



SAMPLE INSIGHT REPORT

GLP-1 Receptor Agonists in NHS Primary Care

Prescribing trends, regional uptake, and pricing dynamics — England 2021–2024

EXECUTIVE SUMMARY

Key Findings at a Glance

This illustrative analysis examines prescribing trends for GLP-1 receptor agonists in NHS primary care across England between 2021 and 2024, drawing on NHS England Electronic Prescribing Dataset (EPD) and TRUD dm+d pricing data. The findings demonstrate the analytical depth PrescribingInsights can deliver for pharmaceutical companies, ICBs, and healthcare consultancies.



SECTION 1

National Prescribing Volume Trends

Monthly prescription items for GLP-1 agonists have grown dramatically since 2021, driven by the launch of semaglutide in oral and injectable formulations and their adoption in both type 2 diabetes and weight management pathways. The chart below shows indexed monthly item counts from the EPD dataset.

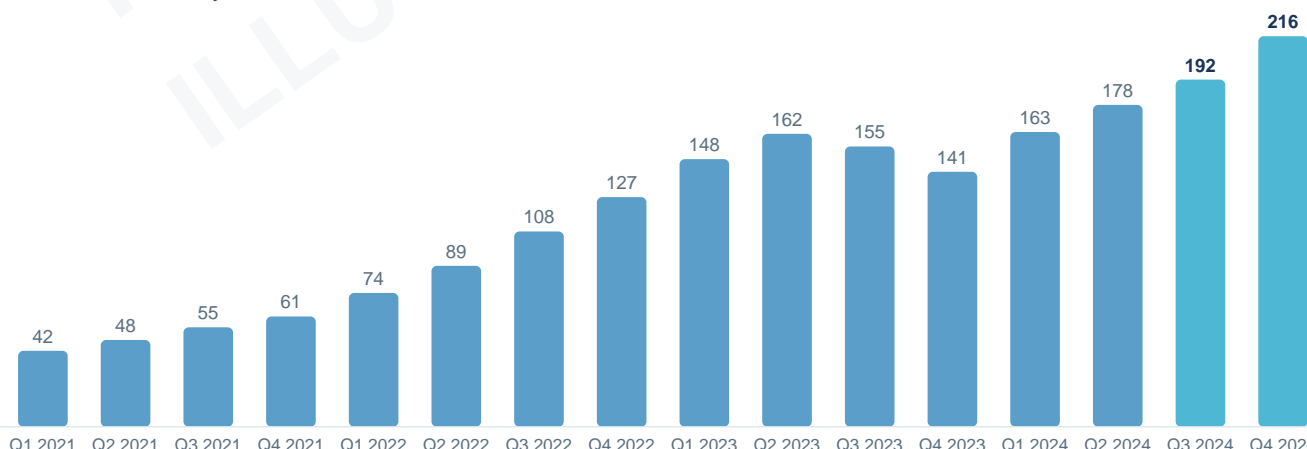


Fig. 1 — Indexed GLP-1 prescribing items by quarter, England (Q1 2021 = 42 base units). Source: NHS EPD (illustrative).



Key observations:

- **Sustained growth** of 312% over the period, with acceleration in 2024 driven by expanded NICE guidance.
- **Q3 2023 dip** reflects a temporary national supply constraint affecting injectable semaglutide — a signal visible in the EPD data and corroborated by dm+d availability flags.
- **Q4 2024** represents the highest volume quarter on record, suggesting the market has not yet reached saturation.

SECTION 2

Regional Uptake Variation by ICB

Prescribing rates per 1,000 registered patients vary significantly across ICBs, ranging from 3.1 to 13.2 items per 1,000 in Q4 2024. This 4.2x variation suggests significant differences in formulary adoption, clinical pathway implementation, and potentially unmet need. The following chart shows a representative sample of ICBs.

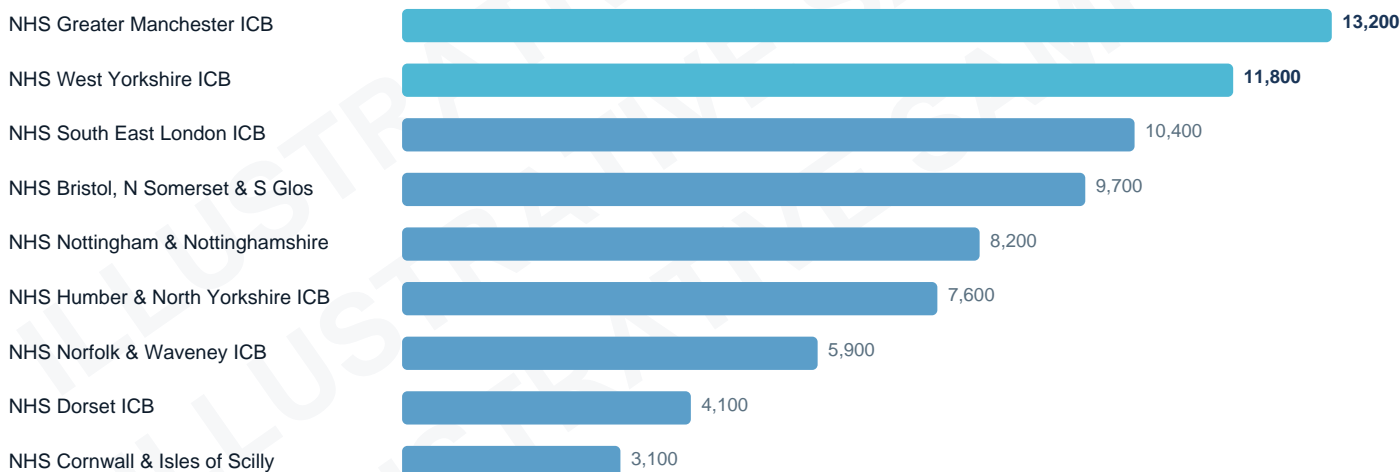


Fig. 2 — GLP-1 prescribing items per 1,000 registered patients, selected ICBs, Q4 2024. Source: NHS EPD + NHSOF (illustrative).

Strategic implications:

- **High-uptake ICBs** (Greater Manchester, West Yorkshire) are likely early adopters with established pathways — suitable for case study development and peer influence strategies.
- **Low-uptake ICBs** represent growth opportunity — targeted formulary engagement and clinical education may accelerate adoption.
- A full engagement would include all 106 ICBs with statistical benchmarking and identification of the key clinical leads driving adoption.

SECTION 3

TRUD Pricing Dynamics

NHS TRUD dm+d data enables tracking of Drug Tariff basic prices and reimbursement category changes over time. For GLP-1 agonists, this reveals important signals about pricing pressure and market dynamics that can inform launch strategy.



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Product (VMP)	Drug Tariff Cat.	Basic Price (28-day)	Price Change YoY	Status
Semaglutide 0.5mg inj (1ml)	Cat A	£73.25	+2.1%	Active
Semaglutide 1mg inj (1ml)	Cat A	£73.25	+2.1%	Active
Semaglutide 3mg tabs	Cat M	£31.68	-4.2%	Active
Semaglutide 7mg tabs	Cat M	£73.25	0.0%	Active
Dulaglutide 0.75mg inj	Cat A	£59.60	-1.8%	Active
Dulaglutide 1.5mg inj	Cat A	£59.60	-1.8%	Active
Liraglutide 0.6mg inj	Cat A	£47.36	-6.3%	Active
Exenatide 5mcg inj	Cat A	£31.50	-8.1%	Active

Table 1 — GLP-1 agonist dm+d basic prices and Drug Tariff categories, Q4 2024. Source: NHS TRUD dm+d (illustrative).

Pricing insights:

- **Oral semaglutide** (Cat M) shows downward pricing pressure (-4.2%) suggesting increasing generic competition is anticipated in the medium term.
- **Injectable semaglutide** (Cat A) has remained relatively stable, reflecting continued branded dominance.
- **Older agents** (liraglutide, exenatide) show significant price erosion, consistent with loss of exclusivity and switching behaviour in the EPD data.

ABOUT THIS ANALYSIS

What a Full PrescribingInsights Engagement Delivers

Complete ICB Coverage	All 106 ICBs analysed with statistical benchmarking, outlier identification, and ranking tables.
Monthly Trend Data	Full historical EPD data from 2014 to present — trend analysis, seasonality, and forecasting.
Practice-Level Drill-Down	Identify specific GP practices driving volume — useful for targeted engagement planning.
Live TRUD Pricing Alerts	Weekly dm+d price change tracking with automated notifications for your product set.
Interactive Power BI Dashboard	All findings delivered as a navigable dashboard or static report — formatted for your audience.
Stakeholder Briefing Pack	Executive summary and slide deck ready for leadership, board, or client presentation.



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Bespoke NHS Prescribing Intelligence

Interested in a bespoke analysis for your therapeutic area?

Every PrescribingInsights engagement starts with a free discovery call. We'll scope the analysis around your specific questions and provide a clear proposal before any work begins.

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