GPrX Data

GPrX Monitor
FLASH BRIEFING
EXECUTIVE SUMMARY

NHS prescribing of FreeStyle Libre and its impact on the Blood Glucose Monitoring market

T: +44 (0)1223 902100
E: hello@gprxdata.com

www.gprxdata.com

Contents

GPrX Data

Background

GPrX Data Data is an independent business intelligence provider, with a core focus on NHS prescribing data. We started working with NHS open data at its first release in 2012, and have been supplying data and intelligence on the information ever since.

Our systems hold information on every prescription dispensed in UK primary care going back to 2010. This rich dataset has allowed us to develop bespoke expertise in the tracking and analysis of drug and medical device prescriptions in the community.

GPrX Online, our subscription service, provides quality assured information, reporting prescribing by individual general practices (GPs) as well as at Primary Care Organisation (PCO), regional and national level. The online service is updated throughout the month as new datasets are published, with English data available within 6 weeks of the data period.

We have provided continuous reporting to a number of manufacturers in diabetes care for many years, making this one of our major therapy areas of interest.

Data from GPrX Online provides much of the basis for the following report. Our analyst team is also able to deep dive into the information to provide commentary on individual market sectors.

We provide this service to clients as part of our GPrX Monitor service, and it is from this stable that this report originates.

Drugs and devices for the management of diabetes mellitus currently represent approximately 11% of the NHS's annual prescribing spend in primary care.

There is a concomitant high interest in innovations in therapies and diagnostic tools available to patients, as these potentially have a high impact on overall NHS prescribing expenditure.

The introduction of the FreeStyle Libre (Abbott Diabetes Care) interstitial Flash glucose monitor onto the NHS Drug Tariff in November 2017 was described as "a watershed moment in the history of diabetes care" in an independent paper published in Diabetic Medicine[1].

As a major new development within this market, and one which may herald significant changes to the current landscape, we believe it warrants close monitoring.

This report focuses on the early uptake of FreeStyle Libre by prescribers, and considers how this new product and other factors may impact on the market.

This report is produced independent of any suppliers to the market and is not affiliated to any manufacturer mentioned within.

[1] Leelarathna L, Wilmot EG. Flash forward: a review of flash glucose monitoring. Diabetic Medicine 2018; 35; 472-482.

Methodology

Using prescribing data from England, Scotland, Wales and Northern Ireland, accessed via GPrX Online, we have analysed the spend and prescriptions issued for diabetes drugs and devices in the UK, including FreeStyle Libre.

The data accessed from GPrX Online covers the period from January 2014 through to January 2018 (for Scotland, Wales and Northern Ireland) and February 2018 (England).

GPrX analysts have researched and collated the formulary status of FreeStyle Libre in all the Clinical Commissioning Groups (CCGs) in England, the Health Boards (HBs) in Scotland and Wales, and the Local Commissioning Groups (LCGs) in Northern Ireland to complete the prescribing picture in the UK. GPrX continue to monitor any decisions made by commissioning bodies and update online listings accordingly.

Disease prevelence data is reported by the four UK nations via the Quality and Outcomes Framework (QOF). GPrX analysts have combined this data with the prescribing data from GPrX Online, to analyse the spend on diabetes and FreeStyle Libre at a more granular level.

Additionally, the drivers for change in this market are considered, in addition to the introduction of FreeStyle Libre, and how these may work with or against further uptake of the sensor.

This report will take a look at the current diabetes market within primary care, specifically the market for self monitoring blood glucose devices.

The Diabetes Market

Diabetes affects a significant proportion of the UK population. In 2017, there were 3,689,509 people in the UK with a diagnosis of diabetes[2], an increase of 21.2% since 2012 (Figure 1).

Tackling diabetes has been labelled **"one of the biggest healthcare challenges of our time"**[3].

A Public Health England (PHE) report published in 2015 identified 5 million people with a high risk of developing Type 2 diabetes[4], and Diabetes UK estimates there are almost 1 million people with Type 2 diabetes who have not yet been diagnosed[2].

In 2016/17, 8% of patients in England registered with diabetes had Type 1 diabetes, 89.7% had Type 2 diabetes and 2.3% had other diabetes types[5]. The number of patients with Type 1 diabetes is estimated to be growing at a rate of 4% per year[6].

Diabetes is an increasing financial burden on the NHS. It is estimated to cost the NHS **£10 billion** per year; approaching **10% of its total budget**[7]. Of these estimated costs associated with diabetes, 80% are due to complications arising from the disease[7]. Complications include diabetic foot disease which can result in lower limb amputations - 7,000 leg, foot or toe amputations are carried out in England every year on patients with diabetes, costing the NHS approximately £1.2 billion[8].

In primary care, prescriptions for drugs used in diabetes (section 6.1 of the British National Formulary (BNF)) now represent almost 11% of the total net ingredient cost (NIC) of community prescriptions in England, having risen from 6.9% in 2006 (Figure 2). The proportion of prescription items accounted for by drugs used in diabetes has also risen, from 3.8% in 2006 to 4.8% in 2017 (Figure 2).

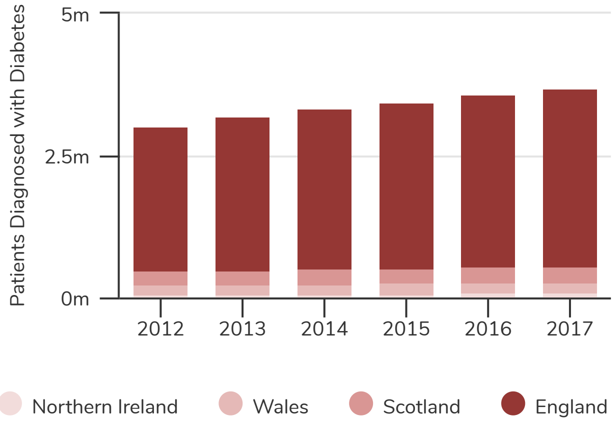

Figure 1: Registered Patients with Diabetes, by Nation, 2012 - 2017

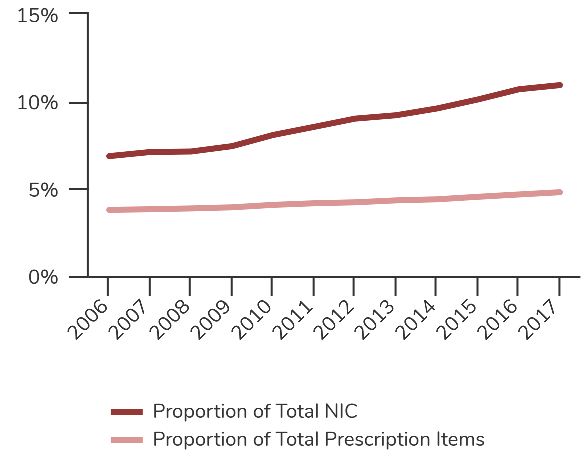

Figure 2: Proportion of Total NIC and Prescription Items for NHS England accounted for by Drugs used in Diabetes, 2006 -2017

[2] Diabetes UK. Diabetes Prevalence 2017 (November 2017). Available at https://www.diabetes.org.uk/professionals/position-statements-reports/statistics/diabetes-prevalence-2017 Last accessed 18 April 2018.
[3] NHS England. Tackling diabetes is one of the biggest healthcare challenges of our time. Available at https://www.england.nhs.uk/blog/tackling-diabetes-is-one-of-the-biggest-healthcare-challenges-of-our-time/ Last accessed 18 April 2018.
[4] GOV.UK. Five million people at high risk of Type 2 diabetes. Available at https://www.gov.uk/government/news/five-million-people-at-high-risk-of-type-2-diabetes Last accessed 18 April 2018.
[5] NHS Digital. Prescribing for Diabetes. Available at https://digital.nhs.uk/media/31873/Prescribing-for-Diabetes-England-2006-07-to-2016-17-pdf-/default/NHS-DIGITAL-pres-diab-eng-1617. Last accessed 18 April 2018.
[6] JDRF. Type 1 diabetes facts and figures. Available at https://jdrf.org.uk/information-support/about-type-1-diabetes/facts-and-figures/ Last accessed 18 April 2018.
[7] Diabetes UK. The Cost of Diabetes Report. Available at https://www.diabetes.org.uk/resources-s3/2017-11/diabetes%20uk%20cost%20of%20diabetes%20report.pdf Last accessed 18 April 2018.
[8] Diabetes Professional Care. Diabetes Professional Care Foot and Wound Clinic. Available at https://www.diabetesprofessionalcare.com/37-news/news-blog/248-footcare-focus-at-dpc. Last accessed 18 April 2018.

Companies in the Market

When looking at the blood test strips market (glucose and ketones testing strips) in the UK, five companies accounted for 76.5% of spend on blood test strips in 2017.

In the full **Flash Briefing**, we highlight who the top five companies are and their market share by NIC for 2017 (Figure 11).

The market share commanded by the top 5 companies in the market, as measured by NIC, as been falling over the past four years (Figure 12).

We look at how companies in the blood test strips market have fared between 2014 and 2017, focusing on changes in market share in this period (Figure 13).

Further analysis provided in the Flash Briefing covers the premium test strips and low cost test strips markets separately, including market share information. FreeStyle Libre prescribing data is presented, as well as considerations for the short and long term effects on the market.

For further details or to purchase the full report, please contact **hello@gprxdata.com**.

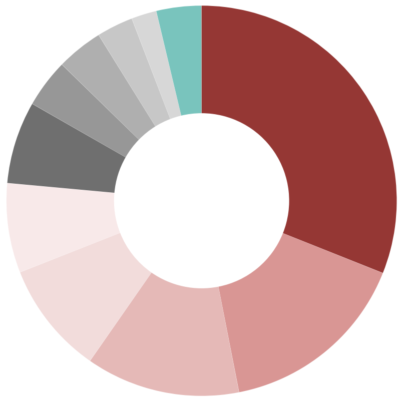

Figure 11: Top Companies' Market Share of the Blood Test Scripts Market by NIC in 2017

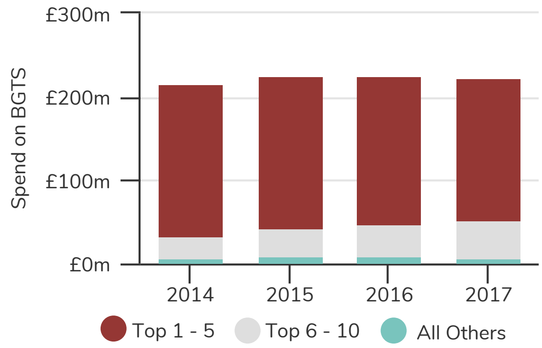

Figure 12: Changes in Proportion of NIC Earned by Top Companies 2014 - 2017

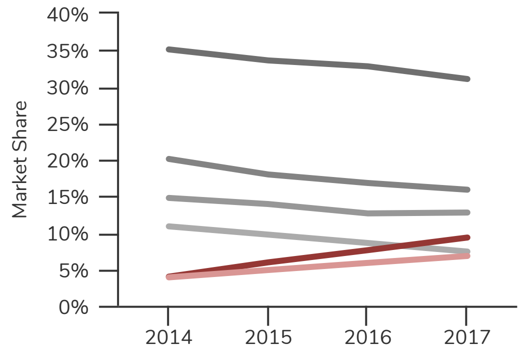

Figure 13: Changes in Market Share 2014 - 2017

FreeStyle Libre Prescribing

Using GPrX Online UK data to January 2018 (February 2018 for England), we are able to see the number of practices and the number of CCGs, HBs and LCGs that have already prescribed FreeStyle Libre. As well as those CCGs and HBs that have had **no** practices prescribing (Figure 23).

The full Flash Briefing provides information on the practices and CCGs / Health Boards that have prescribed FreeStyle Libre, despite formulary guidance not to prescribe (Figure 23).

Reasons for non-adherence may include:

- certain practices may be early adopters of new products
- GPs may view their patients as individuals who would especially benefit from using the sensors
- prescriptions may have been initiated by specialists in secondary care and then continued in the community

So far, FreeStyle Libre has been prescribed in practices in:

85% of CCGs in England
79% of HBs in Scotland
100% of HBs in Wales; and
100% of LCGs in Northern Ireland
since November 2017.

40% of English practices prescribing FreeStyle Libre are in CCGs where prescribing is currently not recommended. In these cases, it is possible that the clinician has successfully raised an Individual Funding Request (IFR), allowing the patient to be prescribed the product.

Figure 24 shows that there are more practices prescribing in areas where the sensors have been approved; specifically in Wales and Northern Ireland.

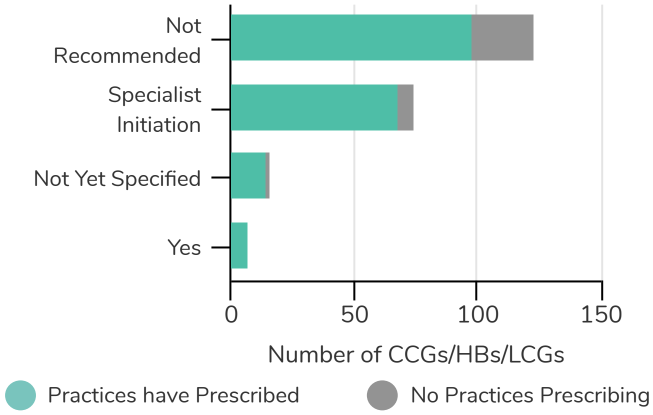

FIgure 23: Formulary Status by Number of Practices Prescribing

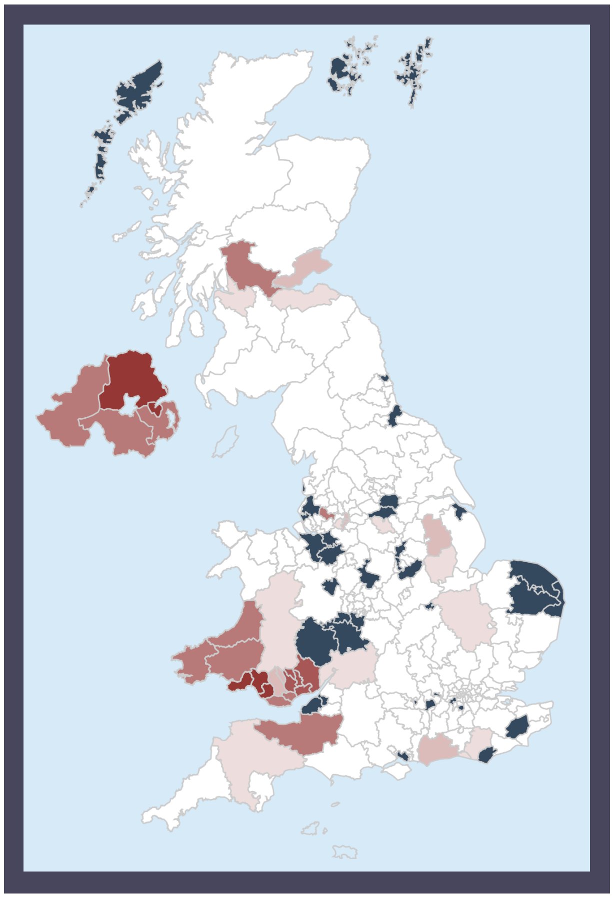

Figure 24: Practices Prescribing FreeStyle Libre

T: +44 (0)1223 902100
E: hello@gprxdata.com

www.gprxdata.com