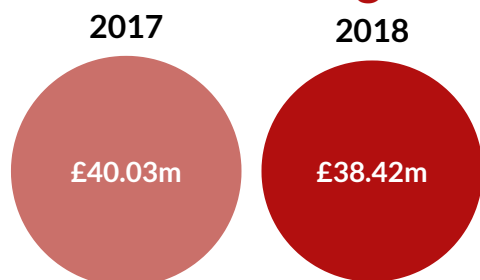


GPrX Market Review 2018

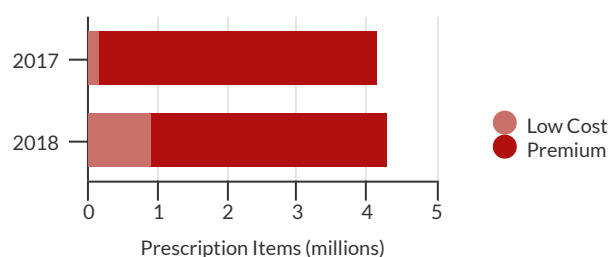
Diabetes Pen Needles

Market Changes



Latest figures from GPrX show a 4% decrease in UK reimbursement spend on diabetes pen needles for 2018 versus 2017, alongside a 3% increase in the number of prescriptions.

Low Cost versus Premium Prescribing Year on Year



Prescribing of Premium pen needles has decreased 15%, whilst prescribing for Low Cost pen needles has increased 395%. Much of this change can be attributed to price changes resulting in products being reclassified from Premium to Low Cost. We have classified Low Cost as costing less than £5 per pack of 100 and Premium as costing greater than £5.

2018 Performance Index

Top Prescribed Premium Brands			
Market share of prescriptions			Change in % MS
Brand	Company	2018	vs 2017
GlucorX FinePoint	GlucorX	34.76%	▲ 2.96%
BD Micro-Fine Ultra	Becton, Dickinson	12.53%	▲ 0.12%
BD Micro-Fine +	Becton, Dickinson	12.47%	▼ -1.87%
Omnican Fine	B.Braun	11.07%	▲ 0.69%
NovoFine	Novo Nordisk	6.35%	▼ -1.08%
Mylife Penfine	Ypsomed	4.75%	▲ 0.10%
BD AutoShield Duo	Becton, Dickinson	3.66%	▲ 1.04%
Unifine Pentips	Owen Mumford	3.02%	▼ -0.15%
GlucorX FinePoint Ultra	GlucorX	2.95%	▲ 0.82%
Insupen	Spirit	2.59%	▲ 0.42%
Mylife Clickfine	Ypsomed	2.38%	▲ 0.06%

Top Prescribed Low Cost Brands			
Market share of prescriptions			Change in % MS
Brand	Company	2018	vs 2017
BD Viva	Becton, Dickinson	50.67%	▼ -6.23%
TriCare	Owen Mumford	19.78%	▲ 6.77%
Verifine	Neon	9.76%	▼ -9.84%
Omnican Fine	B.Braun	7.84%	▲ 7.32%
CarePoint	GlucorX	7.42%	▲ 2.19%
Verifine Ultra	Neon	1.80%	▼ -2.91%
Mylife Penfine	Ypsomed	1.55%	▲ 1.55%
Carepoint Ultra	GlucorX	0.76%	▲ 0.76%
4SURE	Nipro	0.33%	▲ 0.33%
CareFine	Neon	0.07%	▲ 0.07%
PROFine	Prosum Medical	0.02%	▼ -0.01%

Classification

Mylife Penfine (Ypsomed) appears in both performance index tables as the price of this product changed in November 2018, resulting in a reclassification to Low Cost.

The following products had price changes resulting in reclassifications in 2017:

Brand	Company	Premium	Low Cost
BD Viva	Becton, Dickinson	Jun 17	Jul 17
CarePoint	GlucorX	Aug 17	Sep 17
Omnican	B. Braun	Oct 17	Nov 17
TriCare	Owen Mumford	Oct 17	Nov 17

Largest Market Share



Premium
GlucorX FinePoint - GlucorX
With a market share of 34.76%

Low Cost
BD Viva - Becton, Dickinson
With a market share of 50.67%

Newcomer Brands 2018

CarePoint Ultra - GlucorX (Low Cost)
CareFine - Neon (Low Cost)
4SURE - Nipro (Low Cost)
Dropsafe - HTL-STREFA (Premium)