UK Life Sciences Customer Newsletter

Deep Dive into the Insights

September 2024

UK Key Insights at a Glance

PRIMARY CARE SALES*

+4.9% in value and
+**3.5%** in volume yoy

HOSPITAL CONSUMPTION*

+12.6% in value and
+**3.5%** in volume yoy

* MAT Jun 24 vs MAT Jun 23

TOP 3 ATC*

% GROWTH

1. Hepatoprotectives
2. Oncology
3. Cardiovascular

% DECLINE

1. Blood Forming Agents
2. Vitamins and Minerals
3. Respiratory

MAT Jun 2024

TOP 5 CORPORATIONS

BY VALUE

1. Roche
2. AstraZeneca
3. J&J
4. Novartis
5. MSD

BY % GROWTH

1. Ipca
2. Insud Pharma
3. Amarin
4. Beaumont
5. Paion

PATIENT CONSULTATIONS/REFERRALS

3% INCREASE IN TOTAL PRIMARY CARE CONSULTATIONS

8% INCREASE IN PRIMARY CARE IN-SURGERY CONSULTATIONS

MAT Jun 24 vs. MAT Jun 23

PROMOTIONAL ENGAGEMENT WITH HCPs

INCREASE IN REMOTE REP CONTACTS **18%**

INCREASE IN F2F REP CONTACTS **40%**

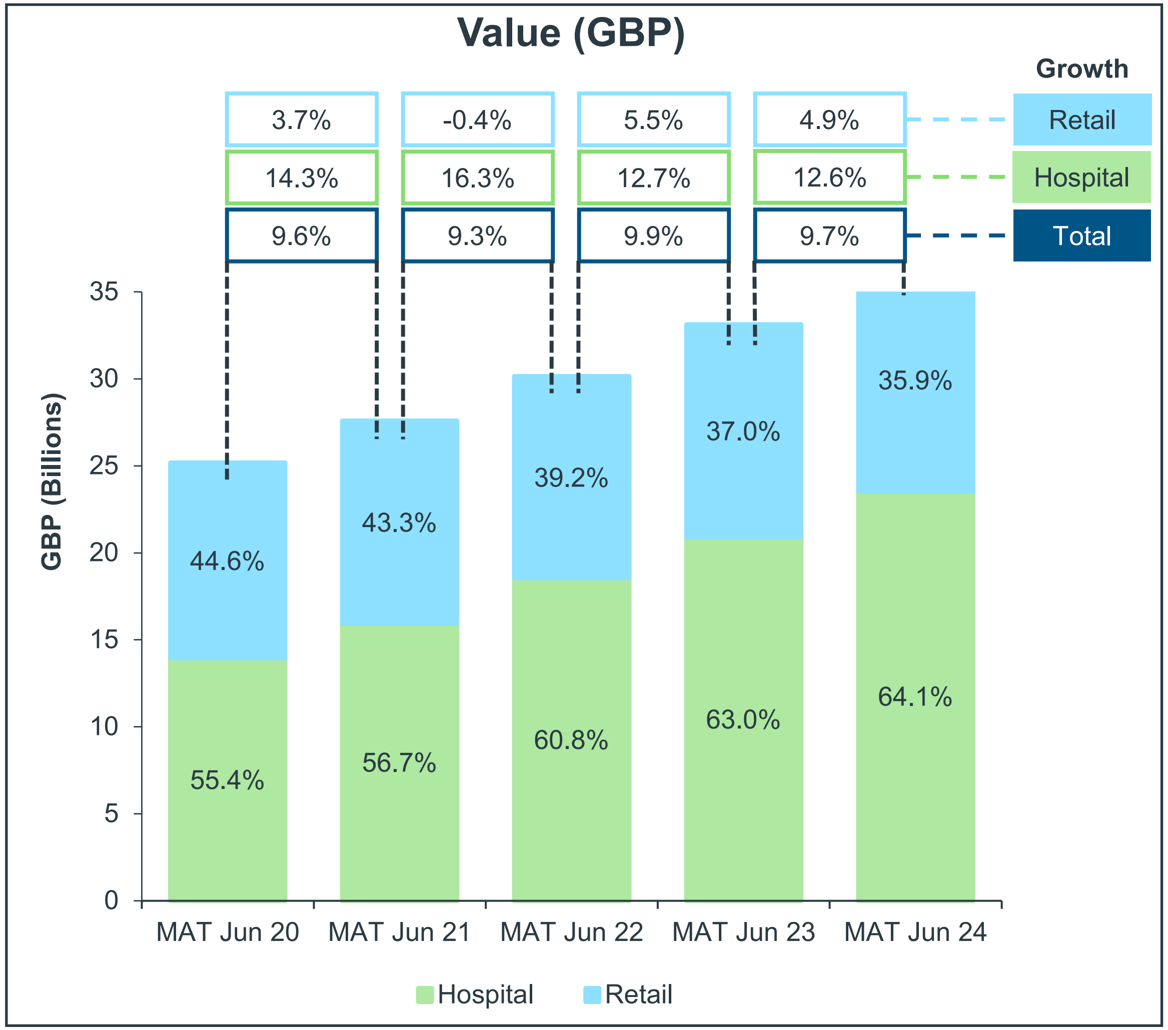
DECREASE IN % OF INTERNET REP CALLS RATED 'VERY USEFUL' **-14%**

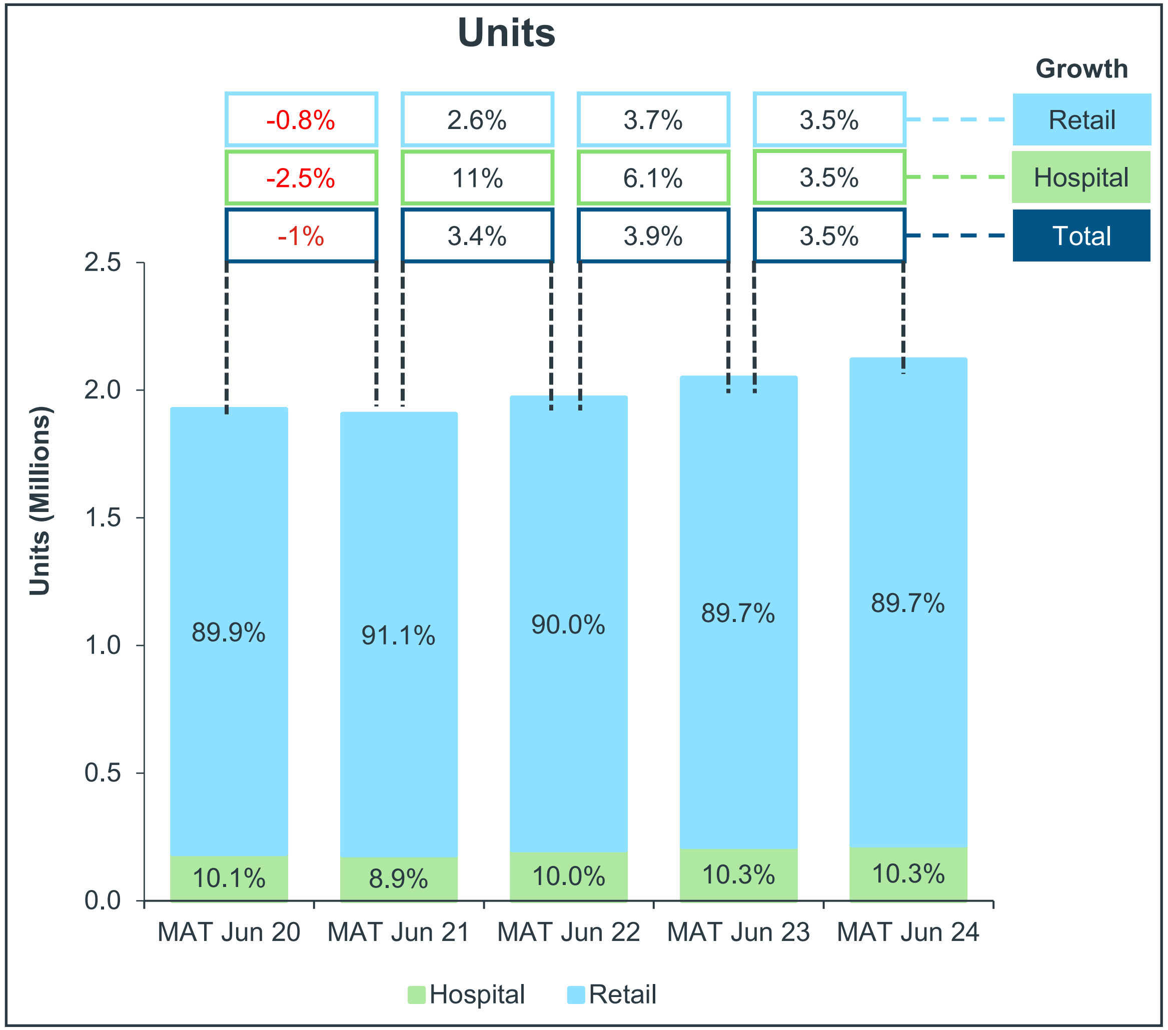
Q2 24 vs Q2 23

UK Key Insights

Retail market growth (MAT) +4.9% in value (+3.5% in volume) vPY, Hospital volume +3.5% despite a value growth at list price of 12.6%

Both sectors have seen growth, with the exception of disruption caused by the pandemic

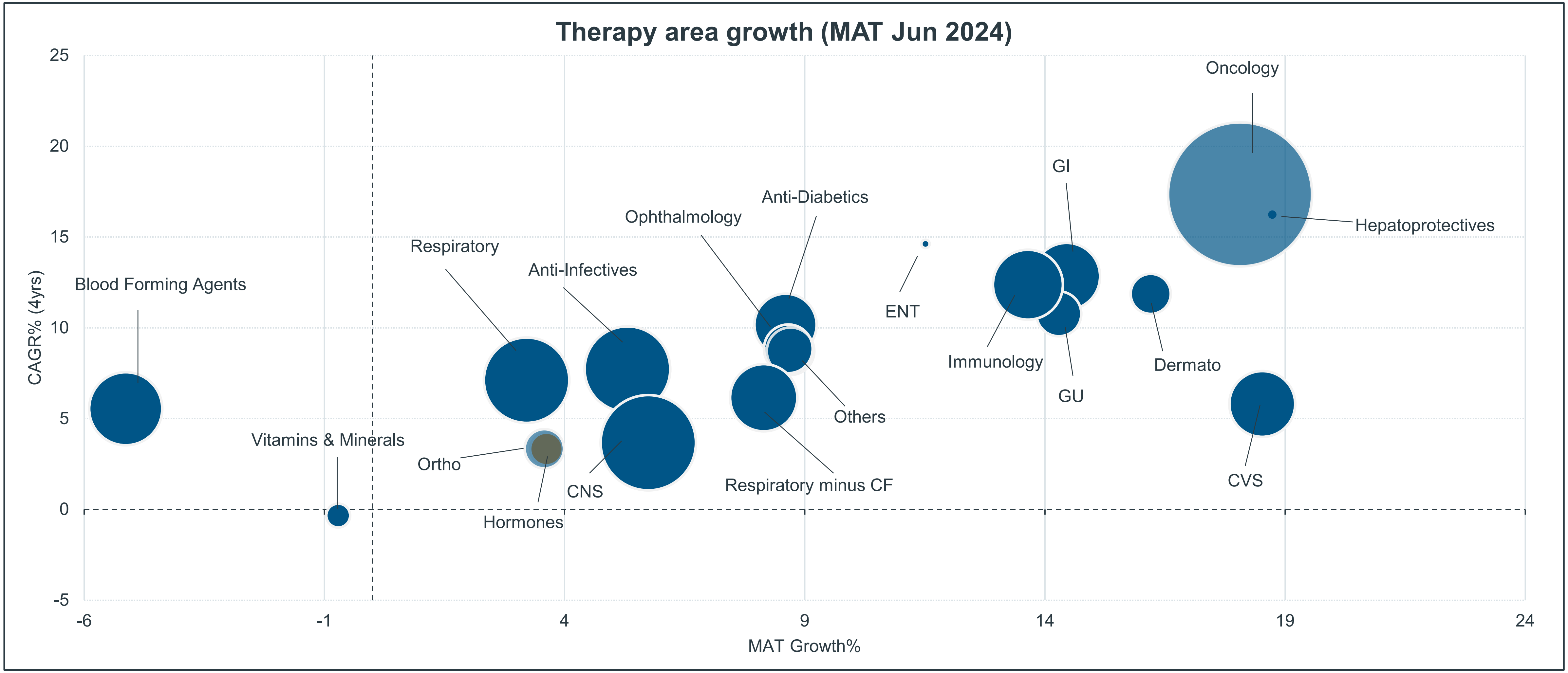




Source: IQVIA XBPI/HPAI combined – Jun 2024

Oncology is the fastest growing therapy area in the UK with an absolute growth of £1,444m in the MAT Jun 24 vs previous MAT

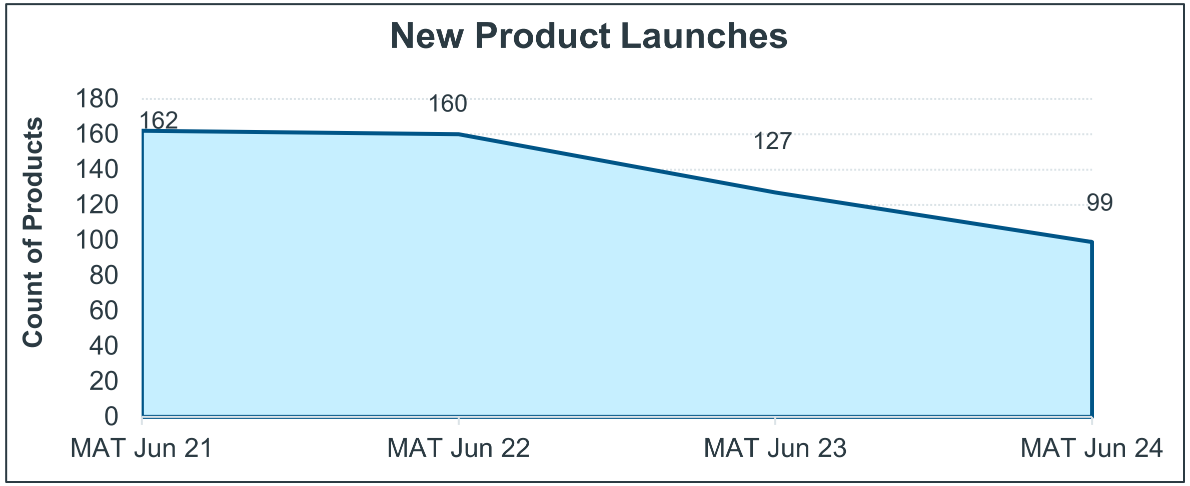
Hepatoprotectives has high % growth in latest MAT but absolute growth of £8m

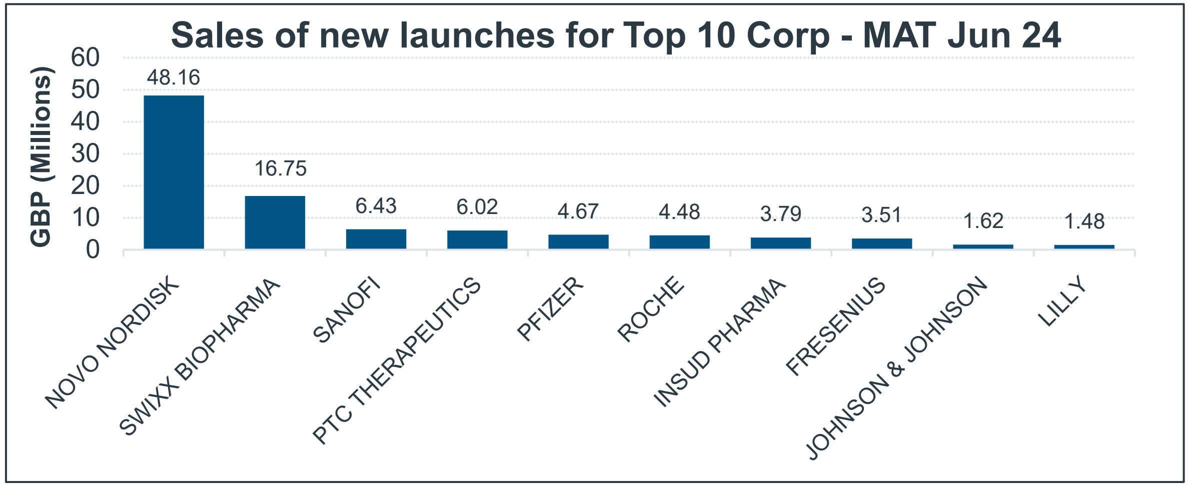


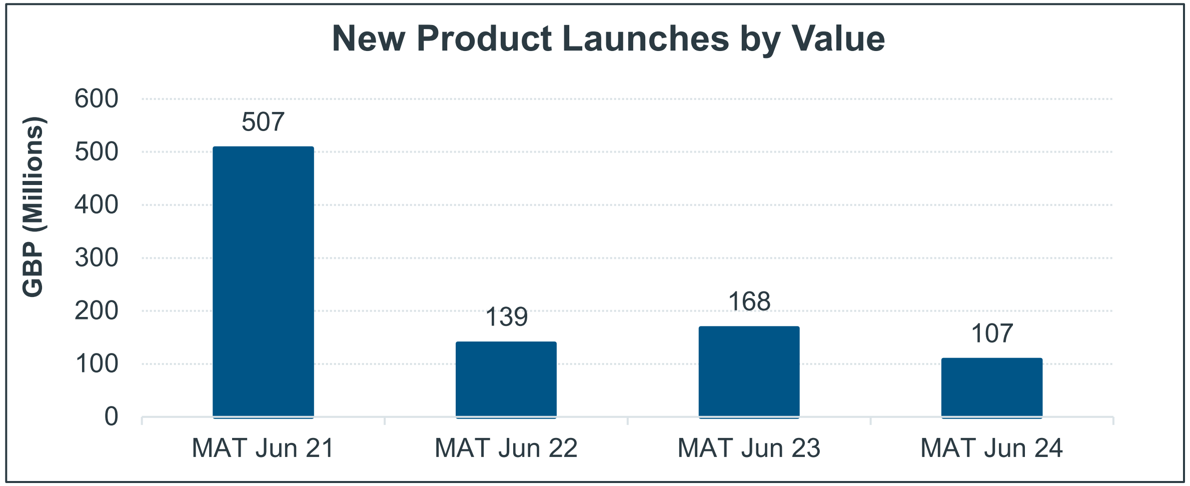
GU = Genitourinary, GI = Gastrointestinal, ENT = Ear, Nose and Throat, CVS = Cardiovascular System, CNS = Central Nervous System
Source: IQVIA XBPI/HPAI combined – Jun 2024

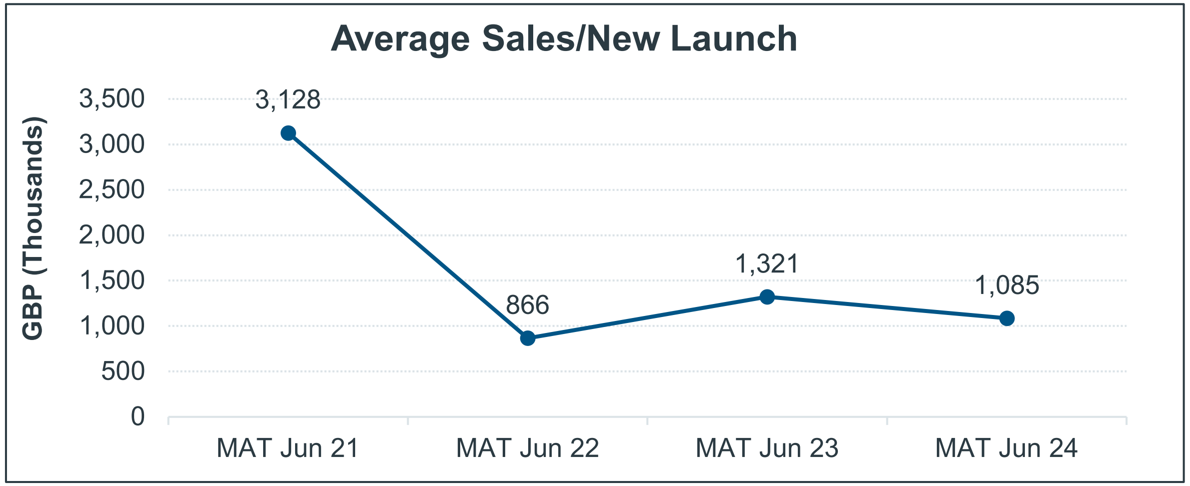
Wegovy Flextouch (£48m) from Novo Nordisk has the biggest sales contribution of new launches in MAT Jun 24

Sales per new product launch (£1085K) has decreased by £236K compared to previous MAT







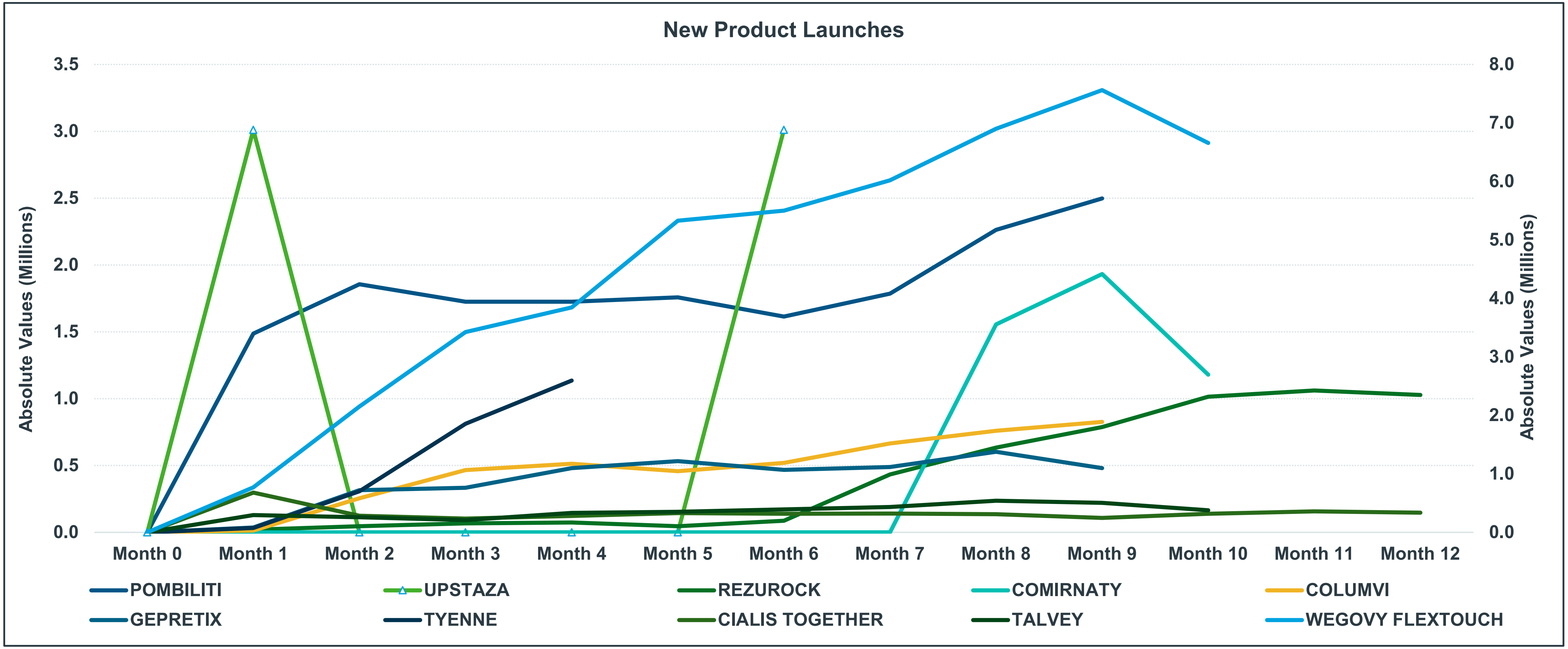


Source: IQVIA XBPI/HPAI combined – Jun 2024

Note: Branded medicines that have their first sales reported in both retail and hospital channels
Branded products includes branded generics and biosimilars

Tyenne (£1136K) has largest growth of 39.7% vs. previous month, Pombiliti (£2498K) has a growth of 10.4% vs. previous month

Wegovy Flextouch, Rezurock, Comirnaty, Gepretix, Cialis Together and Talvey together have seen a negative growth compared to the previous month

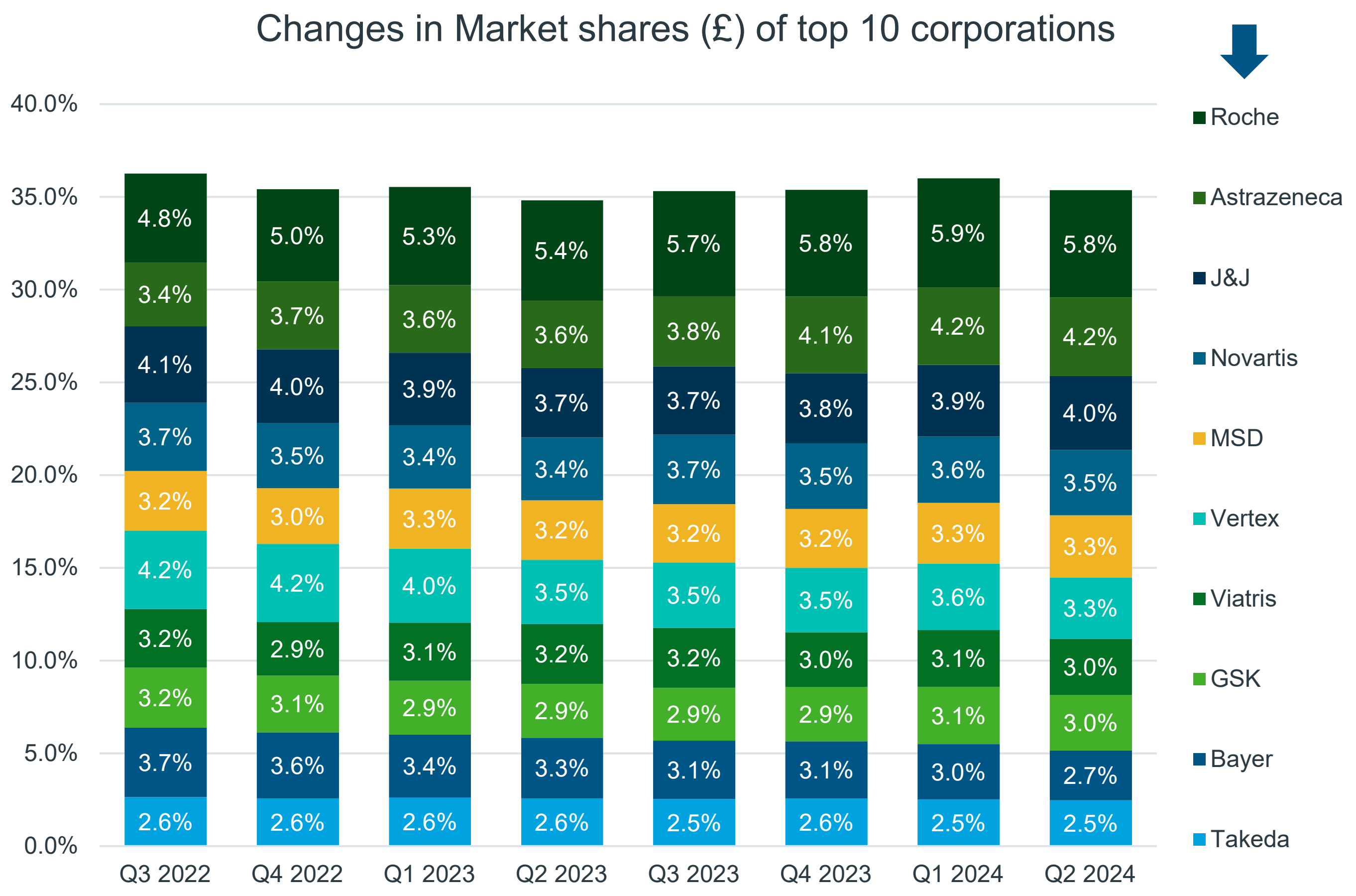


Note: Wegovy Flextouch on secondary axis due to significant sales contribution

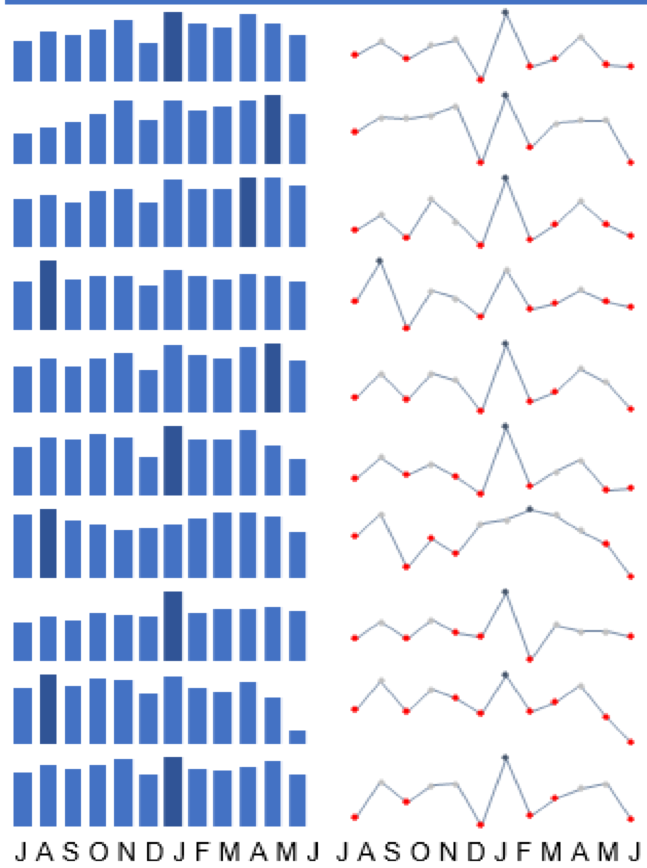
Source: IQVIA XBPI/HPAI combined – Jun 2024

Roche has highest share of UK market (5.8%) in latest quarter with share gain (0.4%) compared to same quarter PY

Bayer share has biggest share decline (0.6%) followed by Viatris (0.2%) during the same period



	Jul 23 to Jun 24* Monthly sales trends	Jul 23 to Jun 24* MoM growth rates	Value (£, m) for MAT Jun 2024, YoY Growth	
Roche			2,100	23.7%
Astrazeneca			1,482	24.4%
J&J			1,393	7.0%
Novartis			1,305	12.8%
MSD			1,179	12.2%
Vertex			1,262	-3.9%
Viatris			1,115	8.5%
GSK			1,078	7.8%
Bayer			1,081	-6.3%
Takeda			916	6.1%



*Standalone graphs (scale not relative to other players); Dark blue bar depicts month of highest value; red markers on line trend chart depicts negative growth
Ranking and share is based on sales in GBP which is based on list price
Source: IQVIA XBPI/HPAI combined – Jun 2024

Keytruda (38.1%) in Total UK Market, Omeprazole (68.2%) in Retail and Keytruda (38.1%) in Hospital have highest value growth

Despite a negative growth, Eylea is second highest value (list price) product in Hospital sector

Total UK Market

Product	MAT Jun 2024 Value	Growth% vs PY
Keytruda	834.0 m	38.1%
Eylea	643.0 m	-11.2%
Kaftrio	630.5 m	-2.1%
Kalydeco	595.6 m	-4.3%
Lipitor	476.2 m	32.6%
Amgevita	460.0 m	17.4%
Xtandi	444.4 m	12.5%
Darzalex	382.7 m	24.5%
Stelara	364.0 m	15.7%
Hemlibra	332.3 m	8.6%

Retail Market

Product	MAT Jun 2024 Value	Growth% vs PY
Lipitor	475.5 m	32.7%
Forxiga	317.5 m	61.1%
Fostair	289.1 m	-1.5%
Lixiana	276.9 m	35.2%
Freestyle Libre 2	270.7 m	40.8%
Xarelto	233.0 m	-14.1%
Jardiance	191.4 m	22.8%
Trimbow	168.0 m	26.5%
Omeprazole	157.3 m	68.2%
Entresto	153.6 m	32.6%

Hospital Market

Product	MAT Jun 2024 Value	Growth% vs PY
Keytruda	834.0 m	38.1%
Eylea	643.0 m	-11.2%
Kaftrio	630.4 m	-2.1%
Kalydeco	595.5 m	-4.3%
Amgevita	460.0 m	17.4%
Xtandi	416.1 m	10.7%
Darzalex	382.7 m	24.5%
Stelara	363.9 m	15.7%
Hemlibra	332.3 m	8.6%
Phesgo	295.2 m	6.8%

Source: IQVIA XBPI/HPAI combined – Jun 2024

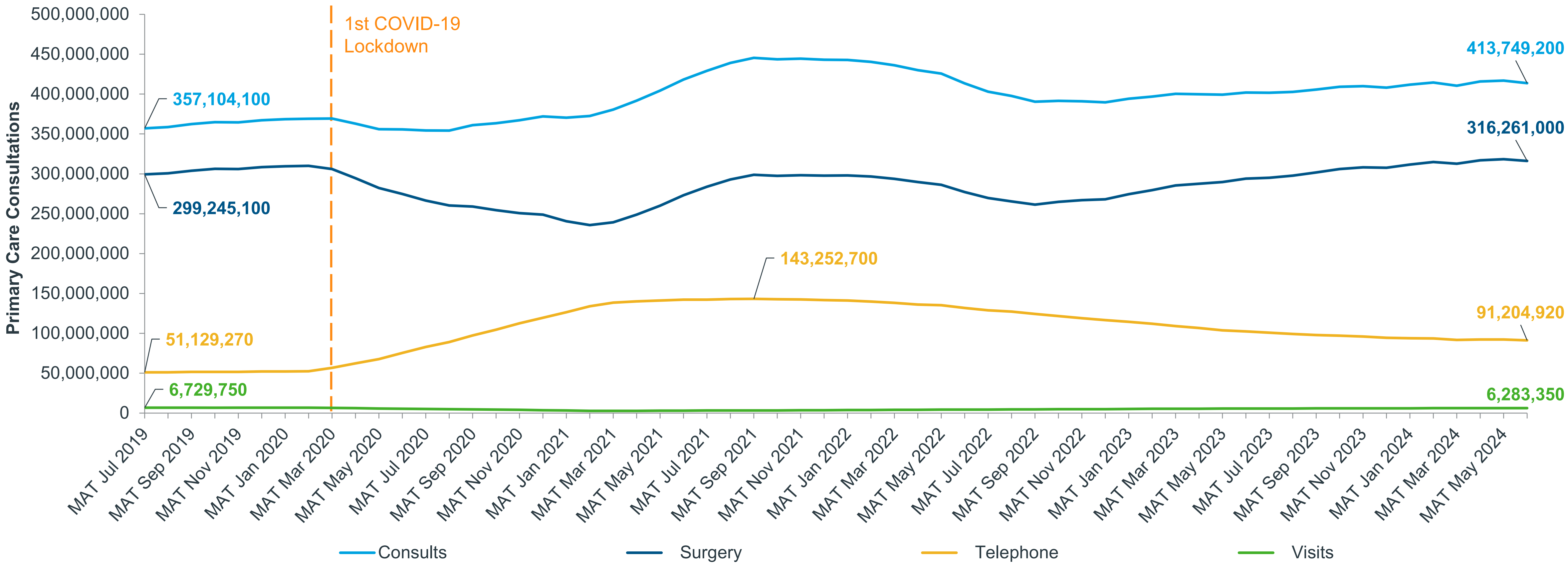
Note: For original brands with off-patent molecules IQVIA use NHS Indicative price (not Drug Tariff price)

Patient and Treatment Dynamics

Primary care consultations are 3% higher in MAT Jun-24 vs. MAT Jun-23, with Surgery (In-person) increasing by 8% over the same period

Over the last 5 years there has been an increase in Telephone consultations; however, this has decreased by 36% in the latest period since its' peak in MAT Sep-21

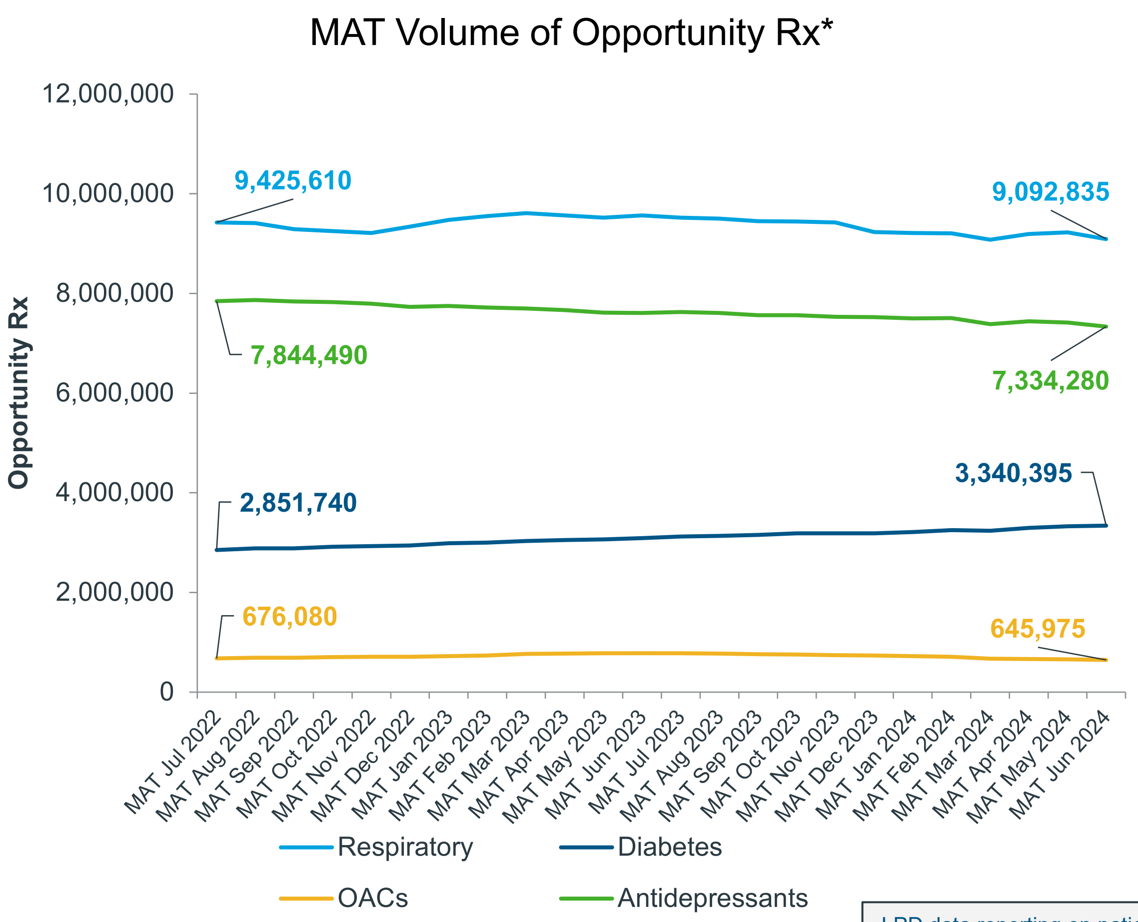
Volume of primary care consultations by type

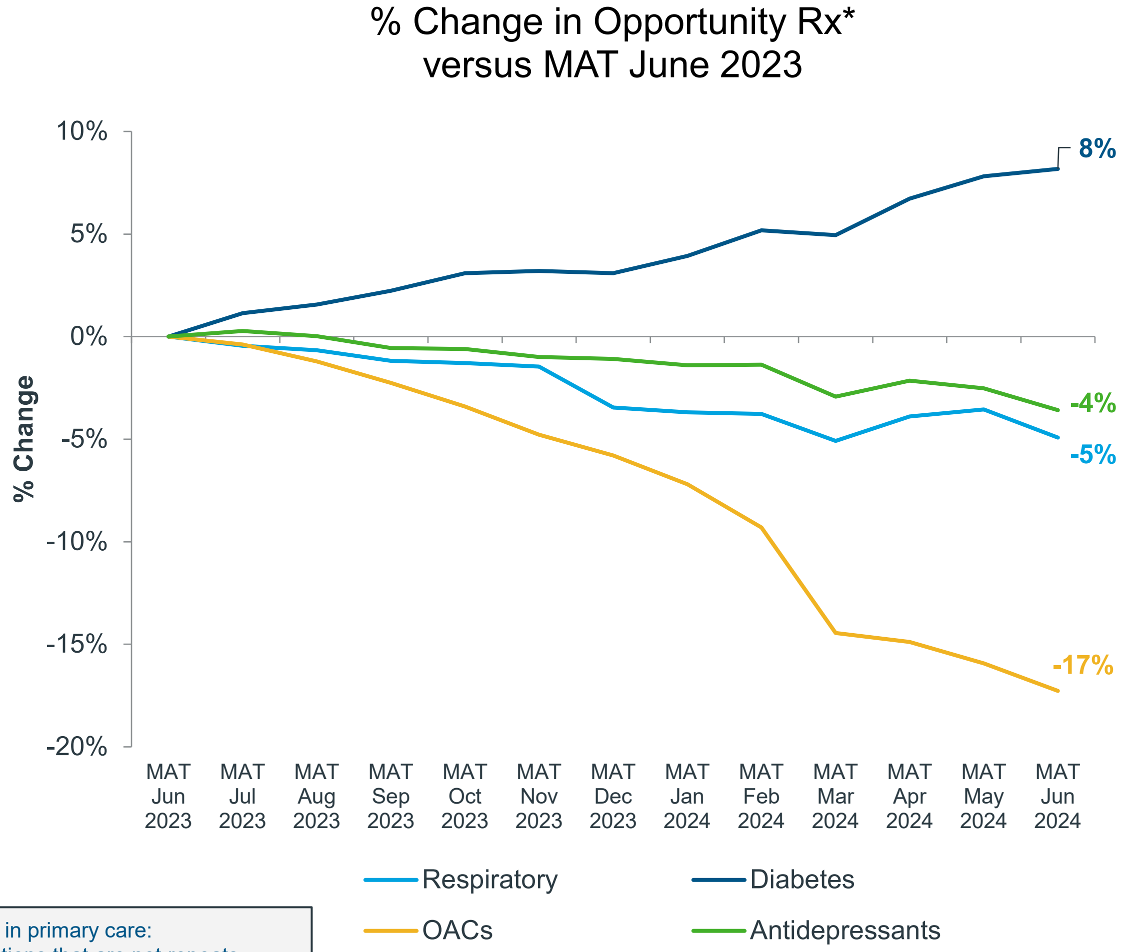


Source: LPD, June 2024

Primary care Opportunity prescribing* for Diabetes continues to increase in volume with the highest rate from MAT Mar 2024 to MAT Apr 2024

The rate of Opportunity Rxs for Respiratory, OACs, and Antidepressants have all decreased when compared to prior year





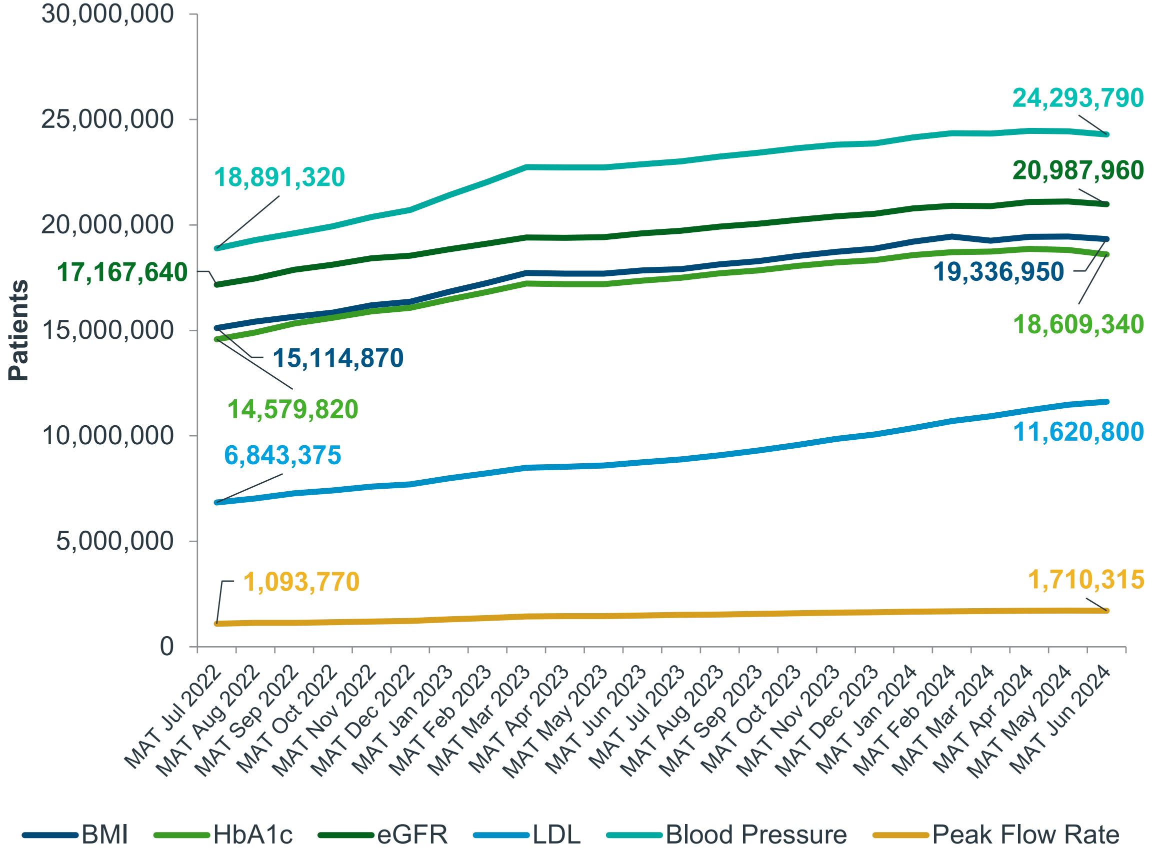
LPD data reporting on patients treated in primary care:
*Opportunity Rx = All dynamic prescriptions that are not repeats
OACs = NOACs + Warfarin | Antidepressants (N06A ATC)

Source: LPD, June 2024

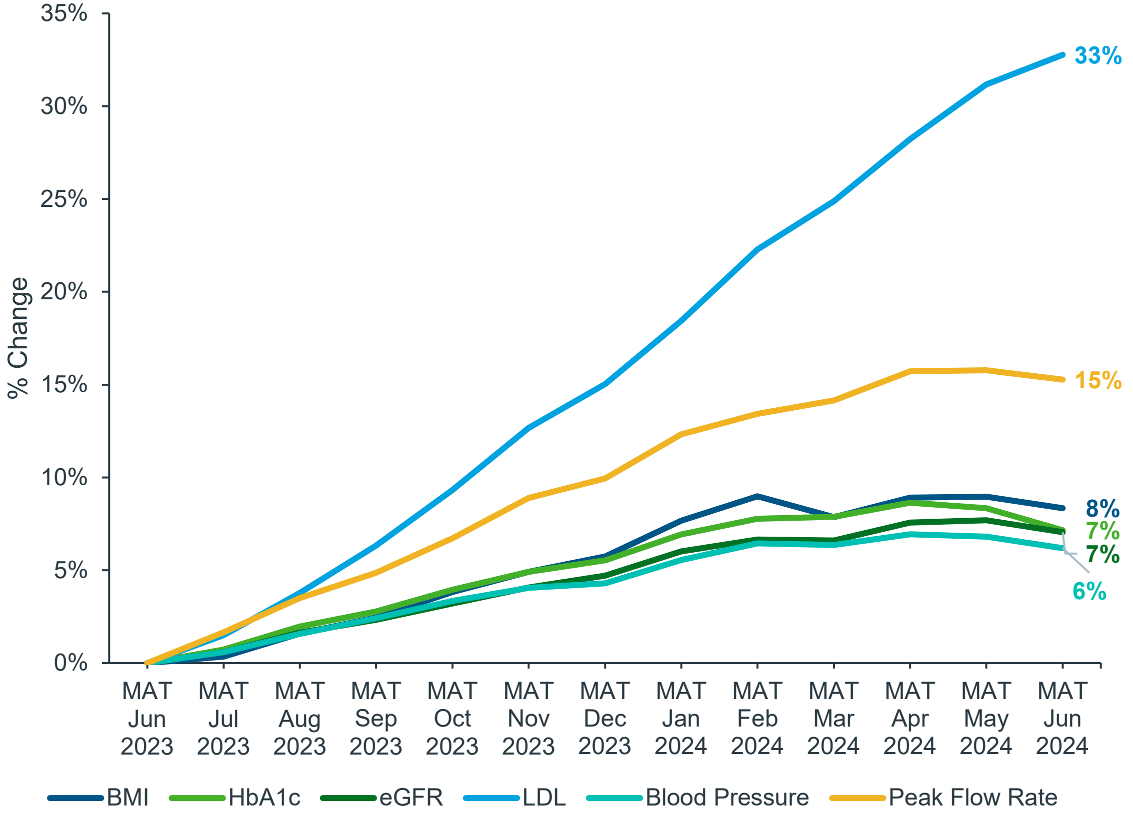
The number of patients who have had a record of a test result in the prior year has increased from MAT Jun-22 to MAT Jun-24

The number of patients with an LDL test result has increased the most in Jun-24 versus prior year

Patients with a test result in the 12 months prior



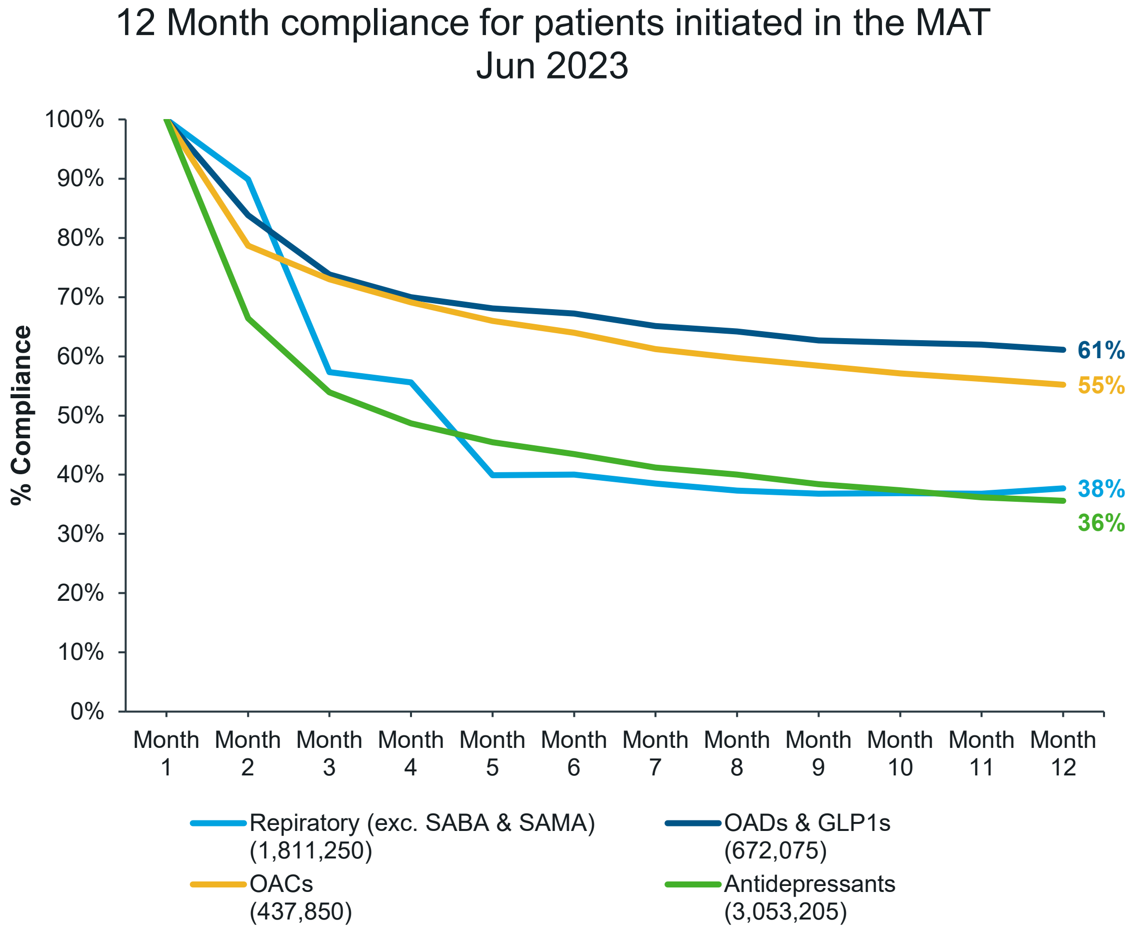
Change in Test Result volumes versus MAT June 2023

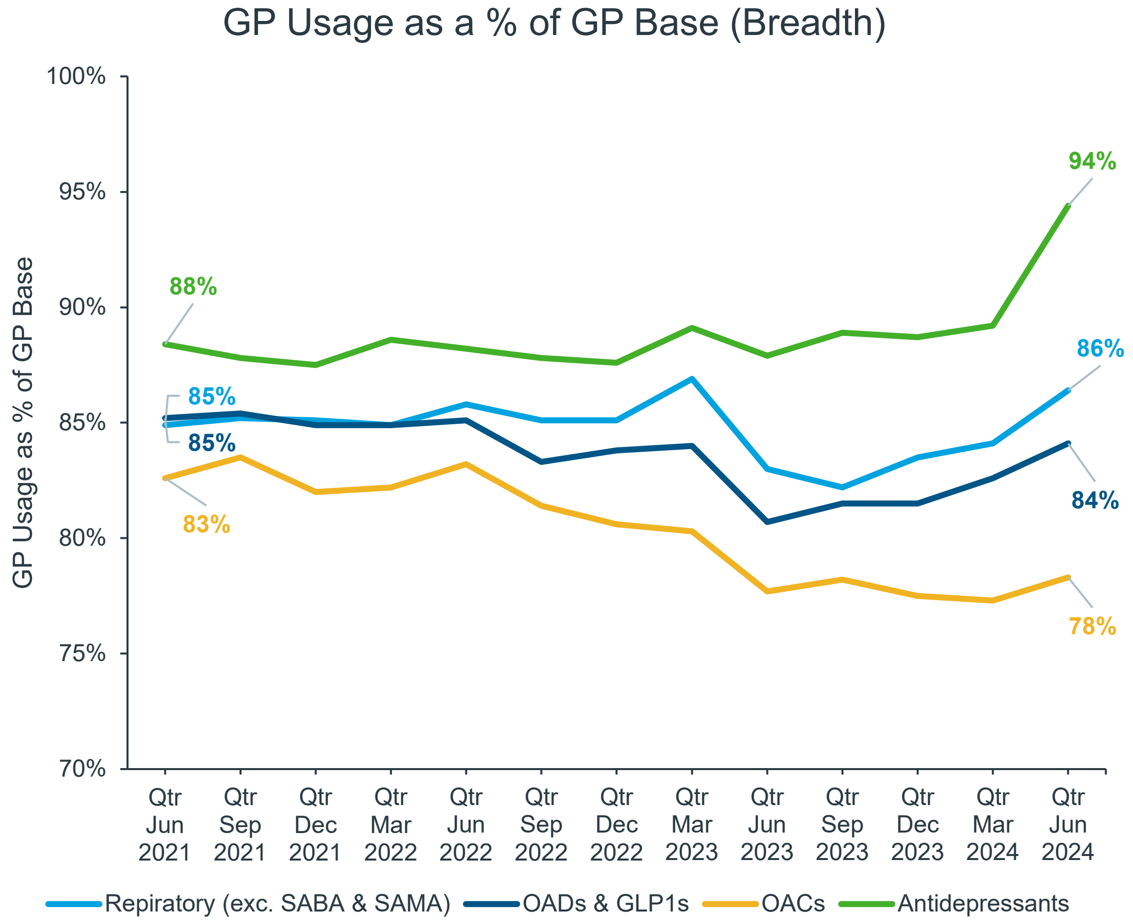


Source: LPD, June 2024

Comparing compliance across 4 conditions highlights the variance in patient behaviour, with the OADs & GLP1 retaining the highest % of patients on treatment at month 12

Breadth of GP Rxing has increased for Respiratory and Antidepressants since Qtr Jun-21, whilst use of OADs & GLP1s and OACs are lower than 3 years ago although to appear to be trending upwards



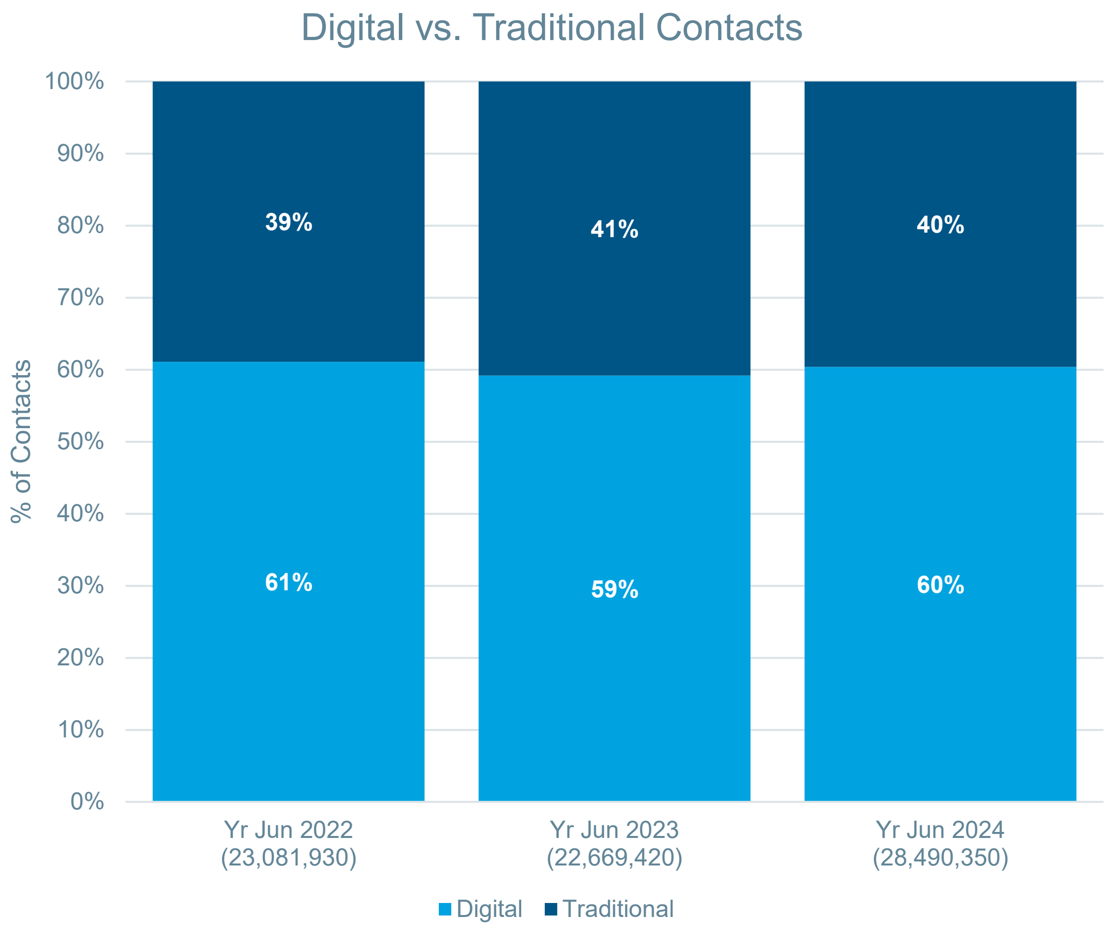


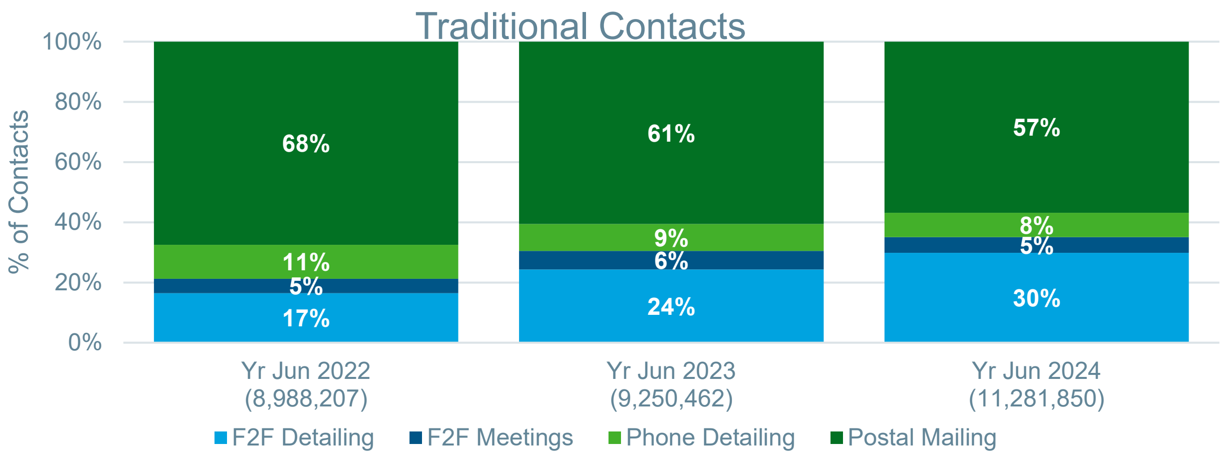
Source: LPD, June 2024

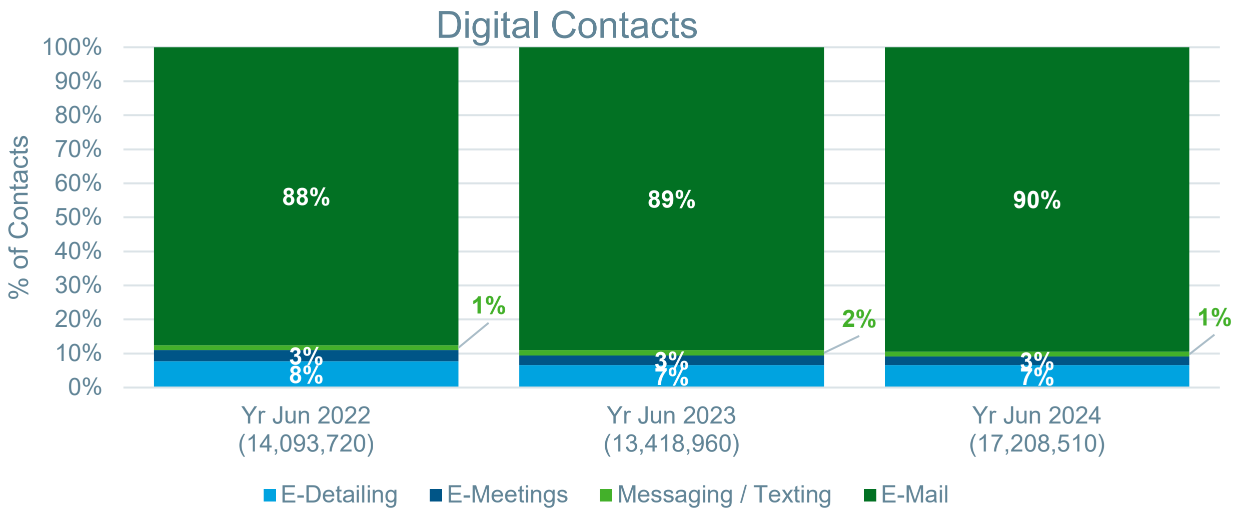
Latest Promotional Trends

The proportion of Digital vs. Trad. Contacts has been consistent over the last 3 years, whilst trad. channel shares have changed

F2F detailing now accounts for 30% of traditional contacts vs. 17% 2 years prior



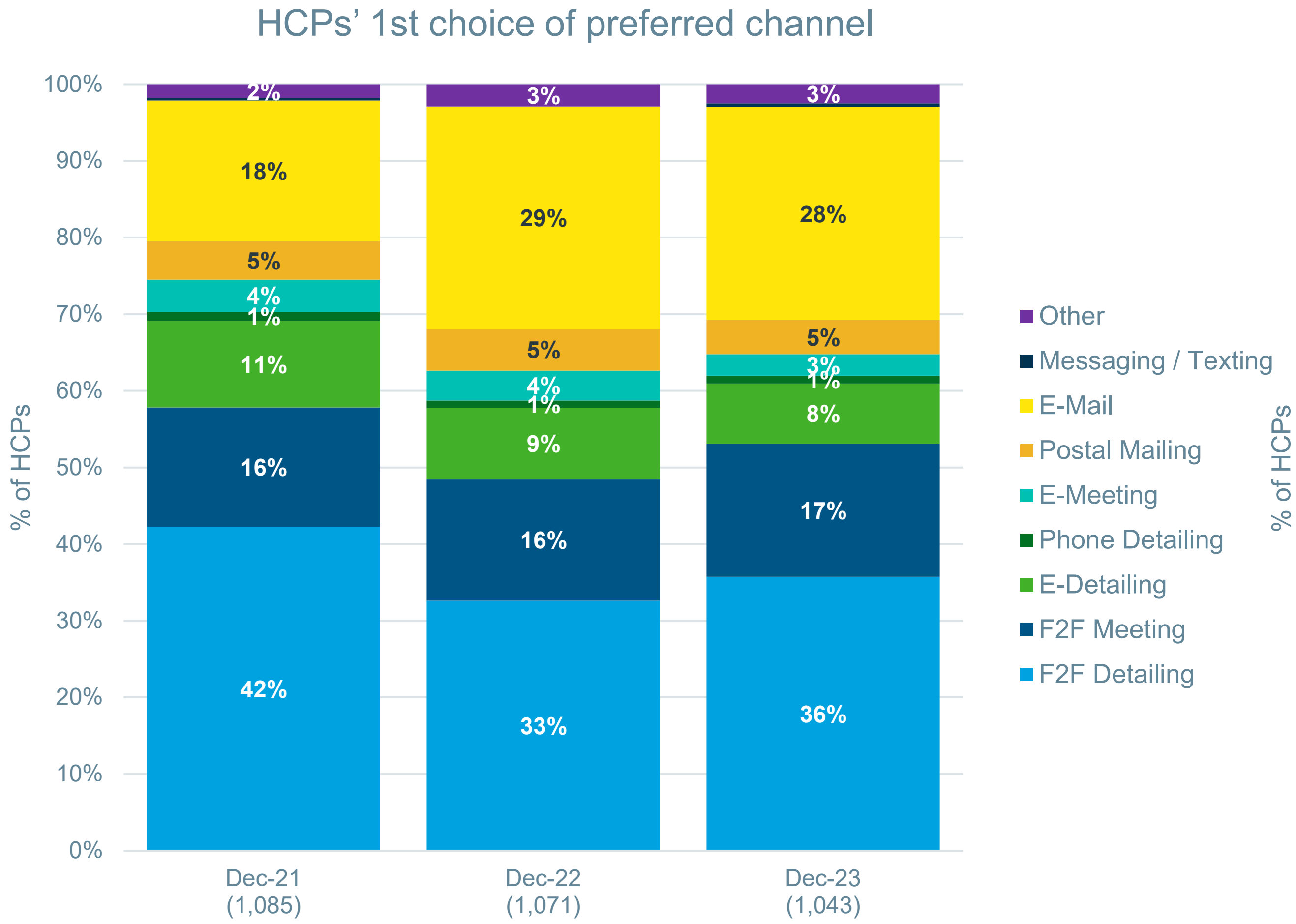


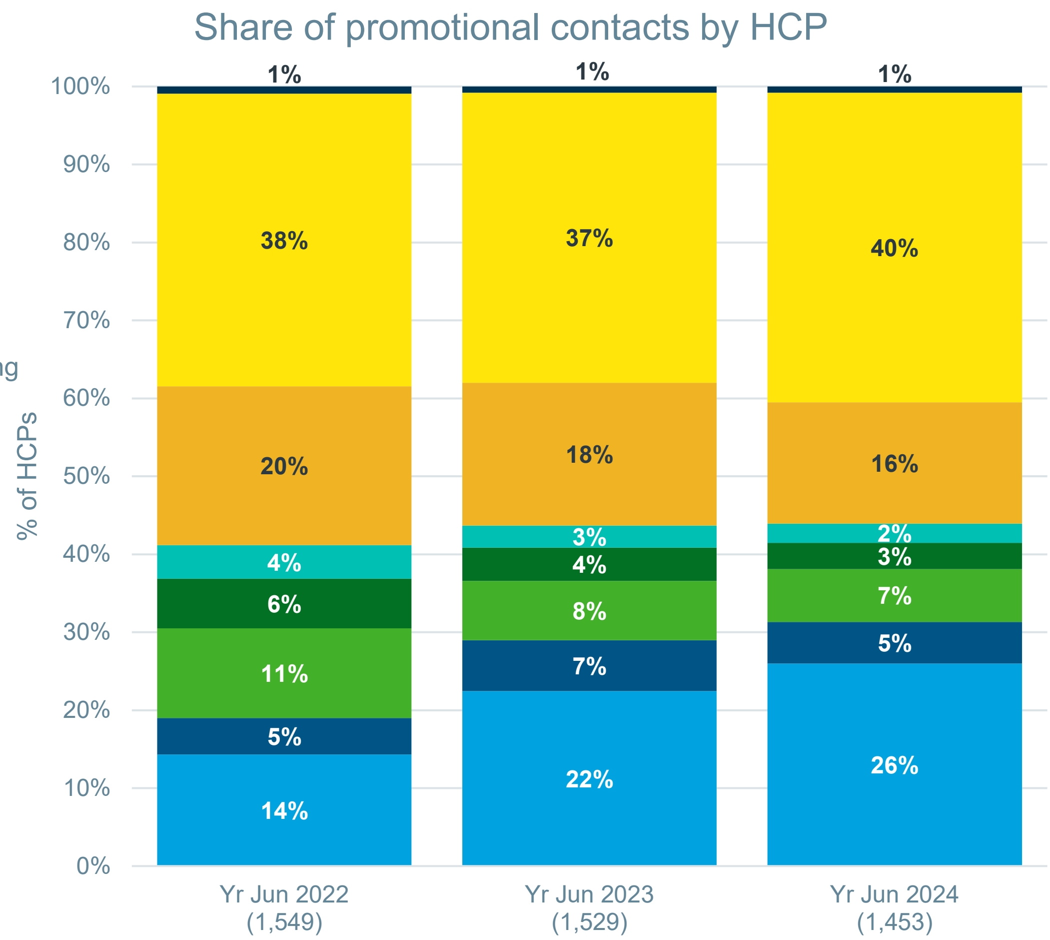


Source: IQVIA ChannelDynamics

F2F Detailing is the leading 1st Choice by HCPs for preferred channel/contact

F2F Detailing as a share of HCP contacts has increased in the last 3 years and is closer to HCP preference



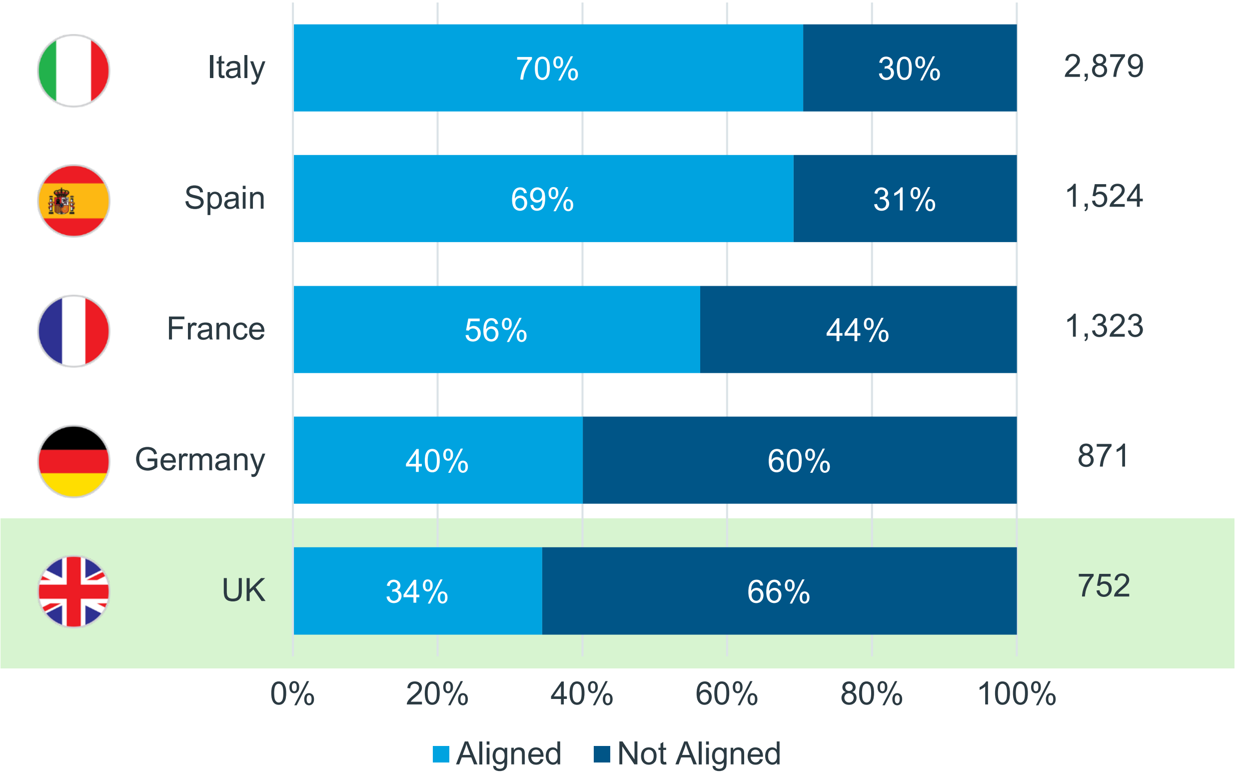


Source: IQVIA ChannelDynamics

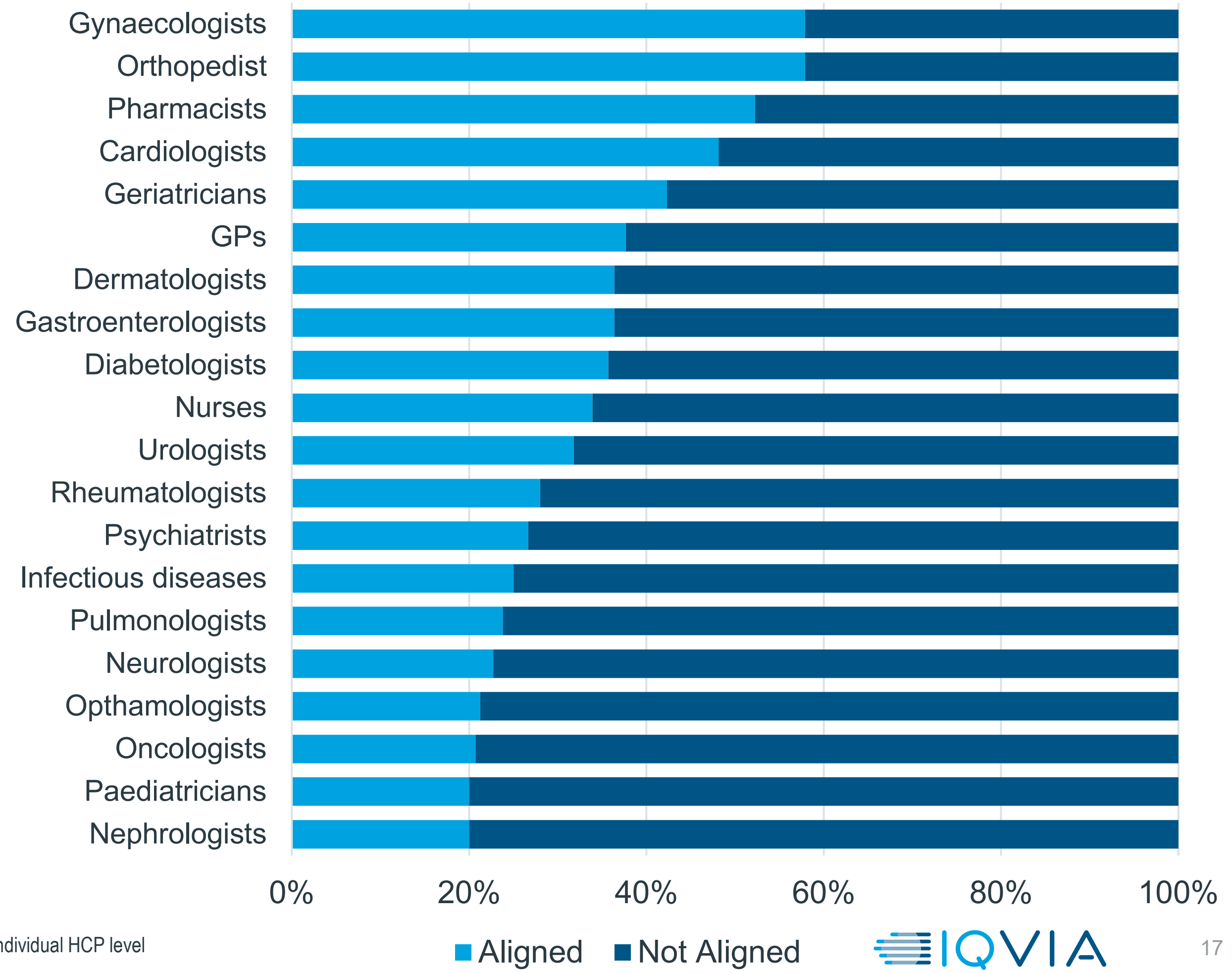
HCPs in the UK have the lowest alignment between channels they prefer and the channels via which they receive info

2023 Channel preference vs. promotional reality across the EU4+UK, with UK specialty analysis

Country level analysis



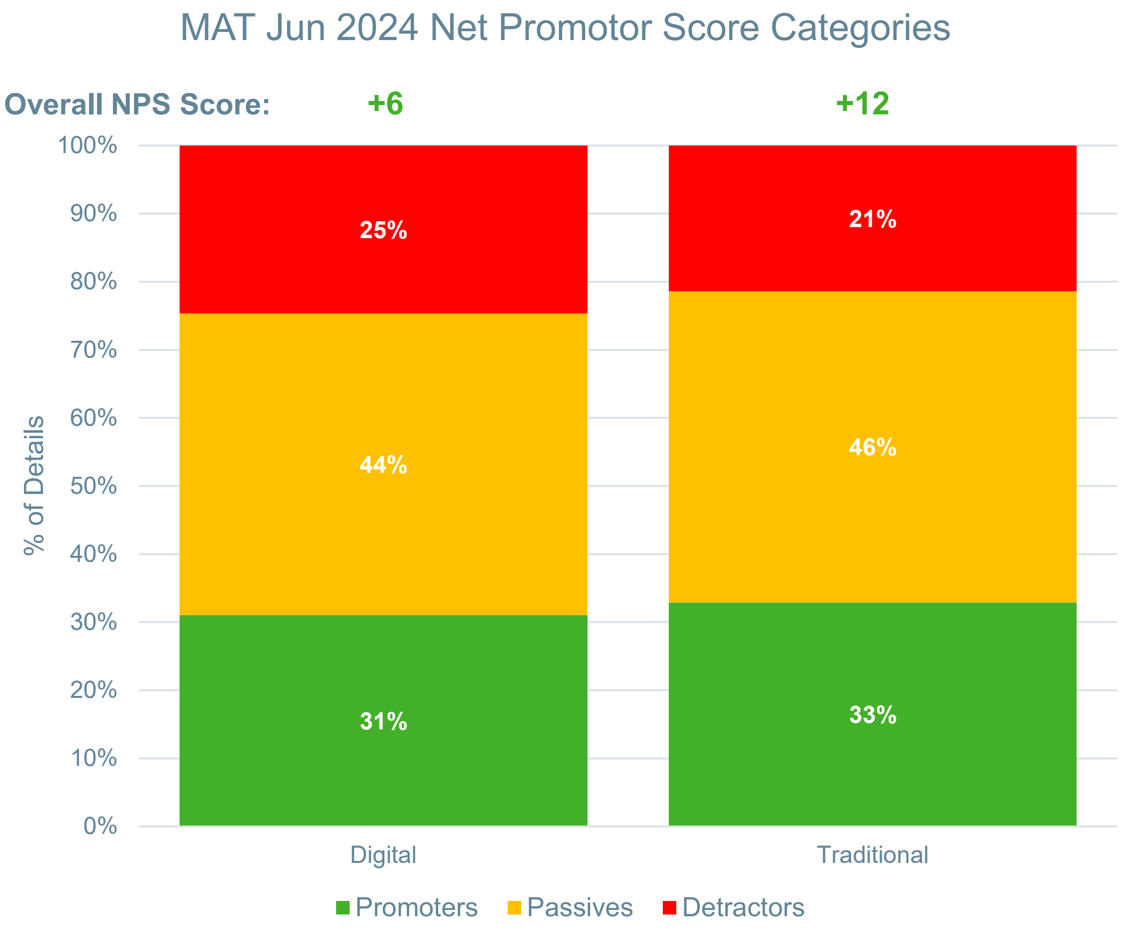
UK Specialty analysis

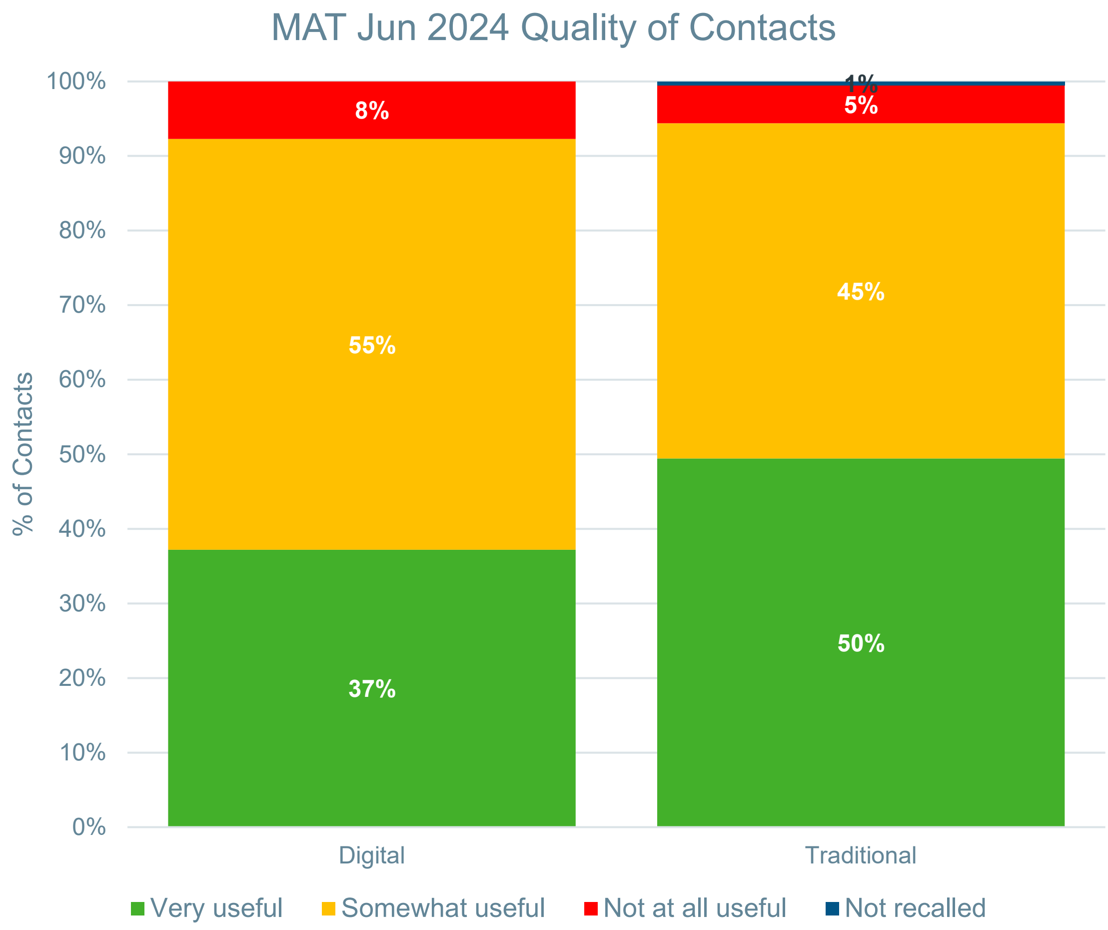


Source: IQVIA EMEA Thought Leadership; Channel Preference Survey 2023 matched with actual promotional data from the IQVIA daily diary study at an individual HCP level

A multichannel approach for engaging HCPs should consider the difference in effectiveness between Digital and Trad. channels

Traditional details/contacts have a higher Overall NPS and higher shares of Very Useful Contacts





Source: IQVIA ChannelDynamics

IQVIA UK Key Data Sources

The following data sources have been used in developing these insights

- **IQVIA™ Prescription Based Services (PBS):** Measure of the local demand for medicines in the UK primary care market using data collected through pharmacy patient medical record systems. Available as national overview and sub-national level audit showing information on what has been dispensed at a brick level.
- **IQVIA™ Hospital Data Service, Hospital Pharmacy Audit (HPA):** Based on the direct acquisition of hospital dispensing via hospital pharmacy departments and outsourced pharmacies. This audit provides usage of all pharmaceutical products down to pack and user speciality level. It reflects usage for in-patient, out-patient and homecare transactions.
- **IQVIA™ Longitudinal Patient Data (LPD):** Longitudinal electronic medical record data from 3 million current and former UK patients. Standard panel of 150 practices, nationally representative. Tracking all entries from a patient's record from registration to de-registration at a GP practice.
- **IQVIA™ ChannelDynamics:** Measuring how health care professionals (HCPs) obtain information on drugs and treatment from life science companies across 36 countries. Online daily diary survey of over 1,400 HCPs across 20+ specialties in the UK, capturing HCP exposure to sales force and all other key communication channels.
- **IQVIA™ Channel Preference:** Analysing health care professional's (HCP's) opinions and preferences as to which promotional channels are used and what types of discussions may be more suited to F2F/remote. Online survey capturing opinions from 1,000+ HCPs across 20+ specialties in the UK, with analysis available at individual physician type. To be run twice a year capturing evolution of opinions, most recent analysis December 2023.

Longitudinal Patient Data (LPD) definitions used within the analysis

Metric	Definition
Opportunity Prescriptions	Dynamic prescriptions that are not Repeats; i.e. New, Restart, Switch, Addon
Consultations	Total number of codes denoting a GP Practice Consultation has taken place, they are not therapy area specific
Surgery (In Person)	Codes denoting a patient came into the GP surgery for consultation
Telephone	Codes denoting a patient consultation took place over the telephone
Home Visit	Codes denoting the GP carried out a Home Visit to see a patient
Referrals to secondary care	Any referral recorded in the patient's electronic medical record to another doctor, nurse or specialist, and including inpatient attendance at hospital or attendance at outpatient clinic
Cancer referrals	A subset of the above containing a relevant mention of oncology, oncologist, cancer, type of cancer or cancer clinic

IQVIA Life Sciences UK Newsletter

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In our quarterly newsletter, we will provide you with valuable insights on the healthcare market, including:

- **UK Key Insights** covering trends from across manufacturers, healthcare professionals, through to patients
- **UK Industry Insights** providing topical analyses
- **UK Innovations** bringing to life how the healthcare ecosystem can drive healthcare forward
- **Thought Leadership and Events** compiling the most recent IQVIA's materials and platforms

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