

**Surrey Pharmaceutical Needs Assessment:
Supplementary Statement – March 2020**



SURREY

Version	Date	Comment
0.1	25.1.2020	Draft Supplementary Statement – Julie George & Lynne Sawyer
0.2	13.2.2020	Revised following comments from PNA Steering Group - Julie George & Lynne Sawyer
0.3	23.2.2020	Approved by Surrey PNA Steering Group
1.0	05.03.2020	Approved by Surrey Health and Wellbeing Board

PHARMACEUTICAL NEEDS ASSESSMENT SUPPLEMENTARY STATEMENT

This supplementary statement:

has been prepared by the Public Health team at Surrey County Council, in collaboration with the Pharmaceutical Needs Assessment (PNA) Steering Group on behalf of the Surrey Health and Wellbeing Board;

- is issued in accordance with Part 2; (6) 3 of the National Health Service (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013¹;
- provides updates to the PNA published in March 2018² and the PNA Supplementary Statement published in March 2019³;
- provides information which supersedes some of the original PNA information, so should be read in conjunction with the original PNA and supplementary statement; and
- relates to changes in population and pharmacy provision between the end of data collection for the 2018 PNA and 2019 Supplementary Statement, that is, January 2019 to December 2019.

Members of the PNA Steering Group include:

- Tacye Connolly, Healthwatch Surrey
- Karthiga Gengatharan, Surrey and Sussex Local Medical Committee
- Julie George, Consultant in Public Health, Surrey County Council (Chair)
- Mike Hedley, Senior Commissioning Manager (Pharmacy and Optometry), NHS England and NHS Improvement – South East Region
- Rachel MacKay, Associate Director of Medicines Management, Guildford and Waverley Clinical Commissioning Group
- James Wood, Chief Executive Officer, Surrey and Sussex Community Pharmacy, representing the Surrey and Sussex Local Pharmaceutical Committee
- Supported by Lynne Sawyer, Public Health Analyst, Surrey County Council.

¹ <http://www.legislation.gov.uk/uksi/2013/349/regulation/6/made>

² [Surrey Pharmaceutical Needs Assessment 2018](#)

³ https://mycouncil.surreycc.gov.uk/documents/s55056/PNA_Supplementary_Statement_February_2019_final.pdf

The Surrey Pharmaceutical Needs Assessment 2018 and subsequent 2019 Supplementary Statement (hereafter called the 2018 PNA for brevity) identified no additional needs for the provision of necessary, essential or advanced pharmaceutical services. This supplementary statement serves as an update on current service provision and review of findings of the 2018 PNA. A full PNA revision will be published prior to the 1st April 2021, as required by the regulations.

Population

Assessment of the latest housing constrained population projections⁴ have not identified any major changes to demography or infrastructure that will impact on pharmaceutical service need as set out in the 2018 PNA and which would be relevant to the granting of control of entry applications.

We have also considered the potential impact of large housing developments on the need for community pharmacy. There are a number of significant developments in the boroughs of Guildford, Waverley, Reigate & Banstead, Runnymede and Surrey Heath. In particular, Guildford and Waverley Borough Councils have a number of significant housing developments planned, which on completion will provide 5,600 and 2,600 units respectively. Mole Valley Borough Council has submitted a draft proposal for 7,000 dwellings. However, none of these developments have sufficient units built to date to indicate a need for a new community pharmacy. (For more details on these developments, see Appendix A.) As part of the process for developing the 2021 Pharmaceutical Needs Assessment, we will be engaging with planners in local districts and boroughs to determine how best to reflect the need for pharmacies in these large-scale developments.

Pharmacists per 100, 000 population can be used to give an estimated level of service provision within a Local Authority. We considered the rate in Surrey and in Integrated Care Partnership areas within Surrey compared to the national average. While the rate in Surrey is slightly below the national average, the rate has not changed since the 2018 PNA and remains at an acceptable level. (See Table 1 below.)

Table 1: Pharmacies per 100,000 population

Area	All Community Pharmacies	Population	2020 Ratio (pharmacies per 100,000 pop)	2018 Ratio (pharmacies per 100,000 pop)
England (2016)	11, 539	55,629,000	21	21
Surrey County	209	1,172,590	18	18
East Berkshire	1	12,800	8	9
East Surrey	32	186,790	17	18
Guildford and Waverley	38	210,073	18	18
North East Hampshire & Farnham*	7	43,260	16	16
North West Surrey	62	348,666	18	19
Surrey Downs	54	290,725	19	18
Surrey Heath	16	97,620	16	18

* includes those pharmacies in Surrey HWB area (not including distance selling or appliances). Source: Number of Pharmacists - NHS Digital; NHS England; population estimates from ONS Small Area Population Estimates, 2017.

⁴ Housing constrained population forecasts are based on assumptions similar to the ONS subnational population projections which take into account births, deaths and inward and outward migration. Housing constrained population forecasts additionally considers information from local boroughs on the availability of housing stock which can impact migration into an area and hence the overall population estimate. Local data is available at [Surrey Housing constrained population projections](#)

Service Provision

The changes which have taken place in the service provision since the 2018 PNA, i.e. between January 2019 to end December 2019, are detailed in Tables 2-4 below. The changes are also shown on the map in Appendix B.

We considered whether the changes in provision materially changed the access of local population to a community pharmacy. As can be seen from the map in Appendix B, all four closures of community pharmacies are located close to alternative provision, with three of the four very close to alternative provision. We specifically considered the closure of the Lloyds Pharmacy in Staines because it had a 100-hour core contract and was located further from alternative provision than the other three closures. However, we determined that there are two other pharmacies within 500-1.5 kilometres and a 100-hour pharmacy within 10 kilometres. We therefore concluded that the closures of these pharmacies do not sufficiently affect access to create an opening for market entry.

Table 2: Changes to Contracts, January 2019 – December 2019

Type of Change	Description of Change
New Pharmacy Contracts	One new contract (distance selling)
Pharmacy Closures	Four pharmacy closures (community)
Pharmacy Mergers	None approved

Table 3: New Contracts

Name	Contract Type	Date of start of contract	Location	Core Opening Hours	Opening Hours (including Supplementary Hours)
Easy Pharmacy	Distance Selling Pharmacy	11/01/19	Unit 11, Littleton House Littleton Road Ashford Middlesex TW15 1UU	Mon: 09:00-13:00; 14:00-18:00 Tue: 09:00-13:00; 14:00-18:00 Wed: 09:00-13:00; 14:00-18:00 Thu: 09:00-13:00; 14:00-18:00 Fri: 09:00-13:00; 14:00-18:00 Sat: Closed	Mon: 09:00-13:00; 14:00-18:00 Tue: 09:00-13:00; 14:00-18:00 Wed: 09:00-13:00; 14:00-18:00 Thu: 09:00-13:00; 14:00-18:00 Fri: 09:00-13:00; 14:00-18:00 Sat: Closed

Source: NHS England

Table 4: Pharmacy Closures

Name	Contract Type ⁵	Date of Closure	Location	Core Opening Hours	Opening Hours (including Supplementary Hours)
Lloyds Pharmacy	40 Hour	30/08/19	13 Station Approach West Byfleet Surrey KT14 6NG	Mon: 08:30-12:00; 16:30-19:00 Tue: 08:30-12:00; 16:30-19:00 Wed: 08:30-12:00; 16:30-19:00 Thu: 08:30-12:00; 16:30-19:00 Fri: 08:30-12:00; 16:30-19:00 Sat: 08:30-12:00; 16:30-19:00	Mon: 09:00 -19:00 Tue: 09:00 - 19:00 Wed: 09:00 - 19:00 Thu: 09:00 - 19:00 Fri: 09:00 - 19:00 Sat: 09:00 - 17:30
Boots the Chemist	40 Hour	14/09/19	17 Thurlestone Parade High Street Shepperton Surrey TW17 9AR	Mon: 09:00-13:00; 14:00-17:30 Tue: 09:00-13:00; 14:00-17:30 Wed: 09:00-13:00; 14:00-17:30 Thu: 09:00-13:00; 14:00-17:30 Fri: 09:00-13:00; 14:00-17:30 Sat: 09:00-11:30	Mon: 09:00 -19:00 Tue: 09:00 - 19:00 Wed: 09:00 - 19:00 Thu: 09:00 - 19:00 Fri: 09:00 - 19:00 Sat: 09:00 - 17:30
Boots the Chemist	40 Hour	11/05/19	11 The Parade Frimley Surrey GU16 7HY	Mon: 09:00-13:00; 13:30-17:30 Tue: 09:00-13:00; 13:30-17:30 Wed: 09:00-13:00; 13:30-17:30 Thu: 09:00-13:00; 13:30-17:30 Fri: 09:00-13:00; 13:30-17:30 Sat: Closed	Mon: 09:00-13:00; 13:30-17:30 Tue: 09:00-13:00; 13:30-17:30 Wed: 09:00-13:00; 13:30-17:30 Thu: 09:00-13:00; 13:30-17:30 Fri: 09:00-13:00; 13:30-17:30 Sat: Closed
Lloyds Pharmacy	100 Hour	23/02/19	The Cause Way Staines upon Thames Middlesex TW18 3AP	Mon: 06:30 -22:30 Tue: 06:30 -22:30 Wed: 06:30 -22:30 Thu: 06:30 -22:30 Fri: 06:30 -22:30 Sat: 07:00 -21:00 Sun: 10:00 -16:00	Mon: 06:30 -22:30 Tue: 06:30 -22:30 Wed: 06:30 -22:30 Thu: 06:30 -22:30 Fri: 06:30 -22:30 Sat: 07:00 -21:00 Sun: 10:00 -16:00

Source: NHS England

Pharmacy opening hours

Pharmacies can apply to NHS England to make changes to their core opening hours, or to notify them of changes to additional supplementary opening hours, throughout the year. Since the publication of the PNA Supplementary Statement in March 2019 there have been three changes to core opening hours (See Table 5 below). There have also been a number of changes to individual pharmacy opening times (n=18). Pharmacies are required to keep their entries up to date on the www.NHS.uk website. Details of individual pharmacy opening times that may have changed can be found on the website.

⁵ Core hours are the minimum contracted hours, a contract can be 30, 40 or 100 hours. Supplementary hours(opening hours) are additional hours to the core hours

Table 5 – Changes to Pharmacy Core Opening Hours

Name	Contract Type	Location	Core Opening Hours	Previous Opening Hours
Laly's Chemist	40 Hour	4a Downing Street Farnham Surrey GU9 7PB	Mon: 09:00-18:00 Tue: 09:00-18:00 Wed: 09:00-18:00 Thu: 09:00-18:00 Fri: 09:00-18:00 Sat: Sun	Mon: 09:00-18:30 Tue: 09:00-18:30 Wed: 09:00-18:30 Thu: 09:00-18:30 Fri: 09:00-18:30 Sat: Sun:
Lloyds Pharmacy	40 Hour	92a Station Road Addlestone Surrey KT15 2AD	Mon: 09:00-14:00; 15:00-18:00 Tue: 09:00-14:00; 16:00-18:00 Wed: 09:00-14:00; 16:00-18:00 Thu: 09:00-14:00; 16:00-18:00 Fri: 09:00-14:00; 16:00-18:00 Sat: 09:00-13:00 Sun:	Mon: 08:30-21:00 Tue: 08:30-21:00 Wed: 08:30-21:00 Thu: 08:30-21:00 Fri: 08:30-21:00 Sat: 09:00-17:30 Sun: 10:00 -16:00
Lloyds Pharmacy	40 Hour	Catteshall Mill Catteshall Road Godalming Surrey GU7 1NJ	Mon: 08:30-11:30; 16:00-19:00 Tue: 08:30-11:30; 16:00-19:00 Wed: 08:30-11:30; 16:00-19:00 Thu: 08:30-11:30; 16:00-19:00 Fri: 08:30-11:30; 16:00-19:00 Sat: 08:30-11:30; 16:00-19:00 Sun:	Mon: 08:30-19:00 Tue: 08:30-19:00 Wed: 08:30-19:00 Thu: 08:30-19:00 Fri: 08:30-19:00 Sat: 08:30-17:30 Sun:

New Community Pharmacy Contract:

In July 2019, PSNC (representing community pharmacies), NHS England & NHS Improvement (NHS E&I) and the Department of Health and Social Care (DHSC) agreed to a five-year contractual framework deal for community pharmacies, guaranteeing funding levels until 2023/24 and setting out how pharmacies will adapt to provide new services to help people to stay healthy and prevent illness; to support and provide urgent care services; to support patients leaving hospital; and to help patients avoid unnecessary visits to GPs and hospitals. <https://www.gov.uk/government/publications/community-pharmacy-contractual-framework-2019-to-2024>

The change worth noting for this supplementary statement, via new contractual arrangements that came into force from 1 October 2019 are:

New national services

In 2019/20 In 2019/20, community pharmacies will be commissioned to provide two new services:

- The Community Pharmacist Consultation Service (CPCS): This service will relieve pressure on the wider NHS by connecting patients with community pharmacies as a first port of call for minor illness or for the urgent supply of medicines. Pharmacies will offer patients a consultation to help them to manage minor illnesses or make an 'emergency supply' of medicine where a patient has previously been prescribed the medicine. The service will take referrals from NHS 111 (rather than those patients being directed to GPs or A&E) with referrals from other settings, such as GP practices and NHS 111 online, in future years.
- Hepatitis C testing: Pharmacies will offer testing for people using pharmacy needle and syringe programmes to support the national Hepatitis C elimination programme.

Changes to existing services

To free up capacity for these new services, the NHS is decommissioning the Medicines Use Review (MUR) service from community pharmacies. The service is being phased out, so pharmacies will be able to offer a limited number of MURs in 2019/20, and again in 2020/21, after which none will be offered. There will however be an extension of the reach of the six mandated public health campaigns that community pharmacies have to take part in, and many community pharmacies will also choose to take part in the Pharmacy Quality Scheme (PQS). From April 2020, all pharmacies will be required to be able to process electronic prescriptions and to have attained Healthy Living Pharmacy (HLP) Level 1 status. Accreditation as an HLP will mean that they are local hubs to promote health, wellbeing and self-care and providing services to prevent ill-health.

Structural changes

HM Government has committed to ensuring that technology can transform the supply of medicines and the delivery of pharmacy services, and discussions will be taking place on this. This will include exploring ways to make dispensing more efficient and to free up pharmacist and pharmacy team time and capacity. Further changes could be announced that may need to be considered in future PNAs.

Conclusion:

There have not been sufficient changes to the local population, taking into account population projections, large housing developments and rate of pharmacists per 100,000, to create a need for new community pharmacy. The changes to the local service provision, taking into account closure of pharmacies and change in hours, are not sufficient to create the need for a new community pharmacy. Therefore, there is no gaps in access to pharmaceutical services in Surrey.

Pharmacy provision will be reviewed next through the 2021 Pharmaceutical Needs Assessment, due to be published by 1st April 2021.

Appendix A – Large Housing Developments

Elmbridge

No large-scale developments of 1,500 - 2,000+ planned.

Epsom & Ewell

Epsom & Ewell Borough Council have confirmed they require 579 dwellings a year to meet the population need. Consultations in May 2020 will identify a strategy and a long-term plan (2017-2037).

Guildford

Guildford borough Council have confirmed they intend to build approximately 15,000 dwellings to be delivered over period 2019/20 through to 2036

The larger developments include:-

Site A24: Weyside urban village (Slyfield Area Regeneration Project (SARP)) – 1,500 homes (500 homes expected to be delivered post plan period) delivered over period 2024/25 through to 2034.

Site A25: Gosden Hill Farm – 1,700 homes (100 homes expected to be delivered post plan period), delivered over period 2022/23 through to 2035

Site A26: Blackwell Farm – 1,800 homes (300 expected to be delivered post plan period), delivered over period 2022/23 through to 2036

Site A31 Ash and Tongham urban extension is allocated for 1,700 homes. Approximately 1,000 have been completed, 700 expected to be delivered by 2034.

Site A35 Former Wisley Airfield – dwellings to be delivered over period 2022/23 through to 2034

Mole Valley

Mole Valley Borough Council are proposing developments of approximately 7,000 dwellings across the borough, with no development exceeding 1,500 units to be delivered over period 2022/23 through to 2034.

Reigate & Banstead

Reigate & Banstead have confirmed developments of 1,510 dwellings, to be delivered by 2034.

Site Meath Green, Horley - 1,510 dwellings approximately 600 have been completed, 910 to be delivered by 2034.

Runnymede

Runnymede Borough Council have confirmed developments in:-

Site: Addlestone – 1,265 dwellings

Site: Chertsey – 2,212 dwellings

Site Egham - 951 dwellings

Runnymede Borough Council are proposing a new “Garden Village” settlement of 1,746 dwellings at Longcross, Chertsey will include C2 accommodation and travelling showperson plots.

1,628 dwellings have been complete over period 2015-2019.

There are plans proposing to deliver a new Garden Village settlement at Longcross of some 1,746 dwellings + C2 care accommodation and Travelling Showperson plots.

Spelthorne

Spelthorne have confirmed existing and proposed allocations sites are well below 1,500 – 2,000 unit threshold.

Surrey Heath

Surrey Heath has planning permission for approximately 1,200 dwellings.

Phase 1: 2019-2024, 300 units

Phase 2: 2025-2029, 450 units

Phase 3: 2030-2034, 448 units

Tandridge

Tandridge Borough Council are proposing developments of approximately 4,000 dwellings in South Godstone to be delivered from the period 2026/28.

Waverley

Waverley Borough Council plan to provide 2,600 dwellings at Dunsfold Aerodrome, - developments will be built over three phases:

Phase 1 2017-2022, 273 units

Phase 2 2022-2027 1,285 units

Phase 3 2027-2032 1,042 units

Woking

No large-scale developments of 1,500 - 2,000+ planned.

Appendix B - Community Pharmacy changes since the 2018 PNA

