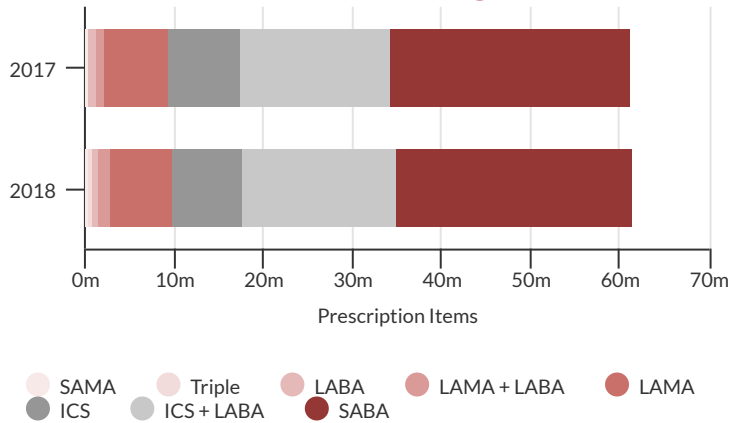


GPrX Market Review 2018

Inhaler Prescribing in Primary Care

Market Changes



Prescription items for inhalers grew 0.25% in 2018 versus 2017 to 61.4m.

Although the overall change in prescription items year on year has been minimal, within that figure different therapy types are seeing larger changes, with evidence of a switch from single to combined therapies. Triple therapies (first prescribed in 2017) are showing the greatest growth.

2018 Performance Index ICS and ICS+LABA Brands

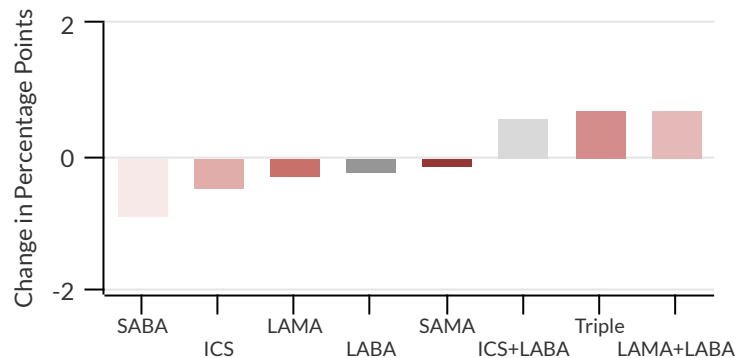
Top 10 Prescribed ICS Inhaler Brands

Market share of prescriptions			Change in % MS vs 2017
Brand	Company	2018	
Clenil Modulite	Chiesi	70.26%	▲1.10%
Qvar	Teva	13.10%	▼0.46%
Flixotide Evohaler	GlaxoSmithKline	3.41%	▼0.20%
Pulmicort Turbohaler	AstraZeneca	3.37%	▼0.17%
Qvar E-Breathe	Teva	2.81%	▼0.07%
Qvar Autohaler	Teva	1.50%	▼0.10%
Beclomet Diprop	Various	1.47%	▼0.00%
Flixotide Accuhaler	GlaxoSmithKline	1.39%	▼0.11%
Easyhaler Budesonide	Orion	0.93%	▲0.07%
Alvesco	Takeda	0.66%	▲0.02%

Top 10 Prescribed ICS+LABA Inhaler Brands

Market share of prescriptions			Change in % MS vs 2017
Brand	Company	2018	
Fostair	Chiesi	27.39%	▲5.02%
Symbicort Turbohaler	AstraZeneca	14.67%	▼1.53%
Seretide Evohaler	GlaxoSmithKline	9.61%	▼1.44%
Relvar Ellipta	GlaxoSmithKline	8.51%	▲1.51%
Seretide Accuhaler	GlaxoSmithKline	8.09%	▼2.21%
DuoResp Spiromax	Teva	7.05%	▲0.20%
Fostair NEXThaler	Chiesi	5.63%	▲0.51%
Flutiform	Napp	5.14%	▼0.05%
Sirdupla	Mylan	4.62%	▼0.21%
Fluticasone + Salmeterol	Various	4.46%	▼2.32%

Changes in Share of Scripts by Therapy Type



Whilst ICS inhalers are seeing a 0.5 percentage point fall in their share of the prescription items for inhalers, ICS+LABA inhalers are seeing an increase in their market share of 0.6 percentage points.

SABA inhalers saw the largest fall in market share of scripts. They accounted for 43.06% of prescriptions for inhalers in 2018, down from 43.92% in 2017

Newcomer Brands 2018 ICS and ICS+LABA

- Kelhale - Cipla Europe (ICS)
- Combisal - Aspire (ICS+LABA)
- Flutiform K-Haler - Napp (ICS+LABA)
- Fobumix Easyhaler - Orion (ICS+LABA)
- Fusacomb Easyhaler - Orion (ICS+LABA)

Largest Market Share

ICS

Clenil Modulite - Chiesi achieved the highest market share of 70.26% and the largest change in market share in 2018 (up 1.1 percentage points)

ICS/LABA

Fostair - Chiesi also achieved the highest market share (27.39%) and the largest change in market share of prescriptions (up 5.02 percentage points on 2017)

