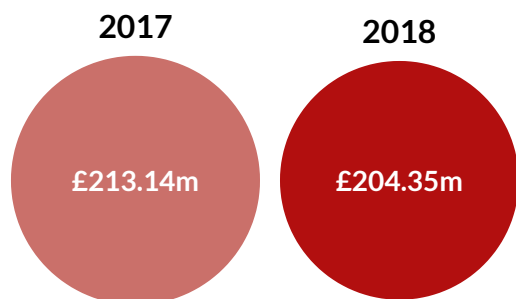


GPrX Market Review 2018

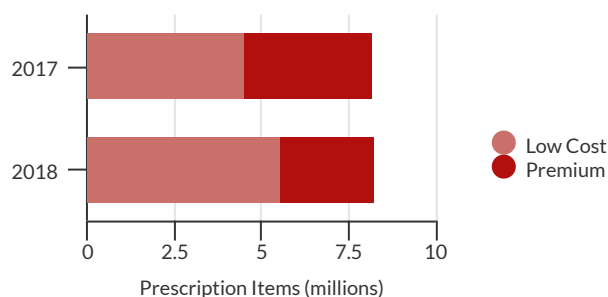
Blood Glucose Test Strips

Market Changes



UK reimbursement spend on blood glucose test strips (BGTS) fell 4.12% in 2018 versus 2017. The key driver for this fall is the increased preference for prescribing Low Cost BGTS versus Premium BGTS.

Low Cost versus Premium Prescribing Year on Year



Prescribing of Low Cost BGTS increased 23% 2018 versus 2017, whilst prescribing of Premium BGTS decreased 27.3%.

2018 Performance Index

Top 10 Prescribed Low Cost Brands			
Market share of prescriptions			Change in % MS
Brand	Company	2018	vs 2017
GlucoRx Nexus	GlucoRx	23.87%	▼ -3.10%
Mobile	Roche	10.49%	▲ 7.45%
WaveSense JAZZ	AgaMatrix	10.15%	▼ -1.06%
Performa	Roche	8.56%	▲ 2.81%
GlucoMen Areo Sensor	A Menarini	7.85%	▲ 1.29%
TRUEyou	Nipro	6.19%	▼ -1.15%
OneTouch Select Plus	LifeScan	5.13%	▲ 0.65%
TEE2	Spirit	5.05%	▲ 1.04%
Contour	Ascensia	4.11%	▼ -0.68%
Mylife Pura	Ypsomed	2.90%	▼ -0.89%

Top 10 Prescribed Premium Brands			
Market share of prescriptions			Change in % MS
Brand	Company	2018	vs 2017
Aviva	Roche	30.46%	▲ 3.97%
Contour Next	Ascensia	20.38%	▲ 4.53%
Freestyle Optium	Abbott	13.80%	▲ 1.53%
OneTouch Verio	LifeScan	7.23%	▲ 0.36%
Freestyle Lite	Abbott	7.19%	▲ 0.66%
CareSens N	Spirit	6.08%	▲ 0.38%
GlucoMen LX Sensor	A Menarini	4.58%	▼ -0.10%
TRUEresult	Nipro	3.86%	▲ 0.79%
FreeStyle	Abbott	2.23%	▲ 0.32%
Active	Roche	1.44%	▼ -0.32%

In 2018, GlucoRx retained their position as the top-prescribed manufacturer of Low Cost BGTS and Roche maintained their position as the top for Premium BGTS.

Largest Growth

Low Cost
Mobile - Roche*
Market share has increased by 7.45 percentage points.

Premium
Contour Next - Ascensia
Growth of 4.53 percentage points in market share by prescription items.



Largest Market Share

Low Cost
GlucoRx Nexus - GlucoRx
With 23.87% of market share, remains top prescribed by scripts.

Premium
Aviva - Roche
Retains top spot in 2018 with market share of 30.46%.



* Mobile achieved the highest growth in market share in 2018, however much of this is due to a reclassification to the Low Cost category following a reduction in price in September 2017. Prescribing prior to this date is assigned to the Premium category. The next highest growth for market share was Performa (also Roche).