Primary Care Growth of Medicines Predictions (existing and new medicines)

Primary Care Growth Existing Medicines (all from types excluding HBP and GP14)								
Medicine/Medicine Group	Prediction	2023/2024 cost (12M estimate)	2024/2025 cost (12M estimate)	Uplift/saving	Impact	Drivers	How calculations have been undertaken	
Direct acting anticoagulant (DOAC)	Continued growth in prescribed items and associated costs.	£ 5,021,171	£ 4,104,921	-£ 916,249	Moderate	Overall DOAC usage continues to grow; the addition of apixaban (2.5mg and 5mg to SDT) has resulted in a significant reduction in pricing. Calculations are based on the assumption that the price of apixaban in December 2023 will hold and that growth will continue at a rate similar to growth over the last 12 months (Q2 22/23 - Q1 23/24)	Quantity used to calculate uplifts (average of % uplift from last 4 quarters of data, Q2 22/23 - Q1 23/24). Apix 2.5mg 4%, apix 5mg 7% and all others flat. % increase applied to Q1 23/24 quantity and then extrapolated from there.	
Sodium Glucose Co- Transporter 2 (SGLT2) Inhibitors	Continued growth in prescribed items and associated costs.	£ 2,715,171	£ 3,975,282	£ 1,260,111	High	SGLT2 and GLP1 are relatively novel agents used in the management of T2 diabetes. It is anticipated that prescribing will continue to grow and that these medicines will be used earlier in the management of diabetes. As such,	Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 10% increase per quarter	
Glucagon like peptide (GLP1) receptor agonists	Continued growth in prescribed items and associated costs.	£ 736,808	£ 1,068,371	£ 331,563	Moderate	growth is to be expect in 2024/2025 and coming financial years. Calculations are based on the assumption that prices will remain stable and that growth will continue at a rate similar to growth over the last 12 months (Q2 22/23 - Q1 23/24).	Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 9% increase per quarter	

Medicine/Medicine Group	Prediction	2023/2024 cost (12M estimate)	2024/2025 cost (12M estimate)	Uplift/saving	Impact	Drivers	How calculations have been undertaken
Antidepressant Medications	Continued growth in prescribed items and associated costs.	£ 3,570,304	£ 4,679,940	£ 1,109,636	High	Mental health prescribing increased during COVID, and this trend has continued post-COVID, attributed mainly to the financial and cost of living crisis. Growth is challenging to predict and as such, anti-depressant prescribing should be considered an ongoing risk to Primary Care prescribing. Calculations are based on the assumption that prices will remain stable and that growth will continue at a rate similar to growth over the last 12 months (Q2 22/23 - Q1 23/24).	Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 7% increase per quarter
ADHD medicines	Continued growth in prescribed items and associated costs.	£ 1,649,805	£ 1,930,038	£ 280,233	Moderate	ADHD prescribing has increased in recent years due to increased awareness of the condition, increased diagnoses, and transfer of prescribing from private sector diagnosis and prescribing. This is particularly prevalent within the adult population. Calculations are based on the assumption that prices will remain stable and that growth will continue at a rate similar to growth over the last 12 months (Q2 22/23 - Q1 23/24). Medication shortages within this area have the potential to further impact on increasing spend (not included in calculations).	Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 4% increase per quarter

Medicine/Medicine Group	Prediction	2023/2024 cost (12M estimate)	2024/2025 cost (12M estimate)	Uplift/saving	Impact	Drivers	How calculations have been undertaken
Continuous Glucose Monitors (CGM)	Continued growth in prescribed items and associated costs.	£ 2,588,089	£ 3,653,299	£ 1,065,210	High	Use of CGMs in patients with Type 1 and Type 2 diabetes is expected to deliver continual growth with the MCN predicting an additional 700 patients to be using the devices in the next 18-24months. The introduction of a second CGM (Dexcom ONE) which is a two part system has allowed for greater patient choice, and an alternative for patients who are unable to use Freestyle Libre (annual costs £910 for FreeStyle Libre vs £923 for Dexcom ONE). Care should be taken when interpreting item predictions for CGMs, as FreeStyle Libre is a one-part CGM system, while Dexcom ONE is a two-part system (skewing item data) - ongoing patient count and cost will be a more reliable measure of growth in this area.	From MCN: We expect another additional 300 people with type 1 diabetes over the next 18-24 months and another 400 people with Type 2 diabetes to take up continuous glucose monitoring over the same period. Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 9% increase per quarter. Comparator calculation undertaken using MCN prediction of 700 patients, with average cost of £916.50/annum, at a rate of 1/8th of predicted growth per quarter£20k more in prediction than if use average growth.

Medicine/Medicine Group	Prediction	2023/2024 cost (12M estimate)	2024/2025 cost (12M estimate)	Uplift/saving	Impact	Drivers	How calculations have been undertaken
Hormone Replacement Therapies (HRT)	Continued growth in prescribed items and associated costs.	£ 1,479,235	£ 2,012,483	£ 533,248	High	Prescribing medications to support with menopause management has increased in recent years due to increased awareness of the condition (government policy and media attention as well as increased diagnoses and transfer of prescribing from private sector diagnosis and prescribing). Calculations are based on the assumption that prices will remain stable and that growth will continue at a rate similar to growth over the last 12 months (Q2 22/23 - Q1 23/24). Medication shortages within this area have the potential to further impact on increasing spend (not included in calculations).	Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 8% increase per quarter
Testosterone in women	Continued growth in prescribed items and associated costs.	£ 16,910	£ 18,304	£ 1,394	Low	Testosterone prescribing in postmenopausal women with low libido has received notable media attention, which has resulted in increased requests for primary care prescribing. This coupled with increased awareness related to menopause management and increase private diagnoses/prescribing has seen an increase in Primary Care expenditure for this indication. While the spend in this particular area is small, it is included as it forms part of the wider HRT risk. Calculations are based on the assumption that prices will remain stable and that growth will continue at a rate similar to growth over the last 12 months (Q2 22/23 - Q1 23/24). Medication shortages within this area have the potential to further impact on increasing spend (not included in calculations).	Average % increase in GIC from last 4 quarters (Q2 22/23 - Q1 23/24) used to make 23/24 and 24/245 estimates. Taken actual GIC for Q1 23/25 and then applied 2% increase per quarter

Primary Care and Hosted Service Growth Existing Medicines								
Medicine/Medicine Group	Prediction	2023/2024 cost (12M estimate)	2024/2025 cost (12M estimate)	Uplift/saving	Impact	Drivers	How calculations have been undertaken	
Buvidal*	Continued growth in prescribed items and associated costs.	£ 922,879	£ 1,386,665	£ 618,379	High	Scottish Government focus. Within NHS Grampian, work is underway to resolve logistical challenges in prescribing and administration through work with primary care and community pharmacy. It is anticipated that this will drive patient numbers and subsequent cost	2023/2024 estimate based on 5M spend. 2024/2025 estimate based on specialist service predictions. Uplift based on variance between 23/24 and 24/25 total spend prediction.	

^{*}It should be noted that Buvidal spend is split across a variety of services, including GP10 and hosted service prescribing. While out with the scope of this paper it is imperative that monies are allocated within the correct service line.

Primary Care Growth New Medicines								
Medicine/Medicine Group Prediction		Uplift	Impact	Drivers	How calculations have been undertaken			
Daridorexant (Quviviq)	New medicine indicated for insomnia (SMC Forward Look 19)	£ 15,405	Moderate	Product launched. Impact from April 2024. Potential for growth following Y1. To be used in Primary Care setting.				
Fezolinetant (Veozah)	New medicine indicated for vasomotor symptoms associated with menopause (SMC Forward Look 19)	£ 6,682	Moderate	Impacted predicted Oct 2024. Potential for growth following Y1. To be initiated in secondary care.	Information taken from SMC Forward Look 19			
Ruxolitinib topical (Opzelura)	New indication and formulation indicated for vitiligo (SMC Forward Look 19)	£ 26,240	Moderate	Impacted predicted Oct 2024. Potential for growth following Y1. To be initiated in secondary care.				