

# GPrX Market Review 2018

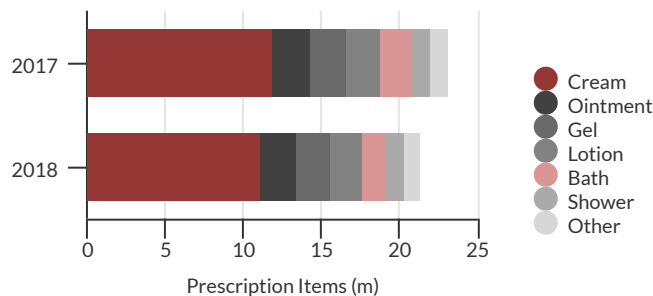
## Emollients Prescribing in Primary Care

### Market Changes

Latest analysis from GPrX Data shows a 6.9% decrease in UK reimbursement spend on emollients, from £154.2m in 2017 to £143.6m in 2018.

Prescription items have also decreased, from 23.25m in 2017 to 21.97m prescription items in 2018.

#### Emollient Prescribing by Type



Creams remain the most prescribed emollient type in 2018, with a market share of 52%.

Bath emollients saw a significant drop in prescription items, down 0.5m items from 2m in 2017 to 1.5m in 2018. We expect further reductions in 2019 for this preparation type as NHS England recommend bath emollients should not be routinely prescribed in primary care.

### 2018 Performance Index

Top 10 Prescribed Emollient Companies			
Market share of prescriptions (All Emollient Types)			
Company	2018	Change in % MS vs 2017	
Thornton and Ross	24.38%	▲	2.22%
Dermal Labs	22.52%	▼	-0.32%
Johnson and Johnson	8.37%	▼	-0.82%
GlaxoSmithKline	6.05%	▼	-1.20%
Bayer	5.85%	▼	-1.09%

Top Prescribed Emollient Cream Brands			
Market share of prescriptions			
Brand	Company	2018	Change in % MS vs 2017
Cetraben	Thornton and Ross	15.00%	▼ -0.29%
Zerobase	Thornton and Ross	11.73%	▲ 1.45%
Aveeno	Johnson and Johnson	11.52%	▼ -1.36%
E45	Forum Health	9.46%	▼ -1.57%
Diprobace	Bayer	9.12%	▼ -2.06%
Epimax	Dermato Logical	6.32%	▲ 2.67%
Dermol	Dermal Labs	5.13%	▲ 0.06%
Epaderm	Molnlycke	4.87%	▼ -0.17%
Zerocream	Thornton and Ross	4.37%	▲ 0.32%
Aqueous Crez	Various	2.92%	▼ -0.79%
Oilatum	GlaxoSmithKline	2.71%	▼ -0.48%
ZeroAQS	Thornton and Ross	2.55%	▼ -0.04%
Balneum Plus	Almirall	1.70%	▲ 0.07%
Hydromol	Alliance	1.44%	▲ 0.03%
Aquamax	Intrapharm	1.38%	▲ 0.10%

### Top Performers

#### Company - Emollient (All Types)

Thornton and Ross  
Despite a falling market, Thornton and Ross increased their prescription items for emollients in absolute terms by 3.9% and by 2.2% in terms of their market share.

#### Market Share - Emollient Creams

Cetraben - Thornton and Ross  
Remains the top prescribed emollient cream brand, with a market share of 15%



#### Growth - Emollient Creams

Epimax - Dermato Logical  
Market share increased by 2.67 percentage points to 6.32% in 2018

### Newcomer Brands 2018

- E45 Eczema Repair - Reckitt Benckiser (Cream)
- Exmaben - Ascot (Cream)
- Exmalatum - Ascot (Cream)
- ExmaQS - Ascot (Cream)
- Ultraveen - Dermatronics (Cream)
- Kreamoint - Essential-Healthcare (Ointment)
- Exmabase - Ascot (Gel)
- Flamigel RT - Flen Health (Gel)