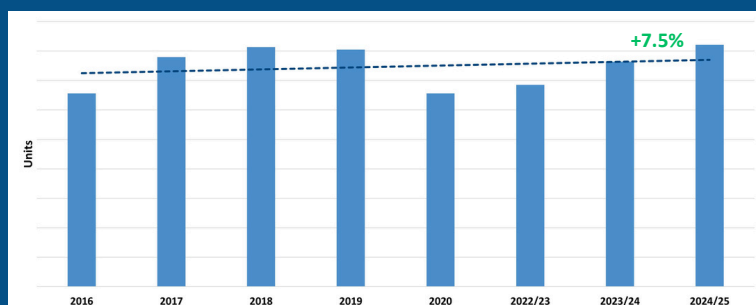


Independent Aseptic Compounders

Driving growth in aseptic medicines

BSNA's Independent Aseptic Compounders (IAC) include Bath ASU, Baxter, B. Braun, Fresenius Kabi, ITH Pharma, Lloyds Clinical and Quantum Aseptics. IAC are a valued partner of the NHS and play a key role in the supply of aseptically prepared injectable medicines to meet patient-specific treatment needs.

Change in total IAC aseptic volumes over time



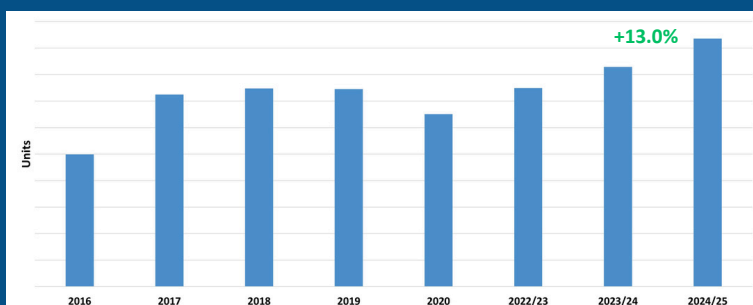
The requirement for aseptic medicines is increasing, and IAC volumes grew by **7.5%** in 24/25 vs 23/24 and **11%** in the year 23/24 vs 22/23.

With an increased focus on healthcare closer to home and the introduction of new and innovative medicines and technologies, further significant growth is expected in the aseptic sector over the next few years.

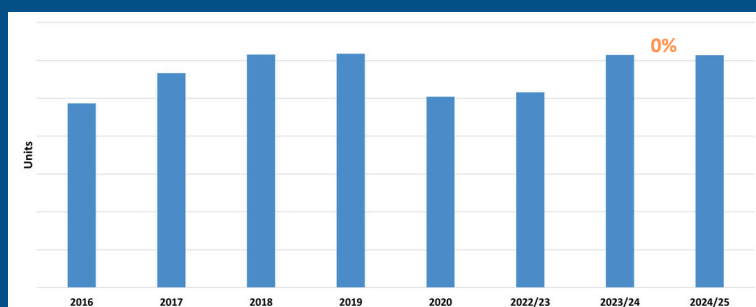
Systemic Anti-Cancer Therapy (SACT) includes chemotherapy and monoclonal antibodies (MABs). The market is fast growing, and volumes have increased considerably, with the IAC reporting a **13%** increase in 24/25 vs 23/24 and a **19%** increase for 23/24 vs 22/23.

With a trend towards personalized medicine, SACT offers a targeted approach to cancer treatment. It is predicted that cancer cases will double by 2040, meaning there will be a growing demand for these and other aseptic products.

Change in IAC SACT volumes over time



Change in IAC PN volumes over time



Parenteral nutrition (PN) delivers specialist nutrition via an intravenous route, bypassing the gut. It can be provided in standardised multi-chamber bags or tailored to an individual patient's requirements.

IAC volumes of PN remained stable in 24/25 vs 23/24, following a 13% increase in 23/24 vs 22/23.