



Specialty Pharmaceuticals

The Specialty Pharmaceutical Service monitors managed care trends related to specialty medication management, such as payer approaches to formulary & utilization management and trends in contracting. Issues in specialty pharmacy and home infusion channel distribution are also reviewed. The service examines and tracks management and contracting trends across several high profile therapeutic classes, including:

- Cystic Fibrosis
- Crohn's Disease
- Hemophilia
- Hepatitis C
- HIV/AIDS
- Multiple Sclerosis
- Osteoporosis
- Pulmonary Arterial Hypertension
- PCSK9 Inhibitors
- Psoriasis
- Rheumatoid Arthritis
- White Blood Cell Stimulants
- Other Genetic & Rare Disease

Service Overview

Payers remain focused on developing optimal cost and utilization strategies as the specialty drug spend continues to rise. HIRC's *Specialty Pharmaceuticals Service* assists pharmaceutical manufacturers in developing and maintaining successful market access strategies by monitoring trends in payers' specialty medication management initiatives, issues in channel distribution, and manufacturer engagement with key customers.

HIRC utilizes a triangulated research design, combining primary survey data, interview insights, and in-depth secondary research, resulting in a deep understanding of issues related to specialty pharmaceutical market access.

Covering Key Stakeholders in the Specialty Market Ecosystem

The service monitors commercial health plan activities to manage the cost and utilization of specialty pharmaceuticals and tracks trends in contracting. Manufacturers' account support engagement, programs, and willingness to contract are assessed from the perspective of the customer. Trends in specialty drug distribution and manufacturer engagement in the specialty pharmacy provider (SPP) and home infusion channels are also monitored.



Bringing Value to Subscribers

HIRC's data and insights enable subscribers to understand and track market dynamics and trends critical to optimal product and value-added program positioning as the specialty market evolves.

Through detailed analyses, key implications, and strategic recommendations from experienced HIRC researchers, subscribers to the *Specialty Pharmaceuticals Service* are able to understand the specialty market landscape, evaluate account support, identify specialty-specific managed care needs, and act upon partnership opportunities.

Research Agenda 2018

Commercial Health Plans: Specialty Medication Management and Market Access

- Current and future payer utilization management and formulary strategies
- Formulary status and utilization management tactics applied to a market basket of 50+ specialty medications
- Plans' overall Product of Choice by class and customer perceptions of product value

Commercial Health Plans: Manufacturer Engagement and Trends in Contracting

- Manufacturer Partner of Choice and the attributes that define leading companies
- Manufacturer benchmarking in account support and willingness to contract
- Trends in contracting by therapeutic class
- Opportunities for partnership

Specialty Pharmacy Providers: Market Landscape Trends and Strategic Imperatives

- Specialty pharmacy provider market activity and strategic imperatives
- Specialty pharmacy service offerings
- Profiles for select industry-leading specialty pharmacy providers

Specialty Pharmacy Providers: Manufacturer Engagement & Contracting

- Manufacturer Partner of Choice and the attributes that define leading companies
- Manufacturer benchmarking in account support and willingness to contract
- Trends in manufacturer contracting approaches with specialty pharmacies
- Opportunities for partnership

Home Infusion Providers: Market Landscape and Manufacturer Engagement

- Home infusion provider market activity and strategic imperatives
- Manufacturer Partner of Choice and the attributes that define leading companies
- Opportunities for partnership

Biosimilars and Specialty Generics: Payer Approaches and Perspectives

- Review of the biosimilar market landscape
- Status of payer adoption of biosimilars and the factors impacting adoption

How to Subscribe to HIRC's Specialty Pharmaceuticals Service

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HEALTH INDUSTRIES RESEARCH CENTER (HIRC) is an independent, nonpartisan organization that conducts strategic market research on trends in health care, pharmaceuticals and managed care businesses. HIRC's benchmark studies focus on the marketing needs of pharmaceutical companies by providing research critical to the development of successful customer-focused marketing strategies.

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