

GPrX Market Review 2018

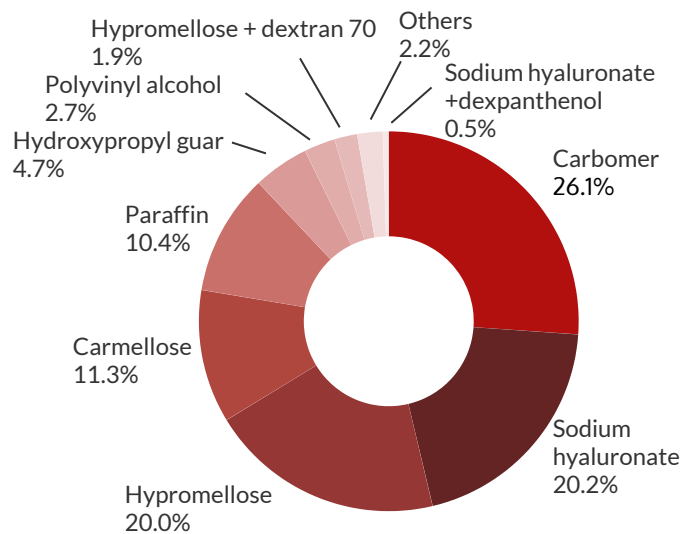
Dry Eye Prescribing in Primary Care

Market Changes

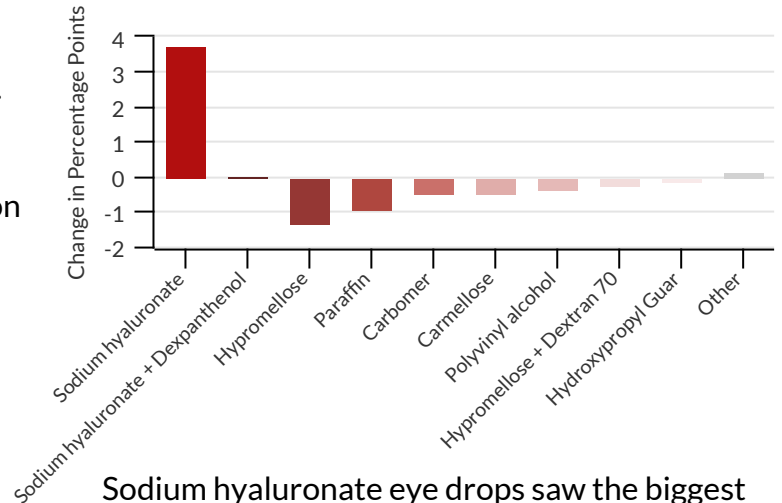
In 2018, there were 12.3m prescription items for dry eye therapies, up from 12m in 2017, an increase of 2.4%. Reimbursement spend on dry eye treatments increased to £77.8m, up 6.8% from £72.9m in 2017.

Therapies containing carbomer remain the most prescribed dry eye treatment, at 26.1% of prescription items, down 0.5 percentage points on 2017.

Market Share of Prescription Items by Active Chemical, 2018



Changes in Share of Scripts by Active Chemical



Sodium hyaluronate eye drops saw the biggest increase in their share of dry eye prescriptions in 2018, up 3.7 percentage points to 20.2% of prescription items. Sodium hyaluronate drops have replaced hypromellose as the second most prescribed dry eye therapy.

Therapies with hypromellose as the active ingredient saw the greatest fall in market share, down 1.3 percentage points to 20.0% in 2018.

2018 Performance Index

Top 10 Prescribed Brands: Carbomer			
Market share of prescriptions			Change in % MS
Brand	Company	2018	vs 2017
Viscotears	Bausch & Lomb	34.33%	▼-3.21%
Carbomer 980	Various	24.91%	▼-1.83%
Clinitas Carbomer Gel	Altacor	21.49%	▲+3.76%
Viscotears Single Dose	Bausch & Lomb	5.16%	▼-0.03%
Carbomer	Blumont	3.47%	▼-0.13%
Xailin Gel	VISUfarma	3.43%	▲+1.29%
GelTears	Bausch & Lomb	2.97%	▼-0.37%
Liquivisc	Thea Pharma	1.19%	▲+0.06%
Artelac Nighttime Gel	Bausch & Lomb	1.08%	▼-0.01%
Medicom Carbomer	Medicom	0.88%	▲+0.27%

Top Prescribed Brands: Sodium Hyaluronate			
Market share of prescriptions			Change in % MS
Brand	Company	2018	vs 2017
Hylo-Forte	Scope Ophthalmics	41.99%	▼-0.41%
Hylo-Tear	Scope Ophthalmics	20.57%	▼-1.90%
Hyabak	Thea Pharma	8.16%	▼-0.78%
Optive Fusion	Allergan	4.19%	▼-0.42%
Thealoz Duo	Thea Pharma	3.49%	▲+1.97%
Clinitas Sod hyal	Altacor	3.48%	▼-0.39%
Xailin HA	VISUfarma	2.70%	▲+0.14%
Blink Intensive Tears	AMO UK	2.65%	▲+0.13%
Oxyl	Bausch & Lomb	1.96%	▼-0.63%
Evolve HA	Medicom	1.75%	▲+1.46%

Newcomer Brands 2018

- Evolve - Medicom
- Evolve Carbomer - Medicom
- Lumecare - Medicom
- Cystadrops - Orphan (reissue)
- Tear dew - Sai-Meds
- Tearvis - Sai-Meds

Top Performing Brands

Carbomer

Viscotears - Bausch & Lomb
highest market share with 34.3%
Clinitas Carbomer Gel - Altacor
largest growth in market share up 3.76 percentage points in 2018

Sodium Hyaluronate

Hylo-Forte - Scope Ophthalmics
largest market share with 41.99% of scripts
Thealoz Duo - Thea Pharma
highest growth in market share, up 1.97 percentage points

