

OXFORDSHIRE HEALTH AND WELLBEING BOARD

25 SEPTEMBER 2025

Oxfordshire Pharmaceutical Needs Assessment 2025

Report by Director of Public Health and Communities

RECOMMENDATION

The Health and Wellbeing Board is RECOMMENDED to

- a) **To receive an update on the production of the 2025 Oxfordshire Pharmaceutical Needs Assessment (PNA).**
- b) **To note that the 2025 Oxfordshire PNA has been out to formal 60-day consultation and is ready for publication.**
- c) **To approve the publication of the completed 2025 Oxfordshire PNA.**

Executive Summary

1. Every Health and Wellbeing Board (HWB) has a statutory duty to carry out a Pharmaceutical Needs Assessment (PNA) every three years. The last PNA for Oxfordshire was published in 2022 and has been kept up to date with supplementary statements reflecting changes in provision. The 2025 PNA is now due for publication in October 2025.

Introduction

2. 'Pharmaceutical Needs Assessments' or 'PNAs' are a special assessment of pharmaceutical services provision in an area. The PNA includes information on current pharmaceutical service provision, information on health and other needs, and an assessment on whether current provision meets current or future needs of the area. It is a mandatory exercise. The Health and Social Care Act 2012 transferred responsibility for developing and updating PNAs to Health and Wellbeing Boards (HWBs). The [NHS \(Pharmaceutical Services and Local Pharmaceutical Services\) Regulations 2013](#) set out the legislative basis for developing and updating PNAs.
3. To prepare the report, data is gathered from a range of sources including pharmacy contractors, pharmacy users, local residents, and others (commissioners, planners).

4. An external expert resource, Soar Beyond Ltd, has been commissioned to support the preparation and delivery of the PNA 2025 report. Soar Beyond have extensive expertise in producing PNAs, having produced 26 in the last round in 2022.
5. Since the last PNA for Oxfordshire was published (in 2022) there have been changes to local provision of pharmacy services, with some contractors closing premises (for example Lloyds in Sainsbury supermarkets) and applications for new pharmacies to open. The PNA provides a formal and evidence-based view on any gaps in pharmaceutical provision locally and is the primary resource used by NHS England when considering applications to open new pharmacies in the county. Therefore, this new PNA will ensure decisions taken on determining applications for new pharmacies in Oxfordshire are informed by the needs of local residents.
6. The final report is a publicly available document and will highlight any current gaps in provision as well as likely future needs based on anticipated demographic changes within the lifetime of the PNA.

PNA progress to date

7. The Oxfordshire PNA process commenced late 2024 overseen by a wider BOB system-wide steering group, as agreed by the Oxfordshire Health and Wellbeing board in September 2024.
8. An Oxfordshire PNA project group has supported the production of the PNA, ensuring that all relevant data is incorporated and that it meets the requirements of the legislation.

The Project group consists of:

- Consultant in Public Health / Nominated Public Health Lead
- Local Pharmaceutical Committee representative
- Healthwatch representative (lay member)
- Soar Beyond representative
- BOB ICB representative

9. Following public engagement, data collection and analysis, the 2025 Oxfordshire PNA was drafted, reviewed and approved by the Oxfordshire PNA project group. As agreed at the last Health and Wellbeing Board, the draft PNA was signed-off by the Director of Public Health and the Chair of the Health and Wellbeing Board in May 2025.
10. The current community pharmacy network in Oxfordshire is considered adequate to meet the needs of the population. There are 99 community pharmacies and 24 dispensing doctor practices, providing good geographic coverage across both urban and rural areas. Access is well supported, with extended opening hours and strong transport connectivity: 78% of pharmacies open on Saturdays, 21% on Sundays, and most residents can reach a pharmacy within 20–30 minutes by various transport modes. Public feedback

confirms high levels of satisfaction with access, with 95% of respondents able to reach a pharmacy within 30 minutes.

11. Future population growth (projected 4.9% increase by 2030) has been considered, and no future gaps in provision are anticipated. While increased demand may place some pressure on services, the network is currently resilient and adaptable through innovations and service improvements. Although the number of pharmacies is below the national average, no unmet need has been identified, and ongoing monitoring will ensure provision continues to meet local requirements.
12. The Draft PNA went out to formal 60-day consultation from the 2 June 2025 until 1 August 2025. It was made available to all statutory consultees as per the PLPS 2013 Regulations, the public and all members of the BOB ICS Steering Group.
13. Statutory Consultees as per the regulations include:
 - Local Pharmaceutical Committee
 - Local Medical Committee
 - Pharmacies included in the pharmaceutical list for Oxfordshire HWB area .
 - Healthwatch
 - NHS Trust or NHS Foundation Trust:
 - BOB Integrated Care Board
 - Neighbouring Health and Wellbeing Boards:
14. There were in total 28 responses, all of them from the internet survey. From the 28 responses, 12 (43%) agreed with the conclusions of Oxfordshire Draft 2025 PNA, 10 (36%) neither agreed nor disagreed, five (18%) disagreed and one didn't respond.
15. Comments focused on the following:
 - (a) Length and complexity of the document
 - (b) Closures over the past few years
 - (c) Rurality across Oxfordshire
 - (d) Quality of service experienced
16. All responses were considered by the PNA Steering Group at its meeting on 14 August 2025 for the final report and signed off by the steering group as an accurate reflection of need and provision of pharmaceutical services across Oxfordshire. No changes were made to the content of the PNA following the consultation. However, all comments received have been responded to in full and are documented in Appendix H.
17. The final PNA is presented to the Oxfordshire Health and Wellbeing board in September 2025. The final PNA must be published no later than 1st October 2025. The PNA will be kept under regular review and updated through supplementary statements as required, to reflect any significant changes in pharmaceutical service provision.

Financial Implications

18. Funding for the production of the Pharmaceutical Needs Assessment for 2025 has already been allocated

Comments checked by:

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Legal Implications

19. The work is being undertaken to ensure the Health and Wellbeing Board is able to comply with its duties to carry out pharmaceutical needs assessments in accordance with the requirements of the [NHS \(Pharmaceutical Services and Local Pharmaceutical Services\) Regulations 2013](#).

Comments checked by:

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