The Bulletin

October 2026

Was October a horror story for UK Pharma? Or are we in for a treat this month?

September 2026 saw the highest number of concessions granted in any single month, with 268. Unfortunately October followed suit and although the final list had not been confirmed at the time of publication, we can see that 159 concessions had already been granted.

We hope you enjoy this issue of the Bulletin, and please do follow us on Linked In for more news and commentary.

Jackie Moss

Editor



WAVEDATA'S PICK OF THIS MONTH'S TOP NEWS STORIES

- **Pharmacy First too difficult to navigate?**
- **New Frankfurt site to boost long-term supply**
- **Pricewatch UK - UK Amoxicillin Prices Spike As Rivastigmine Continues To Climb**
- **UK space mission aims to transform cancer therapies**
- **Pharma's China deal spree grows**
- **Roche signs an exclusive licensing agreement with Rona Therapeutics**
- **Charles Joynson, WaveData MD, Rides The Paracetamol Tabs 500mg 100 Rollercoaster**
- **New drug for endometriosis**
- **Diabetes and ADHD drugs to be tested on Alzheimer's patients**
- **WaveData Top Ten Branded Product Searches**
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- **Future Industry Events**

Pharmacy First too difficult to navigate?

Potential issues that may face those trying to access the extended Pharmacy First services, and the need for them to be easy to find, easy to understand and sustainable to provide, have been highlighted.

Five new prescribing pathways are being introduced: acute otitis externa in adults, seasonal allergic rhinitis in children aged four to 11, mild-to-moderate acne, low-frequency episodic migraine in adults aged 18 to 64, and mild skin and soft-tissue infections and scabies.

For community pharmacy, independent prescribing has the potential to be transformational, but it's feared that they are in danger of making access so complicated that finding the right Pharmacy First service begins to feel like finding a needle in a haystack.

Source: Chemist & Druggist

New Frankfurt site to boost long-term supply

Sanofi has broken ground on a new state-of-the-art insulin manufacturing facility at its BioCampus in Frankfurt, Germany.

The new facility will bring a new generation of insulin production to one of Sanofi's largest integrated research and manufacturing sites, strengthening Sanofi's long-term ability to provide a reliable supply of insulin to millions of people living with diabetes around the world.

The new facility will be built on a 36,000-square-meter footprint at the BioCampus, equivalent to approximately five football fields. It will meet high standards of quality and automation and use advanced digital technologies and artificial intelligence across manufacturing and quality processes.

Source: Pharmatimes

Pricewatch UK – UK Amoxicillin Prices Spike As Rivastigmine Continues To Climb

As steep price rises continue to be a fixture of the UK generics market – with multiple molecules in different presentations seeing their average prices doubling, trebling or even more than quadrupling in September – Generics Bulletin and WaveData look at the latest trends.

The steep generic price increases that have been a feature of the UK market for several months now are showing no sign of slowing down, according to the latest figures from WaveData.

The market researcher pointed to "another bumper month of increases" in September, "with the first 23 products in our analysis showing treble-digit rises." And this "isn't surprising," WaveData suggested, "as last month's [Department of Health and Social Care] concession list reached a record high of 268 products."

Based on UK generic trade prices to independent pharmacists, WaveData calculated that amoxicillin 250mg capsules in 21-count packs experienced the largest average increase in September, topping this month's Biggest Risers table with a 482% average price increase to £1.63 ($2.14), even as the minimum offer of £0.25 per pack remained unchanged.

Source: Generics Bulletin

GENERICS BULLETIN
CITELINE COMMERCIAL

UK space mission aims to transform cancer therapies

A UK biotechnology company has completed a landmark mission to the ISS that could pave the way for manufacturing next-generation cancer therapies in space.

BioOrbit sends a pharmaceutical research platform to the International Space Station (ISS) after a record £9.8 million investment.

BioOrbit is using space infrastructure to produce protein crystals that could enable cancer treatments delivered by an at-home injection, rather than intravenously in hospital.

The mission tested how microgravity could manufacture highly concentrated protein crystals that are difficult to produce on Earth.

Source: UKRI

UKRI UK Research and Innovation

Pharma's China deal spree grows

Novartis has signed a deal worth up to $7.8 billion, in the latest of a flurry of tie-ups between Big Pharma and Chinese biotech's.

The Swiss pharma major is entering a licensing agreement with China-based Abogen Biosciences for its lead asset, an early-stage experimental treatment for autoimmune disease, Abogen said in a statement.

China offers Western biopharma companies hopes of finding their next blockbuster drug, as patents on top-selling drugs, which generate hundreds of billions in sales, face a "patent cliff" in the early 2030s.

Novartis' normally stable shares fell last month by the most since 1987 following several clinical trial setbacks, raising questions about its ability to develop and source new drugs to offset the looming patent expirations.

Source: CNBC

Roche signs an exclusive licensing agreement with Rona Therapeutics

The Agreement targets RNAi therapy with a unique mechanism that distinguishes itself in the increasingly crowded incretin therapy landscape for obesity and metabolic disease.

With its differentiated mechanism to incretin-based therapies, which primarily affect appetite and energy intake, ALK7 could potentially address adipose tissue biology by selectively reducing visceral and other ectopic fat depots while preserving lean mass.

As part of their agreement, Roche will pay Rona up to $100 million in upfront and milestone payments, as well as royalties.

Source: EPR

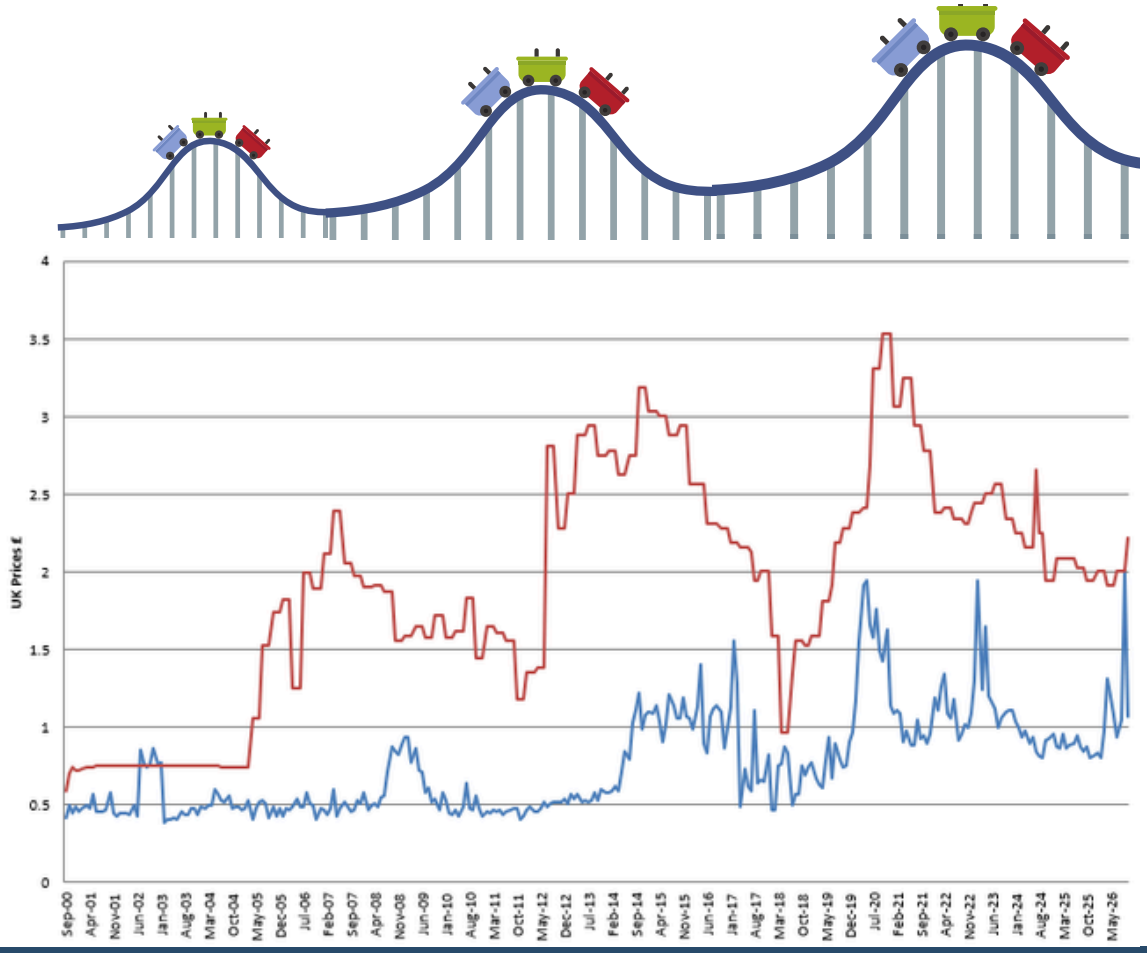
Charles Joynson, WaveData MD, Rides The Paracetamol Tabs 500mg 100 Rollercoaster

This commonly used over-the-counter product has been Category M for at least 10 years and during this time has experienced highly erratic pricing. Since 2005 both the average market price that UK pharmacies and dispensing doctors pay for this product and the English Drug Tariff reimbursement price have been incredibly variable, shooting up and down on a monthly basis.

The big price spikes happened in 2007, 2012 and 2020, but the underlying causes of each may link back to the global financial crisis in 2008, generic reimbursement recalibration in 2012 and Covid in 2020. It's also noticable that changes in reimbursement prices often preceed market price changes, which is unusual as its normally the other way around.

Because this product is a very high volume, low margin product, global production is very vulnerable to destabilisation of any form. This means that any changes in distribution, manufacturing, demand, exchange rate, reimbursement or labour costs can rapidly influence prices.

Potentially it's a rollercoaster ride that most people would not enjoy, taking erratic turns with lots of risk at every stage. We are very glad that this product is available for multiple uses, but manufacturing and distributing it at a profit is very tough.



New drug for endometriosis

Scientists have engineered a potential non-hormonal, non-surgical treatment for endometriosis by adapting the anti-parasitic drug niclosamide, an anti-parasitic medication historically used to treat tapeworm.

The debilitating disease is characterised by severe, chronic pelvic pain and fertility issues when tissue similar to the inner lining of the uterus grows outside it and forms lesions.

For the 190 million people the World Health Organisation estimates are living with the condition, current medical options fall desperately short. Patients are forced to choose between invasive surgeries to strip out lesions or hormone therapies that trigger menopause-like side effects, including osteoporosis, depression, and infertility.

Source: Independent

Diabetes and ADHD drugs to be tested on Alzheimer's patients

A clinical trial has been launched in the UK, where scientists hope to cut years from the search for new Alzheimer treatments.

The trial will test multiple drugs simultaneously, starting with two repurposed medicines already used to treat type 2 diabetes and attention deficit hyperactivity disorder (ADHD).

The study will examine whether the drugs can reduce symptoms such as memory and thinking problems, and help people maintain their quality of life.

Source: BBC

Top Ten Branded Product Searches: WaveData Live

These are the most commonly investigated Branded products on WaveData Live in the last 35 days. Both UK and PI prices were viewed, average prices are shown.

Product	Jul-26	Aug-26	Sep-26	Oct-26
Invokana Tabs 100mg 30	£25.23	£25.23	£26.16	£28.98
Seretide Evohaler CFC Free 250mcg 1 (120 Doses)	£22.54	£22.46	£21.75	£21.59
Ganfort Eye Drops 0.3mg/ml + 5mg/ml 3ml	£11.21	£11.09	£11.11	£11.92
Duaklir Inhalation Powder 340mcg/12mcg 1 (60 Doses)	£31.20	£31.20	£31.20	£31.20
Eklira Genuair Inhaler 322mcg 1 (60 Doses)	£25.30	£25.49	£25.86	£25.21
Azarga Eye Drops 5ml	£9.30	£9.18	£9.10	£8.96
Jardiance Tabs 25mg 28	£35.03	£34.72	£34.78	£34.22
Avamys Nasal Spray 1 (120 Doses)	£5.88	£5.86	£5.76	£5.60
Oestrogel Pump Pack Gel 0.06% 1 (64 Doses)	£9.14	£9.18	£9.15	£8.98
Abilify Maintena Vial 400mg 1	£212.25	£212.67	£210.86	£211.07

Prices correct at time of compilation, but may be subject to change.





















Top Ten Generic Product Searches: WaveData Live

These are the most commonly investigated Generic products on WaveData Live in the last 35 days. Both UK and PI prices were viewed, average prices are shown.

Product	Jul-26	Aug-26	Sep-26	Oct-26
Atorvastatin Tabs 20mg 28	£0.37	£0.34	£0.50	£0.58
Atorvastatin Tabs 10mg 28	£0.20	£0.18	£0.23	£0.25
Sertraline Tabs 100mg 28	£0.70	£0.66	£0.72	£0.81
Atorvastatin Tabs 40mg 28	£0.49	£0.47	£0.63	£0.78
Sertraline Tabs 50mg 28	£0.61	£0.56	£0.62	£0.76
Omeprazole Caps 20mg 28	£0.38	£0.35	£0.36	£0.39
Levothyroxine Tabs 100mcg 28	£0.43	£0.45	£0.81	£2.76
Levothyroxine Tabs 50mcg 28	£0.41	£0.42	£0.80	£2.72
Levothyroxine Tabs 25mcg 28	£0.42	£0.45	£1.07	£2.89
Atorvastatin Tabs 80mg 28	£1.01	£0.97	£1.08	£1.15

Prices correct at time of compilation, but may be subject to change.



FUTURE INDUSTRY EVENTS

WelshConfed26 Annual Conference & Exhibition	3rd - 4th Nov 26	Wales
International Health Lecture 2026	4th Nov 26	London
Supply Chain Excellence Awards	5th Nov 26	London
ABPI Industry Summit - trust during turbulence	5th Nov 26	London
Global Pharma and Biotech Summit	10th Nov 26- 11th	London
The 3rd European Congress on Dermato-Oncology2026	12th - 13th Nov 26	Netherlands
ICR Healthcare 14th Annual Healthcare Conference	16th Nov 26	London
AI in Healthcare Conference 2026	19th Nov 26	Online
Future for vaccines in the UK	24th Nov 26	Online
GHP Autumn Symposium	26th Nov 27	Birmingham
Next steps for NICE in England	30th Nov 26	Online
Health Expo Cyprus	5th - 6th Dec 26	Limassol
Next steps for clinical research and trials in the UK	15th Dec 26	online
Priorities for men's health and wellbeing in England	11th Jan 27	Online
8th HEALTH EXPO ATHENS	20th - 21st Feb 27	Athens
AI in Healthcare Conference	23rd Feb 27	Manchester
Priorities for prevention in health and care in England - innovation, commissioning and delivery models	2nd Mar 27	Online
World EPA Congress 2027	2nd & 3rd Mar 27	Amsterdam
The 9th Int'l Congress on Controversies in Fibromyalgia	13th - 14th Apr 27	Greece
PharmaVenue 2027	26th - 27th Apr 27	Barcelona
LogiPharma	25th - 27th May 27	Vienna

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- WaveData Live: UK & EI Pharma Pricing 1-35 days
- WaveData Pharma TouchStone: UK & EI Pharma Pricing up to 6 months
- WaveData BPPI: UK Pharma Pricing up to 10 years
- WaveData ScriptMap: GP Prescribing Data updated monthly

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