

Trends in the Use of Prescription Opioids and MAT in the Medicaid Program

5 Slide Series, Volume 120

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The Menges Group

Strategic Health Policy & Care Coordination Consulting

Data Sources

- We compiled Medicaid Drug Utilization Files from the Centers for Medicare and Medicaid Services (CMS) from calendar year (CY) 2013 through Q2 2023.
 - This includes prescription drug volume, unit volume, and Medicaid reimbursement (pre-rebate).
 - These files present Medicaid drug utilization at the national drug code (NDC) level by quarter for both the fee-for-service (FFS) and managed care (MCO) settings.
- We analyzed opioid and MAT data by CY from 2013 through Q2 2023.
- We identified the medication-assisted treatment (MAT) drugs and opioids at the NDC level for categorization.

Medicaid Prescription Volume Trends, 2013 through 2023

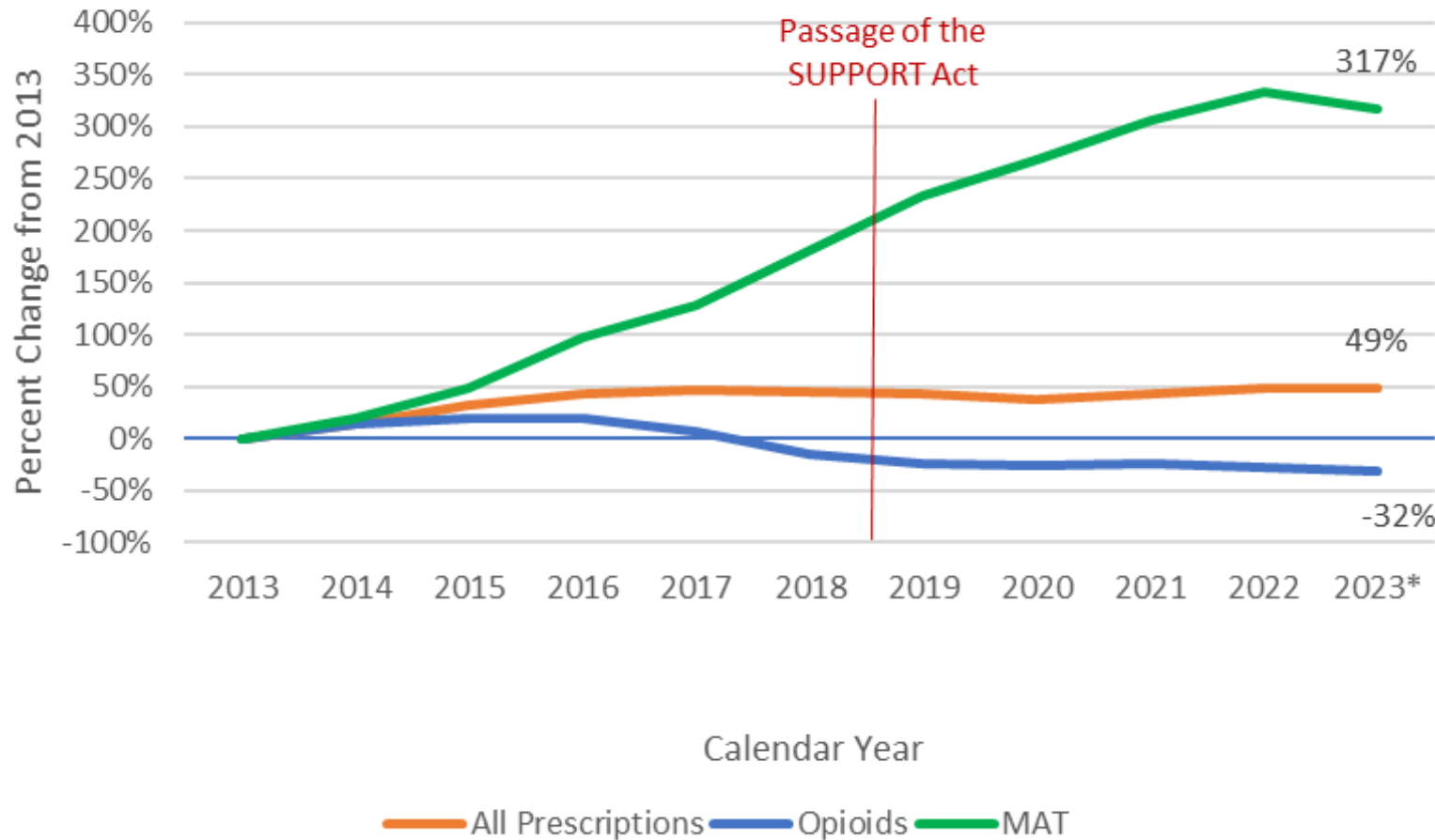
- From 2013-2022, while overall Medicaid prescription volume **increased by 48%**, opioid prescription volume **decreased by 28%**.
- MAT volume more than **quadrupled** during this timeframe. In 2013, there were roughly 14 times as many opioid prescriptions as MAT prescriptions in Medicaid. As of 2022, opioid volume was less than three times larger than MAT volume.

Nationwide Medicaid Prescriptions	2013	2016	2019	2022	2023 (estimated)
Opioids	32,415,655	38,534,519	24,755,295	23,333,055	22,076,378
MAT	2,152,133	4,261,071	7,169,652	9,332,183	8,983,437
All Prescriptions	511,760,759	731,870,742	729,552,843	758,202,104	762,574,186
Opioid % of All Scripts	6.3%	5.3%	3.4%	3.1%	2.9%
MAT % of All Scripts	0.4%	0.6%	1.0%	1.2%	1.2%

- Medicaid opioid prescription volume **increased 19%** from 2013-2016, then **dropped sharply (by 39%)** from 2016-2022.
- Opioids represented 6.3% of all 2013 Medicaid prescriptions, but this dropped to 3.1% as of 2022.

Changes in Prescription Volume since 2013

Medicaid Prescriptions: 2013 to 2023



The SUPPORT for Patients and Communities Act of 2018 addressed many aspects of the opioid epidemic, including treatment, prevention, recovery, and enforcement. It required state Medicaid programs to cover all three FDA-approved MAT medications.

* 2023 values are estimated based on data from the first half of the year

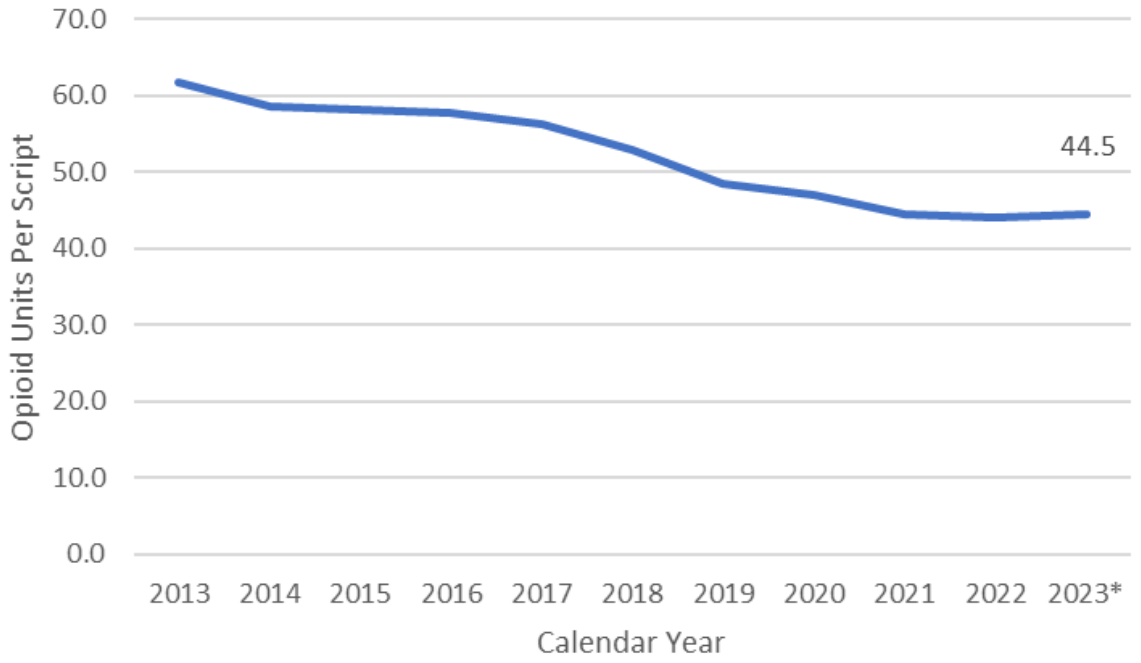
Medicaid Opioid Units per Prescription, 2013 through 2023

Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023 (estimated)
Nationwide Medicaid Opioid Units Per Prescription	61.6	58.6	58.2	57.8	56.2	52.8	48.4	46.9	44.4	44.0	44.5

Opioid units (i.e., pills/capsules) per prescription have steadily decreased from 61.6 in CY2013 to 44.4 in CY2021, representing a **28% decrease**.

This downward trend has turned flat from 2021-2023, however.

Changes in Opioid Units Per Prescription Since 2013

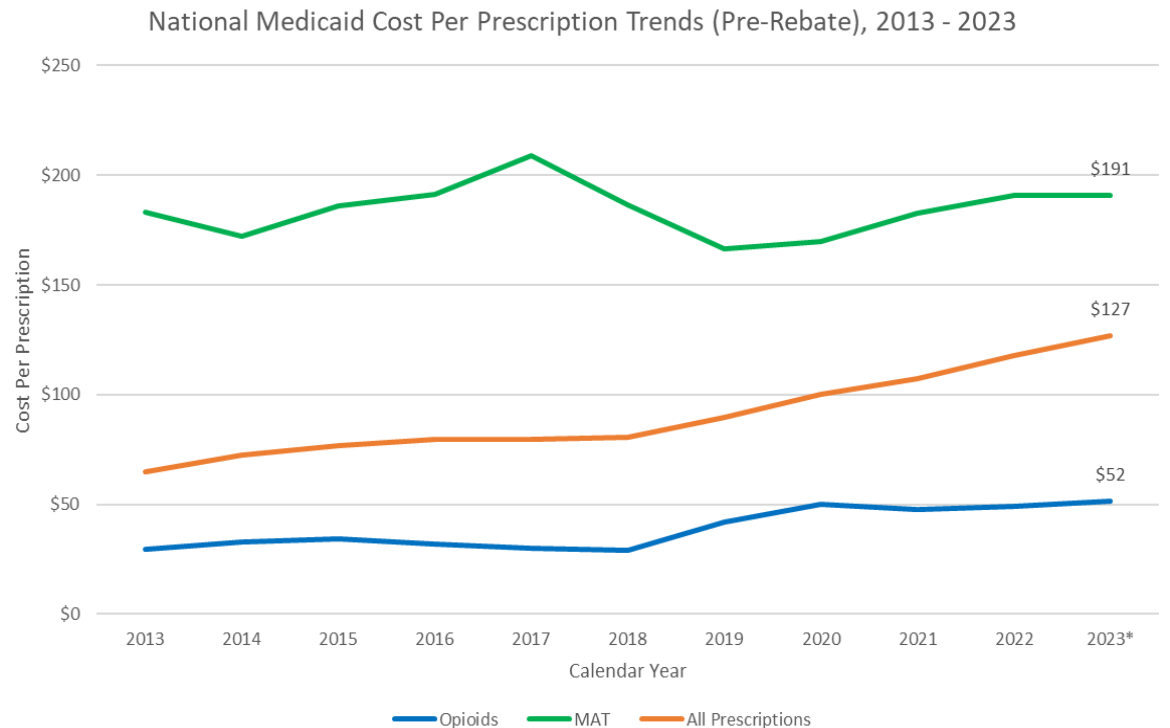


* 2023 values are estimated based on data from the first half of the year

Cost Per Prescription Analysis, 2013 through 2023

National Cost per Prescription (pre-rebate)	2013	2016	2019	2022	2023 (estimated)	% Change (2013-2023)
Opioids	\$29	\$32	\$42	\$49	\$52	75.1%
MAT	\$183	\$191	\$167	\$191	\$191	4.2%
All Prescriptions	\$65	\$79	\$90	\$118	\$127	95.1%

- While both have increased over time, costs per opioid prescription (pre-rebate) averaged \$52 in 2023 – well below overall Medicaid average costs per prescription (\$127).
- Costs per MAT prescription (pre-rebate) are much higher, averaging \$191 during 2023, and have experienced a more volatile trend since 2013. However, the increase in MAT costs per prescription from 2013 to 2023 was much lower than overall Medicaid prescription trends (4% versus a 95% increase).



* 2023 values are estimated based on data from the first half of the year

Trends in the Prescribing of Opioids in the MCO Setting Versus the FFS Setting

MCO Versus FFS Dynamics Related to Prescription Drug Usage

In CY2022, there were 16 states with Medicaid prescriptions primarily paid (>95%) in the MCO setting and 11 states that had 100% of their Medicaid prescriptions paid in the FFS setting.

- Units per opioid script among the majority MCO states was at 40.4, which was **21% lower** than the FFS state grouping, at 49.7 units per script.
- The two state groupings had the **same number of opioid scripts per enrollee**, at 0.27. However, opioid units per enrollee were **24% higher** in the FFS state grouping (13.7) compared to the majority MCO state grouping (10.8).

CY 2022						
State Groupings	Opioid Units Per Script	Opioid Scripts Per Enrollee	Opioid Units Per Enrollee	MAT Scripts Per Enrollee	Opioid % of All Medicaid Prescriptions	MAT % of All Medicaid Prescriptions
Majority MCO State Prescriptions (AZ, DE, FL, HI, IA, KS, KY, LA, NE, NH, NJ, NM, PA, RI, TX, VA)	40.4	0.27	10.8	0.15	3.0%	1.7%
100% FFS State Prescriptions (AK, AL, CT, ID, ME, MO, MT, OK, SD, WI, WY)	49.7	0.27	13.7	0.22	3.3%	2.6%

- MAT scripts per enrollee were **higher** in the FFS state grouping (0.22 scripts per enrollee) compared to the majority MCO state grouping (0.15 scripts per enrollee).
- Within the majority MCO states, Opioid prescriptions as a percentage of all Medicaid scripts was **0.3 percentage points lower**, and MAT prescriptions as a percentage of all scripts was **0.9 percentage points lower** relative to the FFS state grouping.

Trends in the Prescribing of Opioids in Medicaid Expansion State Versus Non-Expansion States

Medicaid Expansion Dynamics Related to Prescription Drug Usage

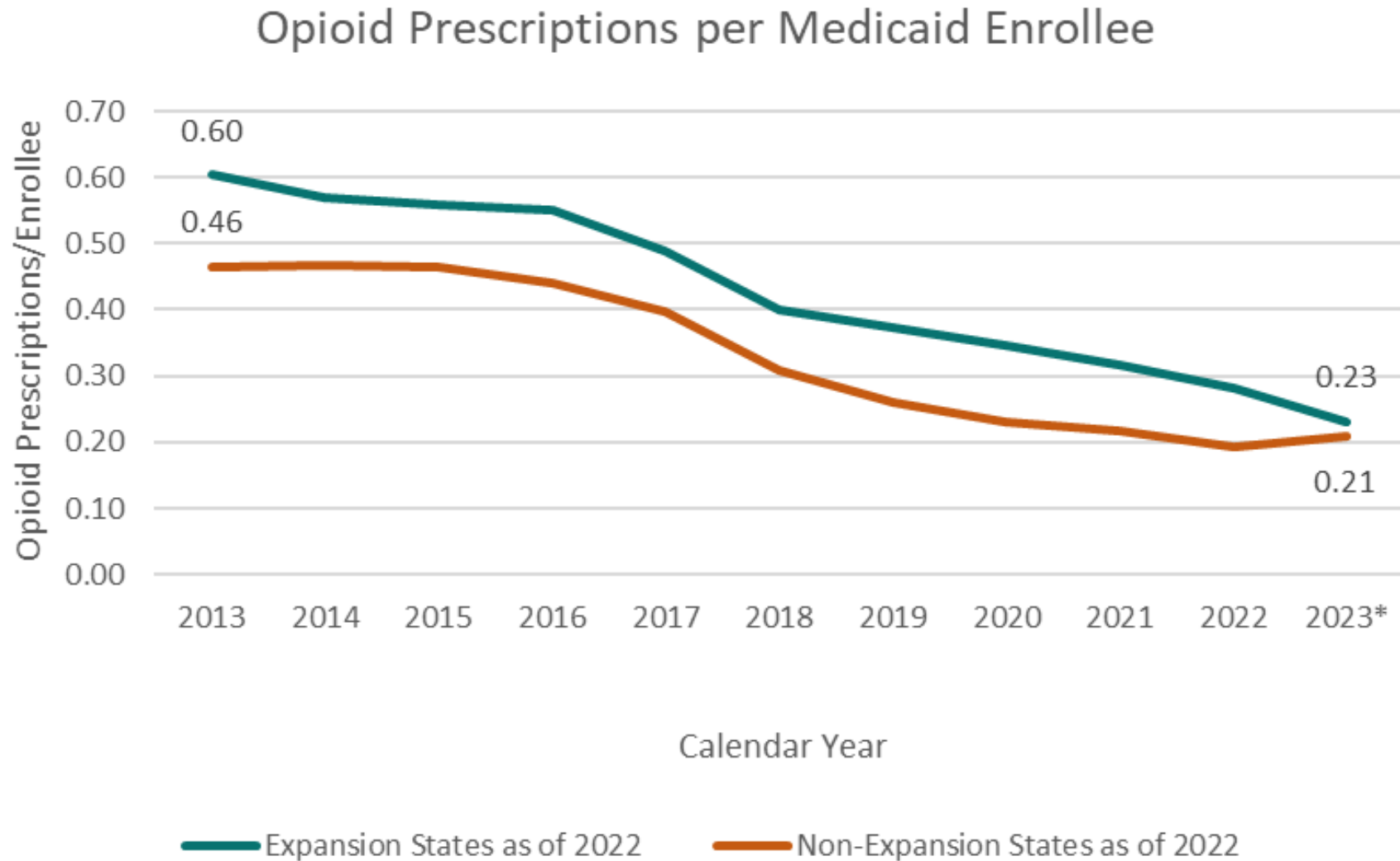
Driven by the additional adult population acquiring Medicaid coverage, prescription volume **increased sharply (51%)** in Medicaid expansion states from 2013-2022. However, a **considerable increase (38%)** also occurred in non-Expansion states during this timeframe.

- As of 2022, opioids made up a slightly higher percentage of all Medicaid prescriptions in Expansion states (3.2%) compared to Non-Expansion (2.8%) states.
- MAT usage during 2022 was about **three times higher** in Expansion states (versus Non-Expansion states) as a percentage of all Medicaid prescriptions.

Expansion State Prescriptions	2013	2016	2019	2022	2023 (estimated)	% Change (2013-2023)
Opioids	24,922,555	30,573,474	20,310,933	19,108,583	16,420,984	-34.11%
MAT	1,850,405	3,855,265	6,611,812	8,600,972	7,993,516	331.99%
All Medicaid Prescriptions	402,361,610	581,578,764	587,072,439	607,071,140	569,677,906	41.58%
Opioid % of All Medicaid	6.19%	5.26%	3.46%	3.15%	2.88%	-53.46%
MAT % of All Medicaid	0.46%	0.66%	1.13%	1.42%	1.40%	205.11%
Non-Expansion State Prescriptions	2013	2016	2019	2022	2023 (estimated)	% Change (2013-2023)
Opioids	7,493,100	7,961,045	4,444,362	4,224,472	4,131,672	-44.86%
MAT	301,728	405,806	557,840	731,211	774,414	156.66%
All Medicaid Prescriptions	109,399,149	150,291,978	142,480,404	151,130,964	156,904,770	43.42%
Opioid % of All Medicaid	6.85%	5.30%	3.12%	2.80%	2.63%	-61.55%
MAT % of All Medicaid	0.28%	0.27%	0.39%	0.48%	0.49%	78.95%

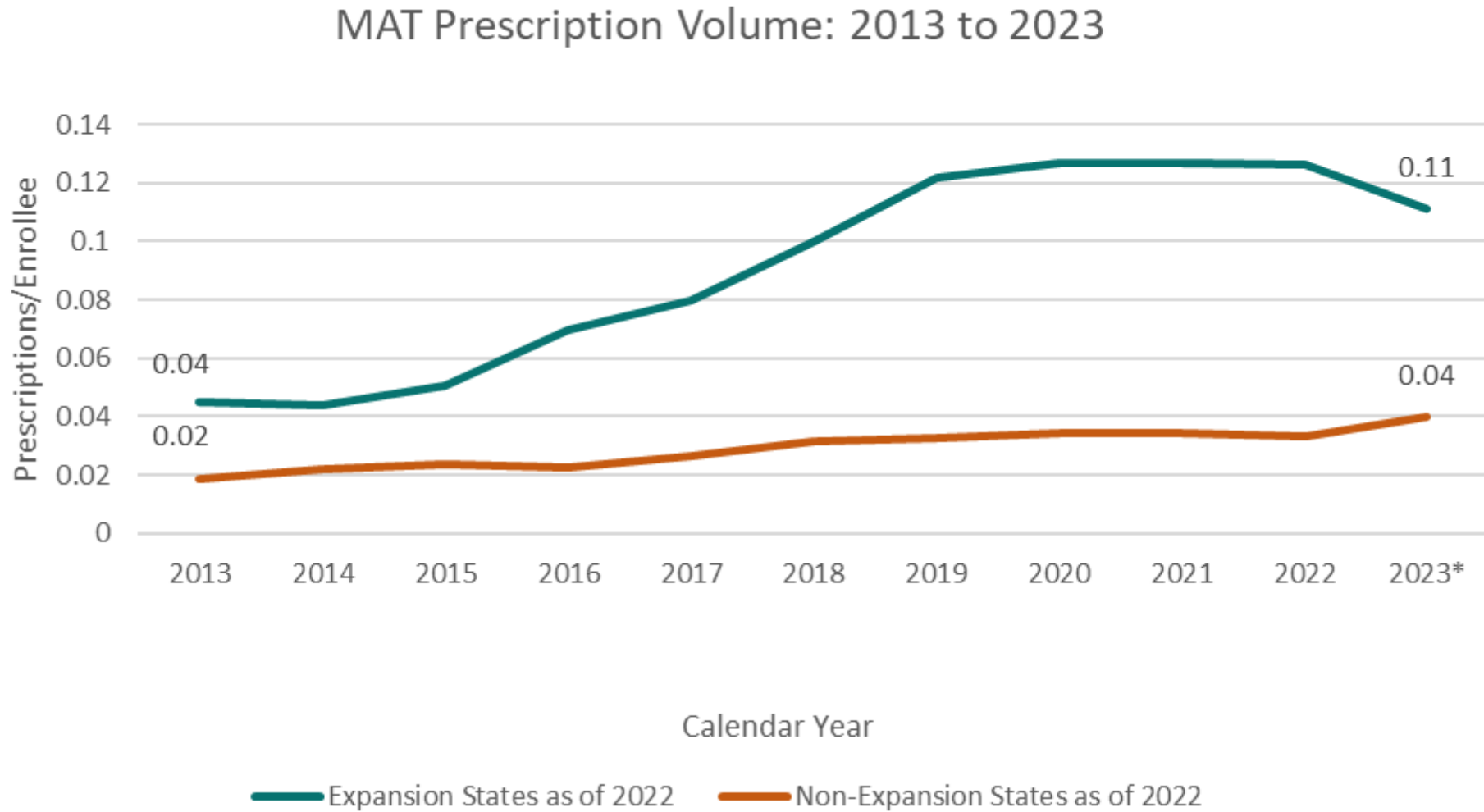
* We determined expansion status based on the status of each state at the beginning of 2022

Opioid Prescription Volume, Adjusted for Medicaid Enrollment



* 2023 values are estimated based on data from the first half of the year

MAT Prescription Volume, Adjusted for Medicaid Enrollment



* 2023 values are estimated based on data from the first half of the year

Key Findings

- In response to the Opioid Epidemic, Medicaid programs have considerably reduced the volume of opioids prescribed. While overall Medicaid prescription volume increased by 48% from 2013-2022, opioid prescription volume decreased by 28%, and opioid prescriptions per enrollee decreased by 54%.
- Over the last decade, Medicaid MAT prescription volume quadrupled, indicating a strong effort to combat opioid use disorder (OUD) with evidence-backed MAT.
- While opioid volume decreased at comparable rates across both state groupings, MAT prescription volume among Medicaid expansion states increased at a considerably faster rate from 2013 to 2019. After 2019, growth in MAT prescription volume per enrollee seemed to level off for both groups.

5 Slide Series Overview

Our 5 Slide Series is typically a monthly publication whereby we briefly discuss/address a selected topic outside the confines of our client engagements. The Menges Group has developed a variety of datasets that we use to support our 5 Slide Series and client projects.

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