

THE DIABETES MARKET

Over **£1 billion** was spent on drugs used in diabetes in England in 2017.

This represents almost **11%** of the total NIC of community prescribing in England, having risen from **6.9%** in 2006.

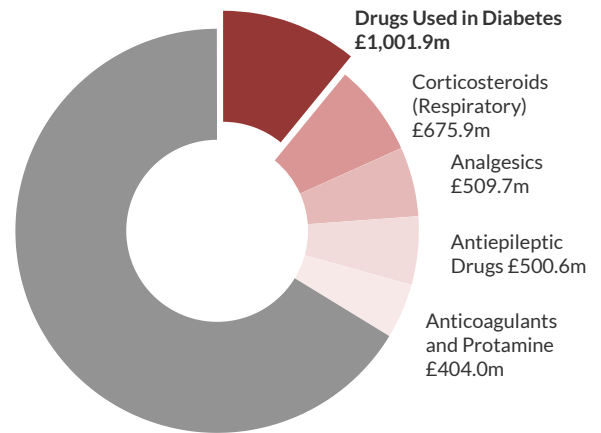
The proportion of prescription items has also risen, from **3.8%** in 2006 to **4.8%** in 2017.

The latest data suggests that this is set to increase further.

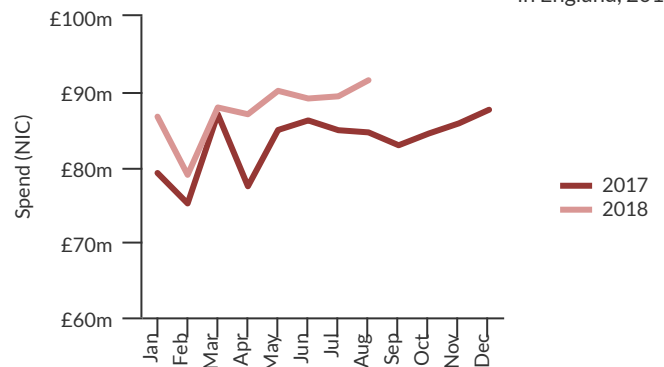
Over **£0.7 billion** has been spent on drugs used diabetes in England, August YTD, and spend has been higher each month in 2018 versus the same month in 2017.

The trend of increasing costs associated with diabetes looks set to carry on as the number of patients registered with diabetes continues to increase.

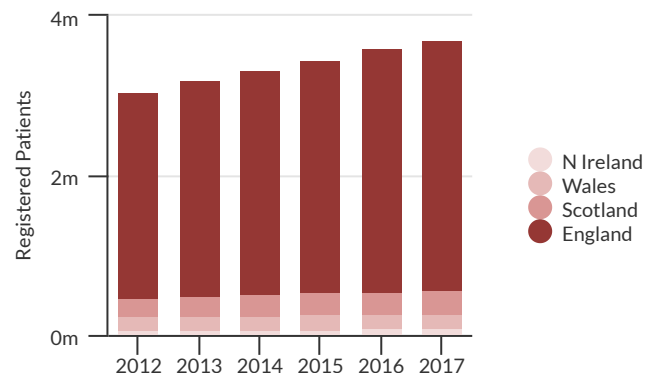
In 2017, there were **3,689,509** people in the UK with a diagnosis of diabetes* an increase of **21.2%** since 2012.



Net Ingredient Cost (NIC) for top 5 BNF Sections in England, 2017



Net Ingredient Cost (NIC) on Drugs Used in Diabetes



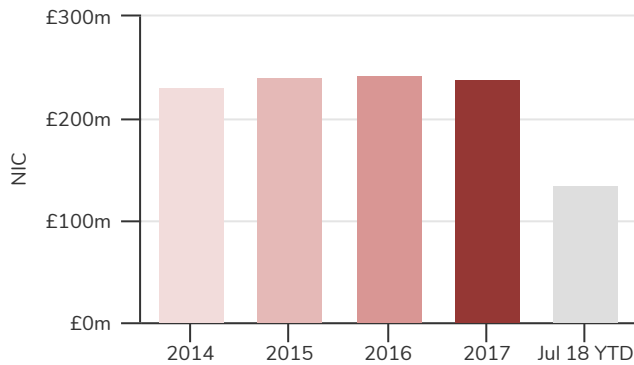
Registered Patients with Diabetes, by Nation, 2012 - 2017

*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.

Data prepared 11/11/2018 based on NHS prescribing data to August 2018 for England, Wales and Northern Ireland and July 2018 for Scotland.

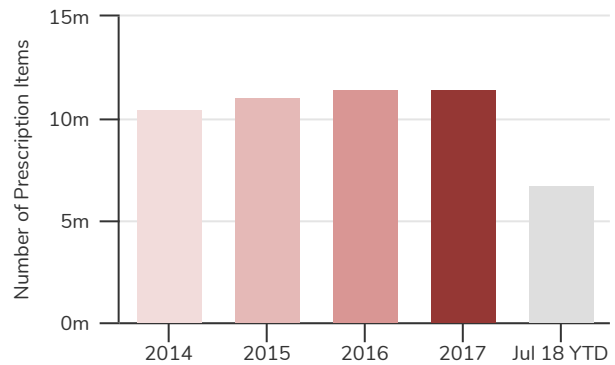
BLOOD TEST STRIPS

The total UK prescription spend on blood glucose monitoring test strips and lancets in 2017 was £239 million, a slight decrease on 2016.



NIC for Blood Glucose Test Strips

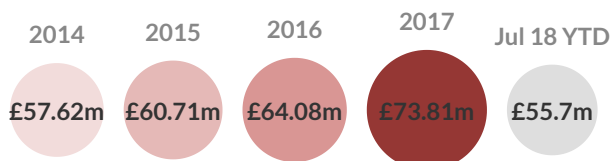
The number of items prescribed, however, has been increasing year on year. This is due to a change in prescribing habits as prescribers switch from premium to low-cost blood glucose test strips



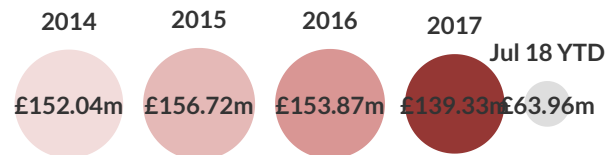
Prescription Items for Blood Glucose Test Strips

July 2018 YTD, £135 million has been spent, a decrease of 4% versus the same period in 2017.

July 2018 YTD, 6.8 million items have been prescribed, an increase 2% versus the same period in 2017.



Spend (NIC) on Low-Cost Test Strips in UK Primary Care



Spend (NIC) on Premium Test Strips in UK Primary Care

The lowcost test strips market has seen significant growth between 2014 and 2017. Spend on low-cost BGTS has increased 28.11% from £57.6m in 2014 to £73.8m in 2017. This trend looks set to continue in 2018.

The annual spend on premium test strips has fallen year on year for the last two years, with 2017 NIC being 9.45% lower than 2016. This trend also looks set to continue in 2018.

BLOOD TEST STRIPS

RxIndex: Top Brands for Low-Cost Blood Test Strips
in England FP10 Data

	Market share of scripts			% point MS growth	
	Brand	Manufacturer	Aug-18	Prev month	Prev year
Top Ten Low-Cost Blood Test Strips	GlucoRx Nexus	GlucoRx	25.15%	▼ -0.23%	▼ -4.18%
	WaveSense JAZZ	AgaMatrix	10.49%	▲ 0.01%	▼ -1.40%
	Mobile	Roche	10.07%	▼ -0.01%	▲ 10.07%
	Performa	Roche	8.53%	▲ 0.16%	▲ 2.40%
	GlucoMen Areo Sensor	A Menarini	7.68%	▲ 0.07%	▲ 0.84%
	TEE2	Spirit	5.80%	▲ 0.17%	▲ 1.09%
	TRUEyou	Nipro	5.01%	▼ -0.03%	▼ -1.01%
	OneTouch Select Plus	LifeScan	4.43%	▲ 0.01%	▲ 0.15%
	Contour	Ascensia	3.83%	▲ 0.02%	▼ -0.63%
	GlucoLab	Neon	2.91%	▼ -0.12%	▼ -1.53%

RxIndex: Top Brands for Premium Blood Test Strips
in England FP10 Data

	Market share of scripts			% point MS growth	
	Brand	Manufacturer	Aug-18	Prev month	Prev year
Top Ten Premium Blood Test Strips	Aviva	Roche	31.60%	▼ -0.43%	▲ 5.88%
	Contour Next	Ascensia	19.79%	▲ 0.27%	▲ 5.13%
	Freestyle Optium	Abbott	14.12%	▲ 0.49%	▲ 2.27%
	Freestyle Lite	Abbott	7.53%	▲ 0.14%	▲ 1.14%
	OneTouch Verio	LifeScan	6.25%	▼ -0.01%	▲ 0.62%
	CareSens N	Spirit	5.58%	▼ -0.45%	▼ -0.34%
	TRUEresult	Nipro	4.83%	▲ 0.12%	▲ 1.16%
	GlucoMen LX Sensor	A Menarini	3.33%	▼ -0.09%	▼ -0.14%
	FreeStyle	Abbott	2.56%	▼ -0.03%	▲ 0.56%
	Active	Roche	1.66%	▲ 0.04%	▼ -0.35%

Please see <http://gprxdata.com/sectors> for more information.