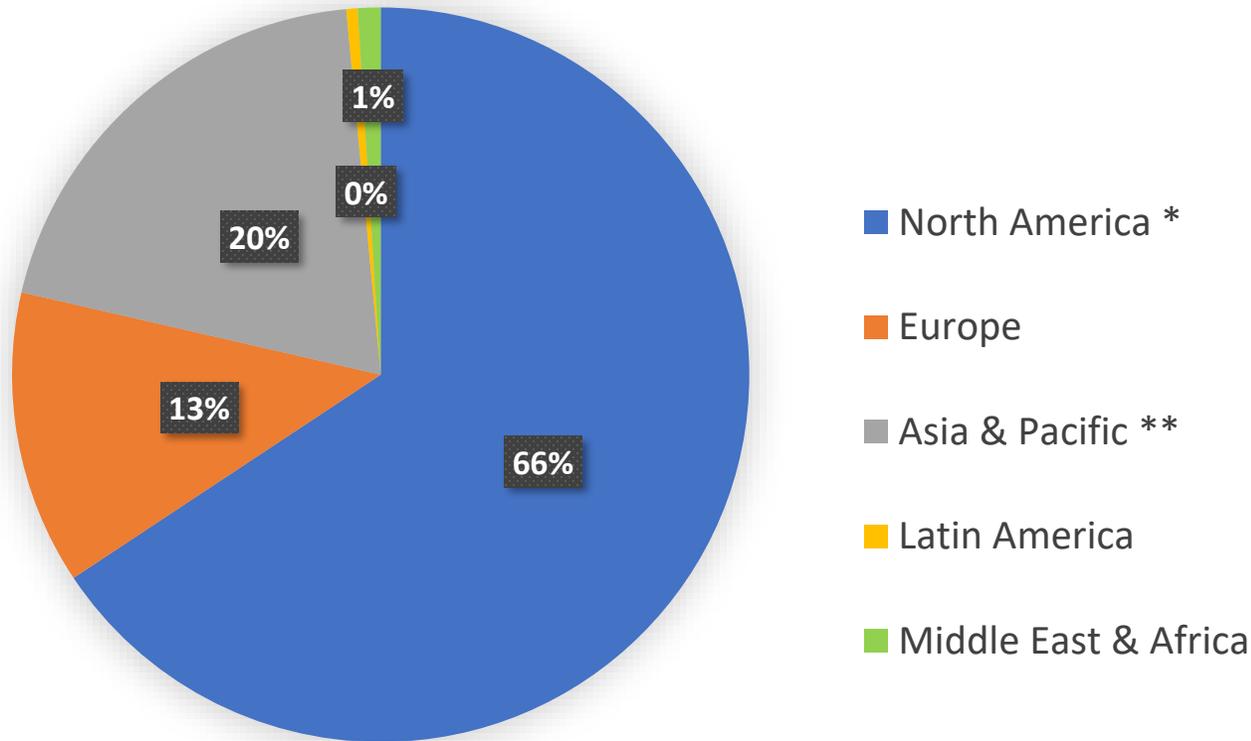
Since 2020, source plasma has grown 11% per year on average, providing 94% of the overall volume increase in the period

The volume of Recovered plasma (all public) grew 5% per year on average since 2020



# Plasma Collections Growth

## Origin of Plasma for Fractionation - 2024



Total Plasma Collection volume 2024: ~90 M liters, up 6% over 2023.

## 2024 vs. 2025

- ↑ Up 7-9%
- ↑ Up 3-5%
- ↑ Up 4-7%

\*United States represented ~99% of the North America total

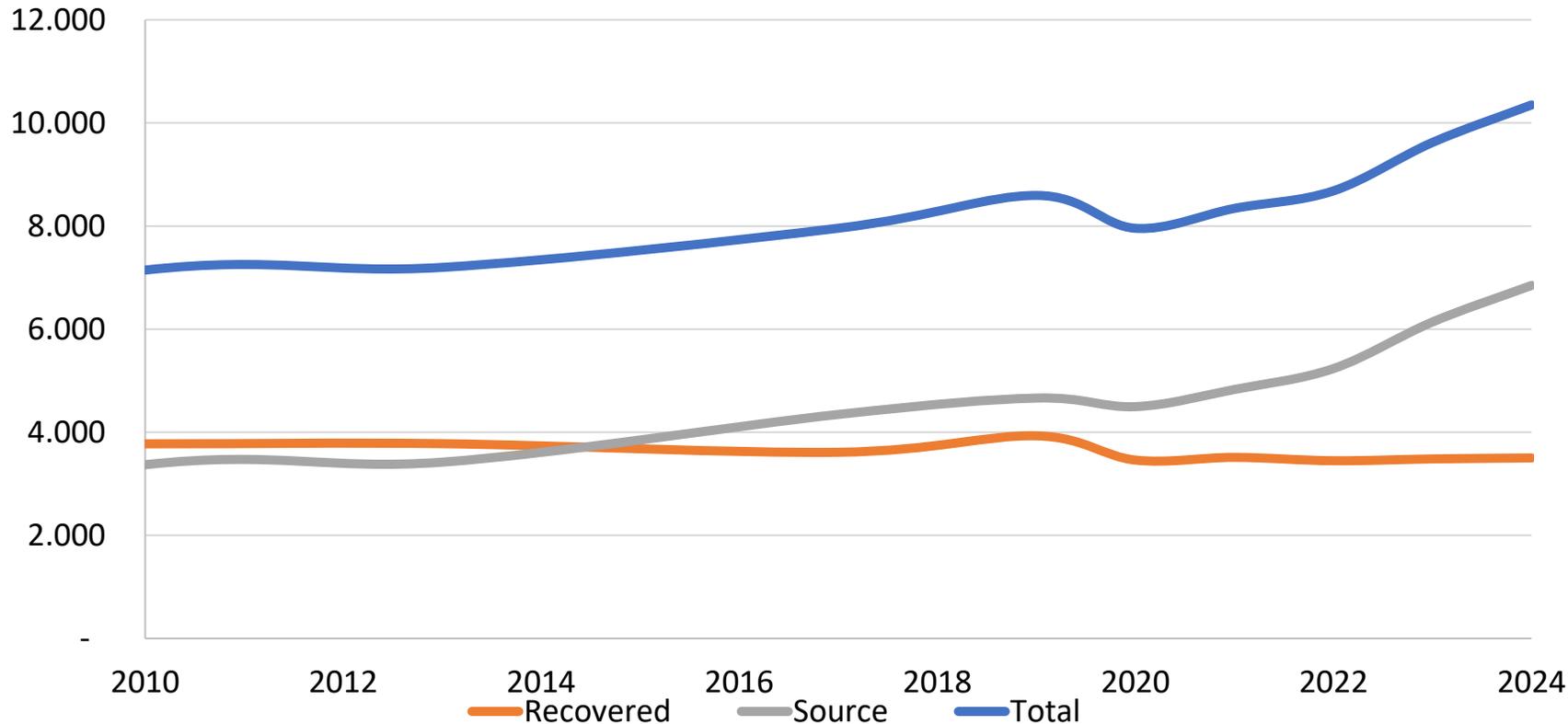
\*\* China represented >70% of Asia & Pacific total

2025 collections were estimated to be ~7% higher than in 2023



In the European Union, plasma for fractionation has also been growing

**European Union Plasma for Fractionation  
(Liters X 000)**



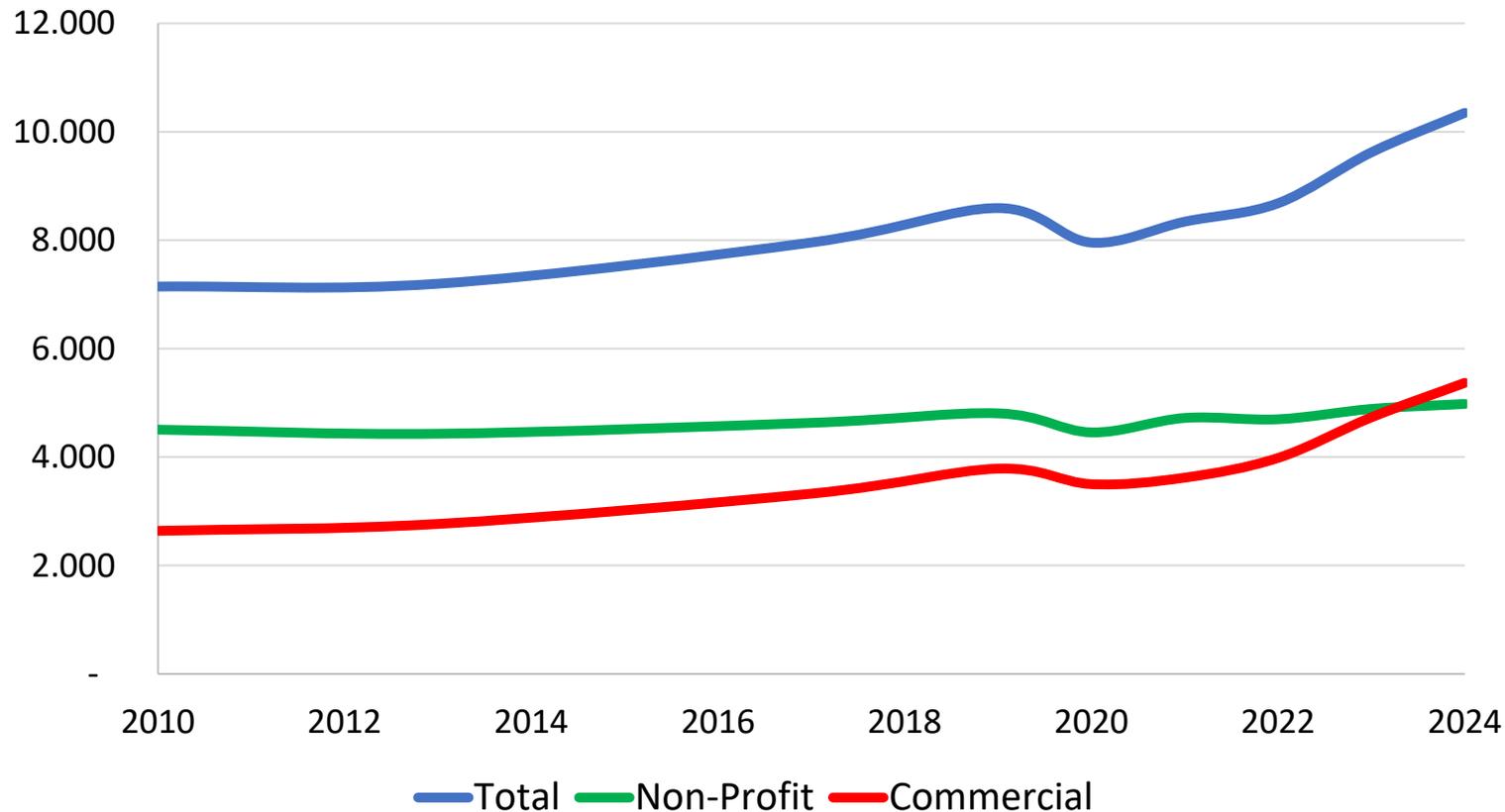
EU plasma collection was over 10 million liters in 2024, a 7.6% growth over 2023.

Since 2021, source plasma has grown 12% per year, providing 100% of overall volume increase since then. It represents 66% of 2024 total EU plasma.

Recovered plasma volume (nearly all public) was flat at -0.1% growth per year since 2021. It represents 34% of 2024 total EU plasma.

Both EU Non-Profit and Commercial collections have recently grown, though Commercial collections are now larger

**European Union Plasma for Fractionation  
(Liters X 000)**

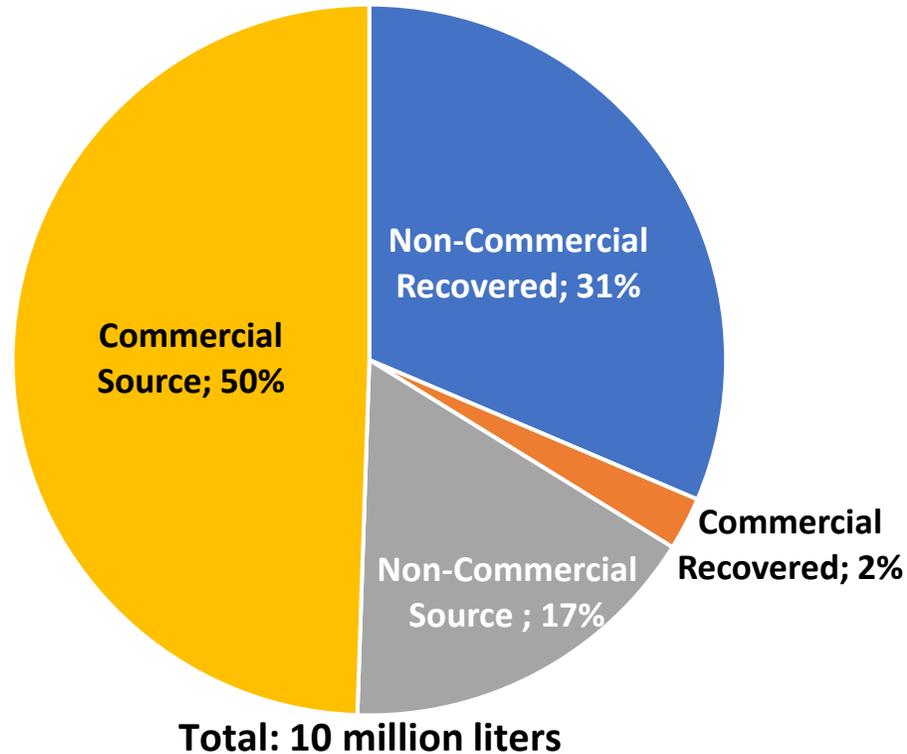


- Plasma volume collected by non-profit organizations was larger until 2024 but still nearly half total volume (48% share in 2024)
  - 2020-2024 CAGR: 2.8%
- Commercial organizations only collect in 4 countries, with 113 million people, or 25% of the total EU population but are now over half of total collections (52% in 2024)
  - 2020-2024 CAGR: 11.3%



# EU plasma source by type in 2024

## Commercial vs. Non-Commercial Source and Recovered in European Union (EU) - 2024



Recovered plasma in 2024: 33%,  
back in 2010, it was 53%

Source plasma in 2024: 67%,  
compared with 47% in 2010



# What's driving Collections Growth in Europe?

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## Non-Profit

More investment in plasmapheresis collection, including stand-alone plasma centers

More outreach to donors, including advertising for plasma donations

Converting blood to plasma donors – who donate more frequently

Partnerships with donor organizations



## Commercial

Expansion of plasma centers (>80 more centers between 2020 and 2024)

Higher donation fees (30-40 €+ per donation)

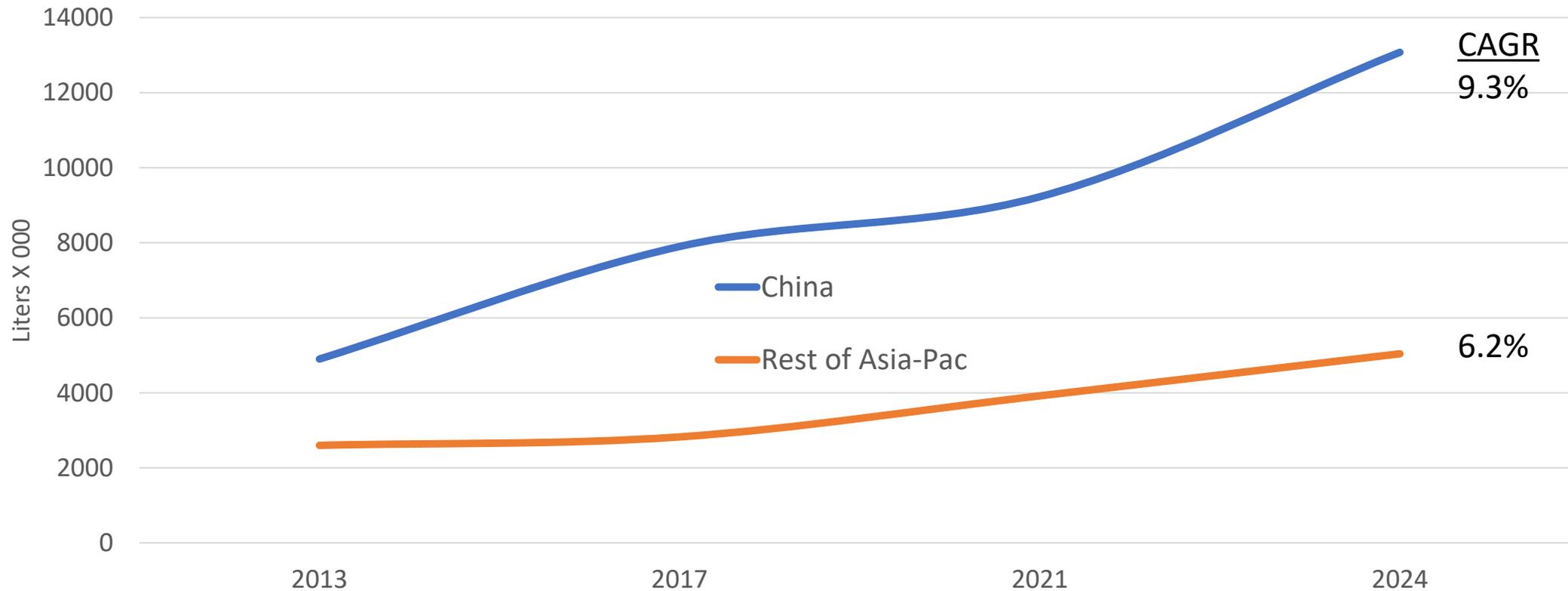
More advertising in media, including social media

Introduction of donor app on phones



# Plasma Collections in Asia & Pacific

China and Rest of Asia-Pacific plasma for fractionation 2013 – 2024

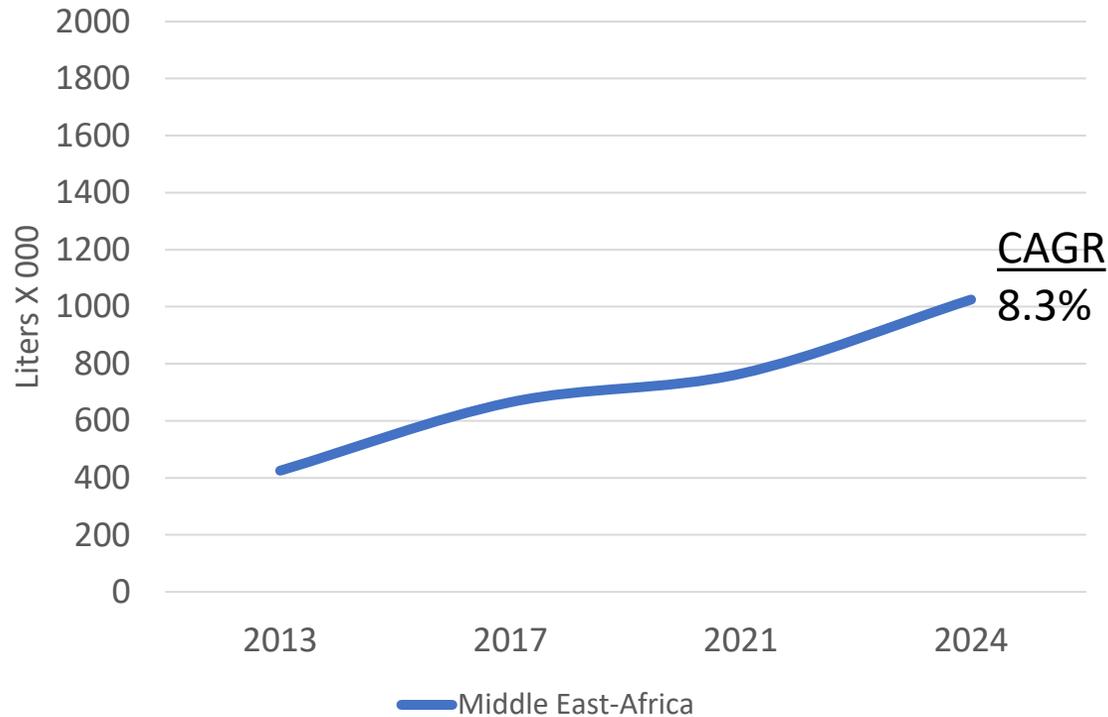


China went from 65% to 72% of the total regional collections between 2013 and 2024.

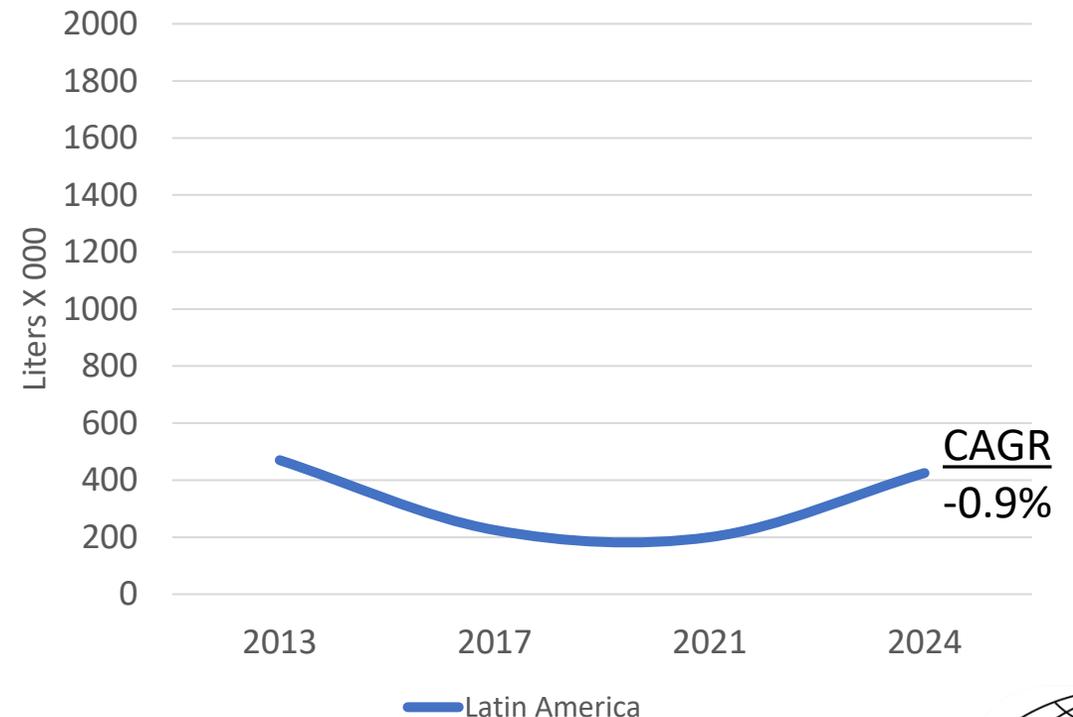


# Plasma Collections in Middle East-Africa & Latin America

Middle East-Africa plasma for fractionation  
2013 – 2024



Latin America plasma for fractionation  
2013 – 2024



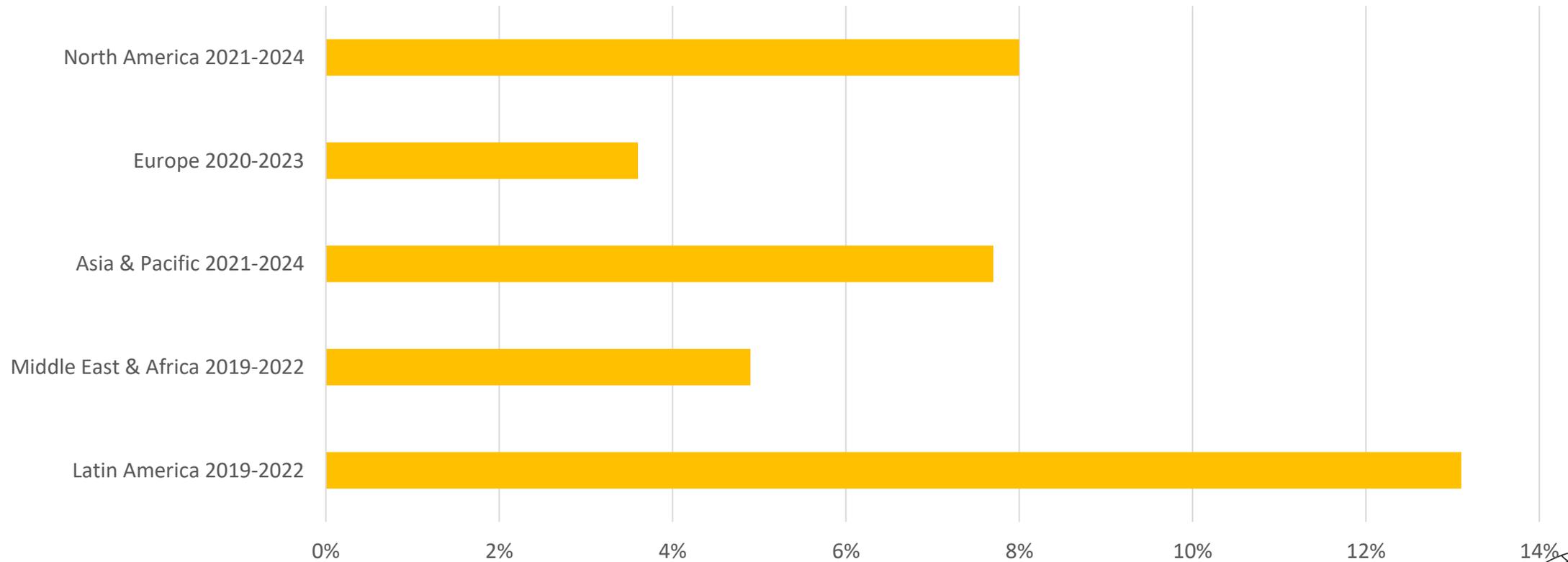
Most of the growth in Middle East-Africa is from Egypt and then Iran

Latin America has declined due to lack of funding in Venezuela and Cuba, despite growth in Brazil



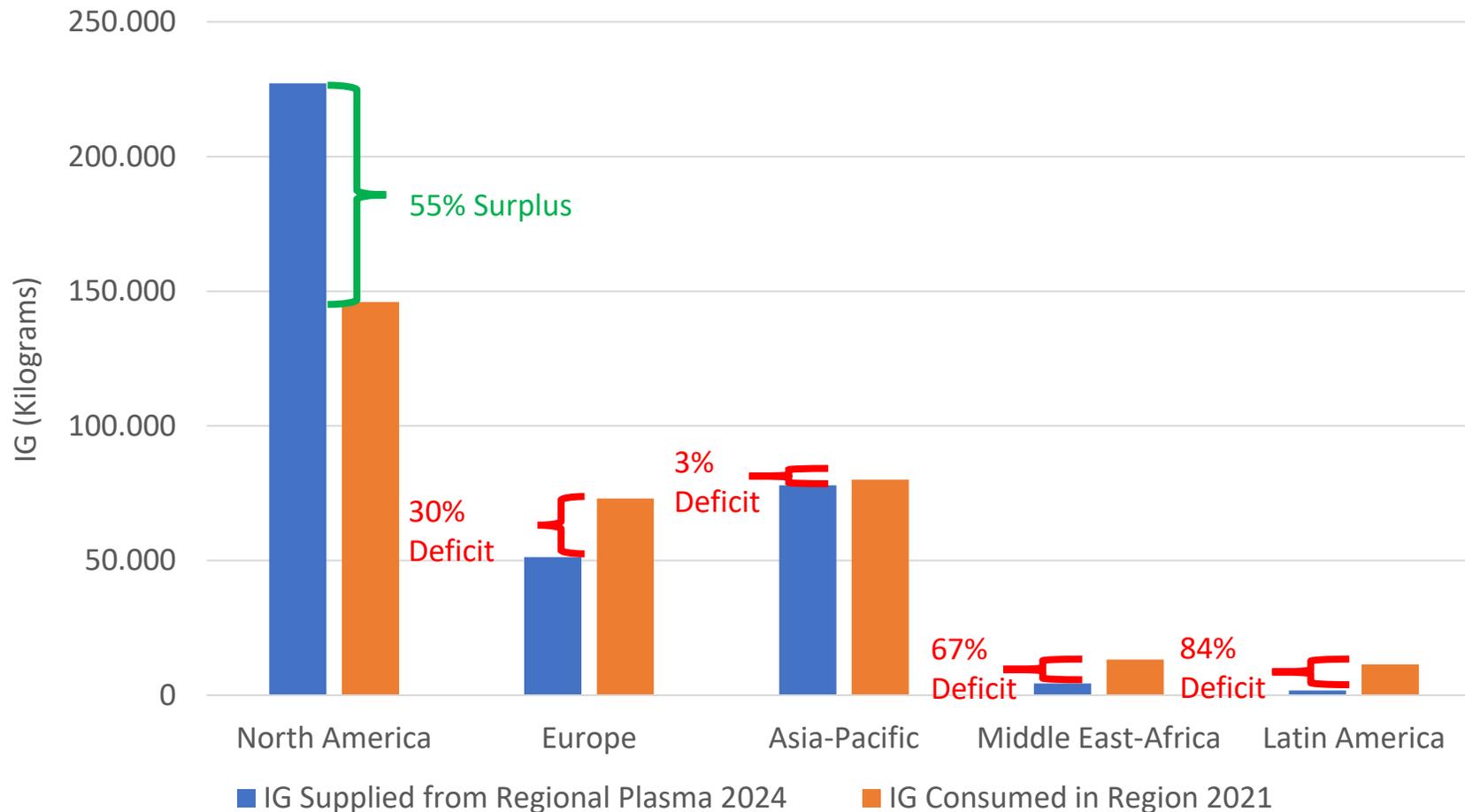
# 3-year Average Growth of IG Volumes by Region

Annual IG growth by Volume



North America (United States) has a large surplus of plasma, which covers Europe, Middle East-Africa and Latin America's deficit

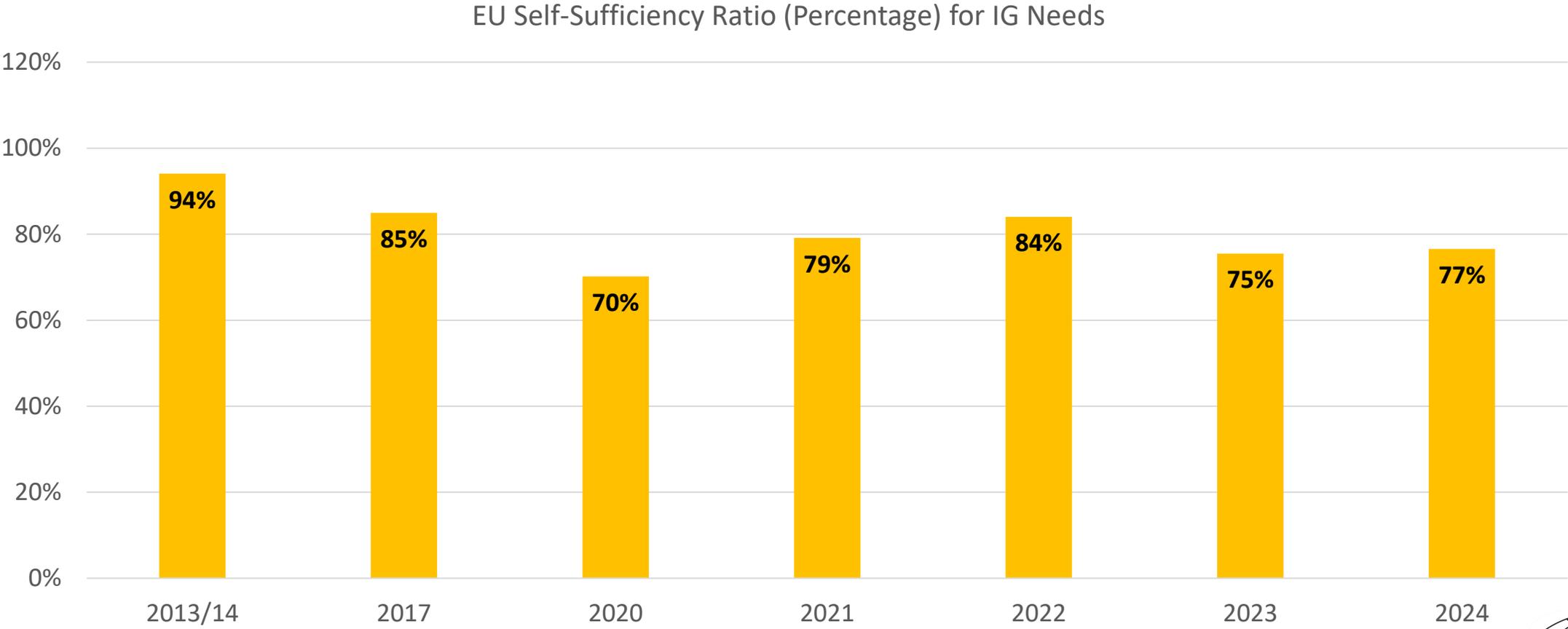
2024- Regional Plasma Supply vs. IG Needs



Yields (g/L): North America: 3.8, Europe 4.5, Asia-Pacific, Middle East-Africa and Latin America, 4.3

- Europe runs the largest deficit, at about 21,000 Kg less IVIG made from European plasma than consumed by European residents.
- Middle East-Africa and Latin America have a deficit of 9-10 tons of IVIG each.
- Asia, mostly due to China is balanced but a small deficit of 2 tons.

The EU countries' self-sufficiency levels have stabilized at around 70-85% since 2021 - Approximately one fourth of the IG volume is imported from the US



Note: IG Yield from 1 L of plasma: 4.5 grams for both recovered and source plasma

# So... Is there Enough Plasma?

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✓ Globally, there is enough plasma collected to meet current usage levels for immunoglobulins and albumin at present prices with some small extra capacity.

But...

✗ It is not well distributed regionally. Europe has the largest absolute deficit to treat its patients with immunoglobulins

And...

? Many patients are still untreated in middle- and low-income countries, where additional funding is required to cover the cost of their therapy



↗ As more patients are covered by health insurance and more funds are allocated to plasma therapies, more plasma will need to be collected to meet the higher demand for these therapies.

# Thank you!



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