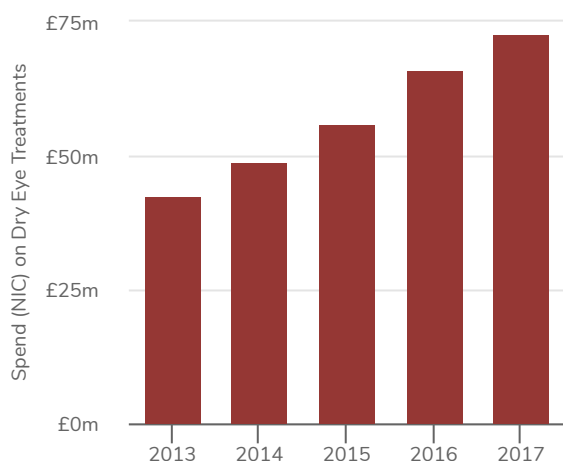


Dry Eye Disease - prescribing trends in the UK and the US

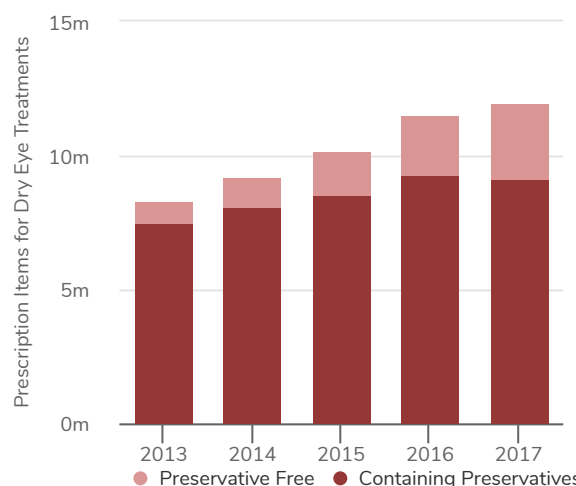
UK Community Spend on Dry Eye Treatments



Spend on Dry Eye Treatments has increased 71% over the last 5 years.

In 2013, Dry Eye Treatments represented 26.8% of all spend on Eye Care Therapies in the UK Community. In 2017, the proportion had risen to 33%.

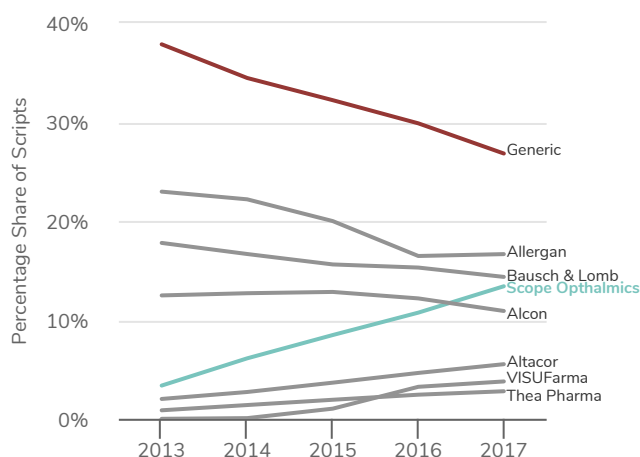
Prescription Items for Dry Eye Treatments



Between 2013 and 2017, the number of prescription items increased 43%.

The proportion of items that are preservative free has also increased and at a faster rate. In 2013, preservative free presentations accounted for 26% of prescription items. In 2017, this number had increased to 39.5%.

Script Share by Company



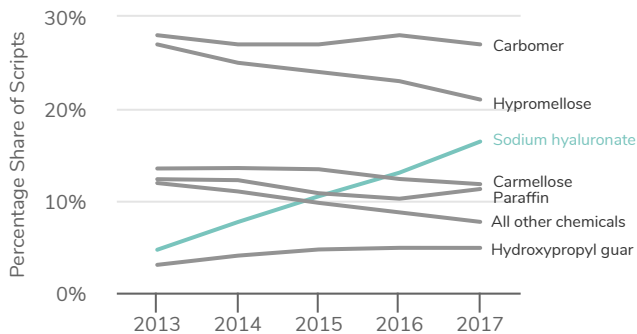
In UK Community prescribing, the proportion of scripts for generic treatments for Dry Eye fell between 2013 and 2017; from 37.9% to 26.8%.

Allergan also saw its share of prescription items fall from 23% in 2013 to 16.7% in 2017.

These falls have been offset by increases for companies such as Scope Ophthalmics, whose proportion of prescription items rose from 3.3% in 2013 to 13.4% in 2017, driven by Hylo-Forte, a preservative free eye drop which contains sodium hyaluronate.

The overall growth in prescription items in this period has meant that, although their share of the market has decreased, the number of prescription items for Allergan and generic treatments has remained relatively constant.

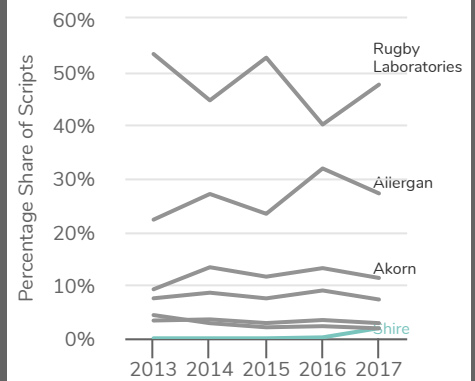
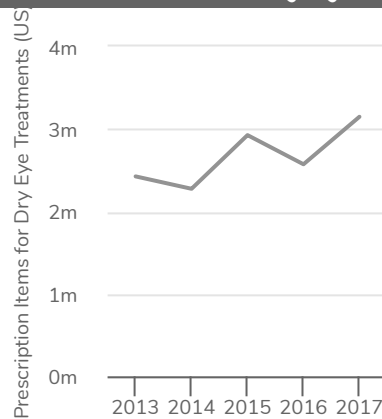
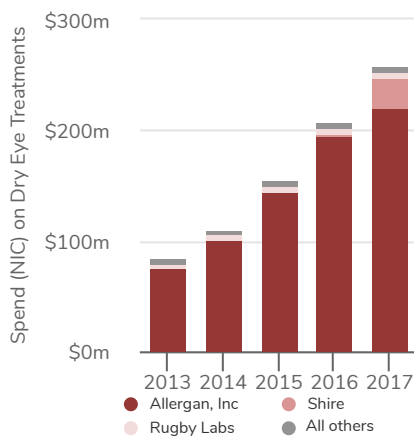
Script Share by Active Chemical



When looking at the active chemical used in the dry eye treatments, we can see prescribing of products containing sodium hyaluronate has increased significantly between 2013 and 2017. The percentage share of prescription items for sodium hyaluronate has increased from 4.7% in 2013 to 16.4% in 2017,

In this same period, prescribing of products containing carmellose and hypromellose have fallen, 2 percentage points and 5 percentage points, respectively.

US Medicaid - Dry Eye



In the US, spend on Dry Eye Treatments increased over 200% in the five years 2013 to 2017, with Allergan consistently the market leader. Rugby Laboratories has consistently had the highest proportion of scripts for their polyvinyl alcohol Artificial Tears.

Medicaid is the largest source of funding for medical and health-related services for people with low income in the United States, providing free health insurance to 74 million low-income and disabled people (as of 2017).

The FDA has yet to approve Hyaluronic acid (HA) as a treatment option in the States, despite HA eye drops being increasingly used to treat Dry Eye in Europe and Asia.

About us



GPrX Data are experts in NHS Health data.

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We provide support to business insight, commercial analytics, sales and marketing teams in some of the biggest Pharmaceutical and Medical Device manufacturers in the UK. As well as some of the smallest.

Our sector-specific **online portals** let clients rapidly analyse trends and compare products or geographic areas.

We're a rapidly growing company with a dedication to **responsive service**, and proud to be a **trusted partner** to clients across a diverse range of industry sectors.

We deliver **rapid, accurate industry analysis** based on reliable NHS sources. Our data is available to subscribers via an easy-to-use online portal.

Our team:

- Assimilates prescribing data from all 4 UK nations
- Monitors all new medications
- Keeps on top of additions, price changes and licensing status
- Updates GPrX Online within days of data publication, each and every month.