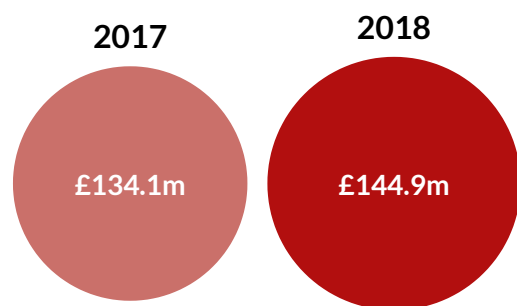


GPrX Market Review 2018

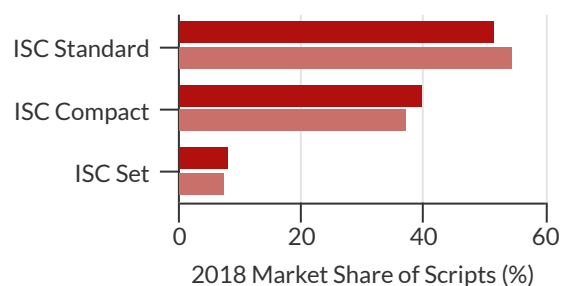
ISC Catheters

Market Changes



Latest figures from GPrX Data show an 8.1% increase in UK reimbursement spend on ISC catheters for 2018 versus 2017, alongside a 4.3% increase in the number of prescription items.

2018 Market Share by Catheter Type



Standard ISC catheters made up 51.7% of ISC catheters in 2018, down 3 percentage points on 2017. The market share of compact ISC catheters increased 2.5 percentage points to 40% in 2018.

2018 Performance Index

Top 10 prescribed ISC Standard brands				
Market share of scripts				Change in % MS vs 2017
Brand	Company	2018		
SpeediCath	Coloplast	29.51%	▼	-1.16%
LoFric Primo	Wellspect	11.85%	▼	-0.53%
VaPro Hydrophilic	Hollister	8.51%	▲	0.22%
LoFric Non PVC Nelaton	Wellspect	7.31%	▼	-0.69%
Hydrosil Gripper	Bard	4.97%	▼	-0.04%
Actreen Lite	B.Braun	4.14%	▲	0.05%
EasiCath	Coloplast	3.51%	▼	-0.25%
LoFric Nelaton	Wellspect	2.84%	▼	-0.24%
Actreen Hi-Lite	B.Braun	2.48%	▲	0.46%
LIQuick Base	Teleflex	2.41%	▲	0.65%

Top 10 prescribed ISC Compact brands				
Market share of scripts				Change in % MS vs 2017
Brand	Company	2018		
SpeediCath Compact	Coloplast	47.09%	▼	-5.17%
LoFric Origo	Wellspect	15.48%	▲	0.18%
LoFric Sense	Wellspect	11.90%	▼	-1.20%
VaPro Pocket Hydro	Hollister	9.59%	▲	0.63%
SpeediCath Flex	Coloplast	8.57%	▲	4.03%
SpeediCath Compact Eve	Coloplast	4.70%	▲	1.42%
Curan Lady	CliniMed	1.90%	▲	0.17%
Hydrosil Rose	Bard	0.60%	▼	-0.25%
Curan Man	CliniMed	0.18%	▲	0.18%

Largest Growth



Standard ISC Catheters
LIQuick Base - Teleflex
Market share of scripts grew 0.65 percentage points in 2018 alongside an absolute growth in scripts of 34.87%.

Compact ISC Catheters
SpeediCath Flex - Coloplast
Market share of scripts grew 4 percentage points in 2018.

Largest Market Share

Standard ISC Catheters
SpeediCath - Coloplast
Retains top spot in 2018 with 29.5% of market share.

Compact ISC Catheters
SpeediCath Compact - Coloplast
Retaining top spot in 2018 with market share of 47.09% of scripts.



Newcomer Brands 2018

Convatec - GentleCath Glide Hydro
Clinimed - Curan Advantage
Clinisupplies - Prosys SensaCath Hydro
Peak - Ultrasmooth Aqua