

EMERGING TRENDS IN SPECIALTY DRUG MANAGEMENT

Highlights from the 2025 Trends in Specialty Drug Benefits Report

Co-sponsored by Genentech and Pharmaceutical Strategies Group (PSG)

Managing overall specialty drug costs and total cost of care are an increasing priority



Other considerations include: reducing patient out-of-pocket costs, reducing inappropriate utilization and patient satisfaction

Although rebates remain a staple of pricing or financial arrangements, payers are interested in alternative arrangements

In the past 1 to 2 years:

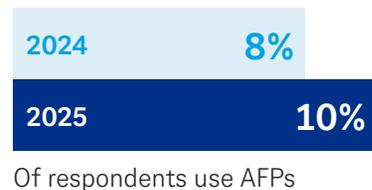


>60% of respondents are somewhat to very interested in alternatives to traditional pharmacy benefit manager (PBM) pricing arrangements



Respondents expressed greatest interest in lower-priced drugs without a rebate vs. a rebate-driven approach

Use of alternative funding programs (AFPs) has grown slightly despite increasing concerns about sustainability



13% in 2024
17% in 2025
Of respondents are considering AFPs



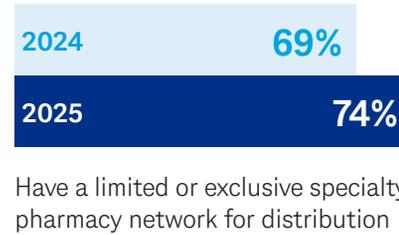
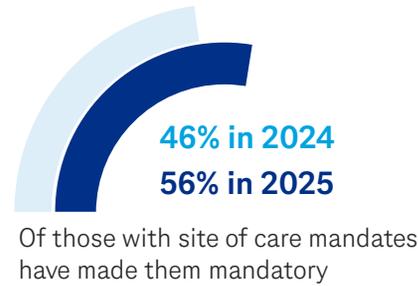
72% in 2024
79% in 2025
Think AFPs are not at all or slightly sustainable

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Utilization management approaches are shifting as payers seek to drive affordability

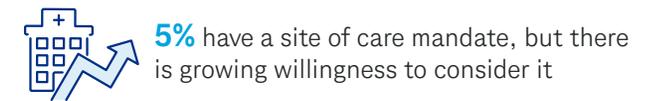


There is concern about the unintended consequences of utilization management

Among other issues, respondents expressed moderate to great concern about the impact on:



Spotlight on Oncology



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