

# 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



2024

37%

2025 Managing overall specialty drug costs is top priority 43%



2024

38%

2025 Managing total cost of care is top priority 41%



**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:



68%

Saw increased rebates  
under the pharmacy benefit



56%

Saw increased rebates  
under the medical benefit



**>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

2024

8%

2025

10%

Of respondents use AFPs



13% in 2024

17% in 2025

Of respondents are  
considering AFPs



72% in 2024

79% in 2025

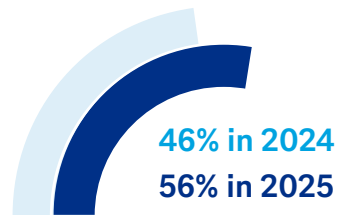
Think AFPs are not at all  
or slightly sustainable

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### Utilization management approaches are shifting as payers seek to drive affordability



Of those with site of care mandates  
have made them mandatory



Have a limited or exclusive specialty  
pharmacy network for distribution



### There is concern about the **unintended consequences** of utilization management

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



56%

Member satisfaction



30%

Health disparities

### Spotlight on **Oncology**

27%  
Cover blood-based  
cancer screening



27%  
Cover biomarker  
testing



5% have a site of care mandate, but there  
is growing willingness to consider it



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and the patients you serve?

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