US Pharmaceutical Trends, Issues & Outlook for NACDS Regional Chain Conference

Pharmacy Industry Trends
January 20, 2025

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There are several factors contributing to challenges in the U.S. pharmacy marketplace

Biosimilars
Adoption of biosimilars in the U.S. Market has been slow, this could impact new entries in this space

Drug Shortages
Many drugs in the U.S. have been in shortage for over 2 years, and FDA post COVID inspection catchup could create more shortages

Reimbursement Challenges
Pharmacies are struggling with fees, complex business models and declining reimbursement

Drug Supply Chain Security Act
All parties in the supply chain will be required to track prescription drugs from the manufacturer to the pharmacy

Staffing
Labor shortages since the pandemic, burnout and decreased pharmacy school enrollment is leading to staffing challenges

Inflation Reduction Act
2022 legislation will impact 2025 Out-of-Pocket Cost Caps for Medicare patients and 2026 Drug Price Negotiations for CMS

Store Closures
All these challenges are leading to many store closures that are creating pharmacy

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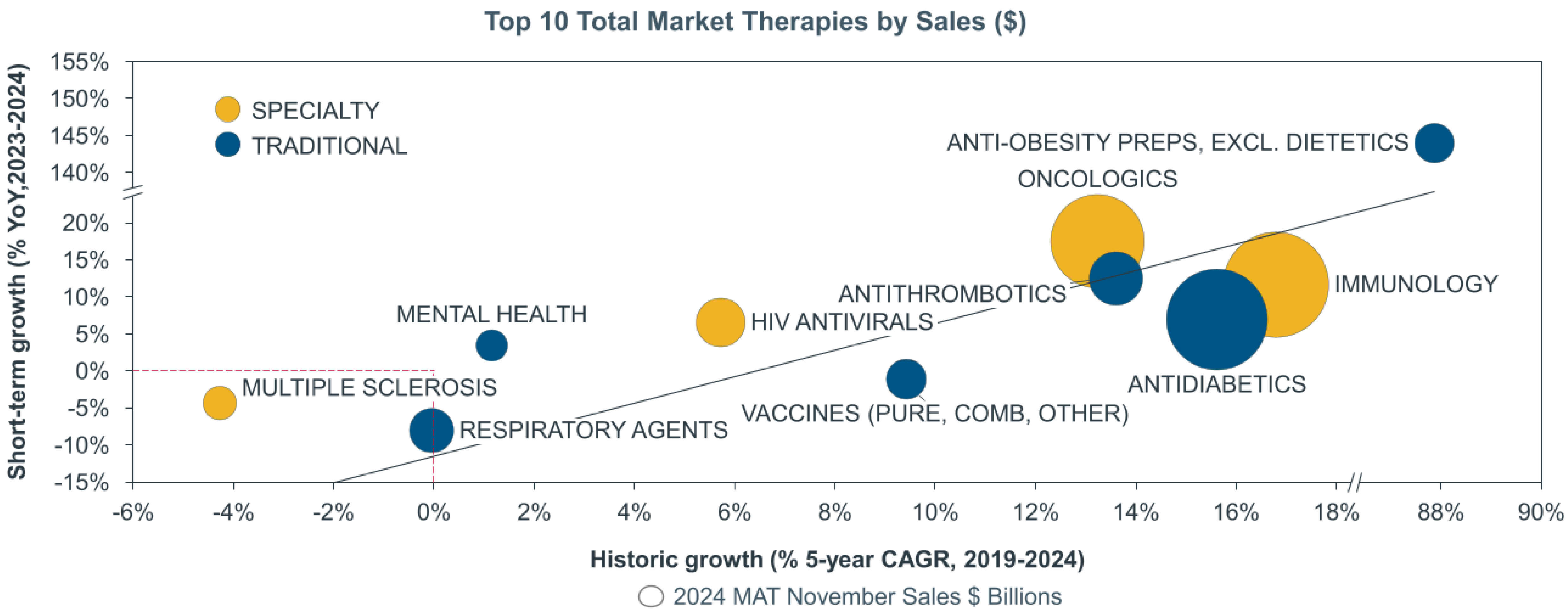
Current Market Performance

The U.S. Retail pharmaceutical market grew 10% in 2024

Components contribution to Growth of 10.0%	2.2%	-0.2%	5.4%	2.4%	0.1%

Anti-obesity drugs led both long-term and short-term growth

COVID-19 Vaccines are not included in Sales



IQVIA National Sales Perspectives, 2024

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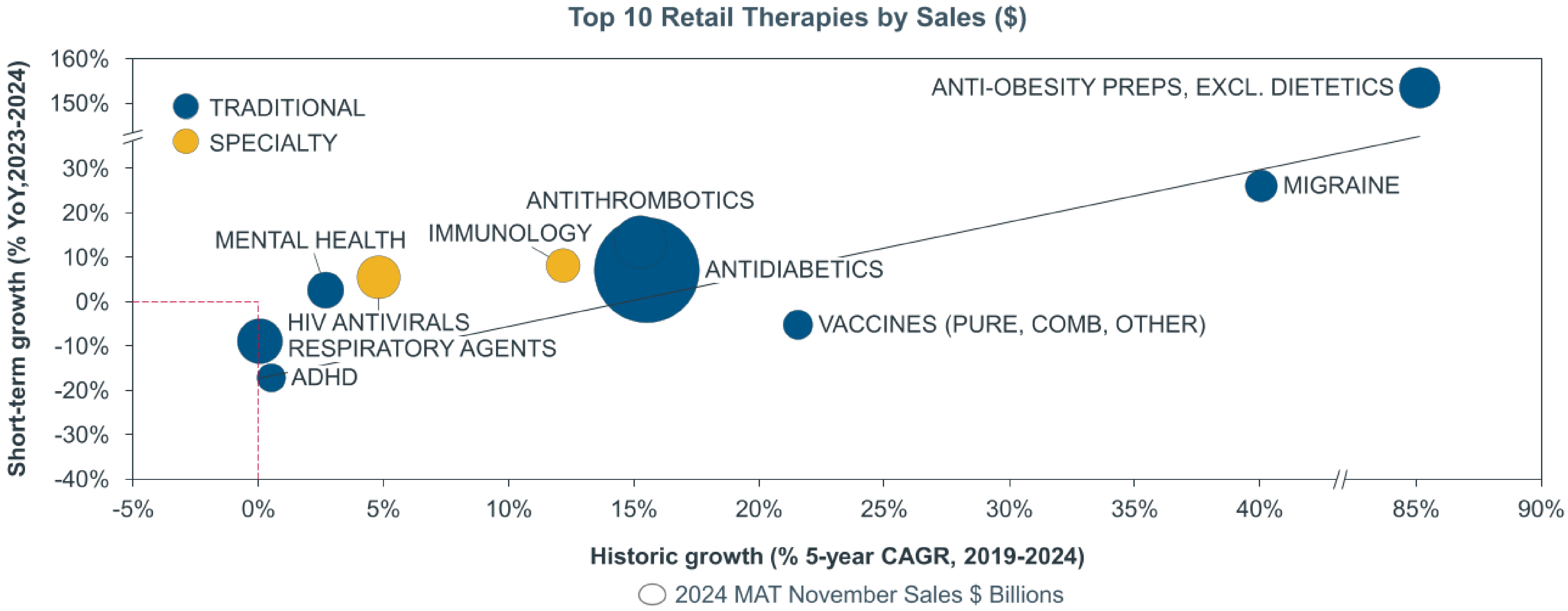
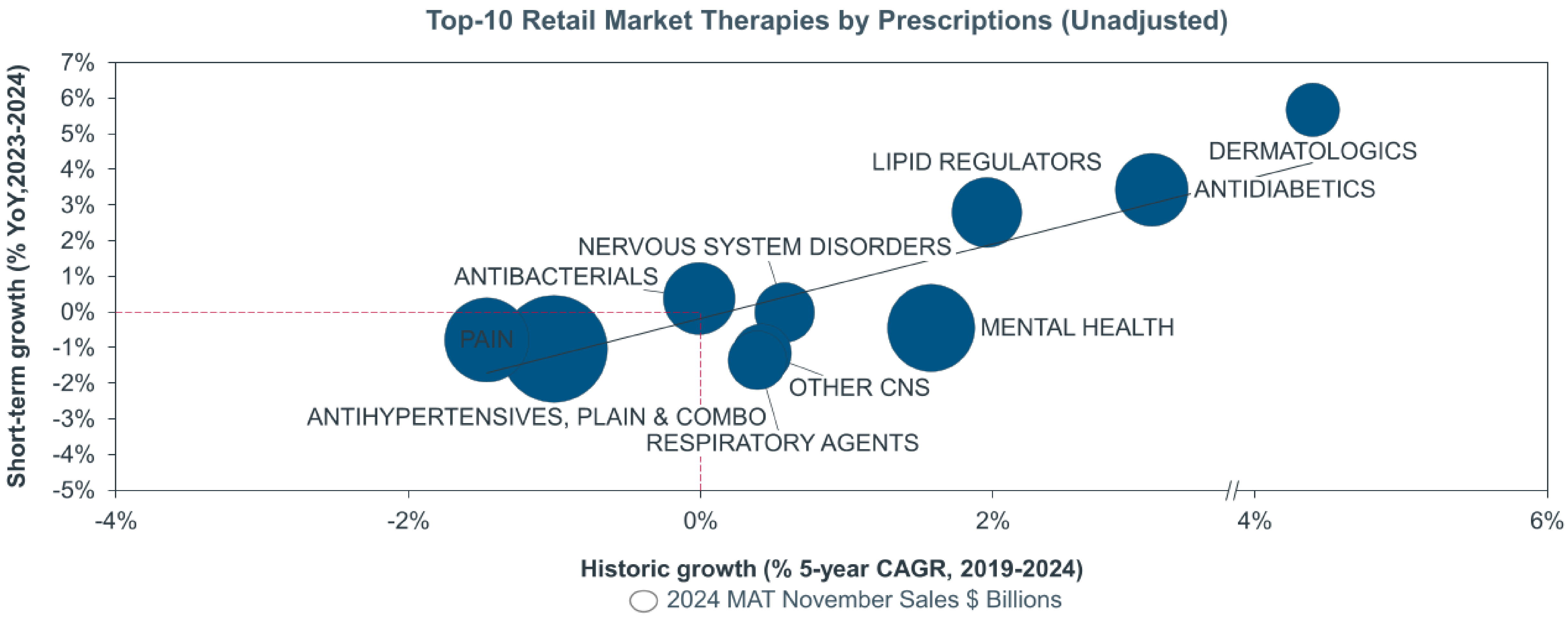


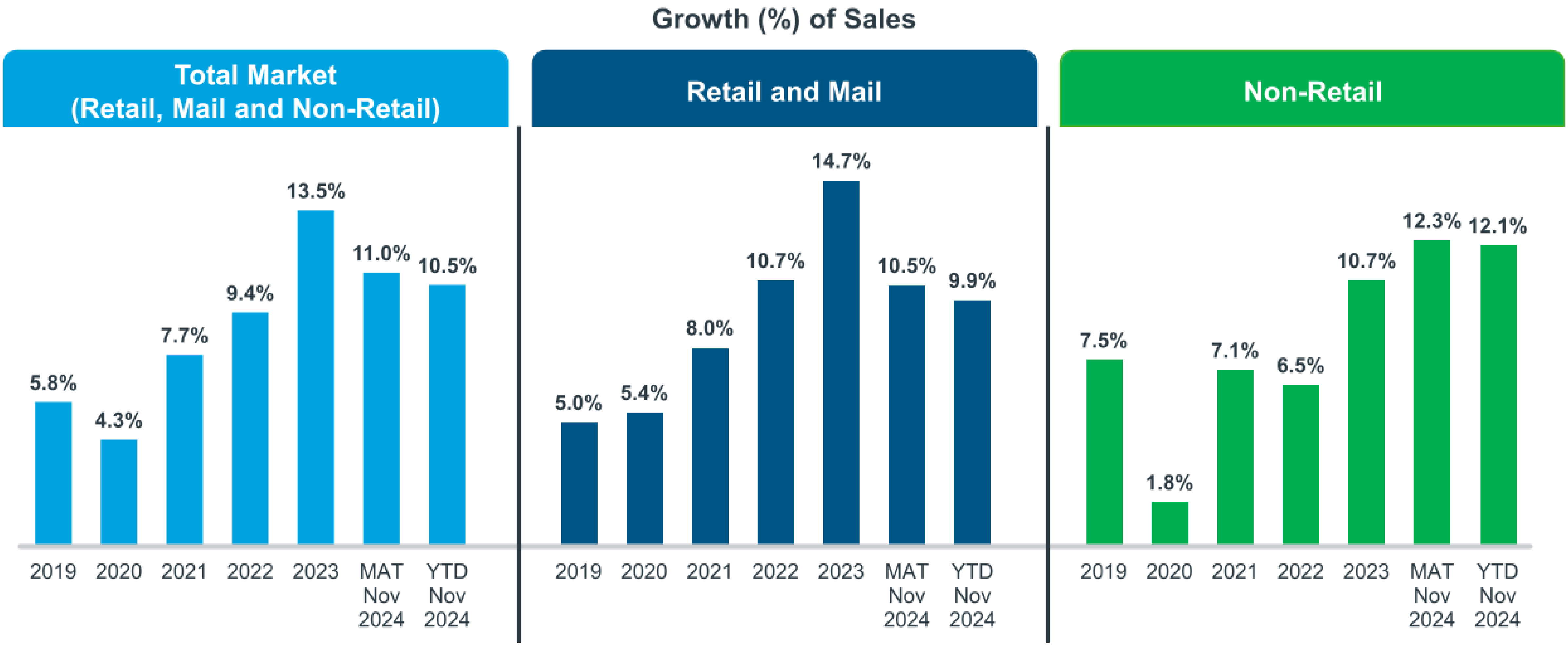
IQVIA National Sales Perspectives, 2024

Although Dermatology prescriptions were the tenth highest therapy by quantity, they led both long-term and short-term growth



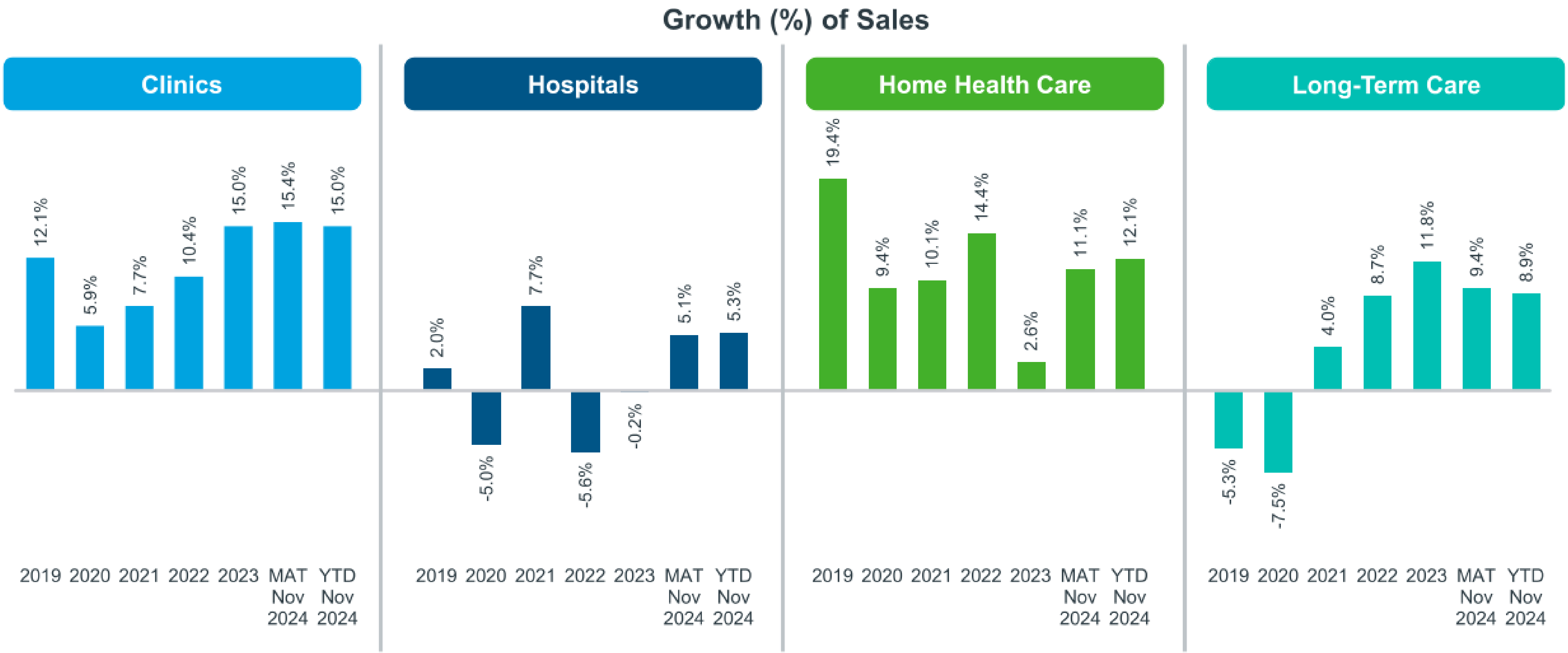
IQVIA National Sales Perspectives, 2024

The Non-Retail channel showed higher growth than Total Market and Retail and Mail



Source: IQVIA, National Sales Perspectives, November 2024
Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

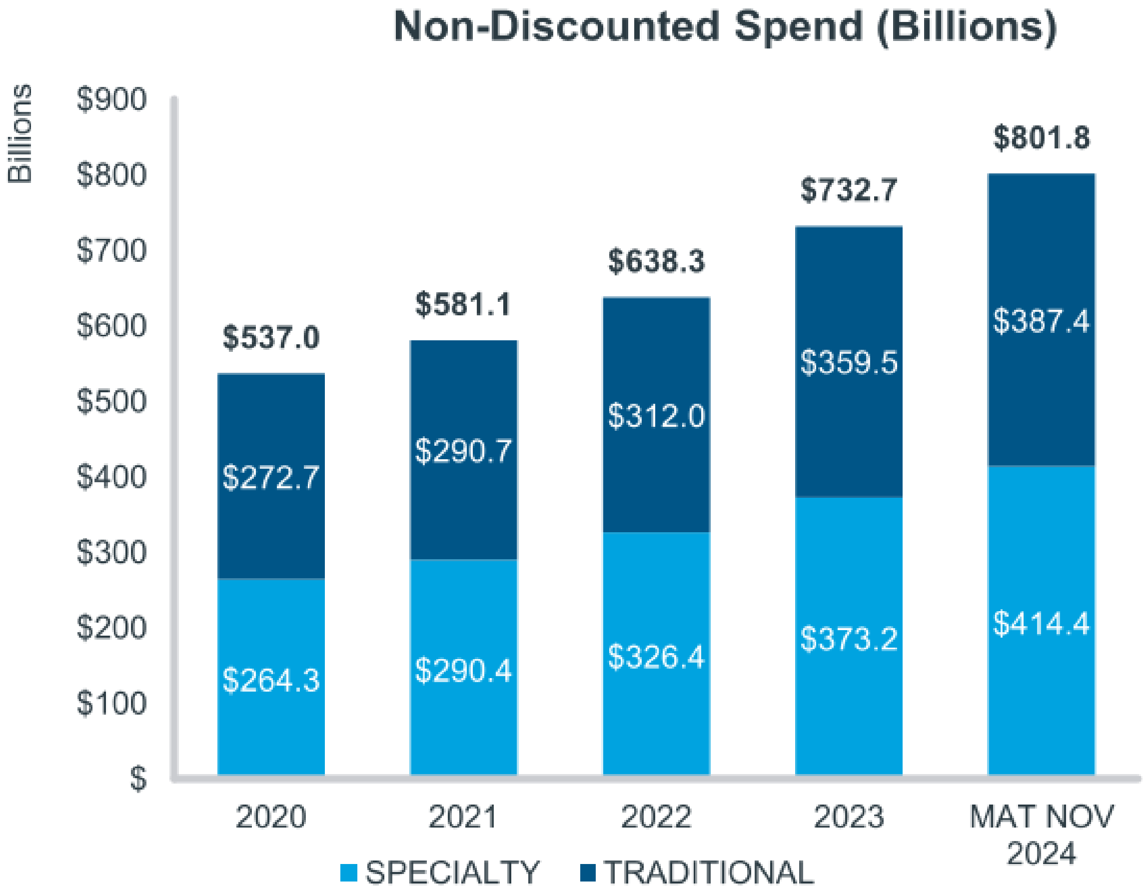
Growth was positive across all Non-Retail sectors, although Hospitals were the weakest

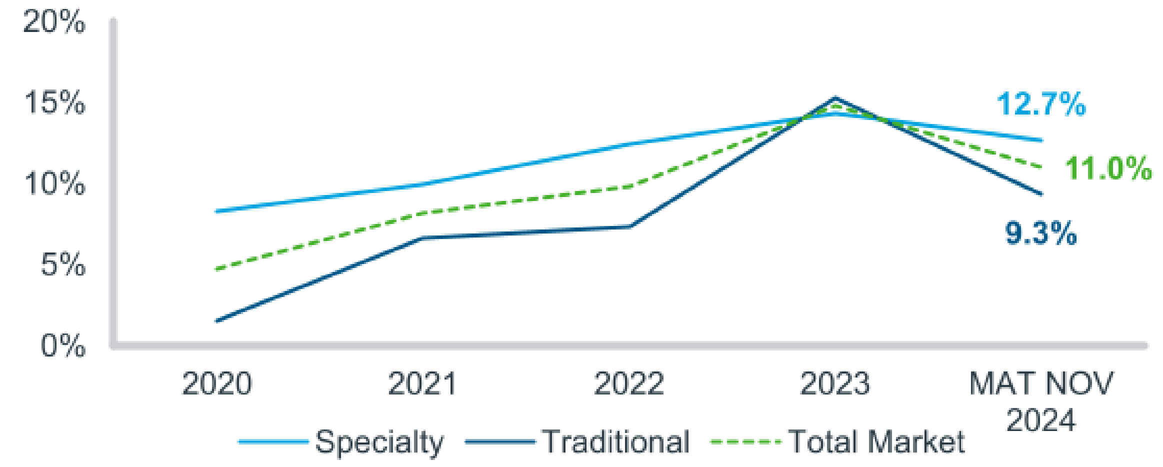


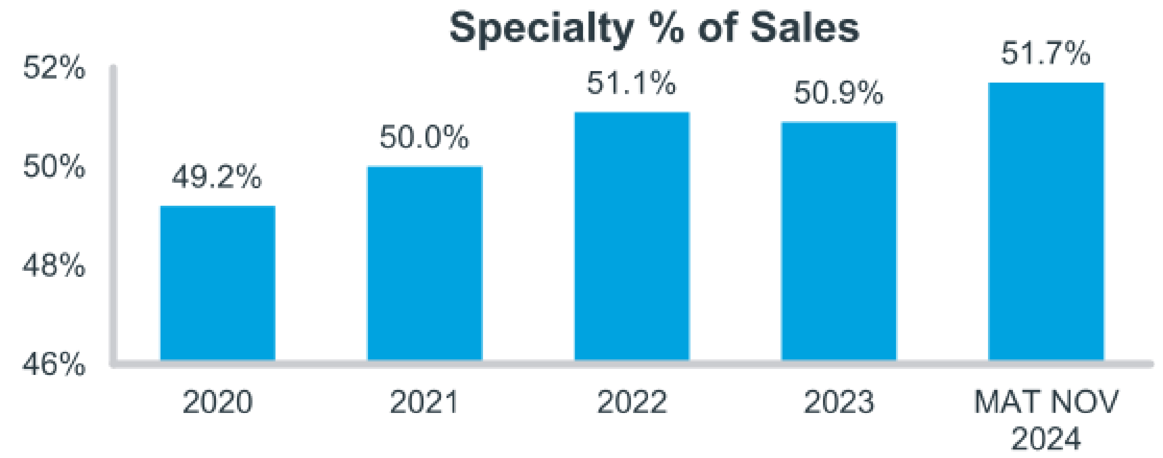
Source: IQVIA, National Sales Perspectives, November 2024
Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

For the total market, specialty growth outpaced traditional growth and has ~51% share of total non-discounted spend

In MAT November 2024, specialty spend grew by 12.7% while traditional growth grew 9.3%







Source: IQVIA, National Sales Perspectives, November 2024

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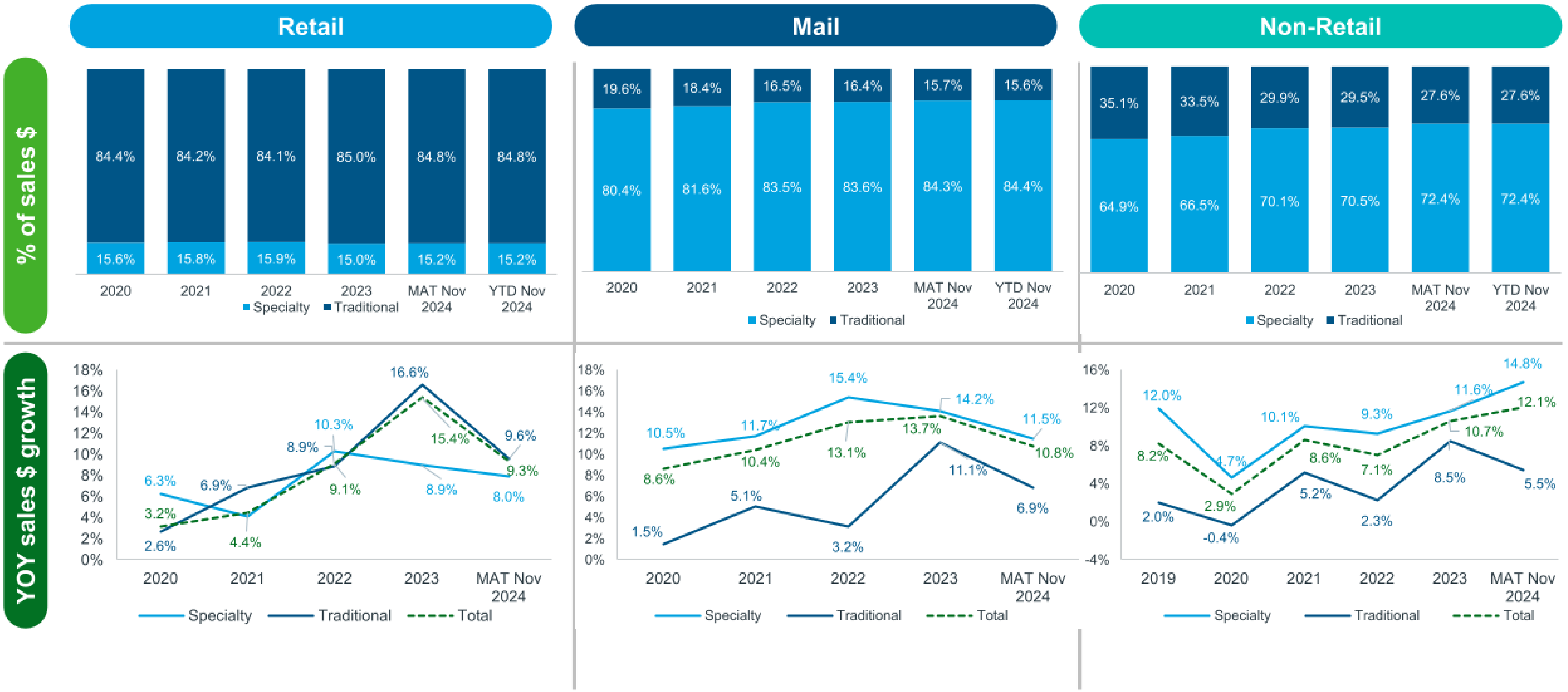
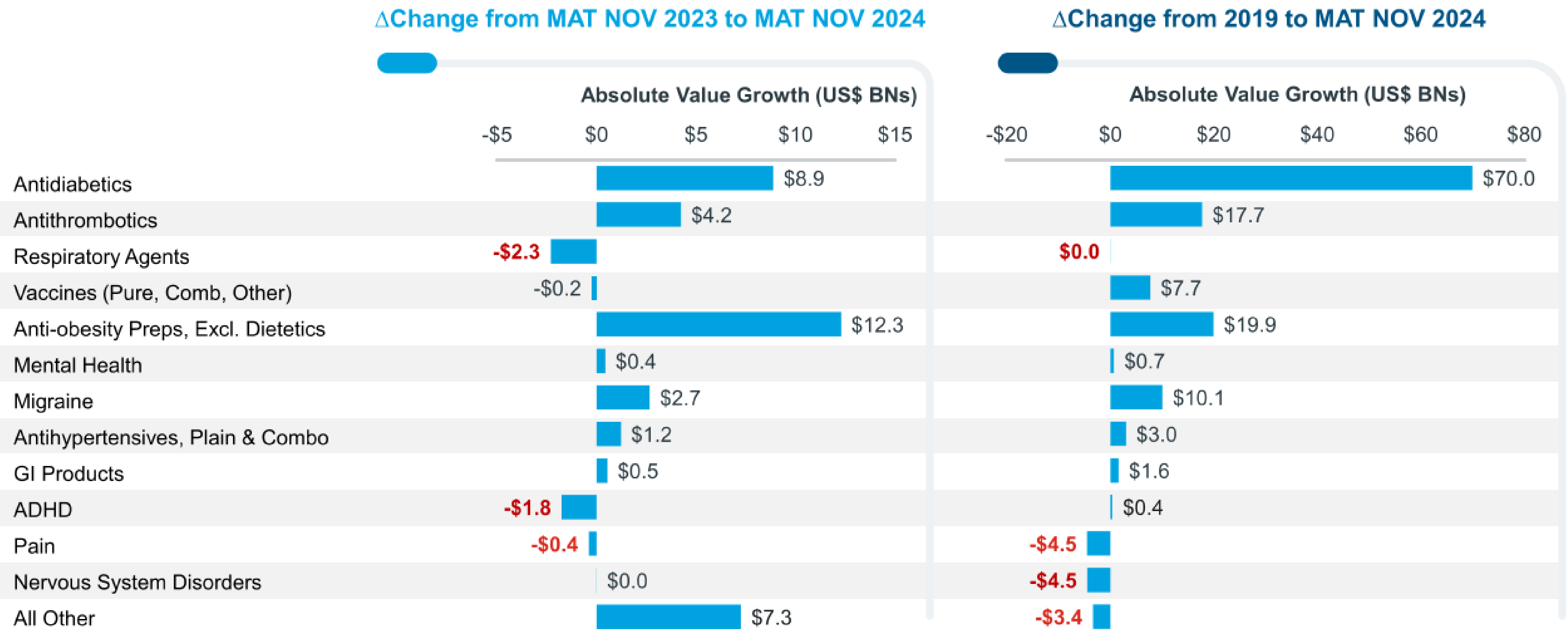
Specialty showed the highest growth in Mail and Non-Retail



Data is based on Rx and OTC Insulins only

Antidiabetics led long-term absolute value growth for traditional therapy areas

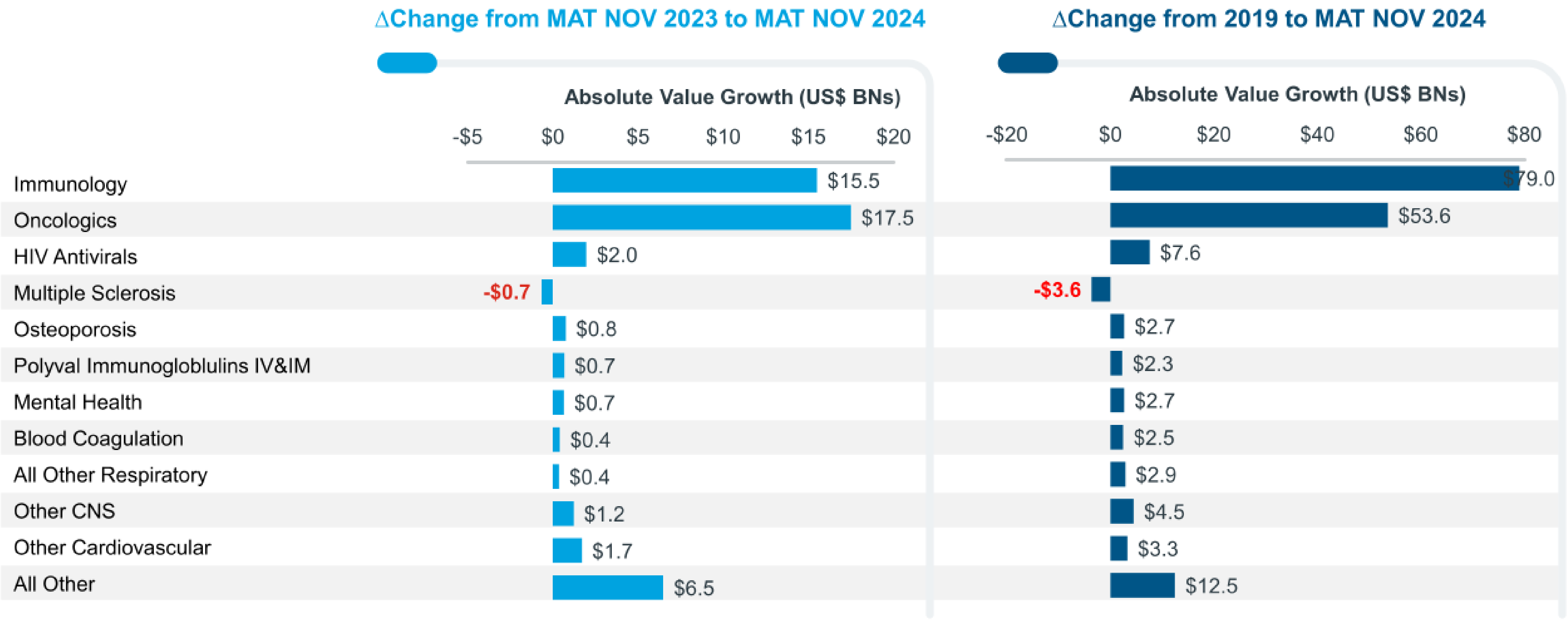
Absolute Value Growth for Top Traditional Therapy Areas



Source: IQVIA, National Sales Perspectives November 2024
Note: top therapy areas ranked on MAT November 2024 non-discounted spend

Immunology and Oncologics contributed the most absolute value growth for specialty therapy areas

Absolute Value Growth for Top Specialty Therapy Areas



Source: IQVIA, National Sales Perspectives, November 2024
Note: top therapy areas ranked on MAT November 2024 non-discounted spend

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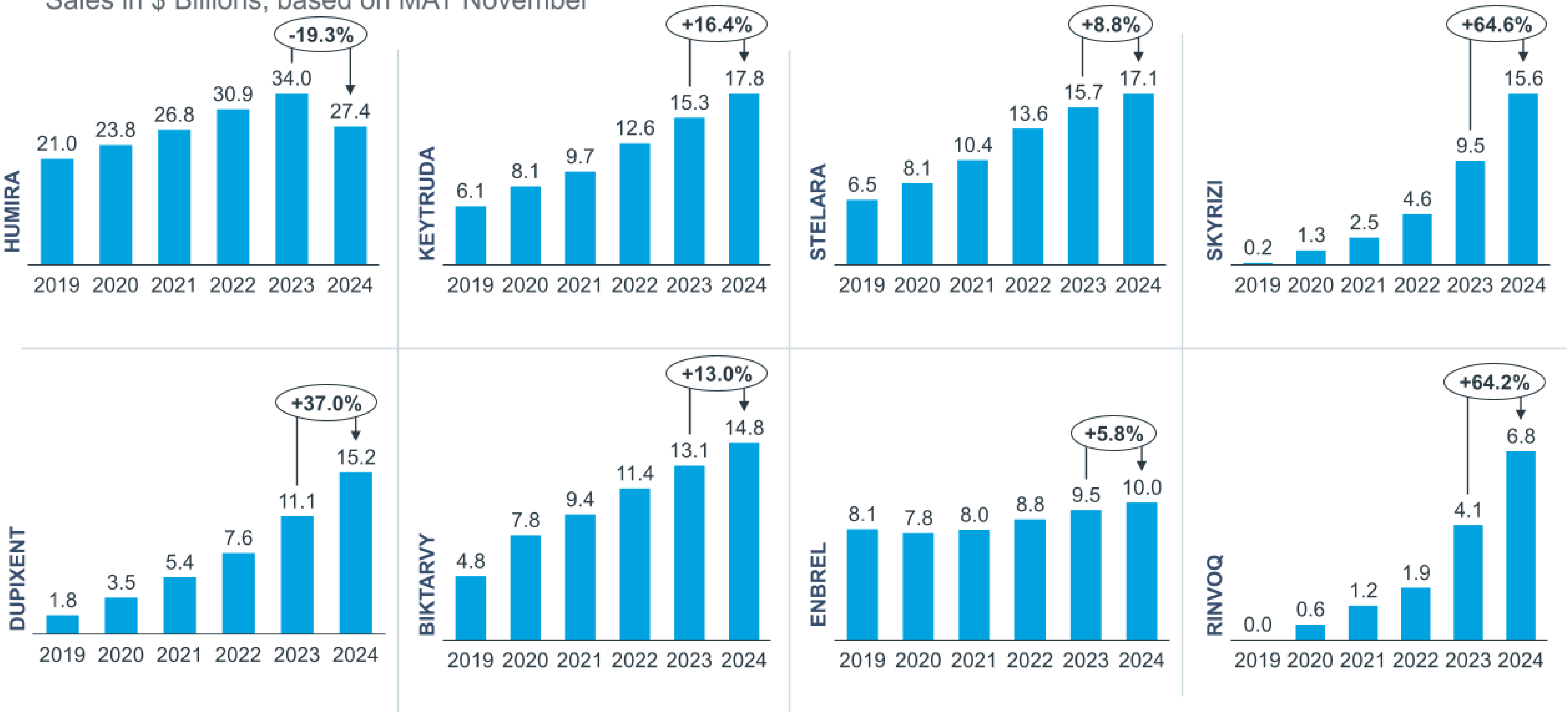
Humira saw a large decline in 2024, but the other top specialty products continued to grow

Top 8 Specialty Sales Products
Sales in $ Billions, based on MAT November



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The top 10 therapy areas grew at 11.3% and accounted for 72.6% market share

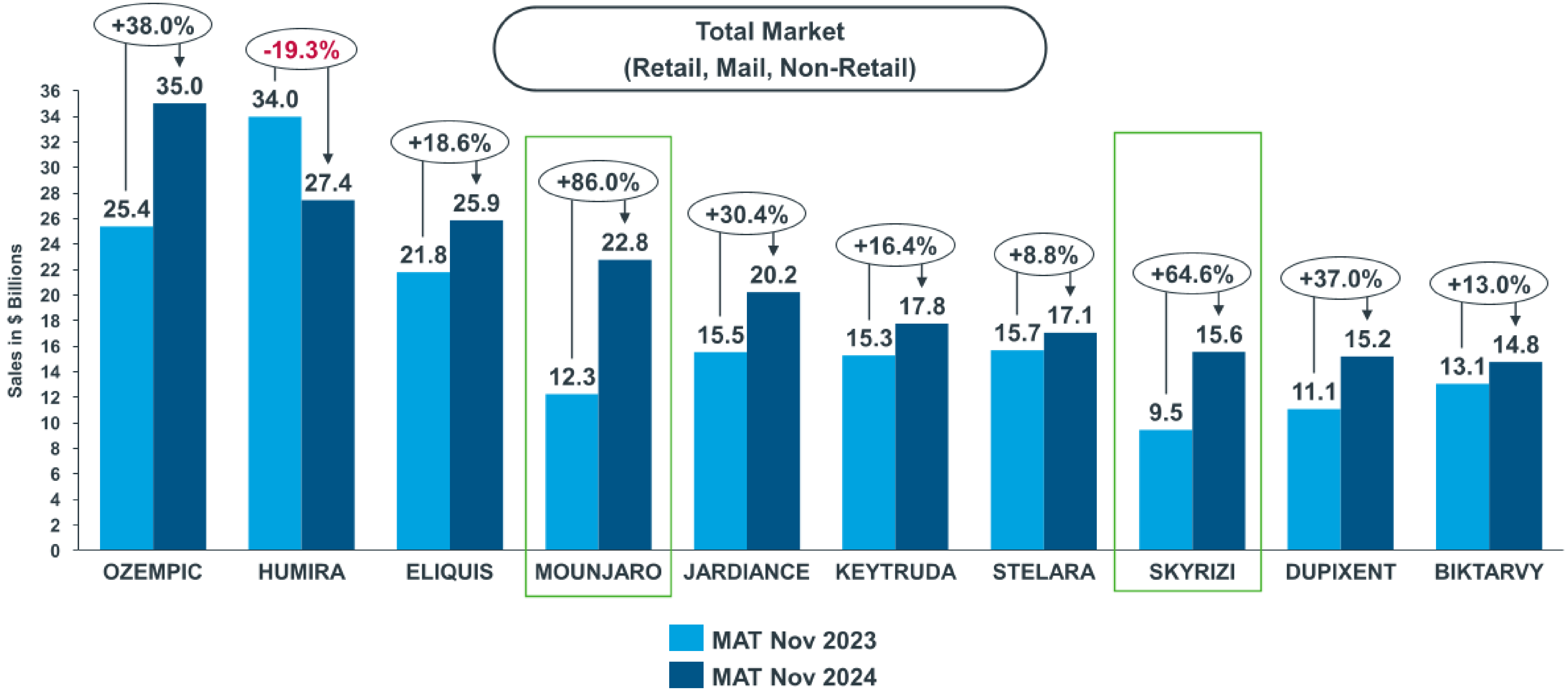
Rank	Therapy Area	Non-Discounted Spend (US$ BNs)			
		MAT NOV 2024	Market Share	ABS Growth	Growth
1	IMMUNOLOGY	$148.6	18.5%	$15.5	11.6%
2	ANTIDIABETICS	$136.8	17.1%	$8.9	7.0%
3	ONCOLOGICS	$117.7	14.7%	$17.5	17.5%
4	ANTITHROMBOTICS	$38.4	4.8%	$4.3	12.5%
5	HIV ANTIVIRALS	$32.0	4.0%	$2.0	6.6%
6	RESPIRATORY AGENTS	$27.5	3.4%	$-1.7	-5.9%
7	VACCINES (PURE, COMB, OTHER)	$21.6	2.7%	$-0.2	-1.1%
8	ANTI-OBESITY PREPS	$20.8	2.6%	$12.3	144.0%
9	MENTAL HEALTH	$20.2	2.5%	$1.1	5.7%
10	MULTIPLE SCLEROSIS	$14.9	1.9%	$-0.7	-4.3%
TOP 10		**$578.6**	72.2%	**$58.9**	11.3%

Source: IQVIA, National Sales Perspectives, November 2024
Limited to Rx and OTC Insulins

IQVIA

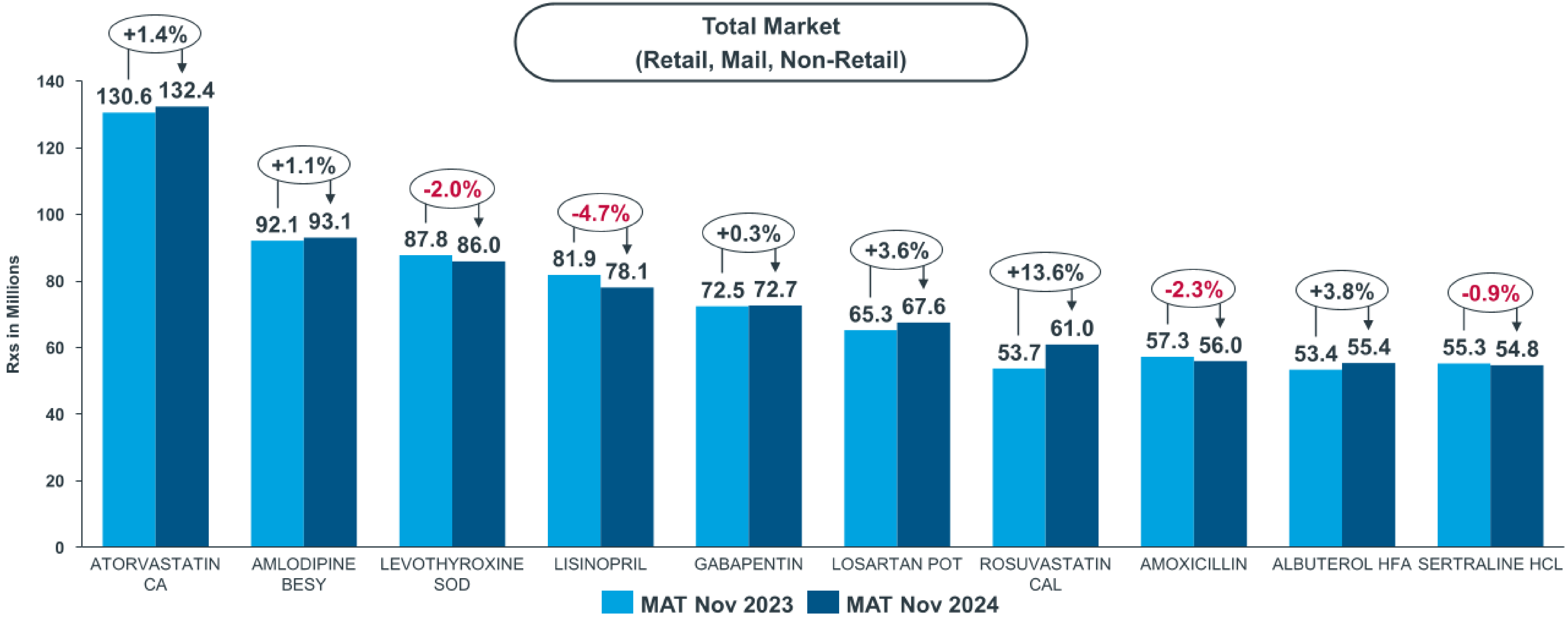
Mounjaro and Skyrizi showed greatest MAT sales growth

Top 10 Products for Total US Market

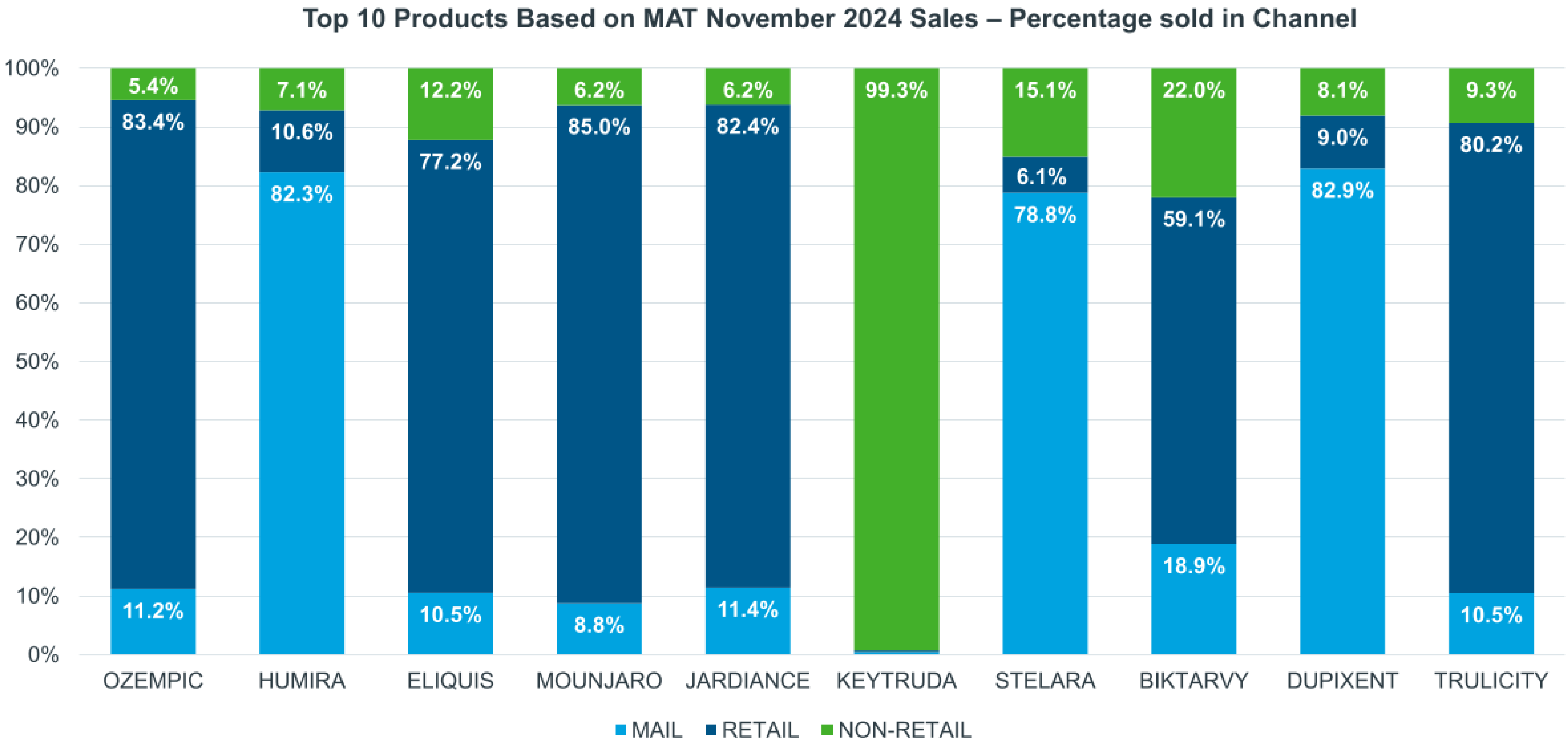


Rosuvastatin Calcium showed greatest MAT Rx growth

Top 10 Rx Products for Total US Market

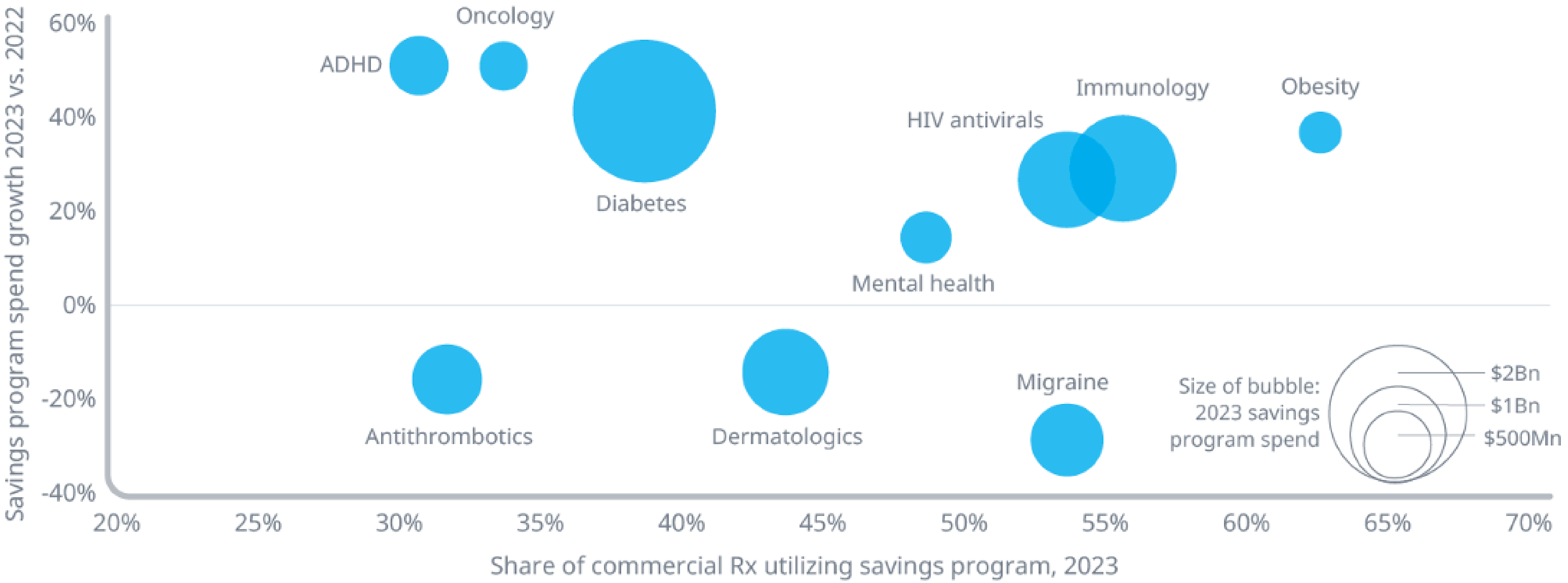


Four of the top five products were prevalent in Retail



Nearly one-third of brand commercial prescriptions in the top 10 therapy areas used savings programs, with Obesity at 63%

Savings program spending growth and utilization in top 10 therapy areas



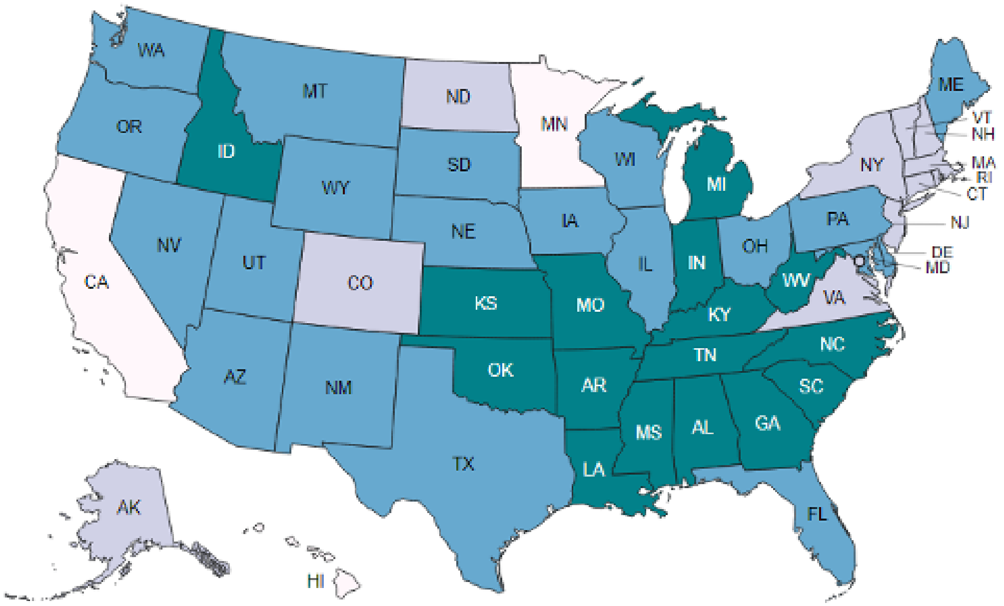
Source: IQVIA Libraries – Copay Card Library, Dec 2023.
Notes: Based on LAAD sample prescription data normalized to 30-day supply with commercial or assistance as the method of payment that utilized a copay card as the primary or secondary payer or an ecoupon. Includes brands and branded generic products.
Report: The Use of Medicines in the U.S. 2024: Usage and Spending Trends, and Outlook to 2028. IQVIA Institute for Human Data Science, April 2024.

“The national opioid dispensing rate steadily declined from 46.8 Rxs per 100 persons in 2019 to 37.5 in 2023” per the CDC

State opioid dispensing rates

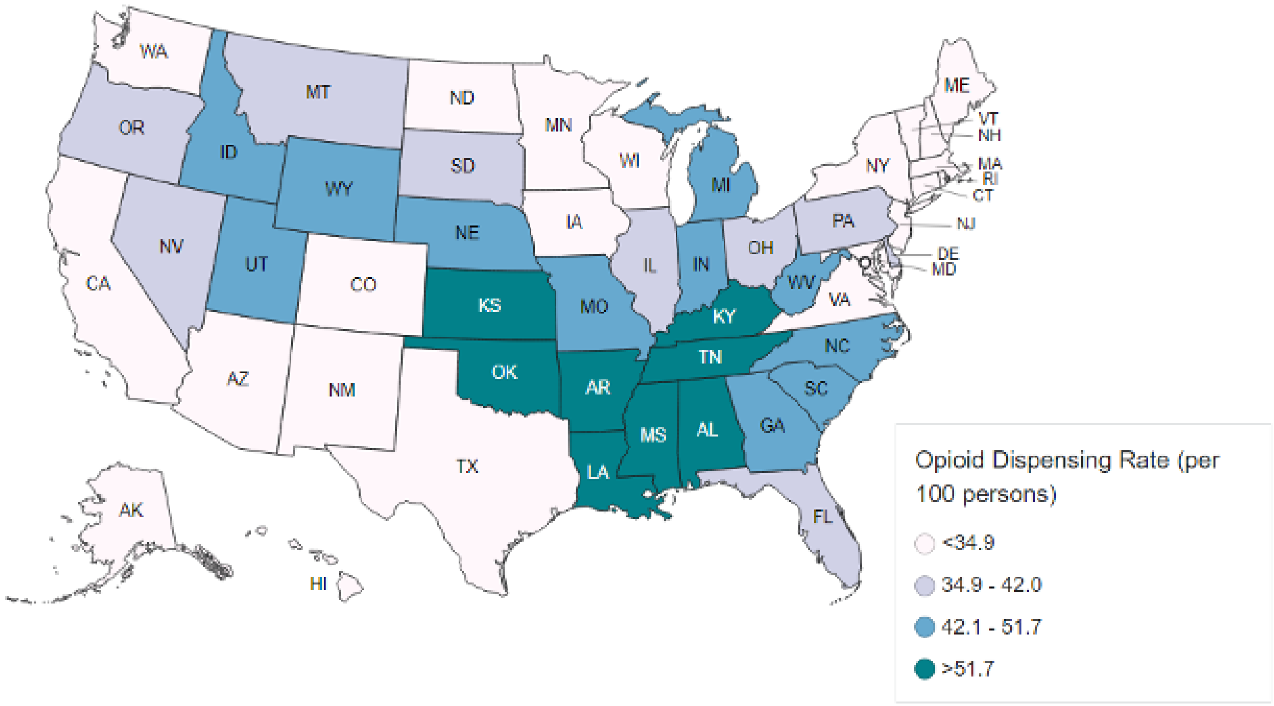
Year

2019



Year

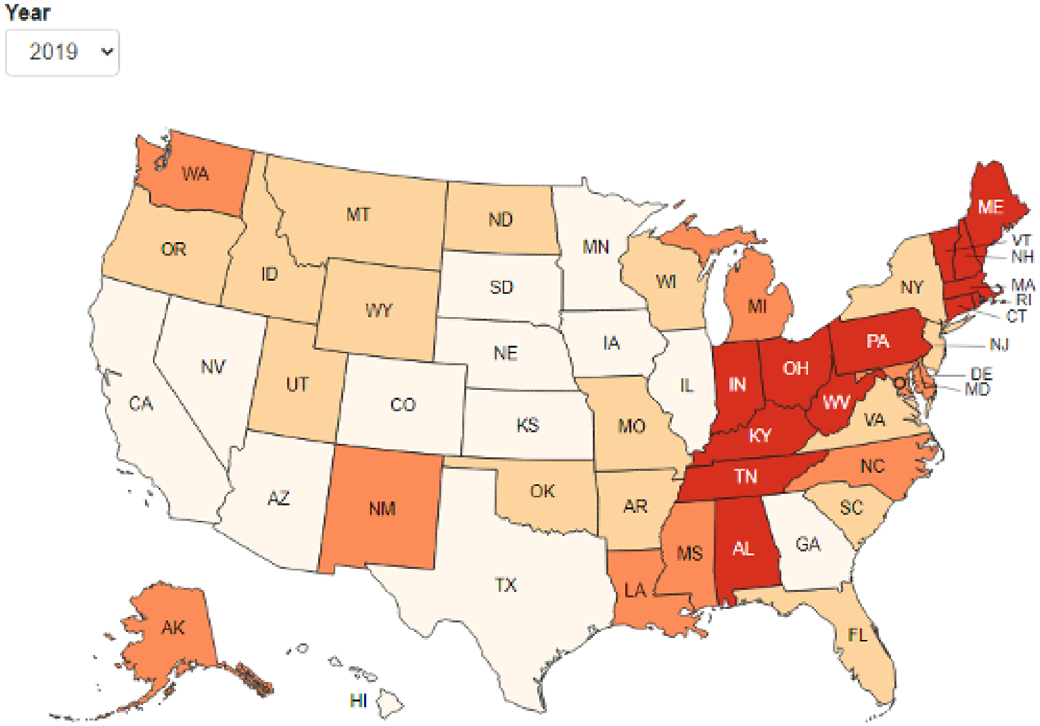
2023

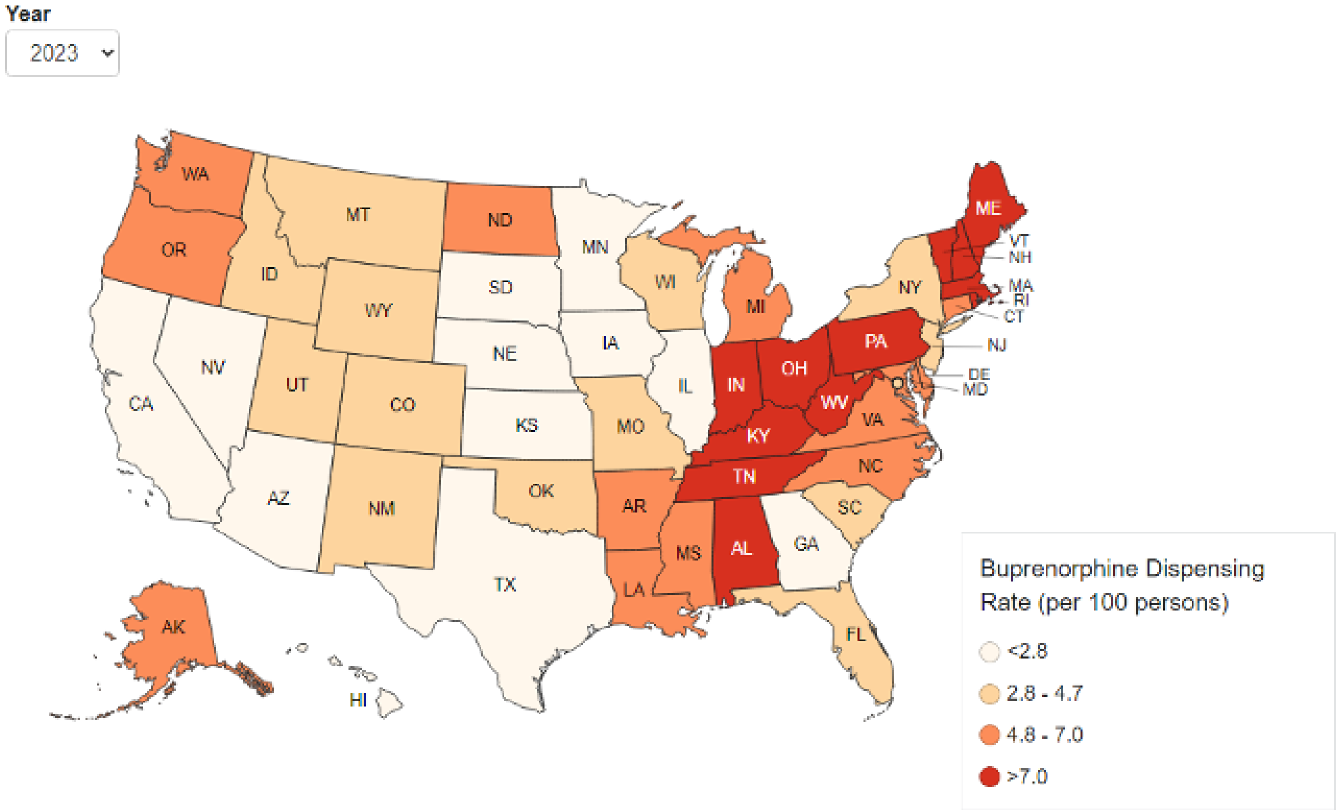


Source: [Opioid Dispensing Rate Maps | Overdose Prevention | CDC](), supported by the IQVIA Government Solutions team

"The overall national buprenorphine dispensing rate remained relatively stable from 2019 to 2023" per the CDC

State buprenorphine dispensing rates

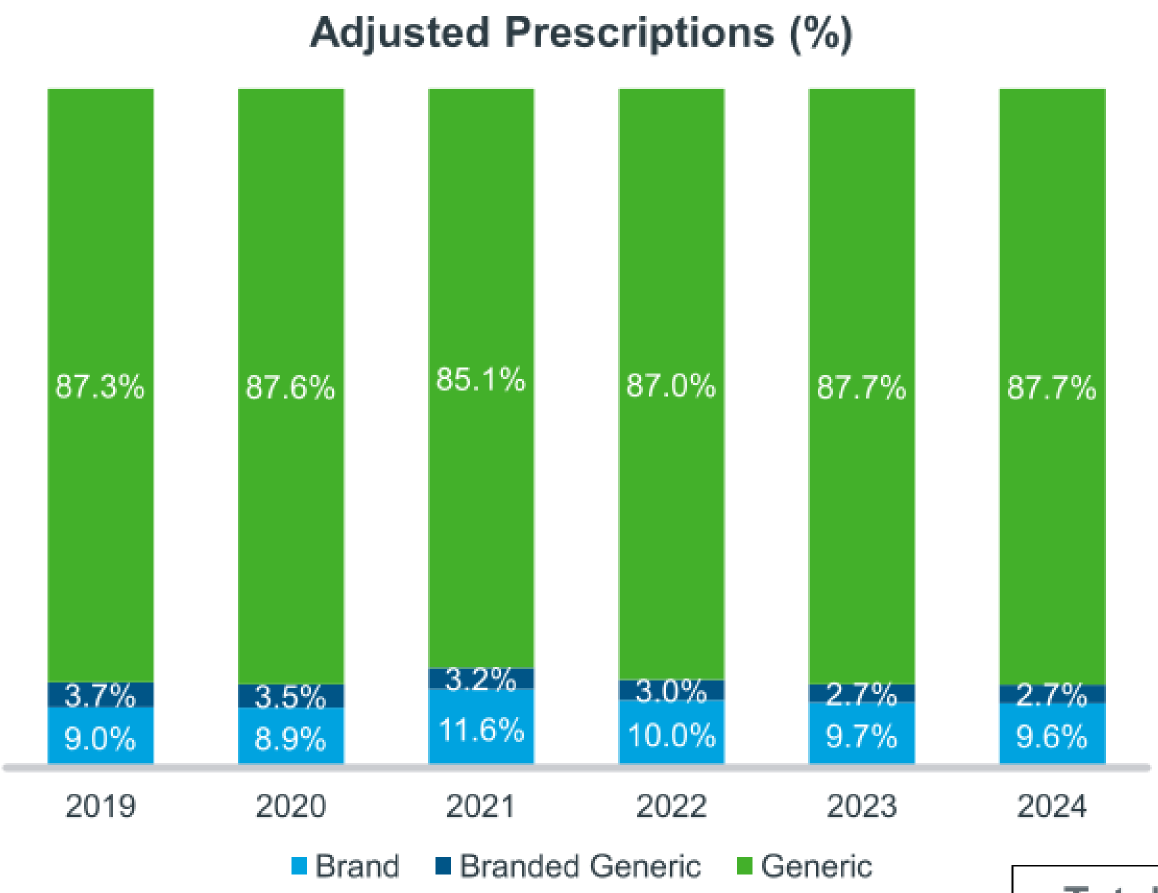


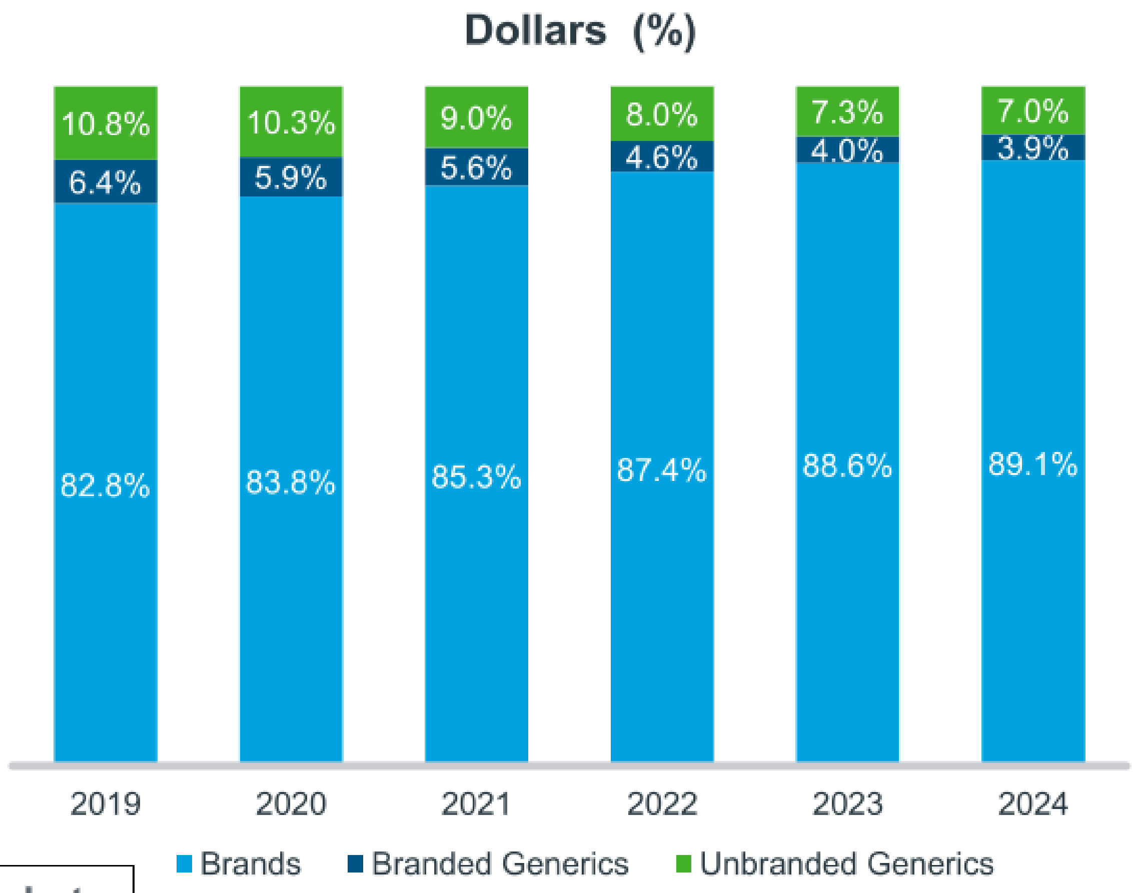


Source: [Buprenorphine Dispensing Rate Maps | Overdose Prevention | CDC](), supported by the IQVIA Government Solutions team

Generics

87.7% of Total Market prescriptions were dispensed as unbranded generics for 2024 (adjusted)

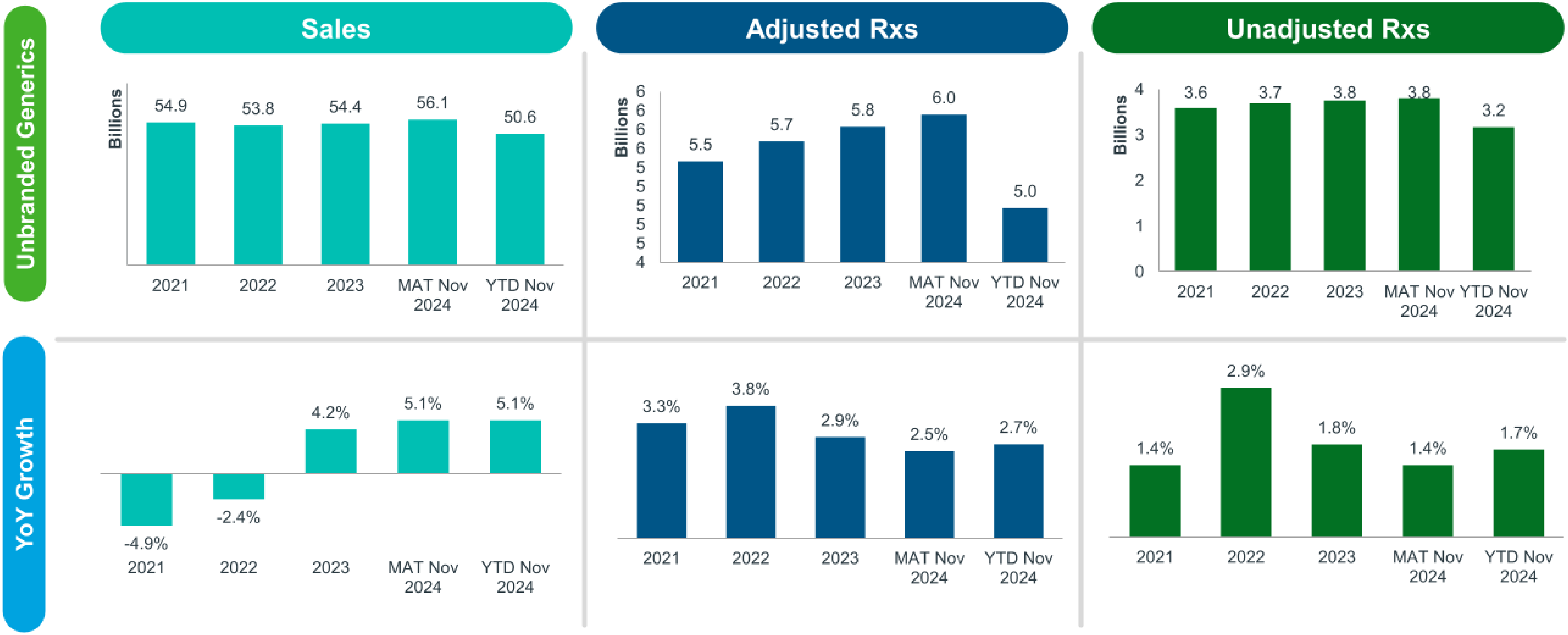




Total Market

Source: IQVIA, National Sales Perspectives, National Prescription Audit, November 2024

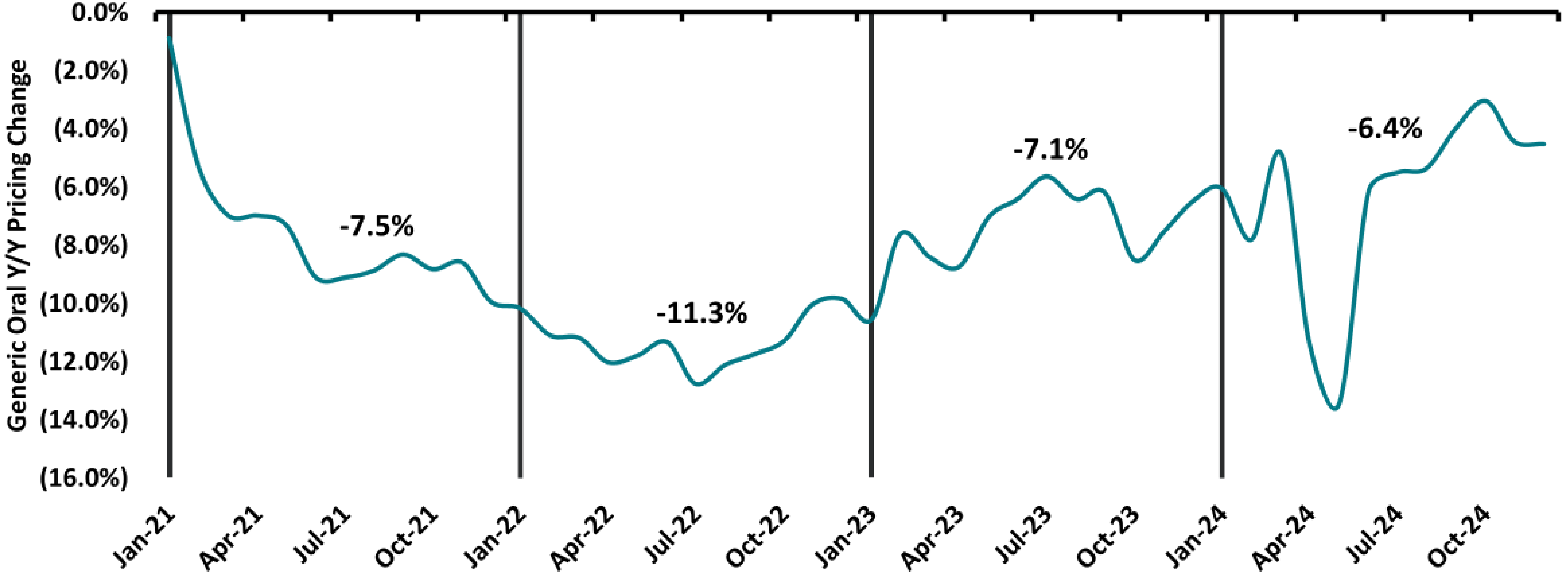
Unbranded generics sales and Rxs were positive



Source: IQVIA, National Sales Perspectives and RxInsights, 2024
Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

Mature oral drug deflation finished 2024 modestly lower than 2023

Mature Oral YoY Generic Price Trend



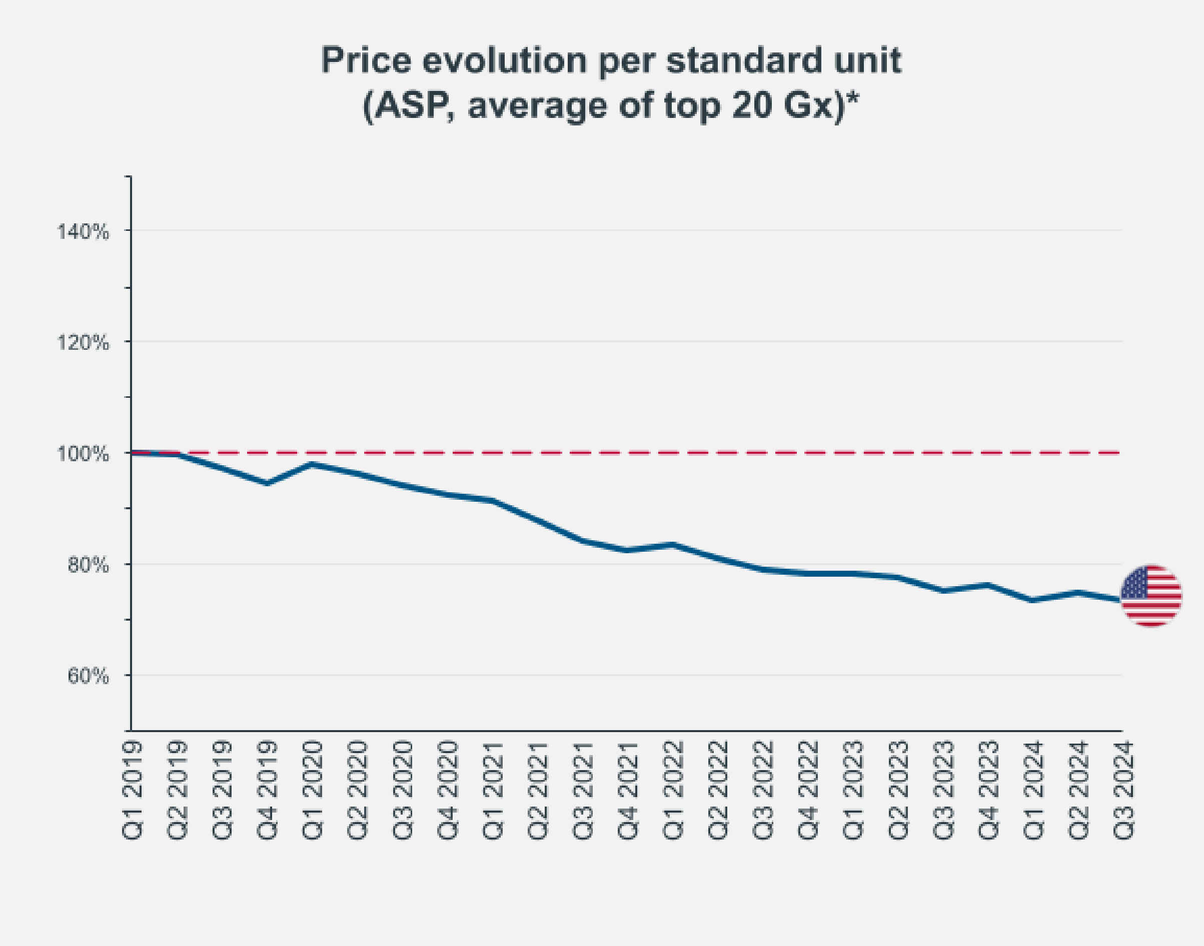
nephron

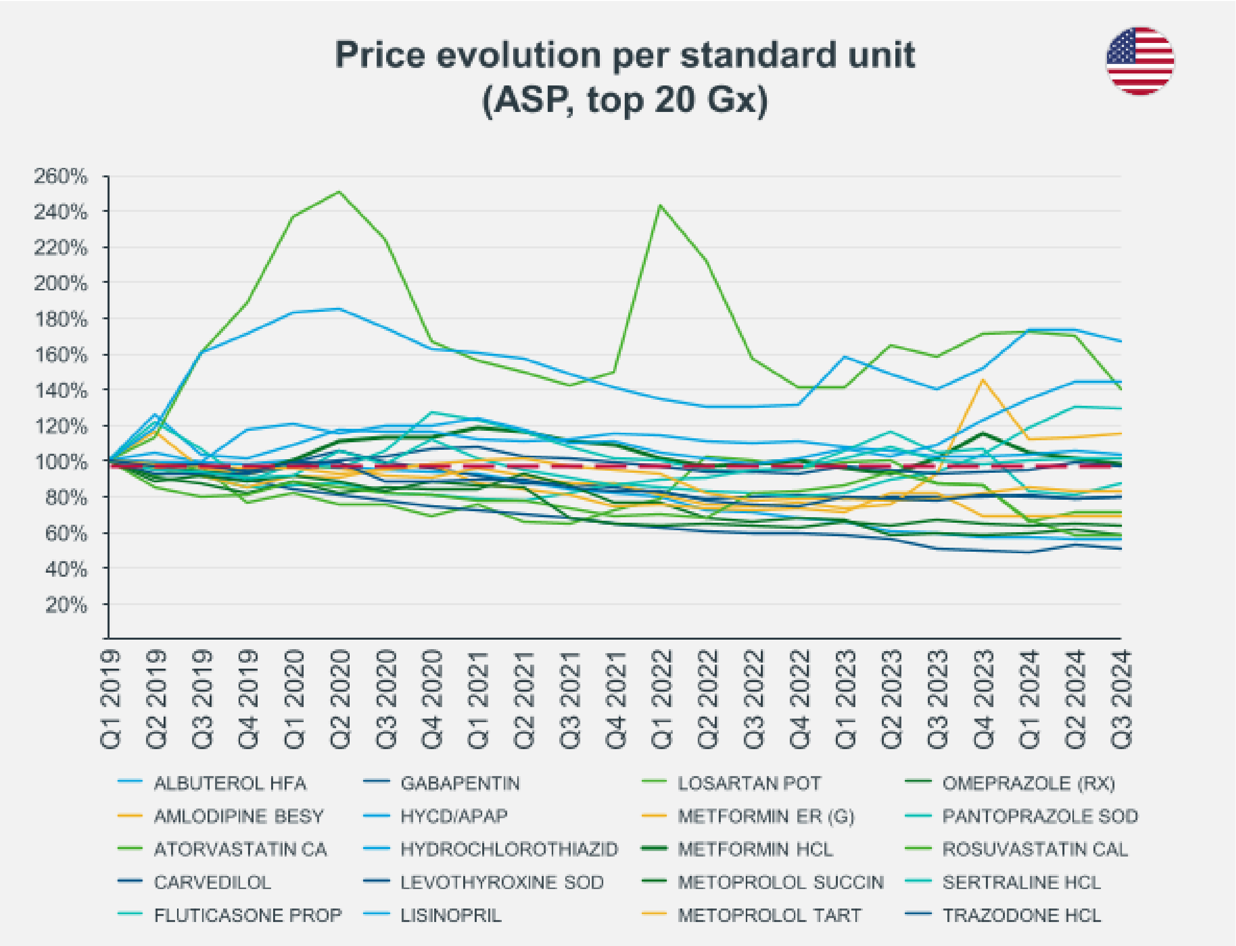
Source: Nephron Research, IQVIA, Glass Box Analytics

IQVIA

In the US, the price of generics has fallen by ~20% since 2019

Price increases are short-lived, and linked to drug shortages





Notes: Top 20 products selected based on Q1 2023 sales (US dollar). ASP=average selling price; *volume weighted analysis
Source: IQVIA MIDAS; Generics Product Class (Early entry generics + Generic products); Rx only

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In 2018, it took seven Brand drugs to equal the total Generic business; in 2024 it only took two

2018

The Top **7 Brand** Molecules = **$55.0B** in Sales

- $5.2B Xarelto
- $5.2B Remicade
- $5.5B Lyrica
- $5.7B Januvia
- $7.1B Eliquis
- $8.0B Enbrel
- $18.4B Humira

Entire Generic Market = **1,044 Molecules** and **$55.7B** in Sales

2021

The Top **3 Brand** Molecules = **$55.2B** in Sales

- $12.2B Trulicity
- $15.9B Eliquis
- $27.1B Humira

Entire Generic Market = **1,072 Molecules** and **$53.6B** in Sales

MAT November 2024

The Top **2 Brand** Molecules = **$62.5B** in Sales

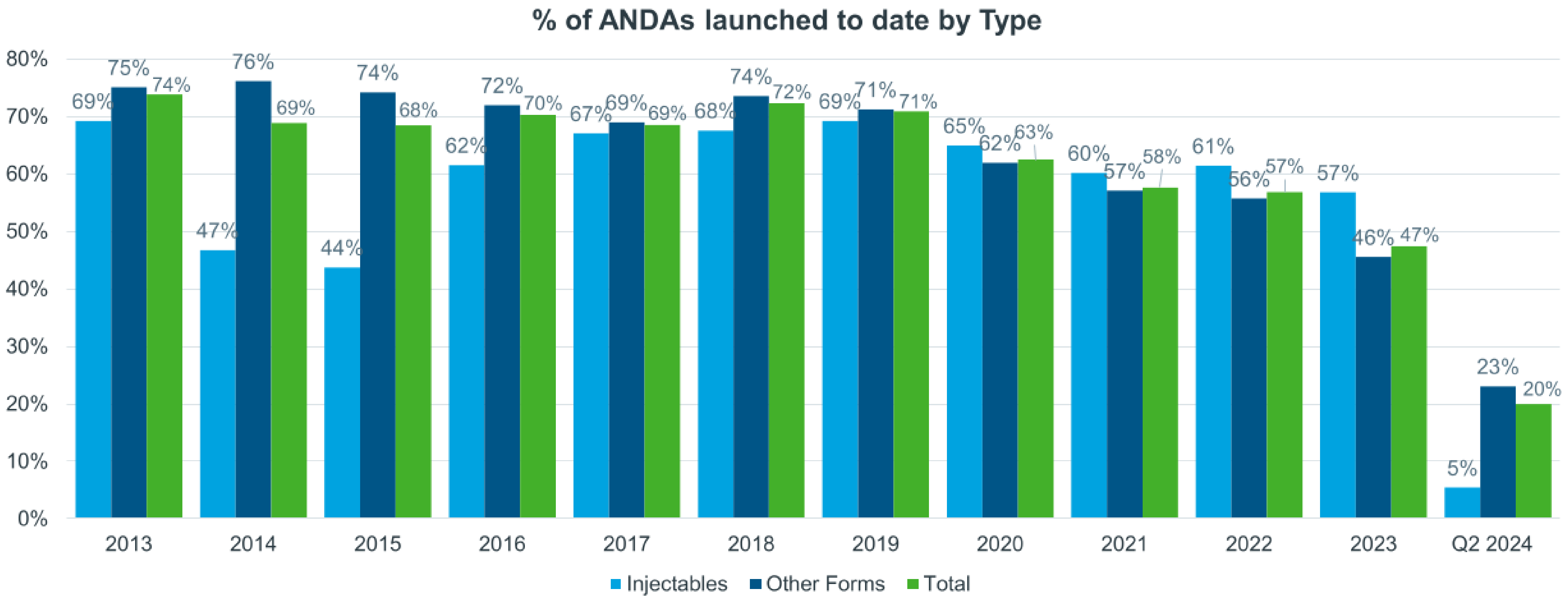
- $27.4B Humira
- $35.0B Ozempic

Entire Generic Market = **1,098 Molecules** and **$56.1B** in Sales

= 50 Generic Molecules

Unlaunched ANDAs accounted for 37% of approvals since 2013, 41% of injectables and 37% of other forms

A rise in trend of the percentage of approved injectable ANDAs launched since 2020 till 2023



New Product Launch Update

IQVIA

Launch Landscape as of November 2024

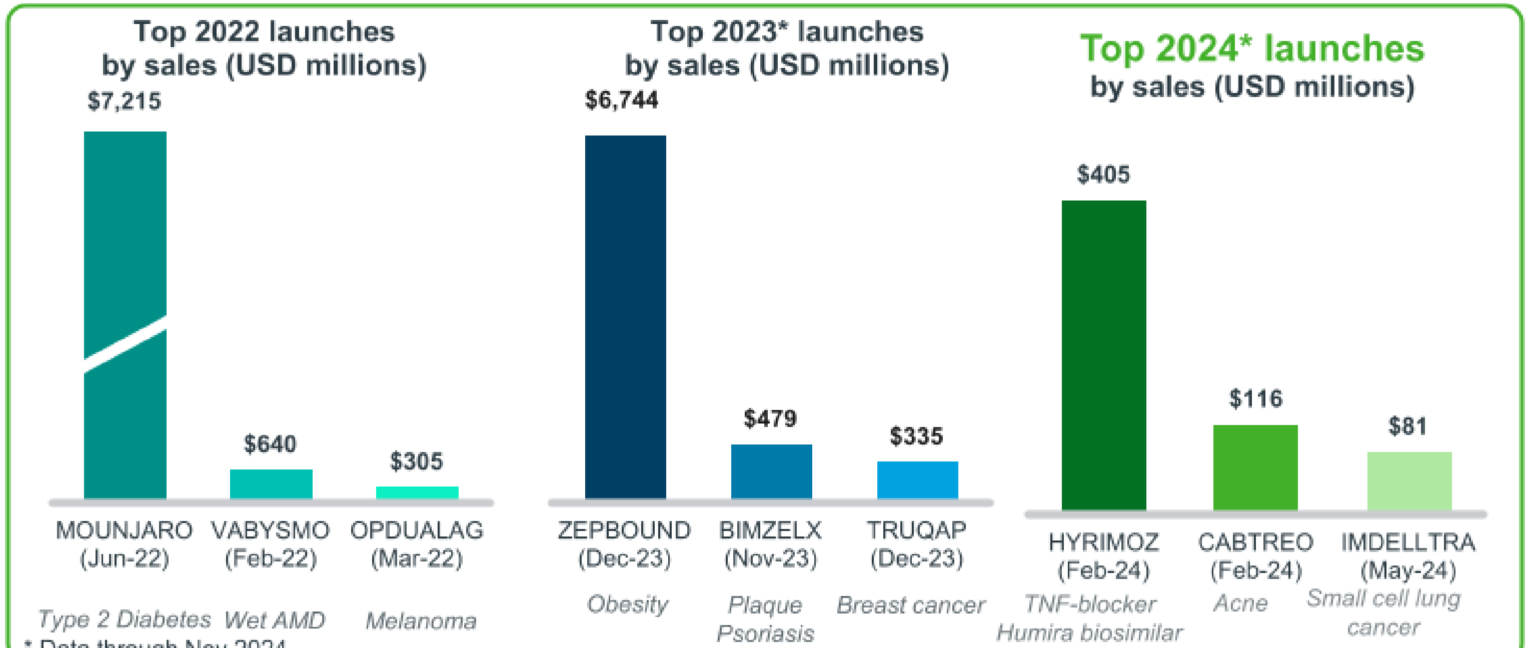
GLP-1s dominated previous years' launch sales and other products like Hyrimoz are growing in 2024
Neurology is the top therapy area in 2024, newly outpacing oncology

69 new launches through November 2024

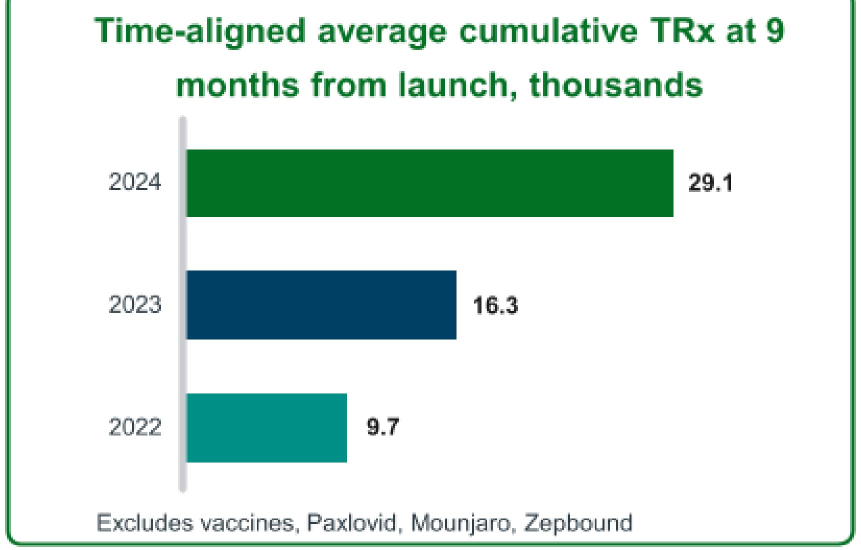
Key Markets to Watch:
MASH
Respiratory vaccines
Humira biosimilars
GLP-1s (*Sleep Apnea*)

Top therapy areas *(share of launches)*

2024 n=53	Neurology 19%	Oncology 16%	Immunology 12%
2023 n=96	Oncology 21%	Immunology 13%	Neurology 13%
2022 n=79	Oncology 17%	Neurology 12%	Cardiovascular 11%



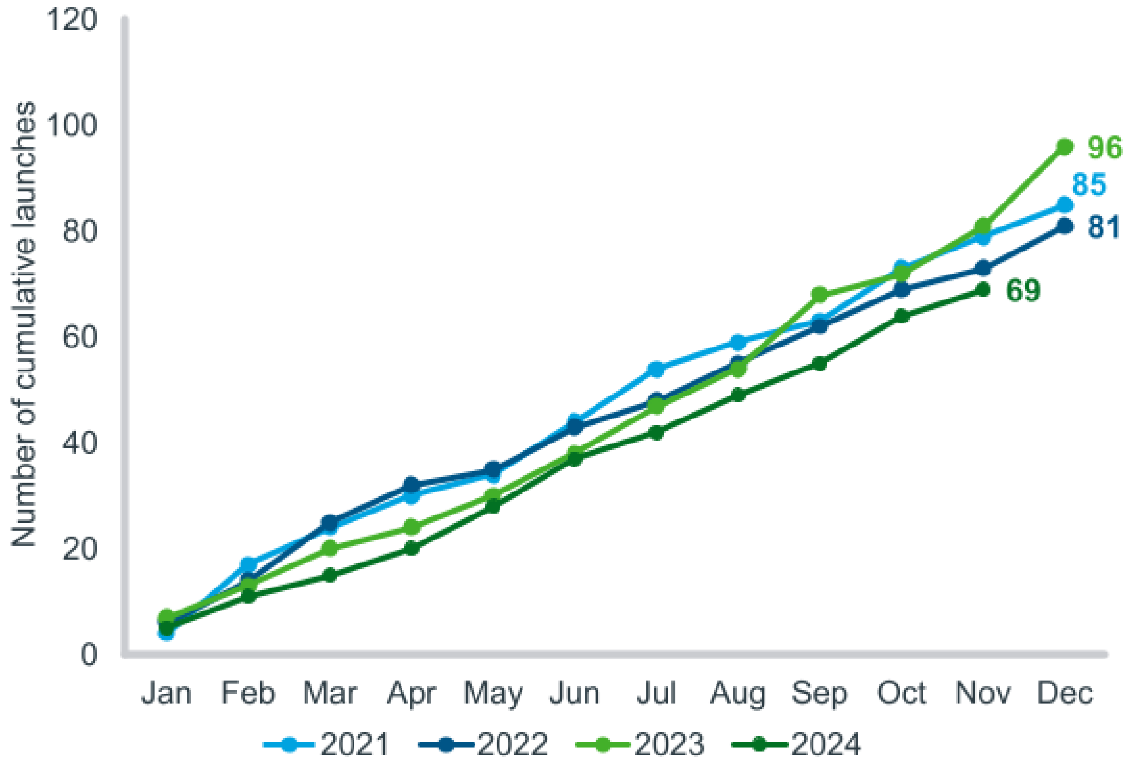
* Data through Nov 2024



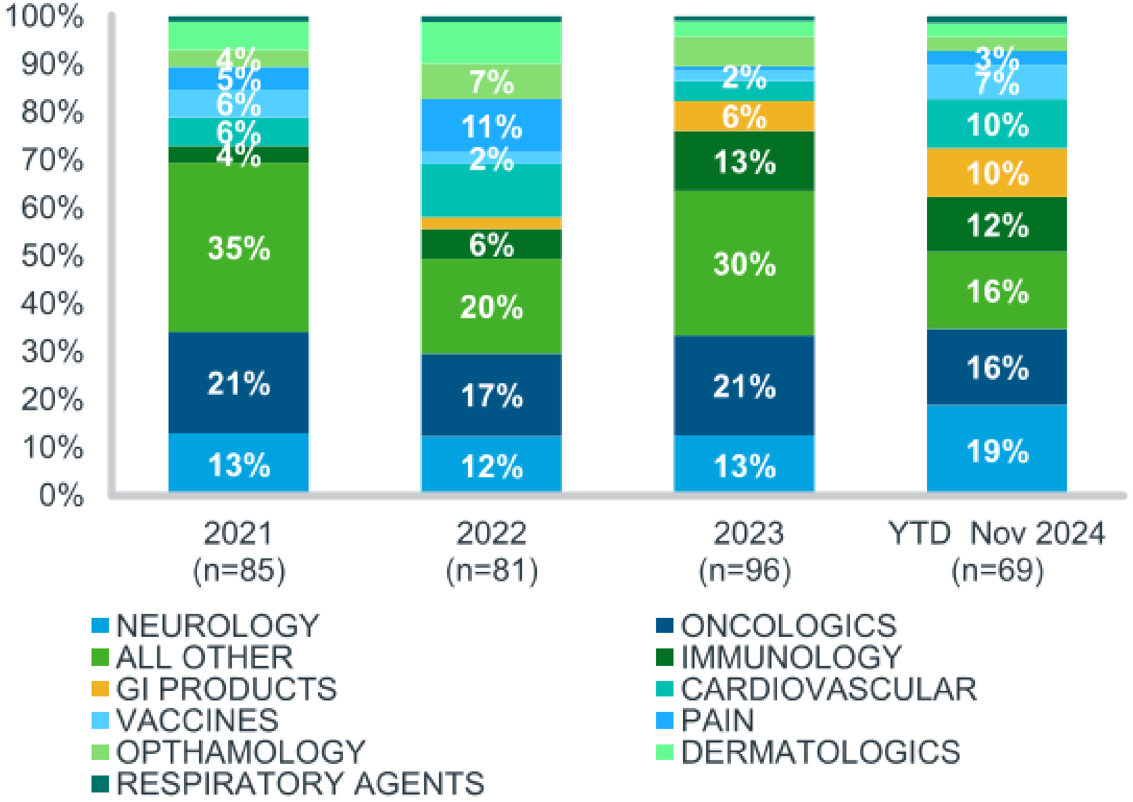
Product launches in 2024 had a more diverse distribution of therapeutic areas compared to previous years

Oncology is the dominant launch therapeutic area over time, but the neurology share is growing

Time-aligned cumulative launches 2021–Nov 2024

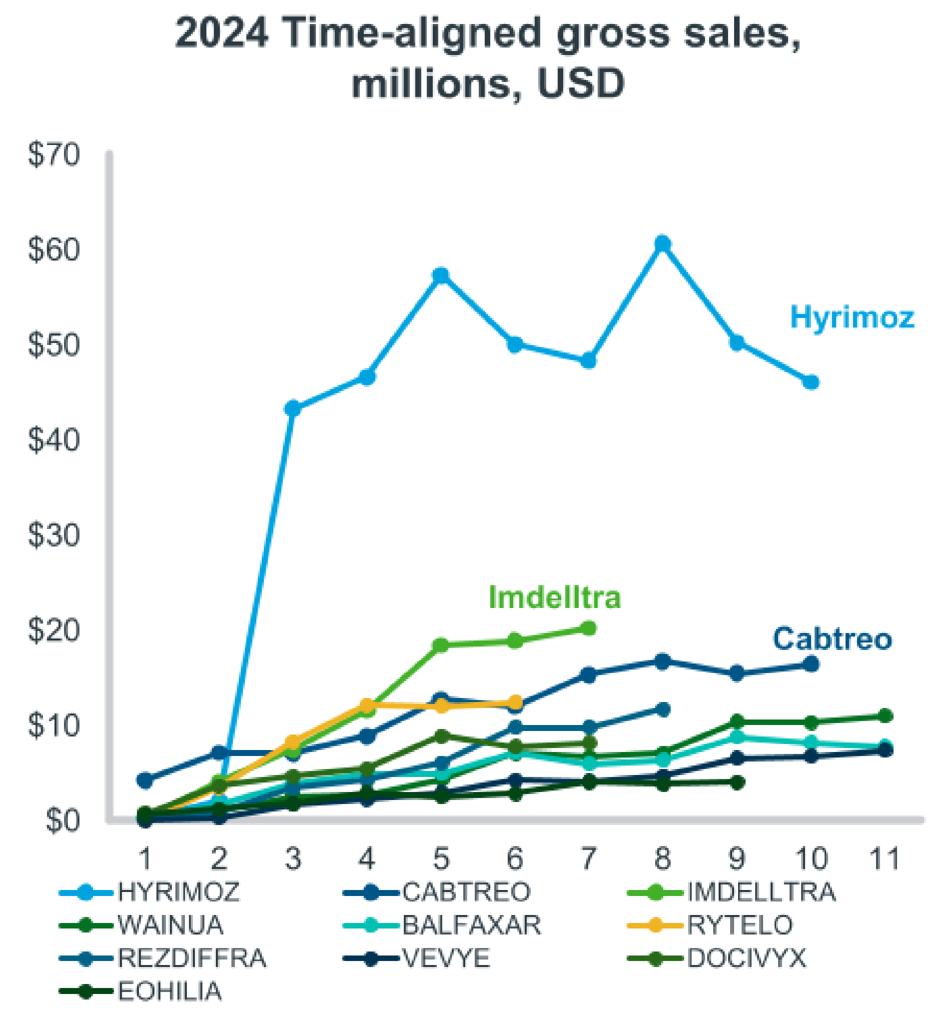


Share of launches by therapy area 2021–Nov 2024



Source: National Sales Perspective; Launch Center of Excellence, IQVIA; publicly available information from the FDA

Hyrimoz is currently the best-selling launch of 2024, followed by standouts Cabtreo and Imdelltra

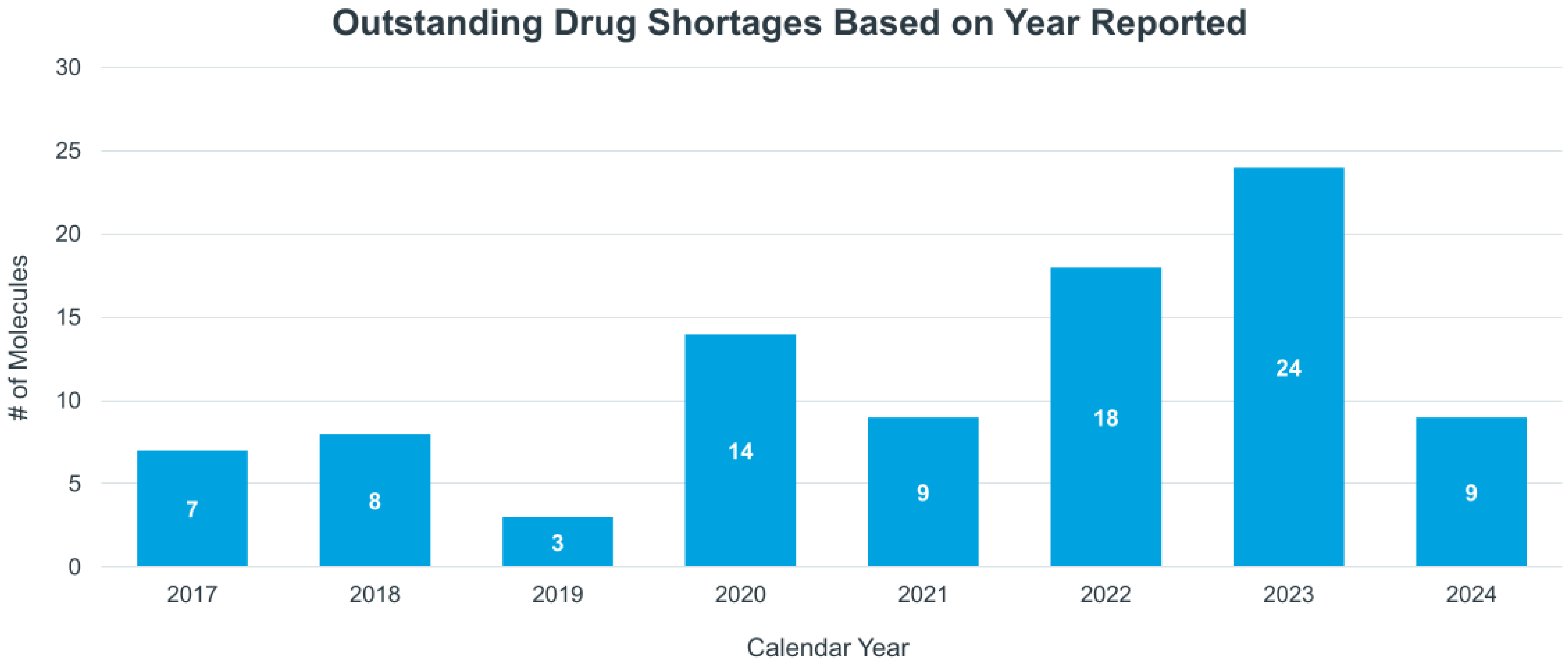


Top 10 Products, 2024	Company	Indication	Launch date	First year gross sales (as of Nov-24)
Hyrimoz *Adalimumab*	Cordavis	Tumor necrosis factor (TNF)-blocker; multiple indications	Feb-24	$404.8M
Cabtreo *clindamycin phosphate, adapalene & benzoyl peroxide*	Bausch Health	Acne	Feb-24	$116.2M
Imdelltra *tarlatamab-dlle*	Amgen	Extensive-stage small cell lung cancer (ES-SCLC)	May-24	$81.0M
Wainua *eplontersen*	AstraZeneca	Polyneuropathy from hereditary transthyretin amyloidosis (hATTR-PN)	Jan-24	$63.9M
Balfaxar *prothrombin complex concentrate, human-lans*	Octapharma	Reversal of warfarin-induced acquired coagulation factor deficiency	Jan-24	$60.0M
Rytelo *Imetelstat*	Geron	low- to intermediate-1 risk myelodysplastic syndrome	Jun-24	$48.5M
Rezdiffra *resmetirom*	Madrigal	Nonalcoholic steatohepatitis (NASH)	Apr-24	$46.5M
Vevye *cyclosporine*	Harrow Health	Dry eye disease	Jan-24	$41.1M
Docivyx *Docetaxel*	Avyxa	Breast cancer, non-small cell lung cancer, prostate cancer, gastric adenocarcinoma, head and neck cancer	May-24	$39.3M
Eohilia *Budesonide*	Takeda	Eosinophilic esophagitis	Mar-24	$24.0M

Source: National Sales Perspective; National Prescription Audit, Patient Insights, IQVIA
Notes:All sales values are USD. Excludes vaccines and RSV antibodies

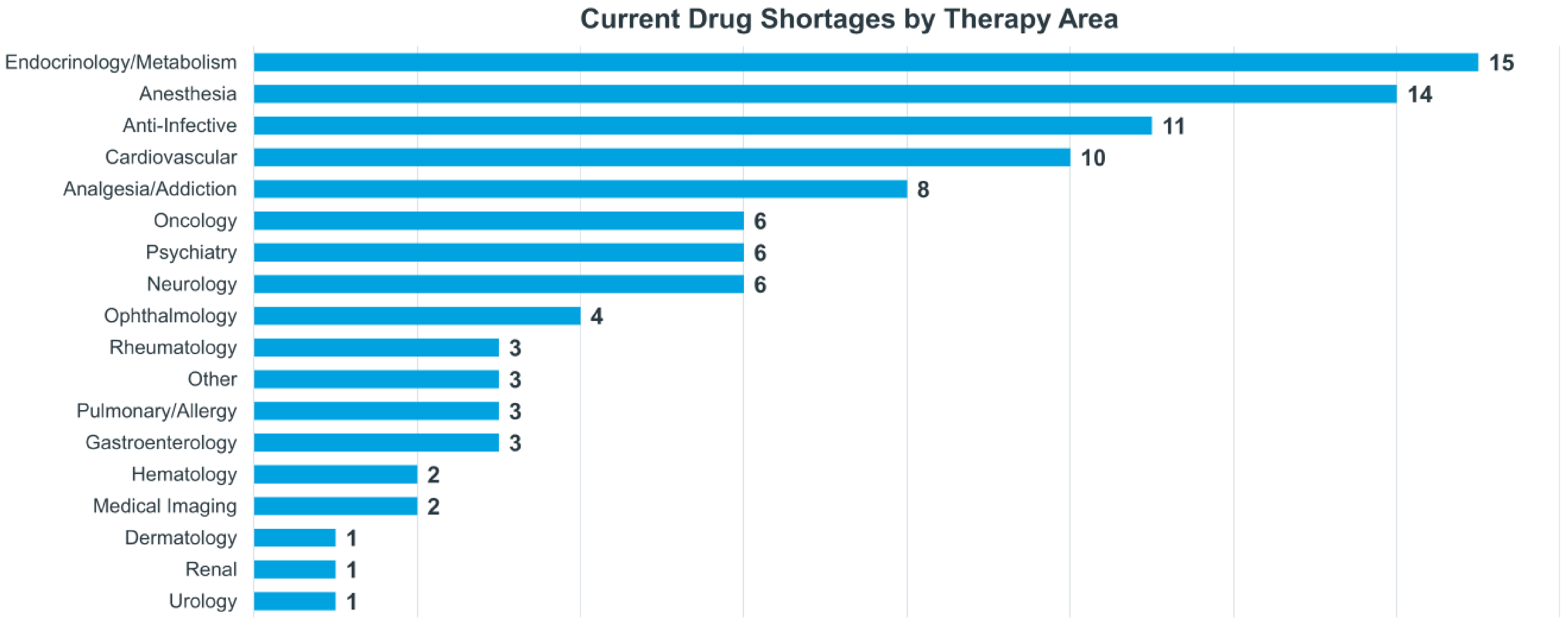
Drug Shortages and Inspections

The number of drugs listed in the FDA Drug Shortages data set continues to remain high



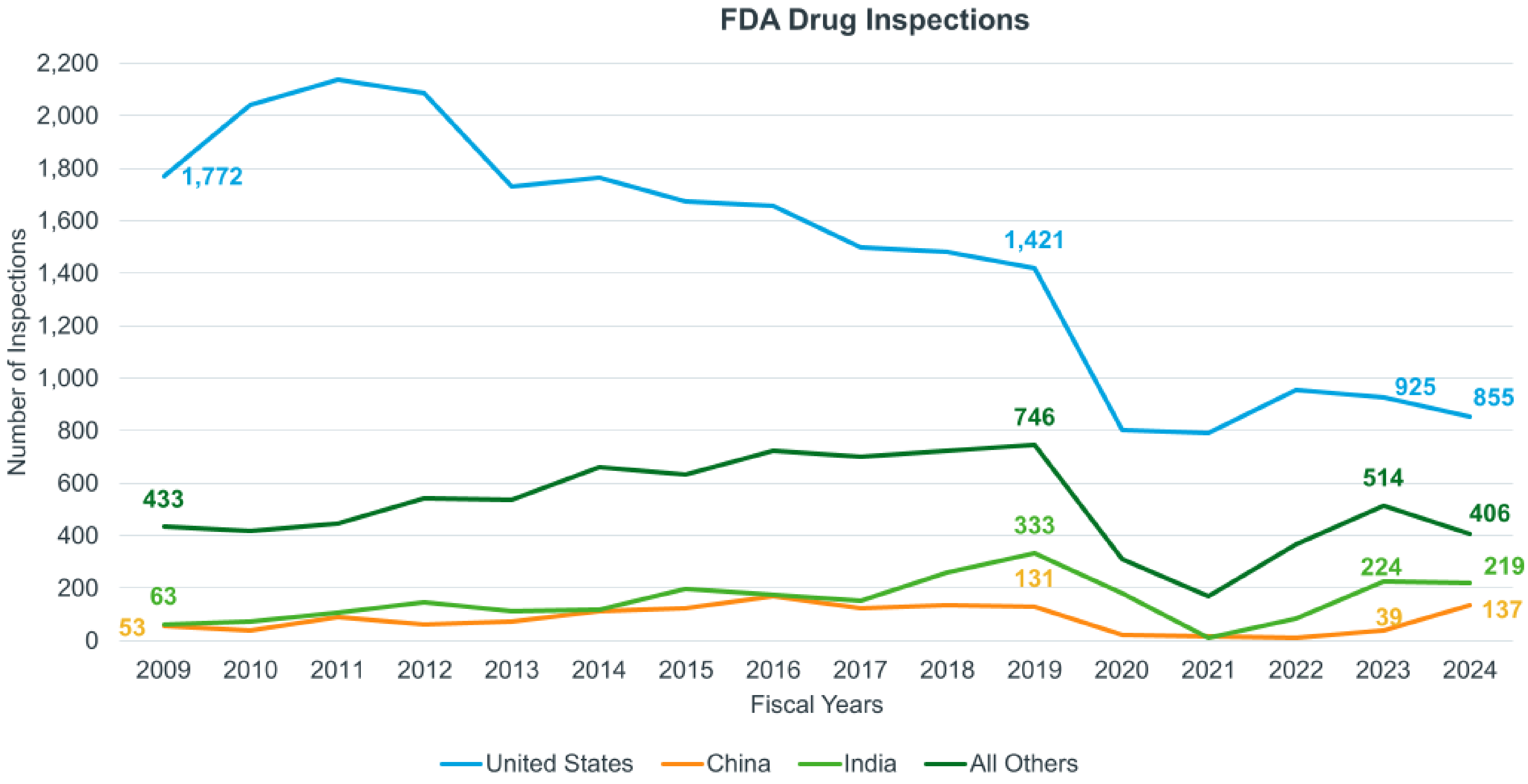
Data Source: https://www.accessdata.fda.gov/scripts/drugshortages/default.cfm, data pulled 1/6/2025

Endocrinology/Metabolism drugs have the greatest number of shortages according to the FDA



Data Source: https://www.accessdata.fda.gov/scripts/drugshortages/default.cfm, data pulled 1/6/2025

FDA inspections of pharmaceutical manufacturing facilities were lower for most countries in 2024 but up in China



- Important Notes:
  - Not all inspections are included in the database. Inspections conducted by States, pre-approval inspections, mammography facility inspections, inspections waiting for a final enforcement action, and inspections of nonclinical labs are not included.
  - The results show final classifications of No Action Indicated (NAI), Voluntary Action Indicated (VAI), Official Action Indicated (OAI) for each project area within an inspection.

The U.S. Government's Fiscal Year runs October 1 through September 30

Data Source: https://datadashboard.fda.gov/ora/cd/inspections.htm , data pulled 1/6/2025

The FDA is facing challenges in the inspection process

Roughly 2,000 pharmaceutical facilities have not been inspected since before the pandemic

Overdue

- Those uninspected facilities represent **42%** of the 4,700 that are registered to produce drugs for the U.S.
- The majority of those are in the U.S.
- More than **340** are in India and China, countries that together make up the largest source of drug ingredients used in low-cost U.S. prescriptions

Inspections

- The agency has increased drug inspections each year since 2021 while prioritizing foreign factories
- Last year's inspection numbers were still down almost **40%** from the pre-pandemic period, when the FDA averaged around **4,300** annual inspections

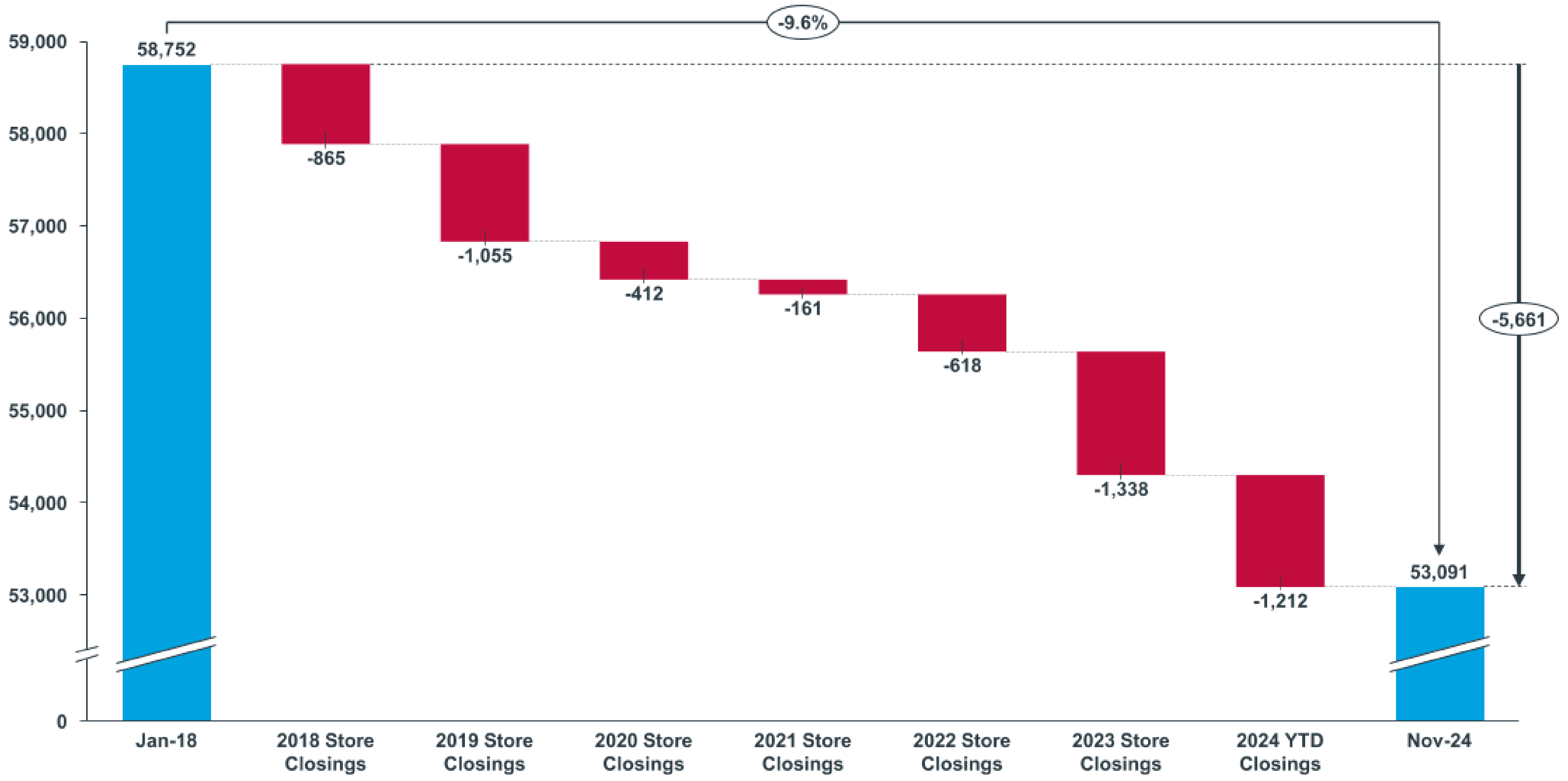
Challenges

- The agency's work has been hampered by a wave of staff departures, currently they have **225** vacancies on their inspection workforce
- The AP's tally of overdue plants also doesn't include any of the new facilities that have registered with the agency since COVID-19 but haven't yet had an initial inspection. FDA's internal list of sites for inspection has increased **14%** over the past five years, the agency noted last year.

Data Source: "Nearly 2,000 drug plants are overdue for FDA checks after COVID delays, AP finds", https://www.ap.org/news-highlights/spotlights/2024/nearly-2000-drug-plants-are-overdue-for-fda-checks-after-covid-delays-ap-finds/, 6 September 2024

Retail Class of Trade and Method of Payment Performance

Over 2,500 retail pharmacies have closed in 2023 and 2024 and there are over 5,600 fewer pharmacies since 2018



Note: The store count data is reflective of the stores in the IQVIA Rx Universe as of November 2024.

According to a 2024 NIH study, almost 16M people live in a pharmacy desert

15.8M

People in the U.S. are living in a pharmacy desert (4.7% of the population)

On average, communities that are pharmacy deserts have a higher proportion of people who:

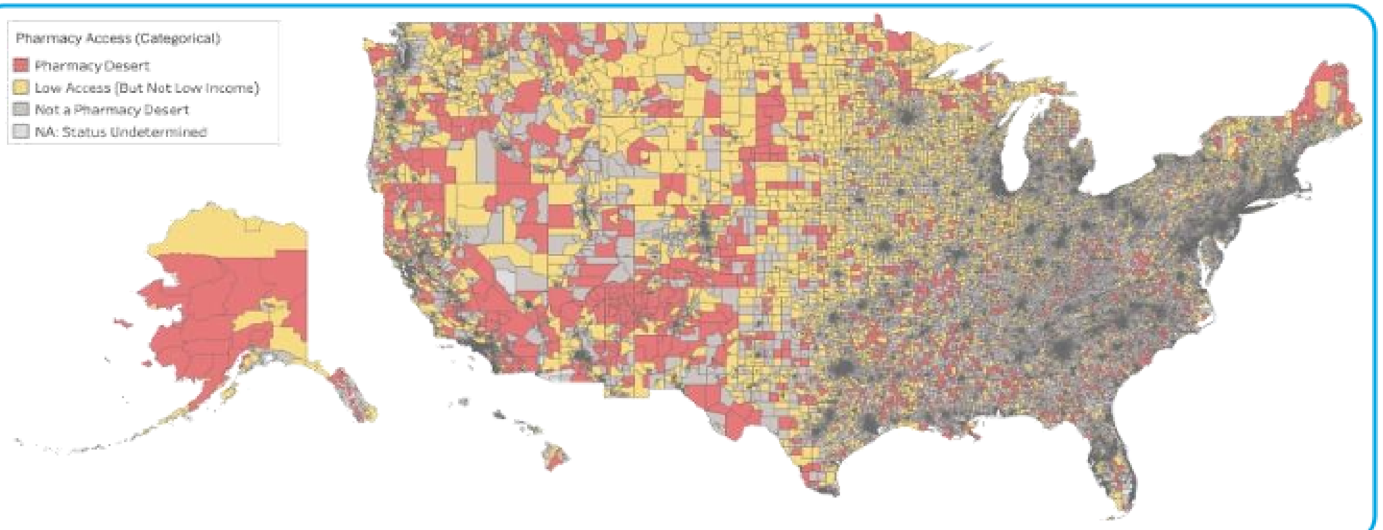
- Have a high school education or less
- Have no health insurance
- Have low self-reported English ability
- Have an ambulatory disability
- And identify as a racial or ethnic minority

Data Source: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC11034534/, Locations and characteristics of pharmacy deserts in the United States: a geospatial study, Mar 16, 2024

Additional findings from the study

Nearly **7** in **10** adults between 40 and 79 years old take at least 1 prescription drug, and approximately **1** in **5** adults take 5 or more prescription drugs

Pharmacy deserts disproportionately exist in rural or historically marginalized neighborhoods, compounding already-existing health inequities experienced by these communities



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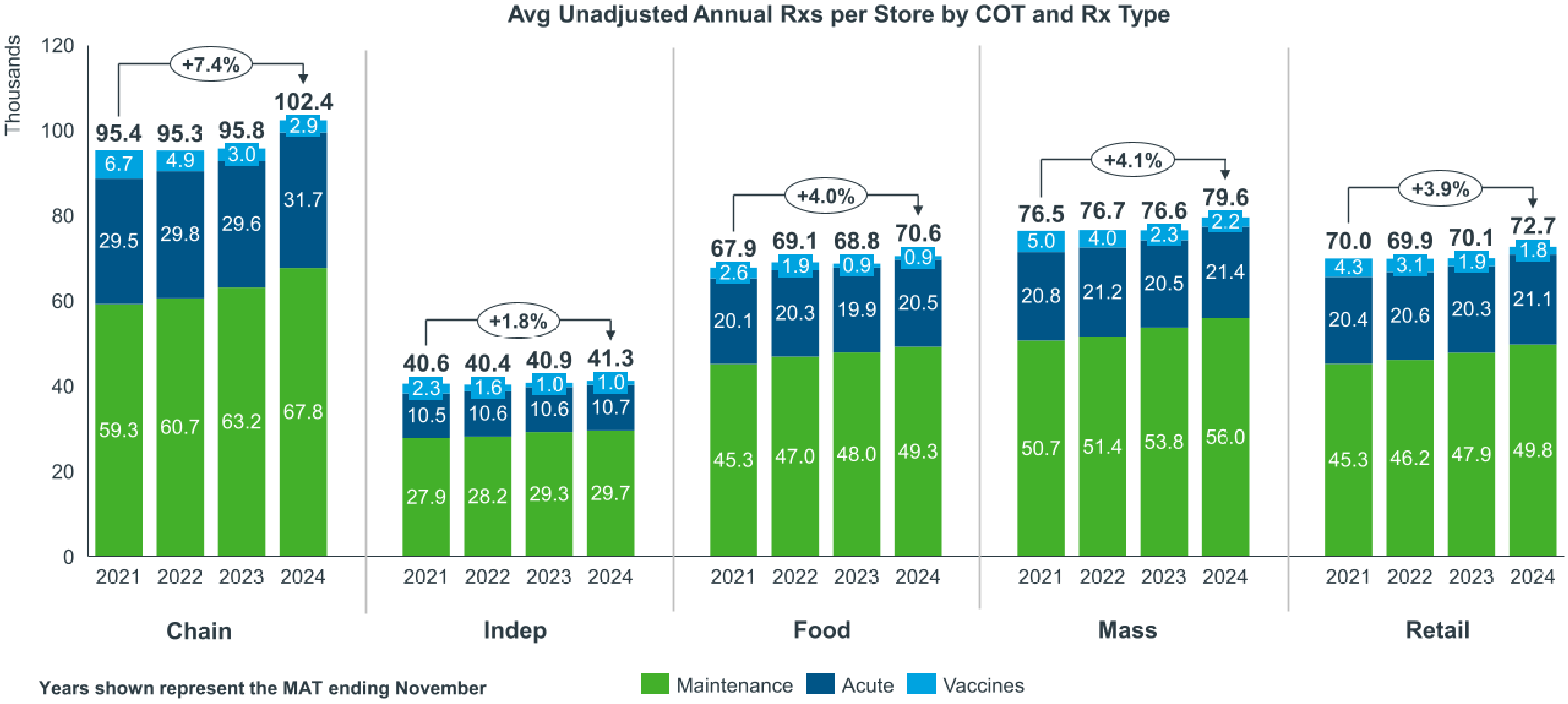
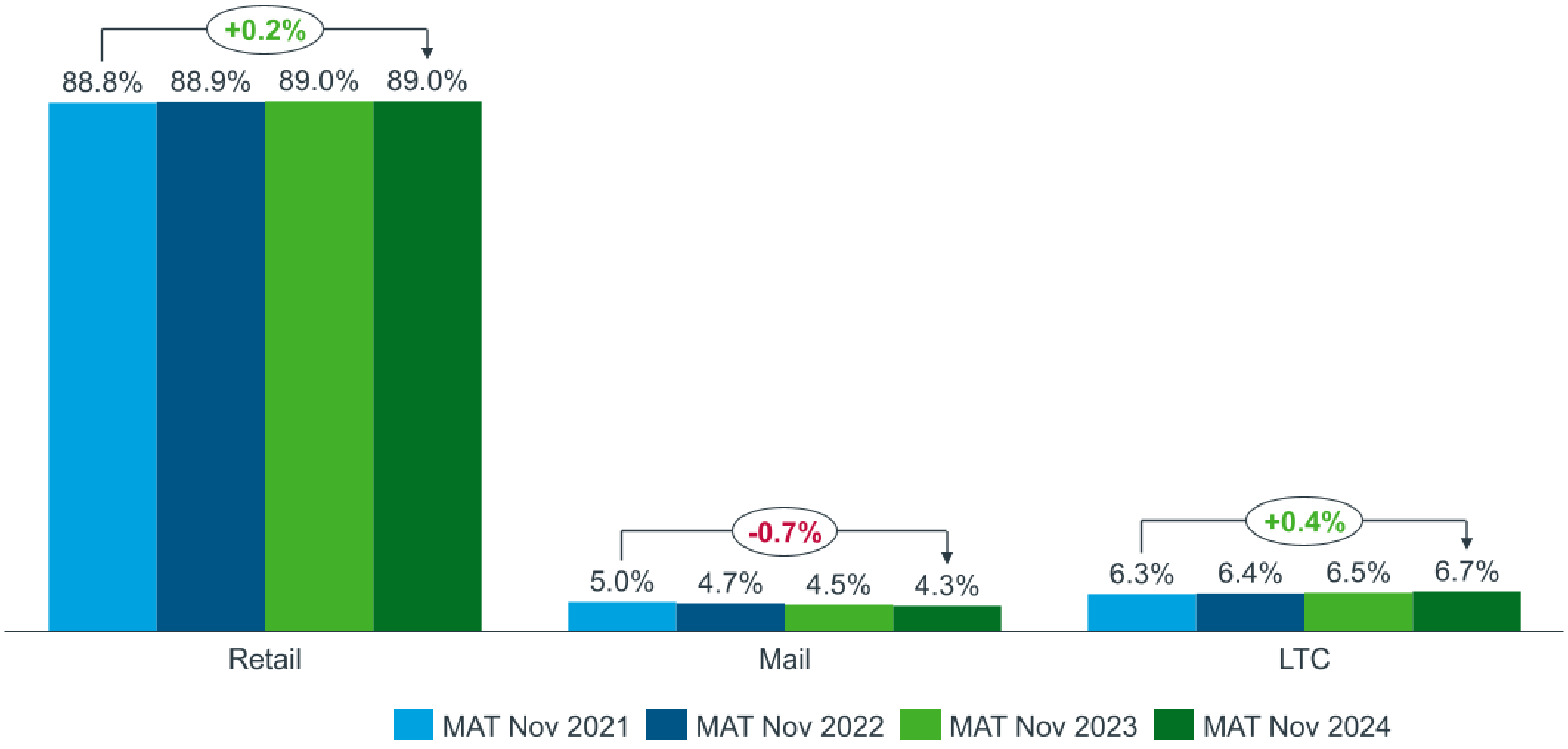
As more pharmacies close, the workload of the remaining ones increased



Years shown represent the MAT ending November

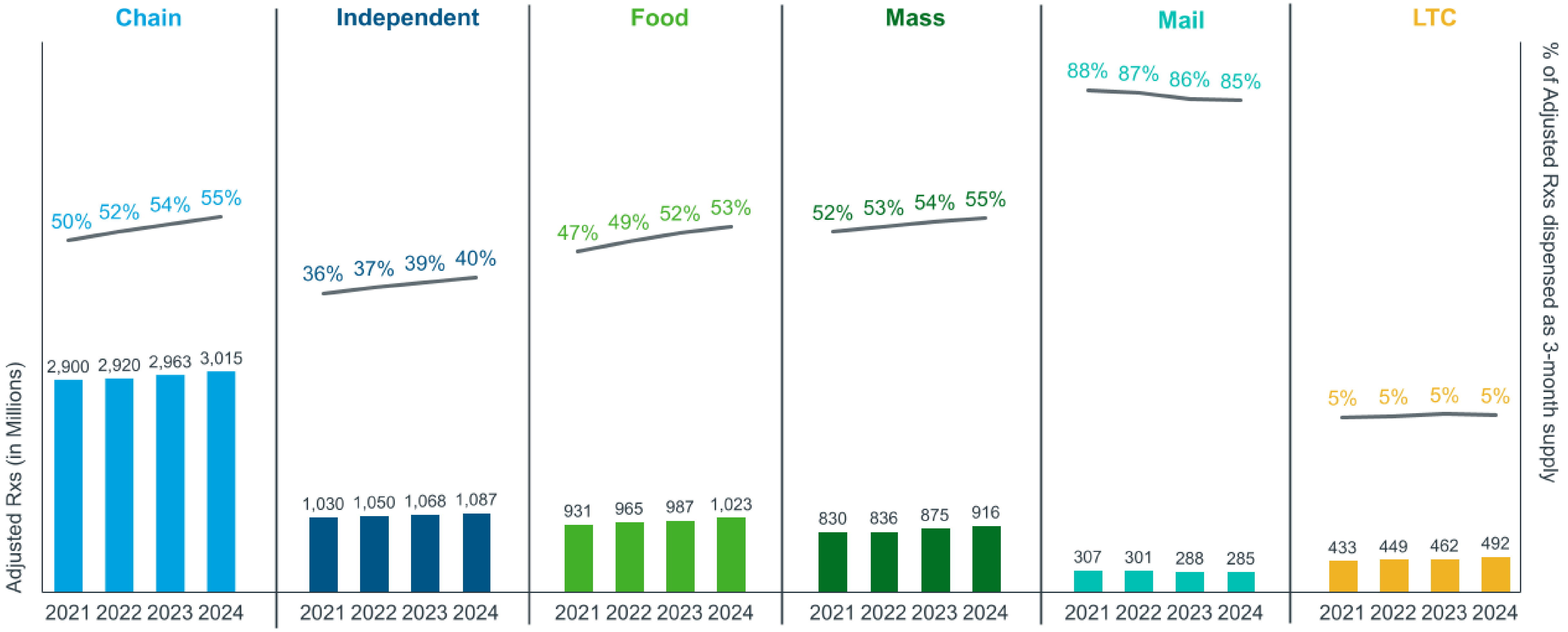
Mail adjusted Rx share continued to decrease each year

Adjusted Rx Market Share by Channel



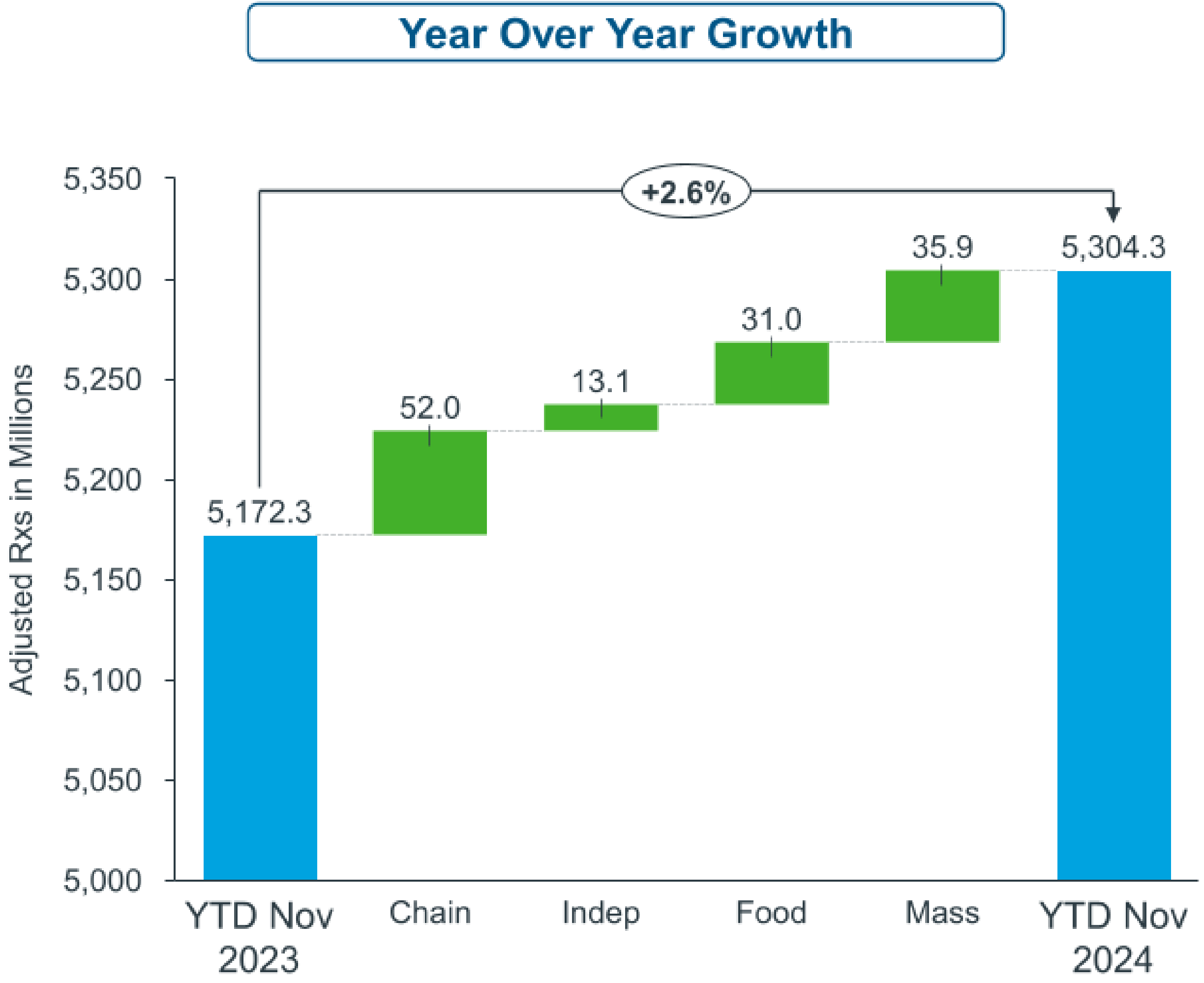
Prescriptions grew on an adjusted basis as more were filled as a 3-month supply in retail channels

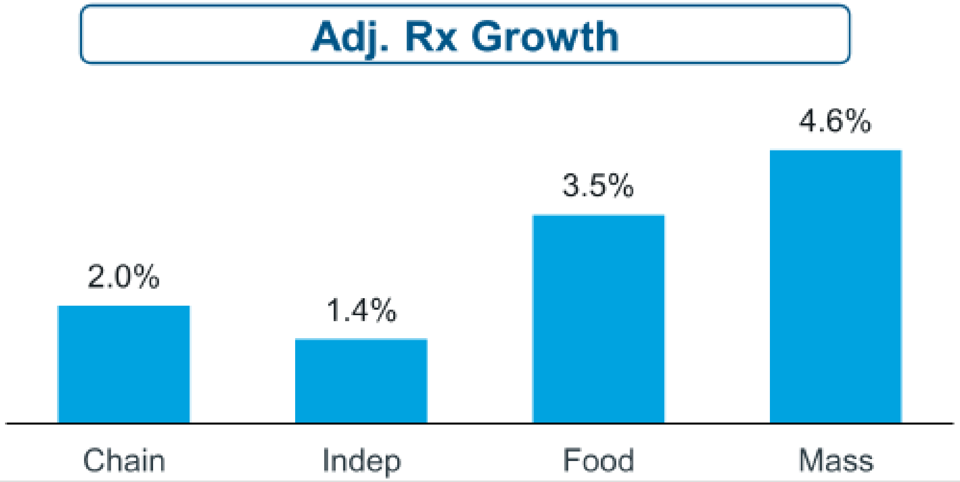
Adjusted Rxs by Channel and % of Adjusted Rxs Dispensed as 3-Month Supply

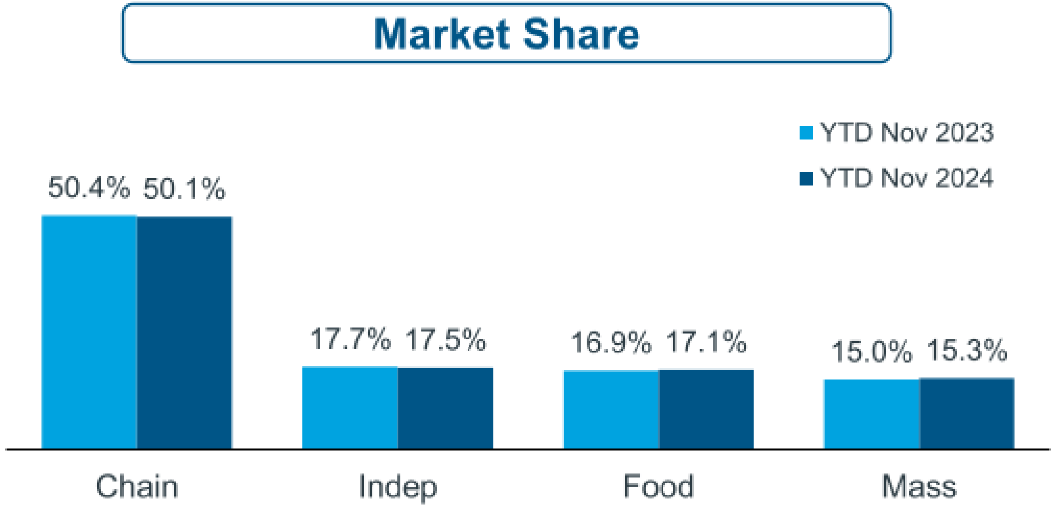


In Retail, Mass had the highest percentage growth while Chain lost share

Data is based on Year to Date, November 2024

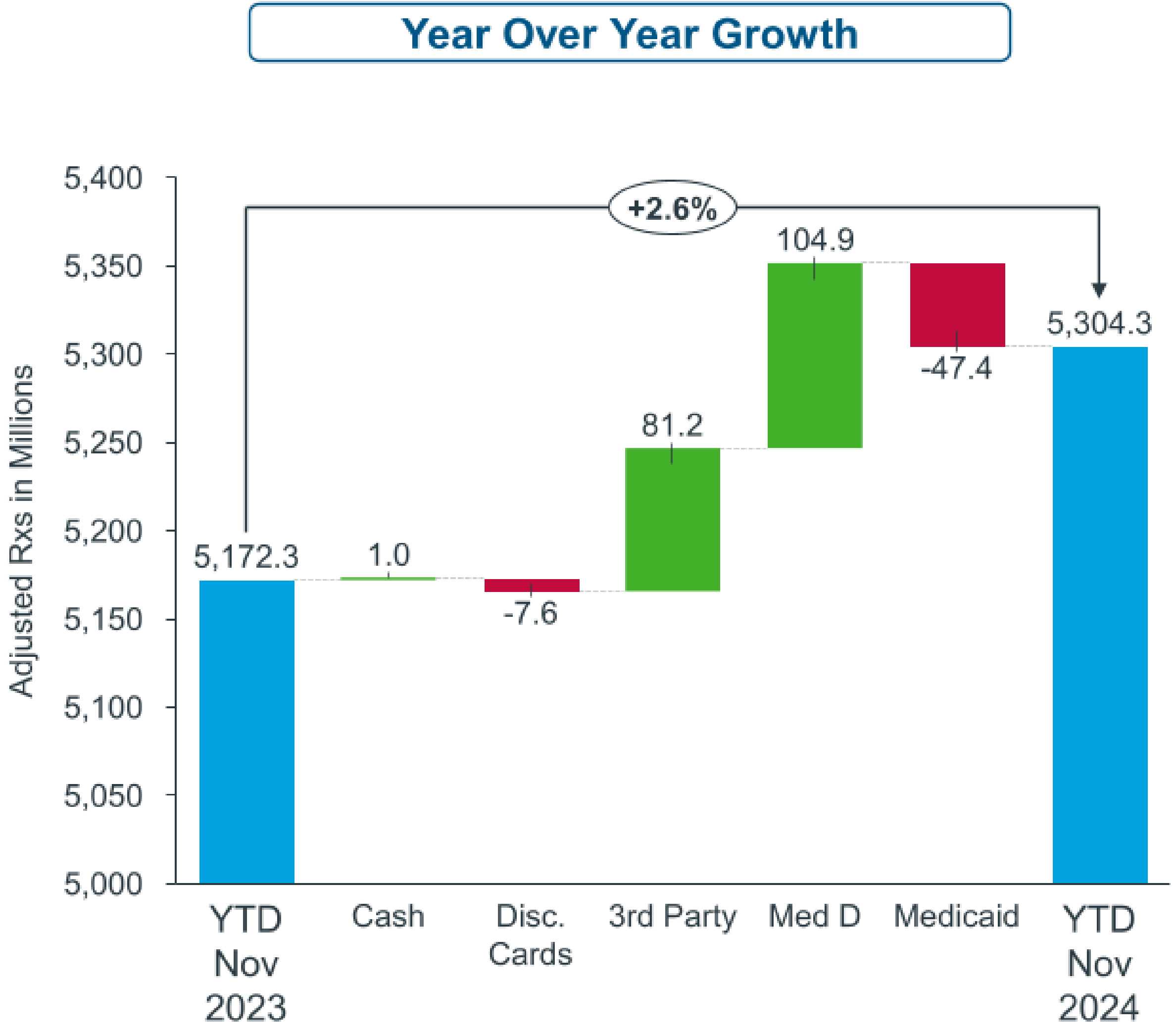


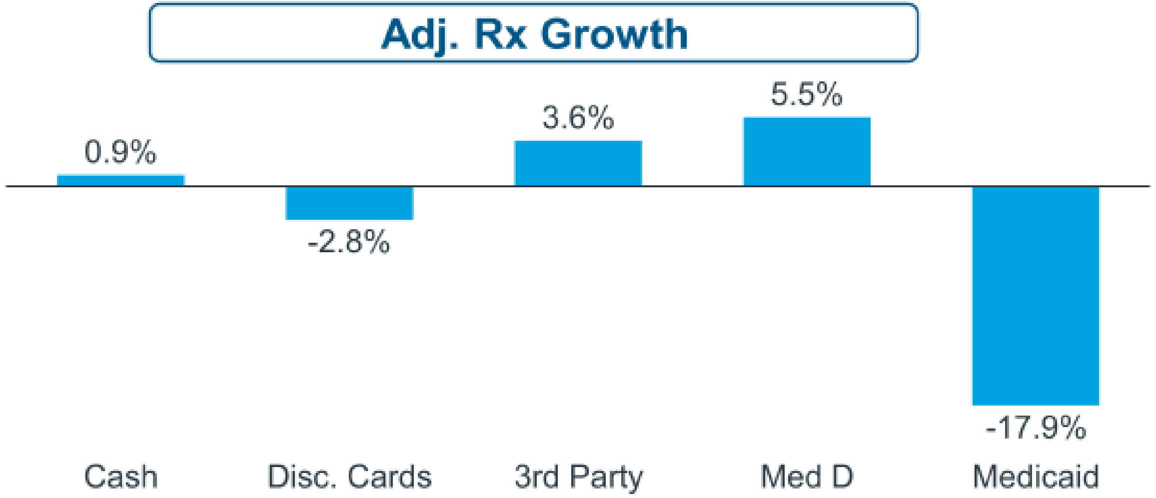


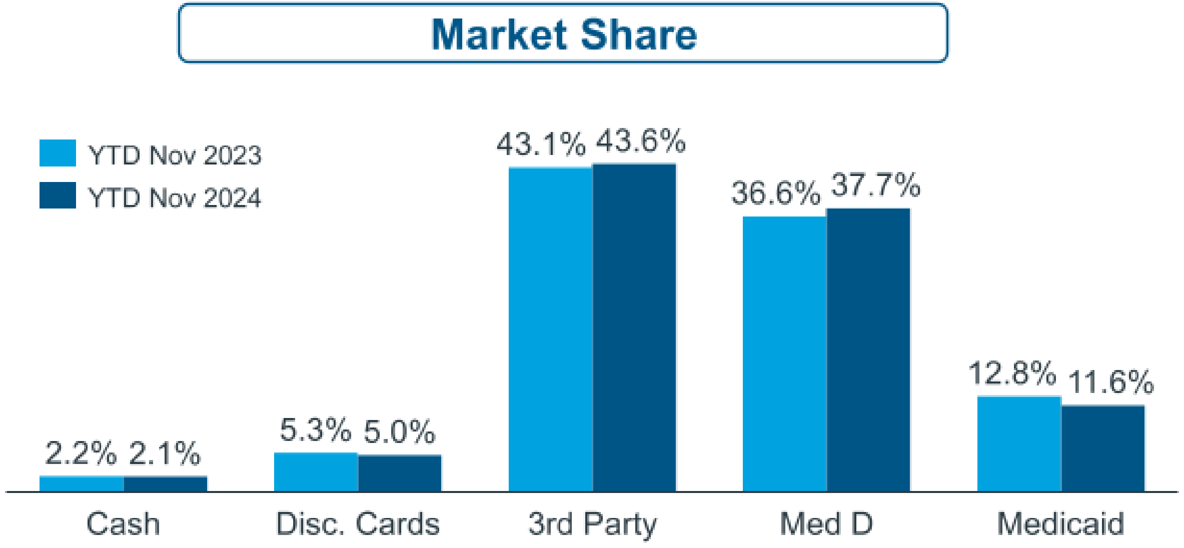


In Retail, Med D had the largest growth and market share gains

Data is based on Year to Date, November 2024



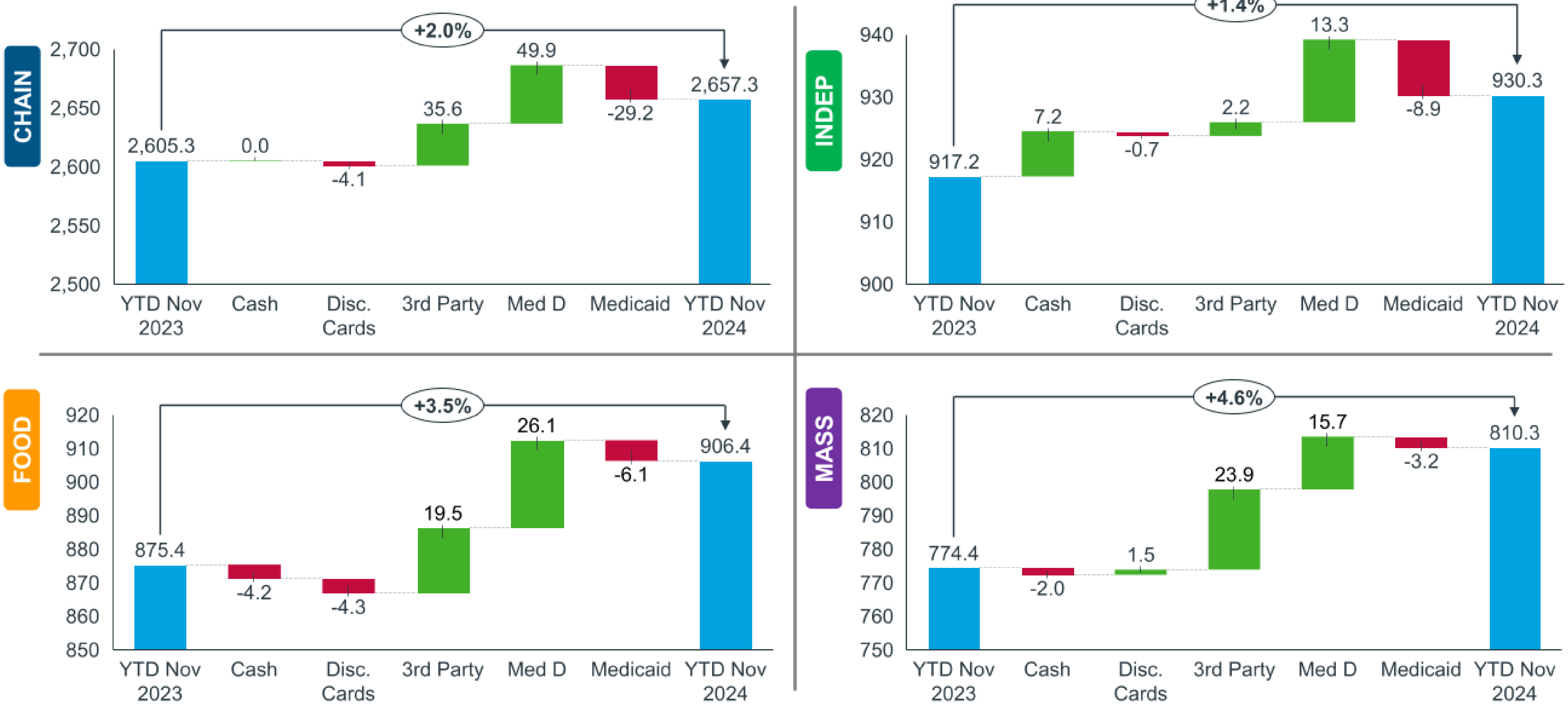




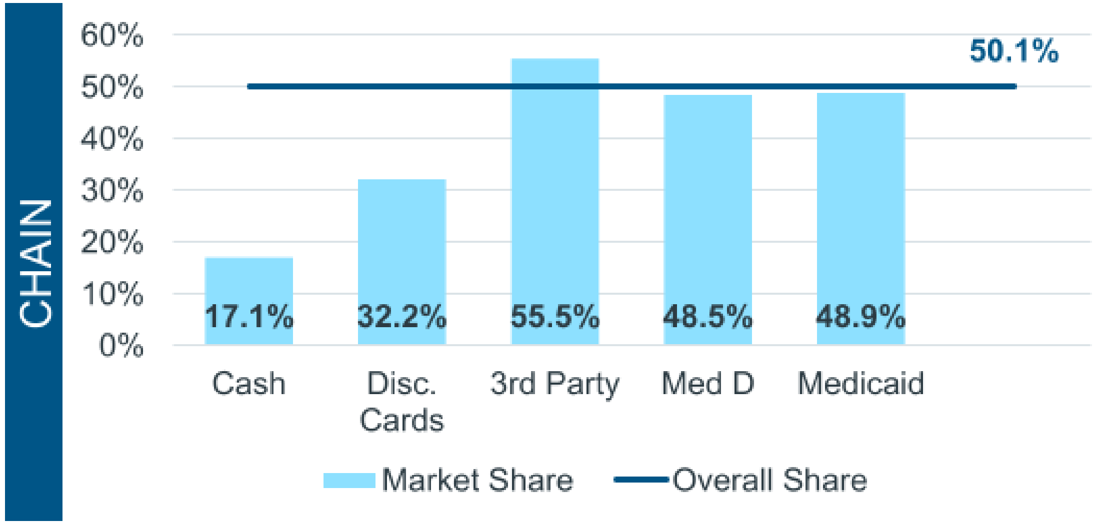
IQVIA

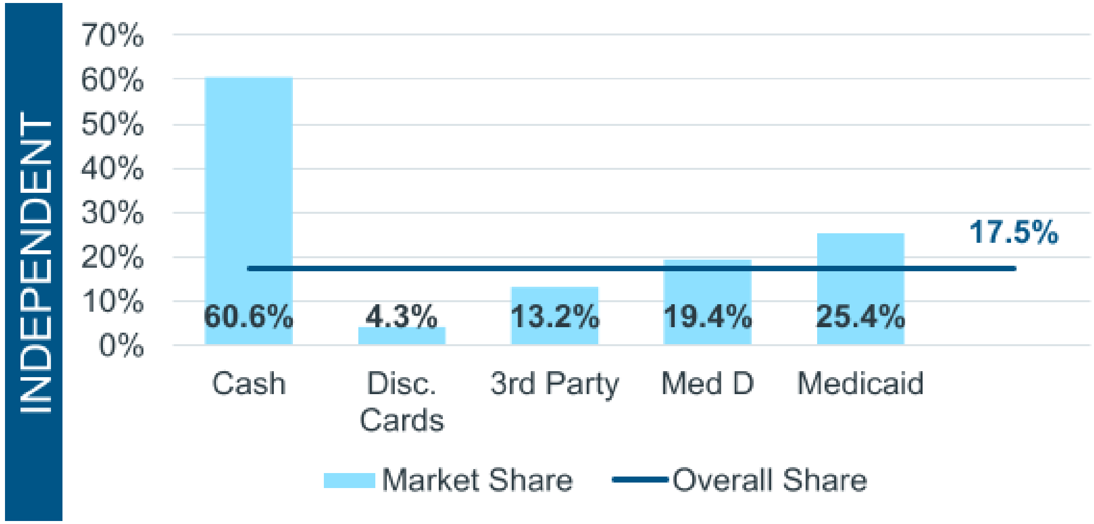
Med D was the driver across Chain, Independents, and Food while 3rd Party was the driver in Mass

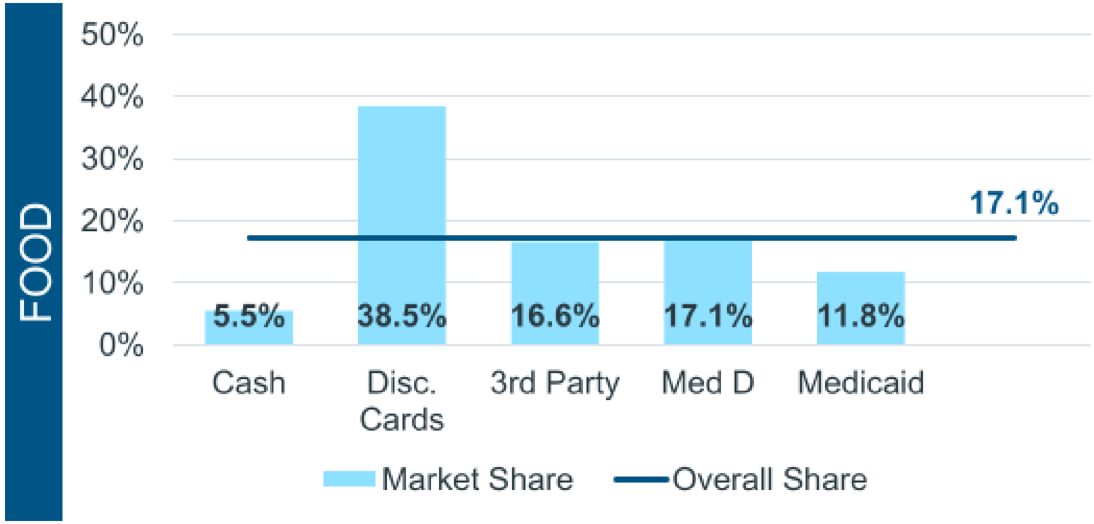
Adjusted Rxs in Millions

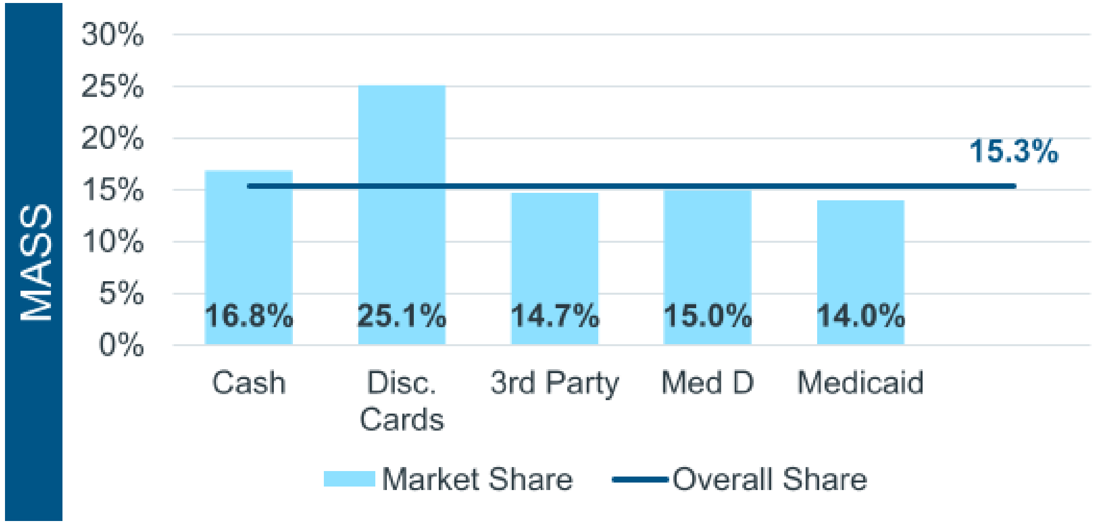


Chain over-indexed with 3rd Party, Independents with Cash, Food and Mass with Discount Cards



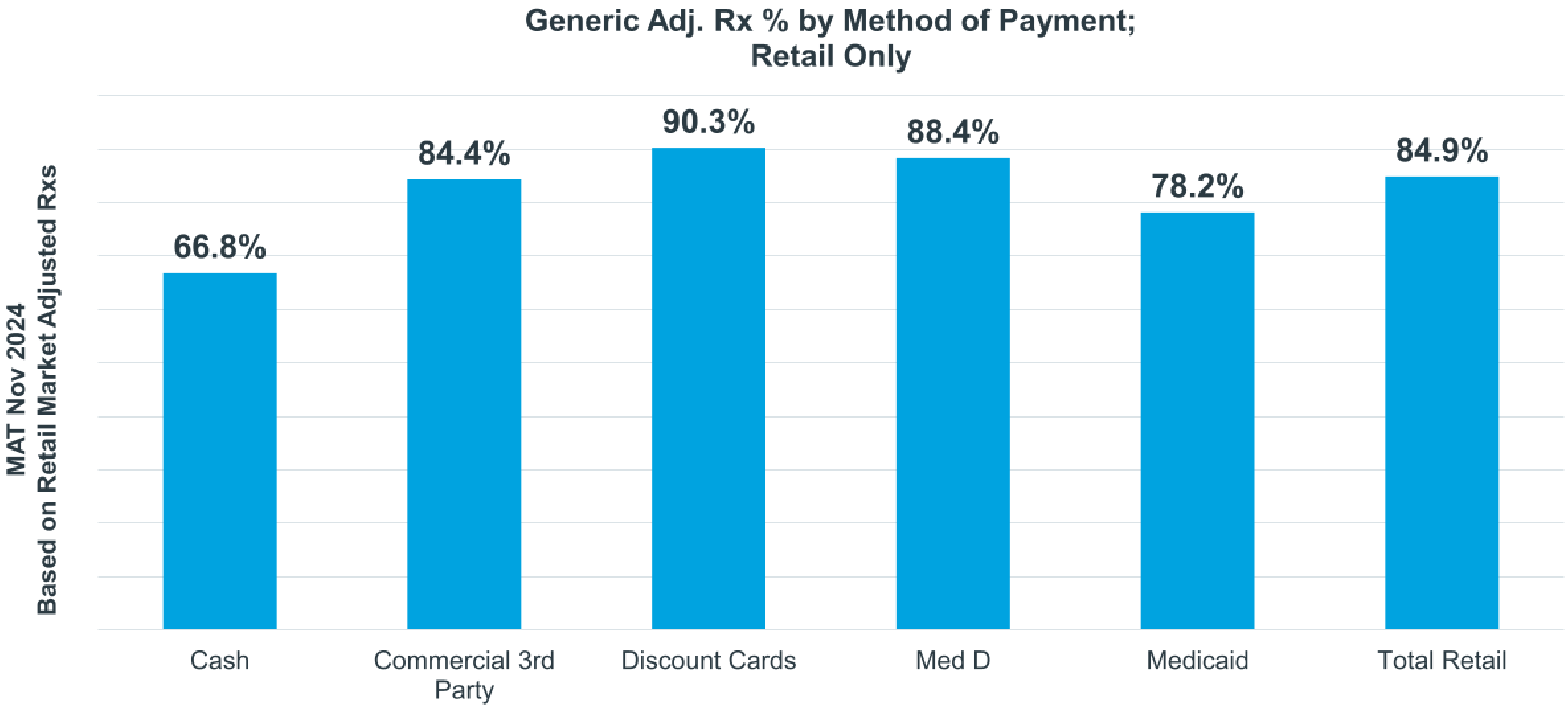






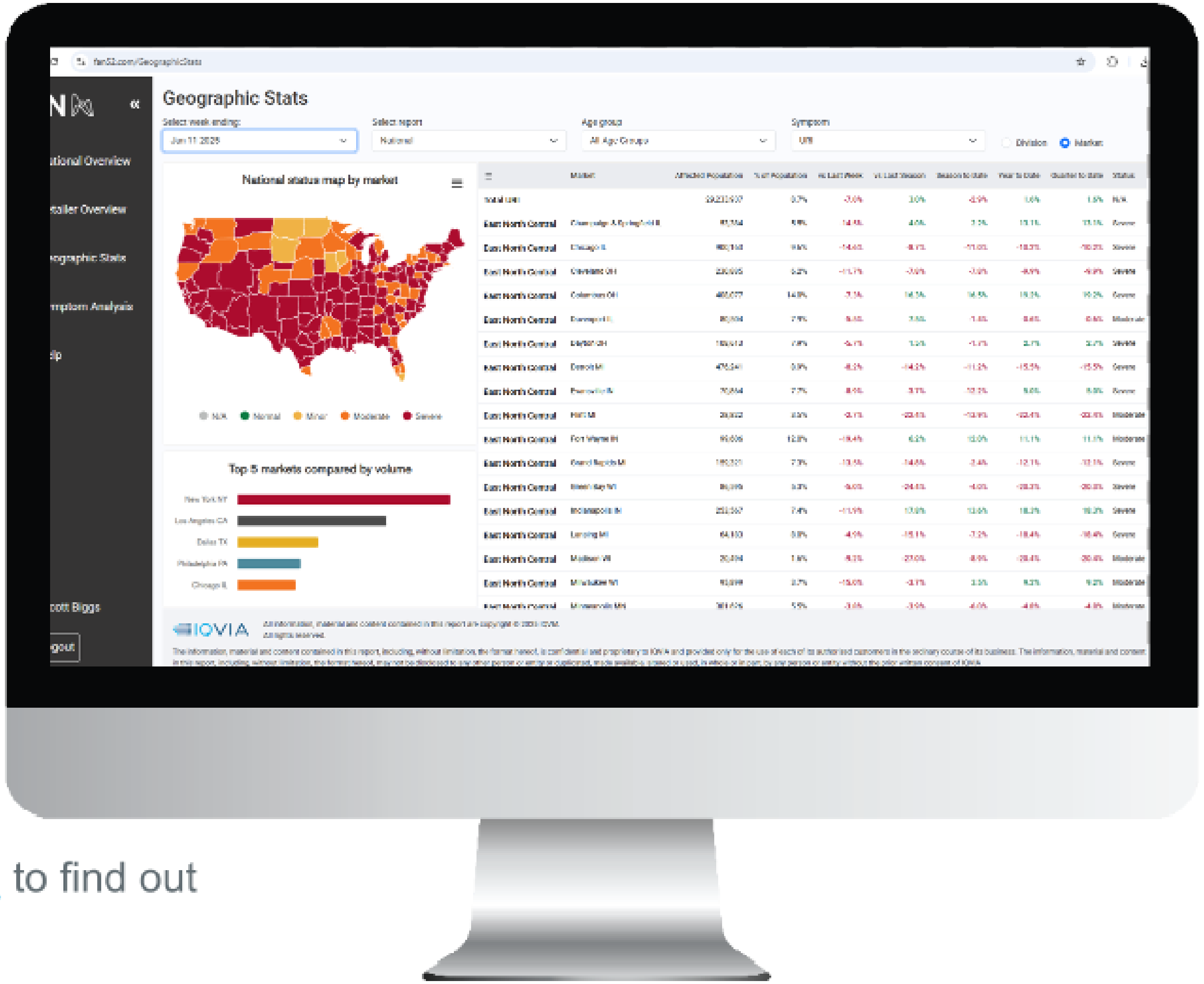
Data is based on Year to Date, November 2024

Discount Cards have the highest percentage of generic prescriptions



Cough, Cold and Flu Season and Vaccines

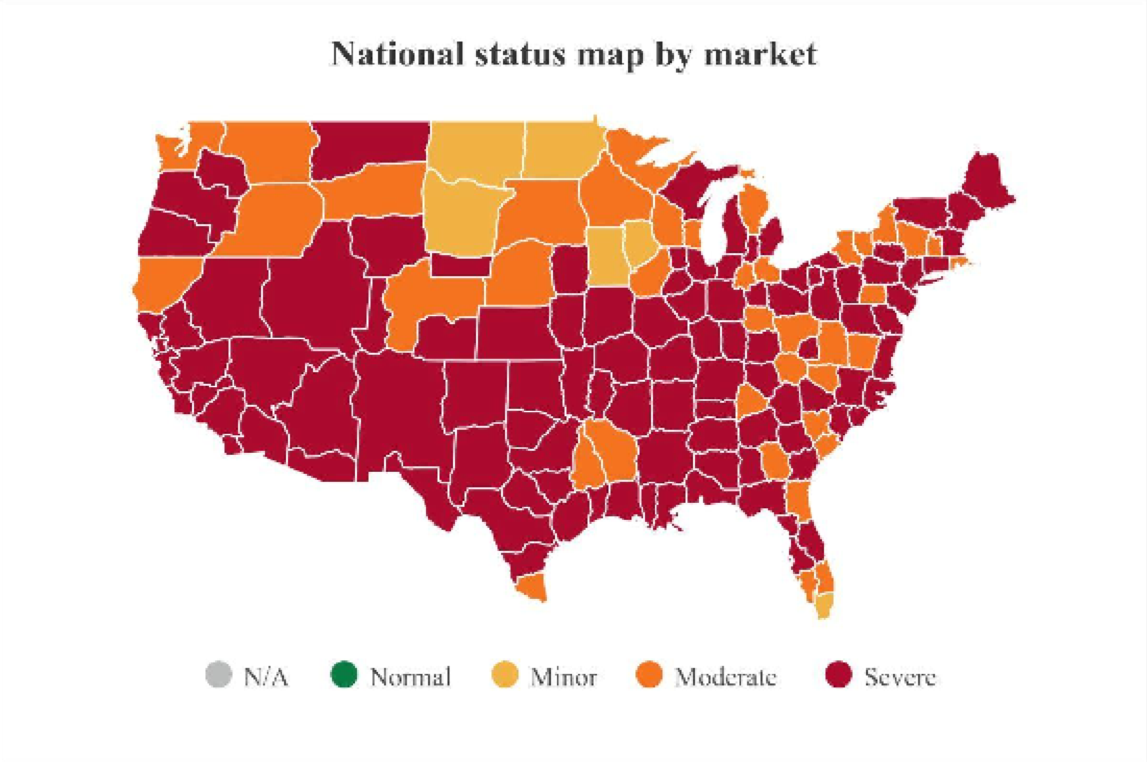
IQVIA's FAN® product underwent a complete overhaul this season with new views across the entire tool



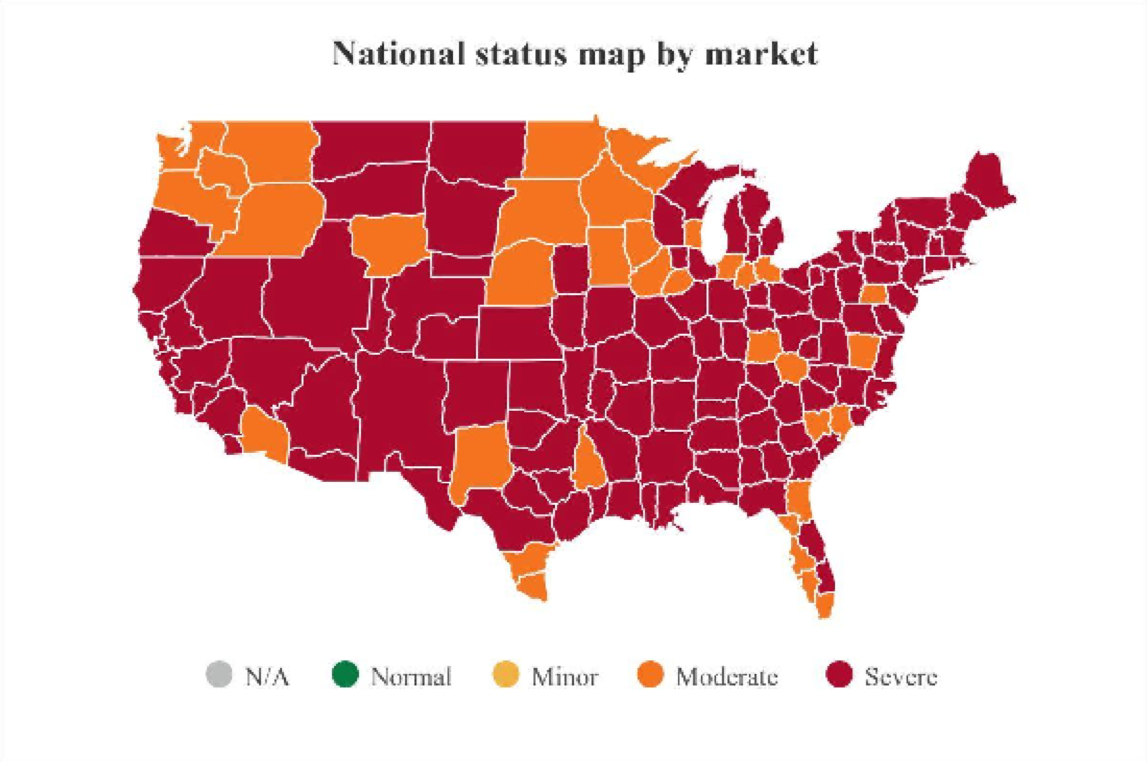
Go to www.fan52.com to find out more

While we're at the peak of the season, the heat map has more Minor and Moderate areas than a year ago

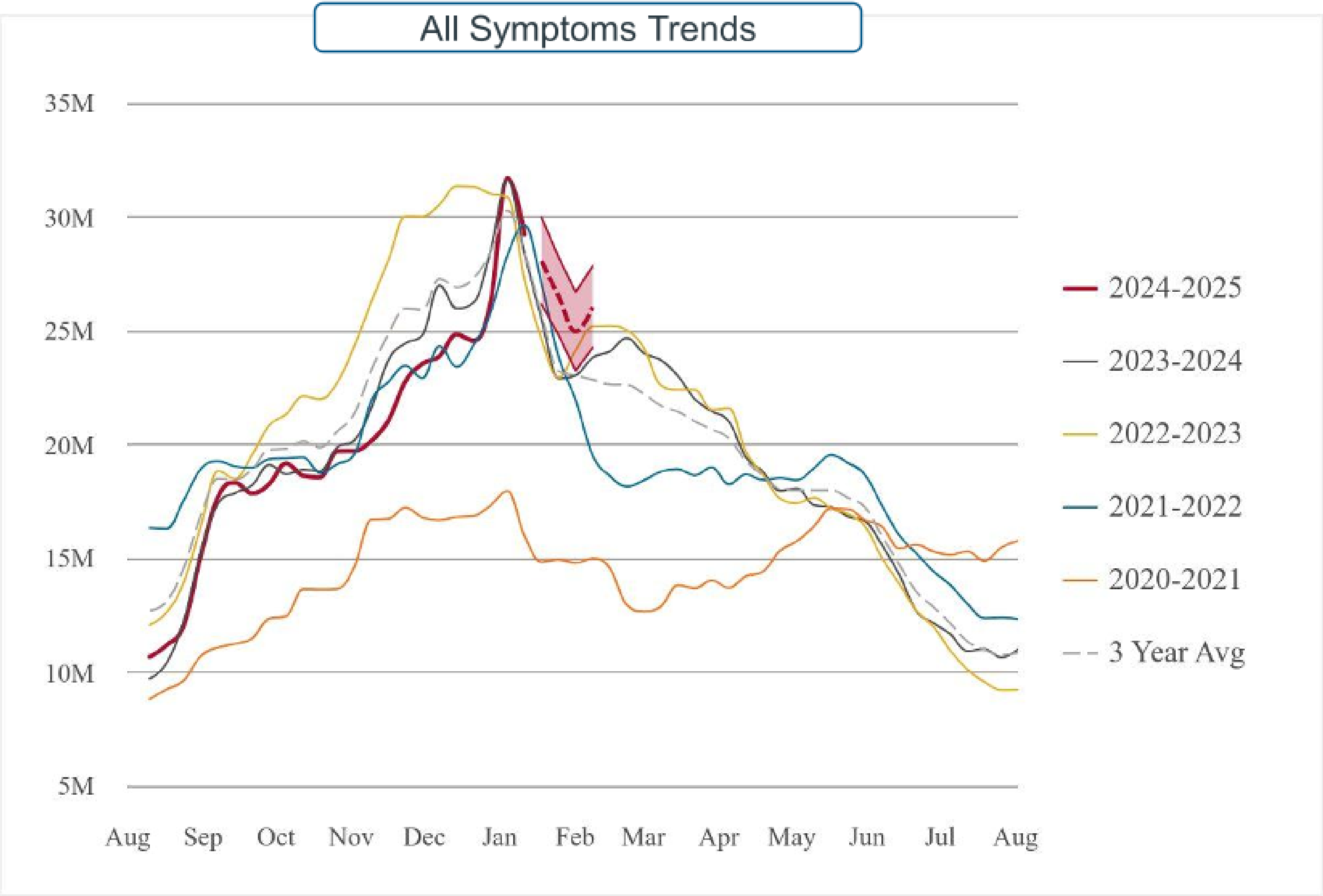
Current Season
Week Ending 1/11/25

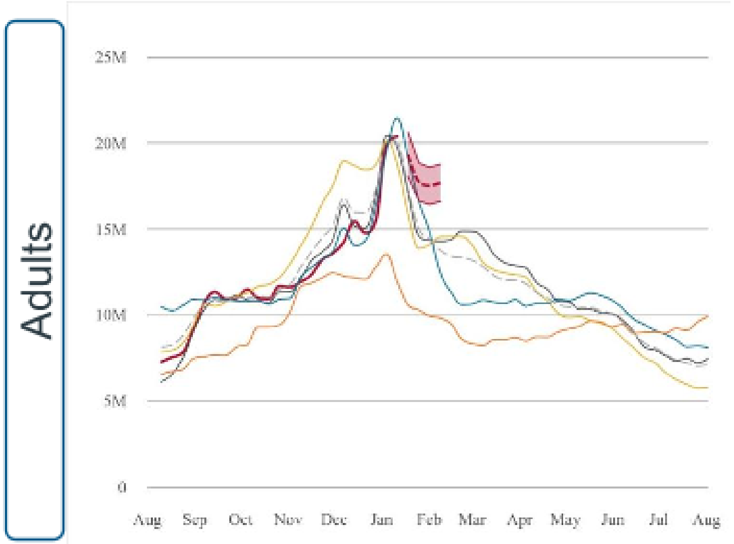


Current Week, Previous Season
Week Ending 1/13/24

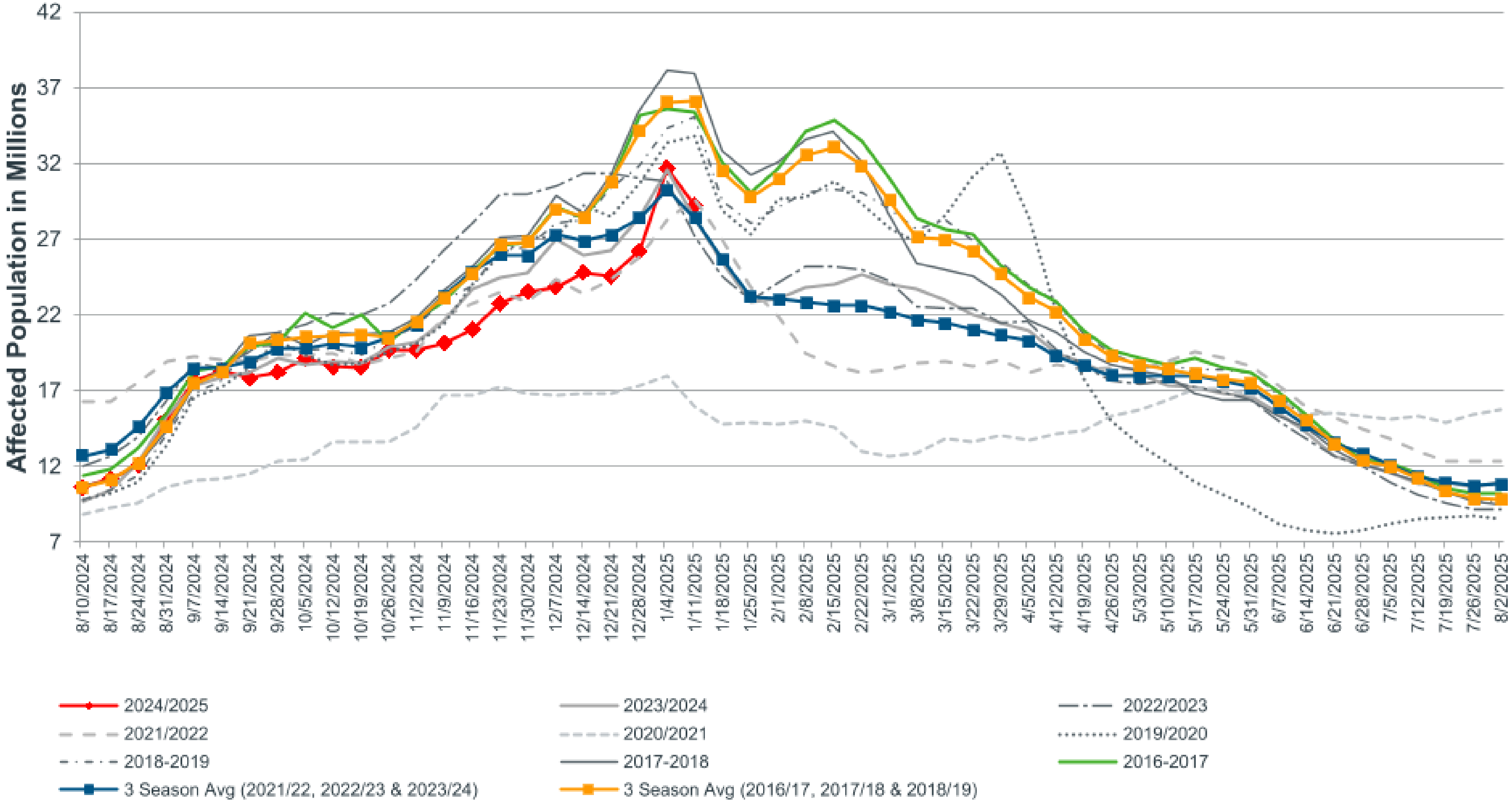


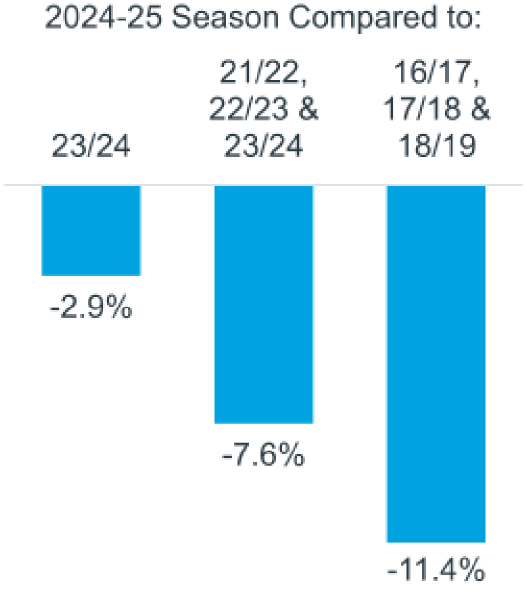
Overall FAN® indicates that we are past the first peak as pediatrics have dropped and adults are at the peak





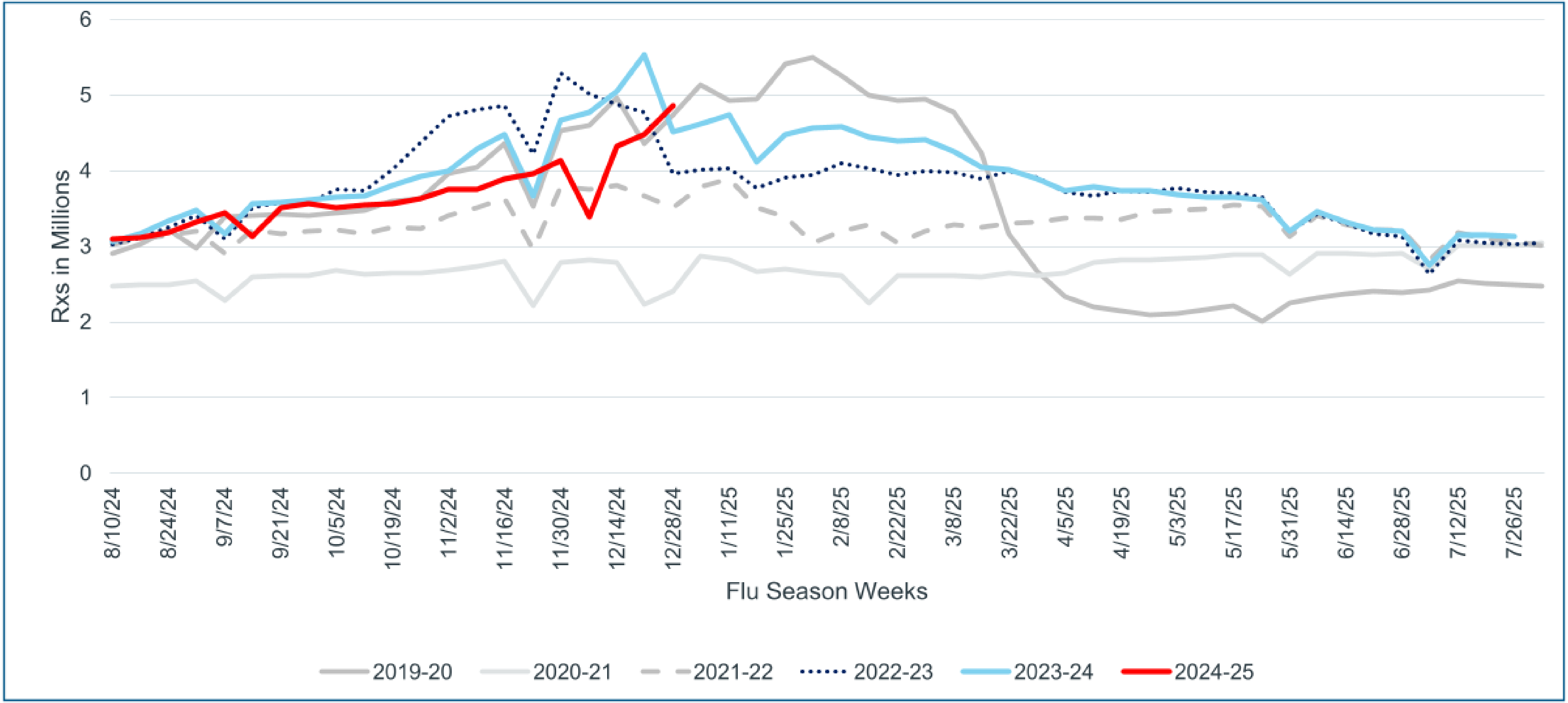
According the IQVIA's FAN® report, the current season is trending historical norms





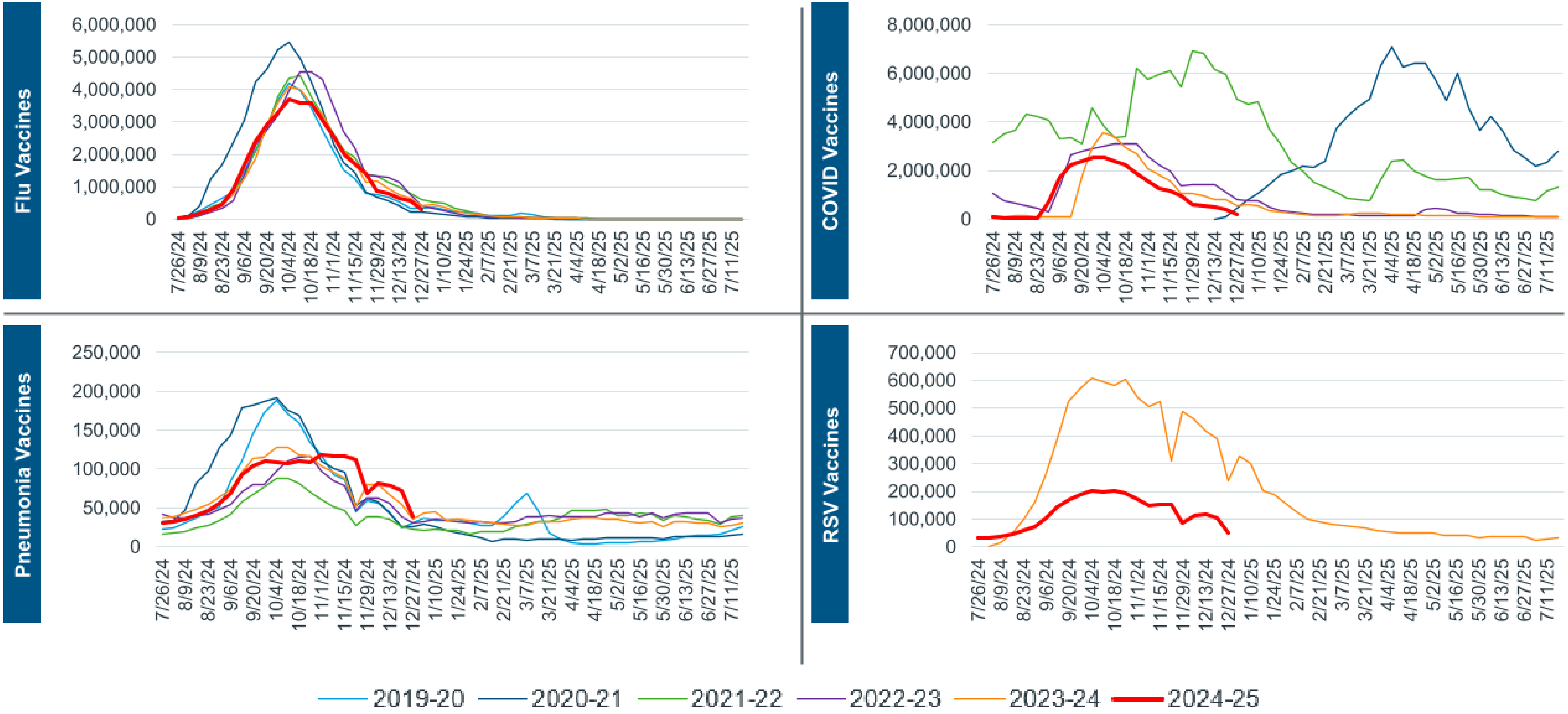
IQVIA CONSUMER HEALTH

Currently, this Cough, Cold and Flu Season's Rxs are running below last season



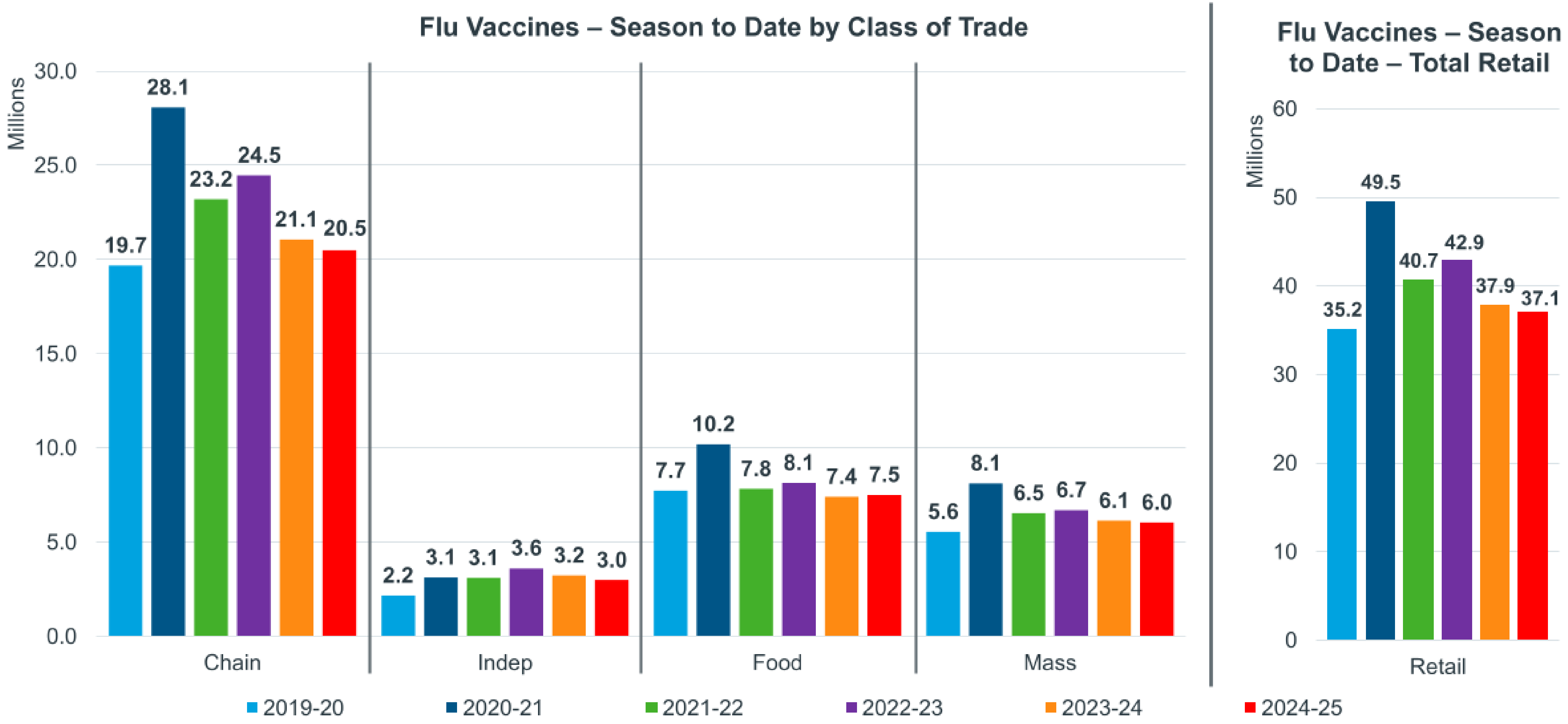
IQVIA

Flu vaccines this season are trailing behind the previous four seasons



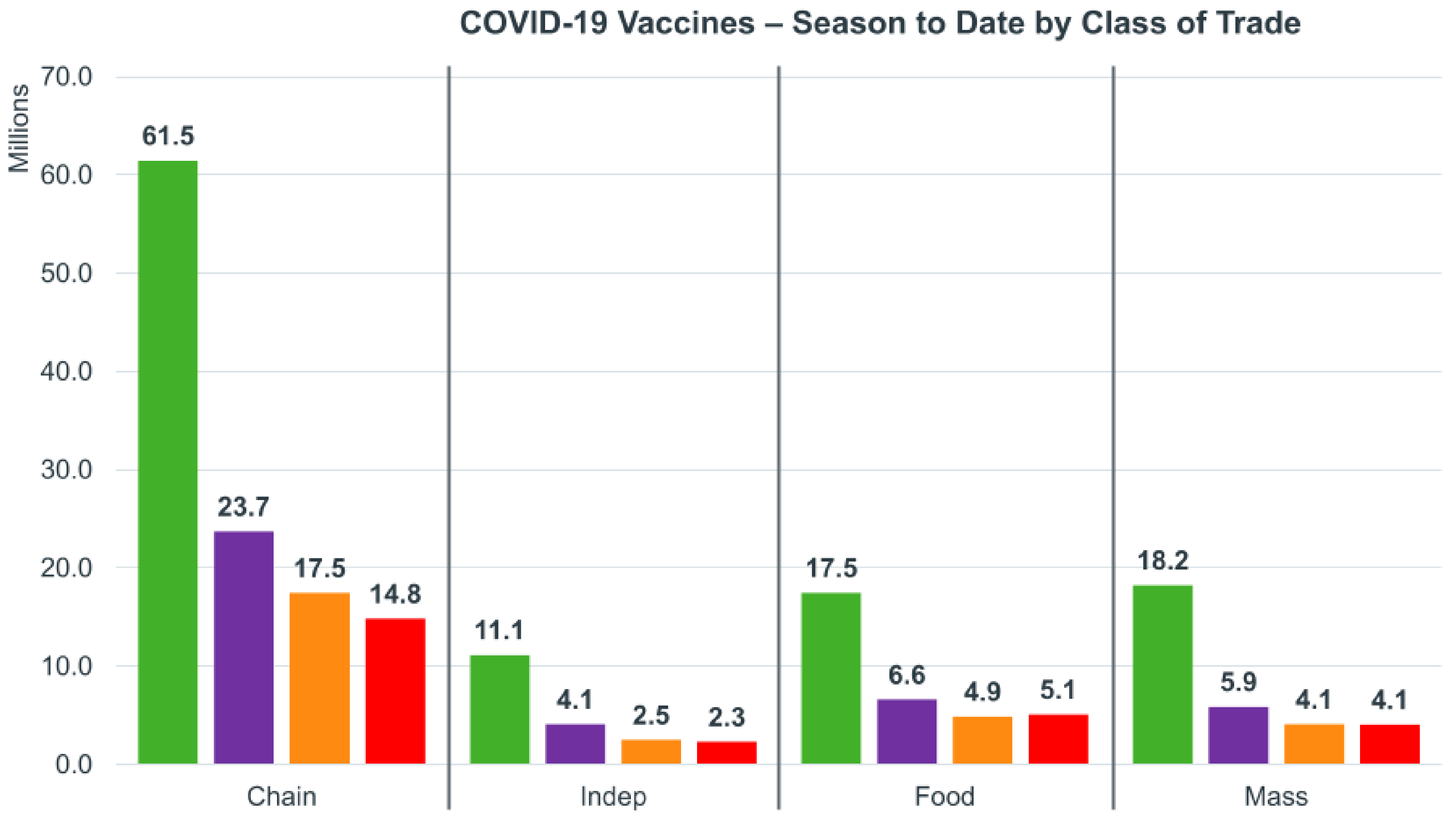
IQVIA

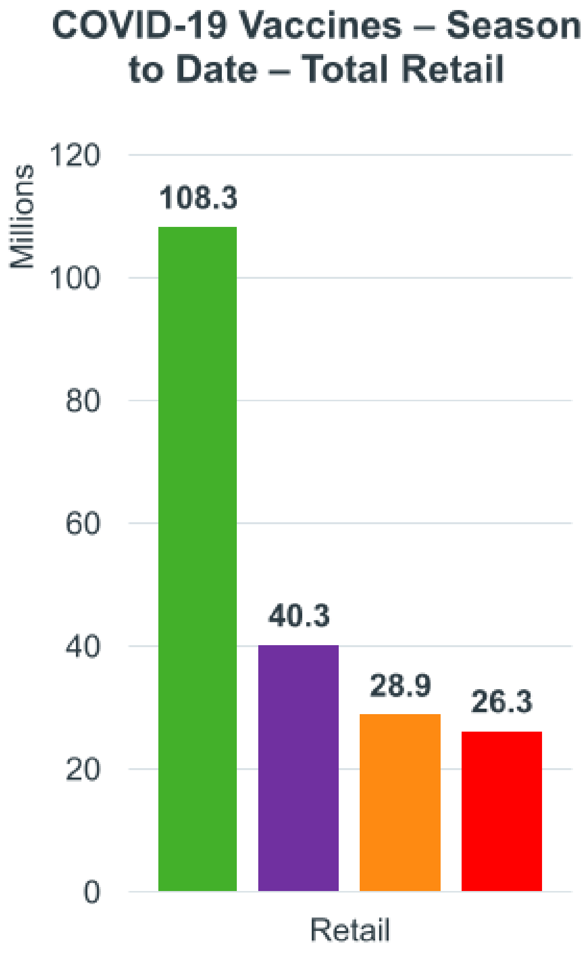
Food is the only COT outpacing last season



Season to Date defined as Week Ending 7/26/24 through Week Ending 12/27/24

COVID vaccines are trailing the previous two seasons in Retail

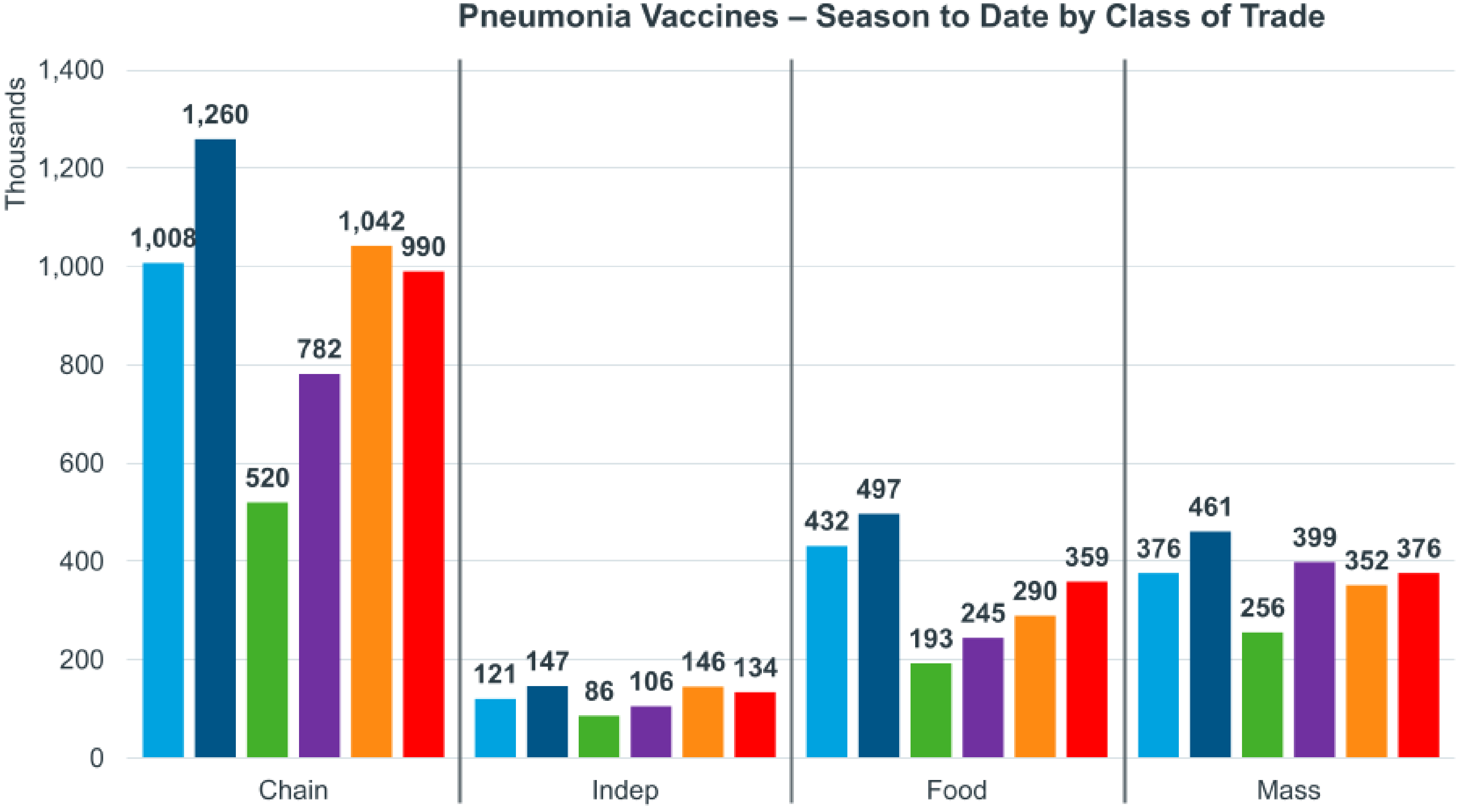


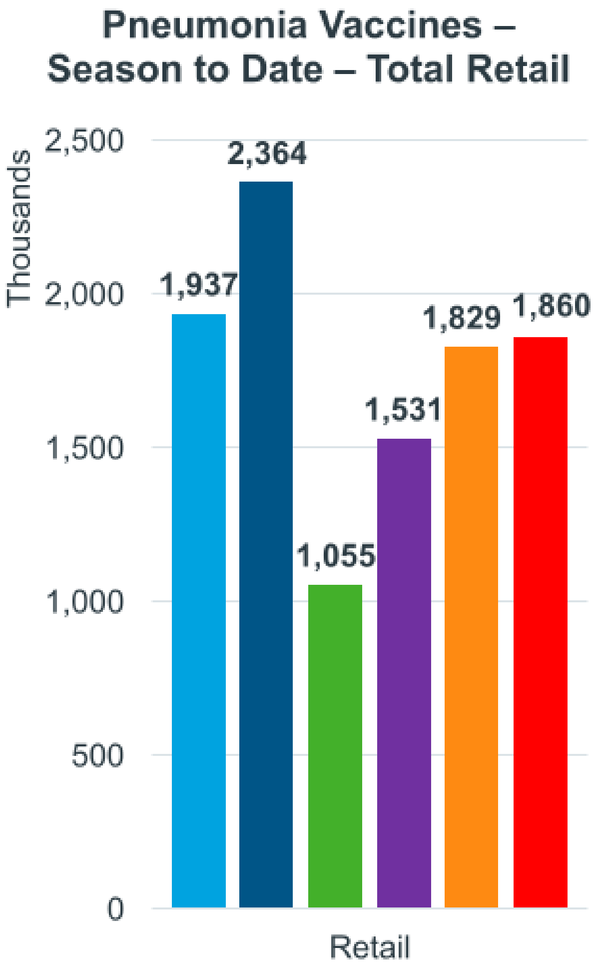


2021-22 2022-23 2023-24 2024-25

Season to Date defined as Week Ending 7/26/24 through Week Ending 12/27/24

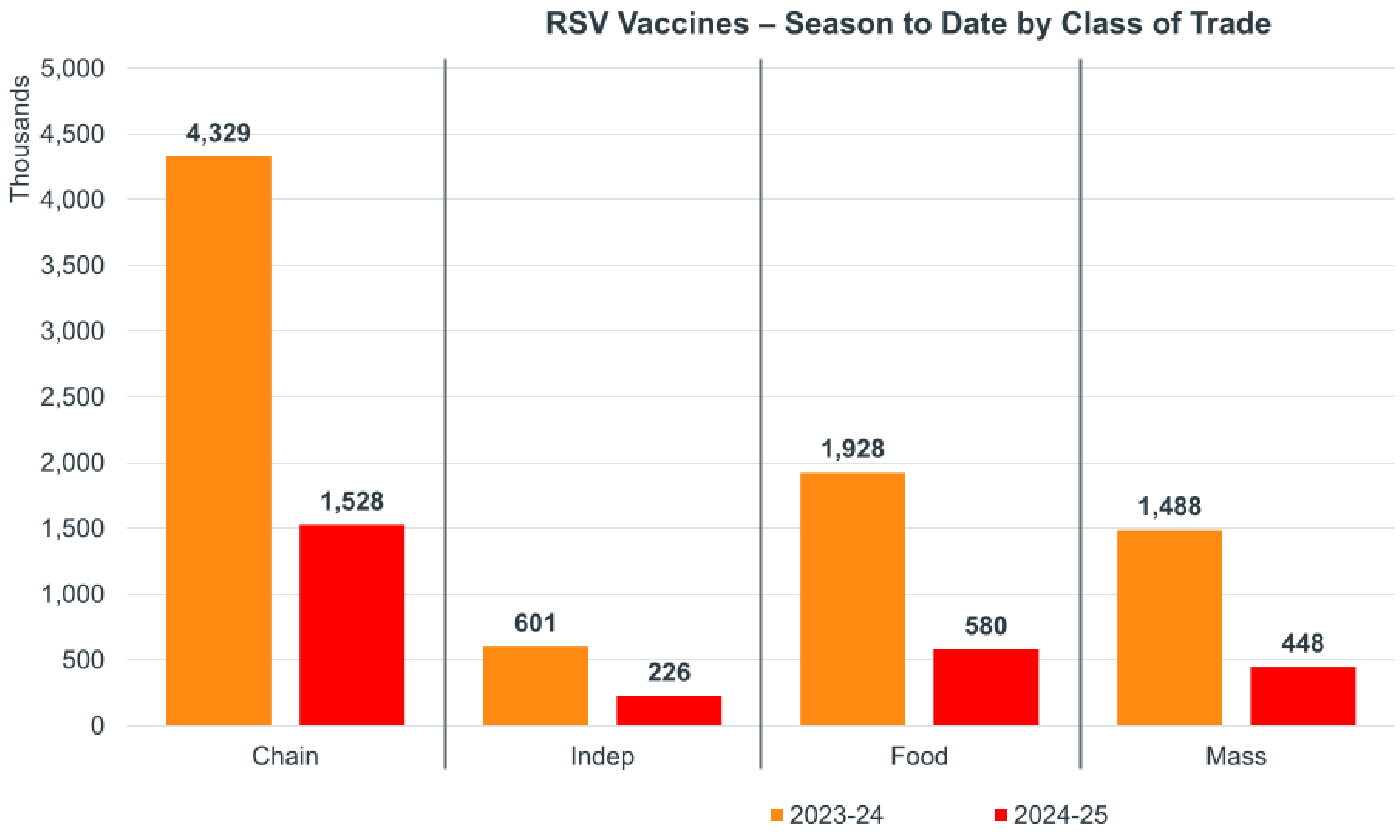
Food and Mass are outperforming the 2023-24 season with Pneumonia vaccines

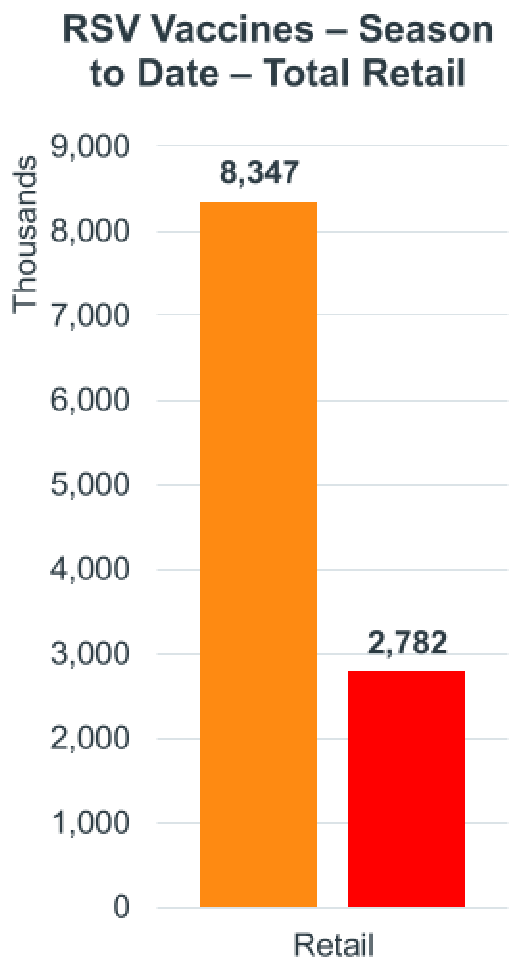




Season to Date defined as Week Ending 7/26/24 through Week Ending 12/27/24

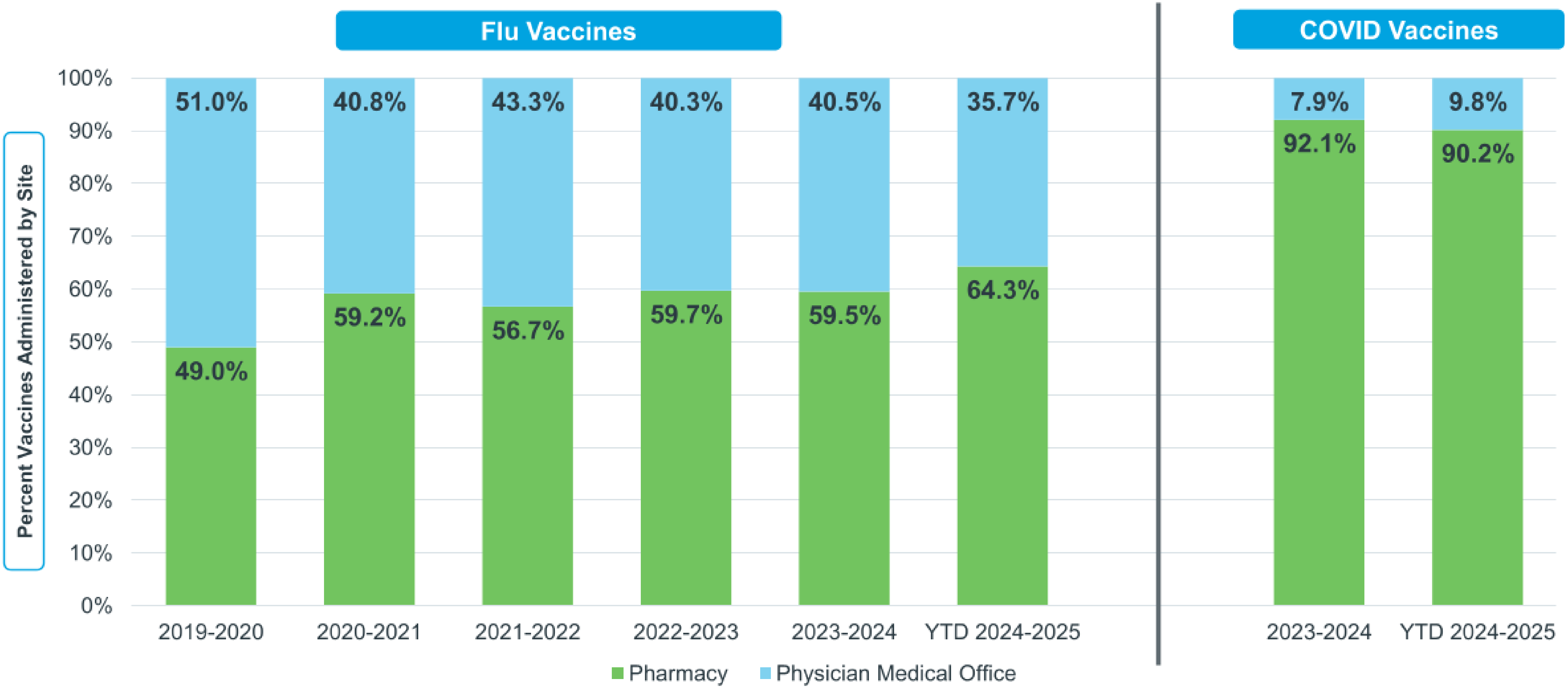
RSV vaccines are down over 66% versus last year





Season to Date defined as Week Ending 7/26/24 through Week Ending 12/27/24

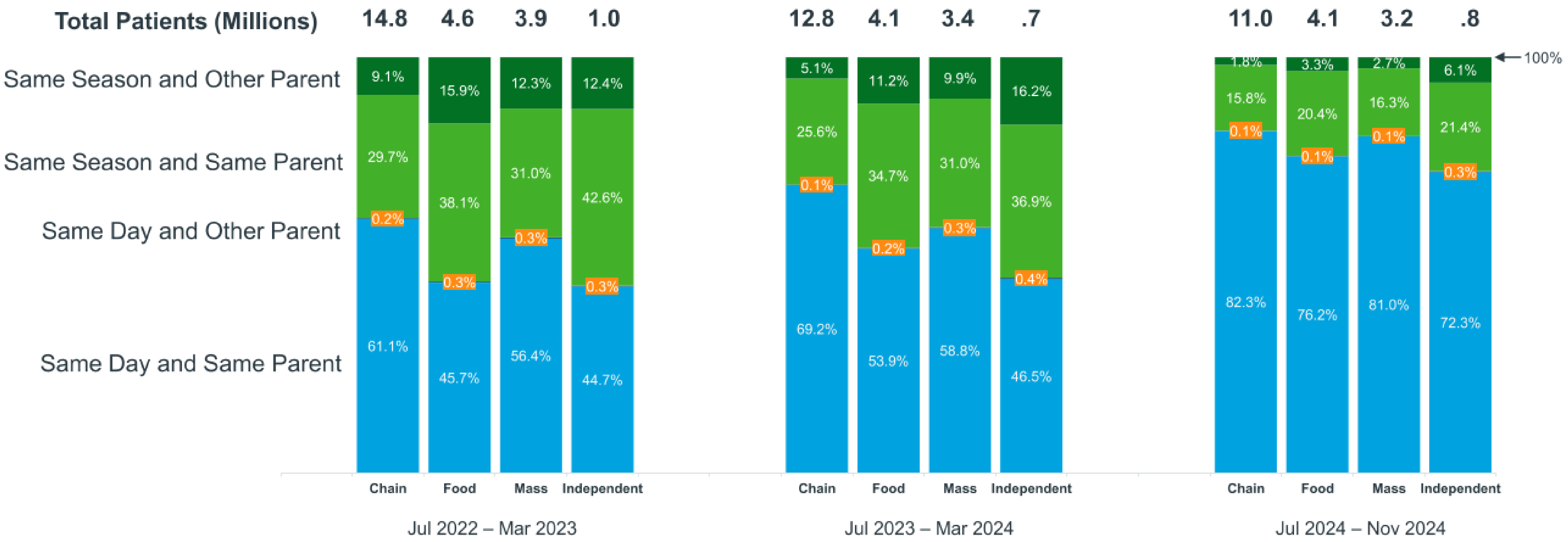
64% of flu vaccines are administered at a pharmacy while over 90% of COVID vaccines are administered at a pharmacy



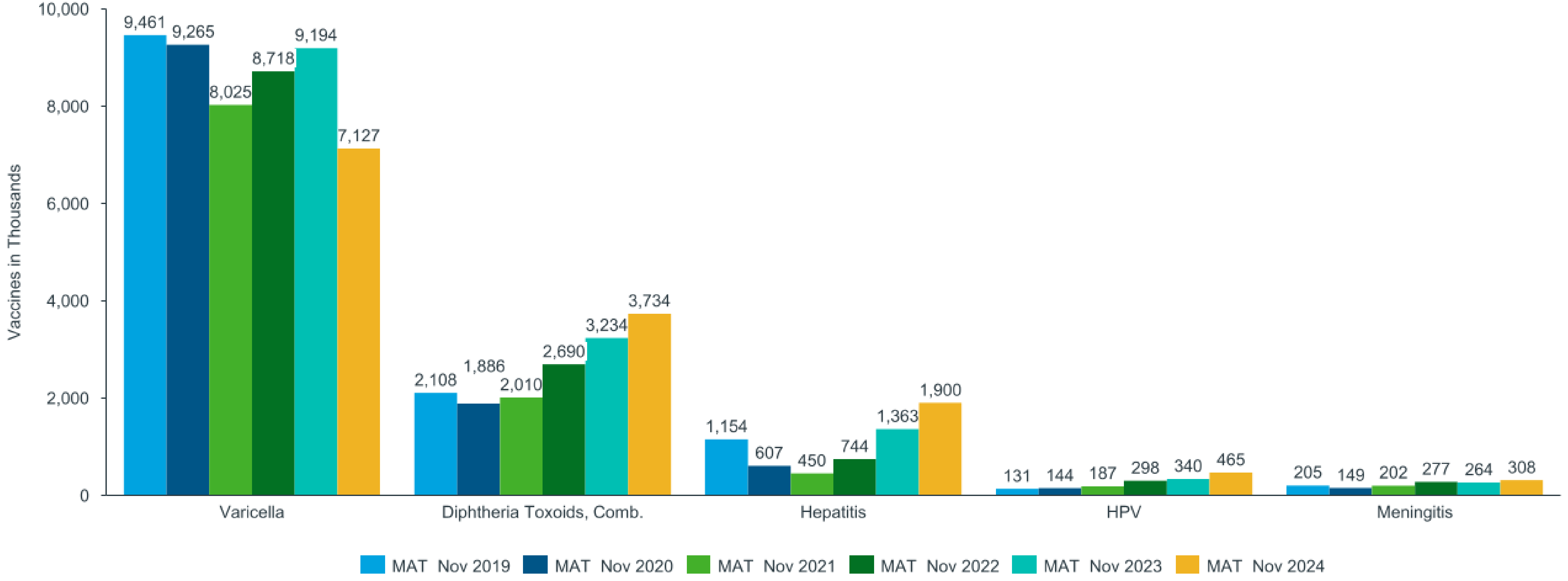
Source: IQVIA: Government Solutions. https://www.cdc.gov/flu/fluvaxview/dashboard/vaccination-administered.html through 11-30-2024, and COVID-19 Vaccinations Administered in Pharmacies and Medical Offices*, Adults 18 Years and Older, United States | COVIDVaxView | CDC sourced 1-8-2025.

In the current season, most patients who receive both Flu and COVID are receiving them on the same day at the same location

Patients getting both Flu and COVID Vaccines During Flu Season



With the exception of Varicella, all other vaccinations at Retail showed YoY growth



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GLP-1s

The GLP-1 category of drugs is impacting behind and in front of the pharmacy counter

KFF Health Tracking Poll May 2024: The Public's Use and Views of GLP-1 Drugs

- **1** in **8** adults say they've taken a GLP-1 agonist
- **6%** say they are currently taking a GLP-1
- **32%** of adults say they have heard "a lot" about these drugs, up from **19%** in July 2023
- **62%** of adults who have taken GLP-1 drugs say they took them to treat a chronic condition including diabetes or heart disease
- **54%** of all adults who have taken GLP-1 drugs say it was difficult to afford the cost, including **22%** who say it was "very difficult"

Source: https://www.kff.org/health-costs/poll-finding/kff-health-tracking-poll-may-2024-the-publics-use-and-views-of-glp-1-drugs/

grocerydoppio's latest report continued to show how GLP-1s are impacting grocery shopping

Source: grocerydoppio's 2024 Digital Grocery Takeaways, December 30, 2024

97% of households report their spending on groceries has been reduced after taking a GLP-1

-11% The amount of reduction in average grocery spend

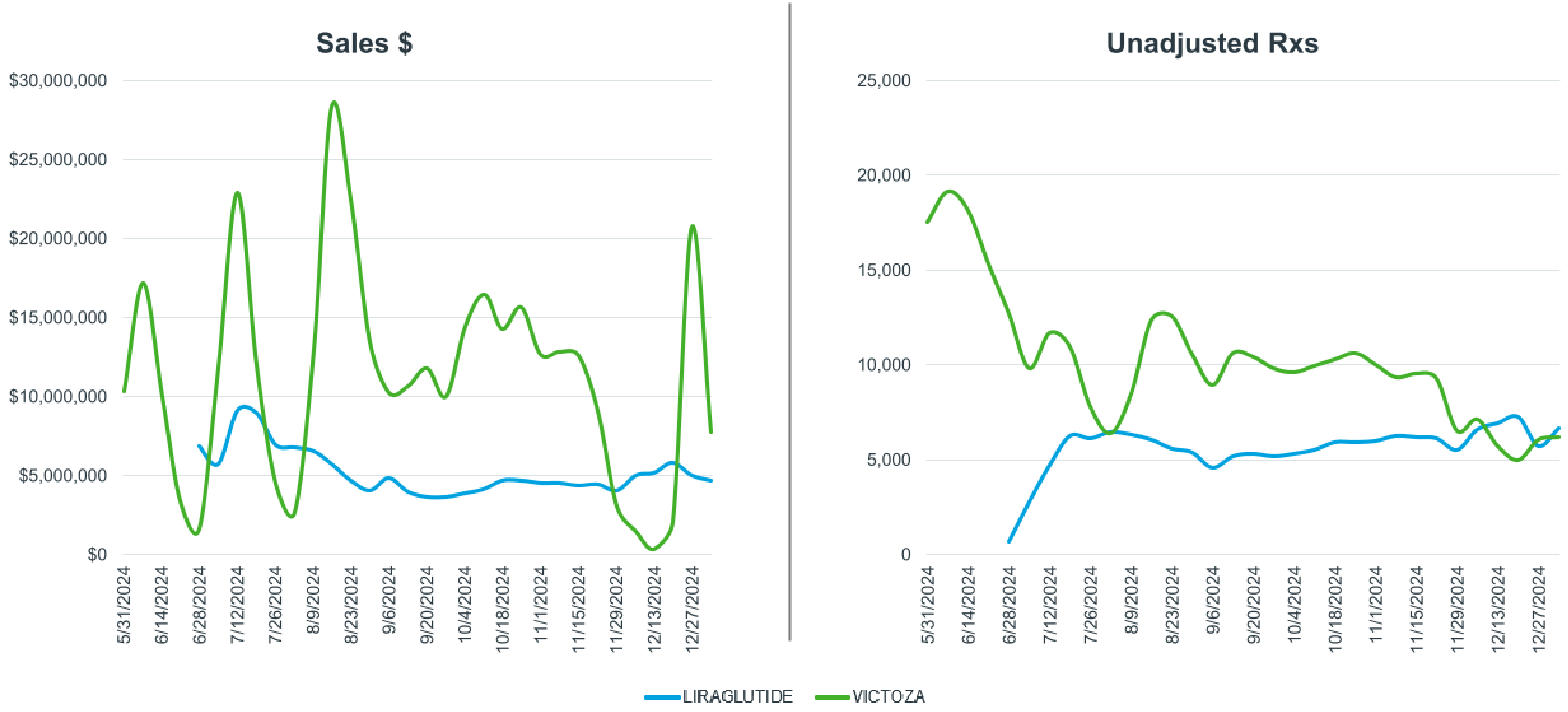
Biggest category winners:

- Lean protein
- Meal replacements
- Healthy snacks

Biggest category losers:

- Snacks and confectionary
- Prepared baked good
- Soda/Sugary Beverages

Liraglutide prescriptions appear to be gaining slight momentum as we approach 2025



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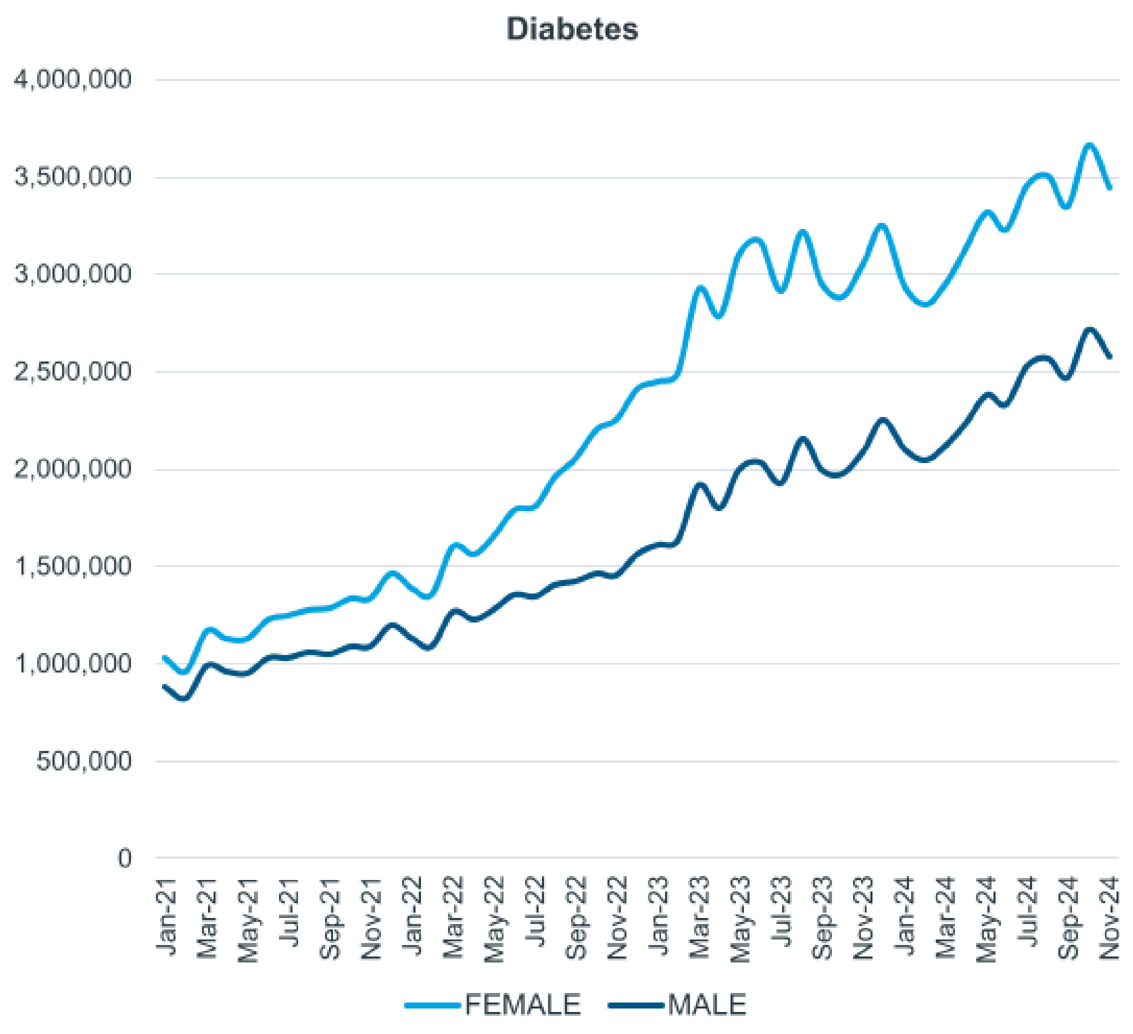
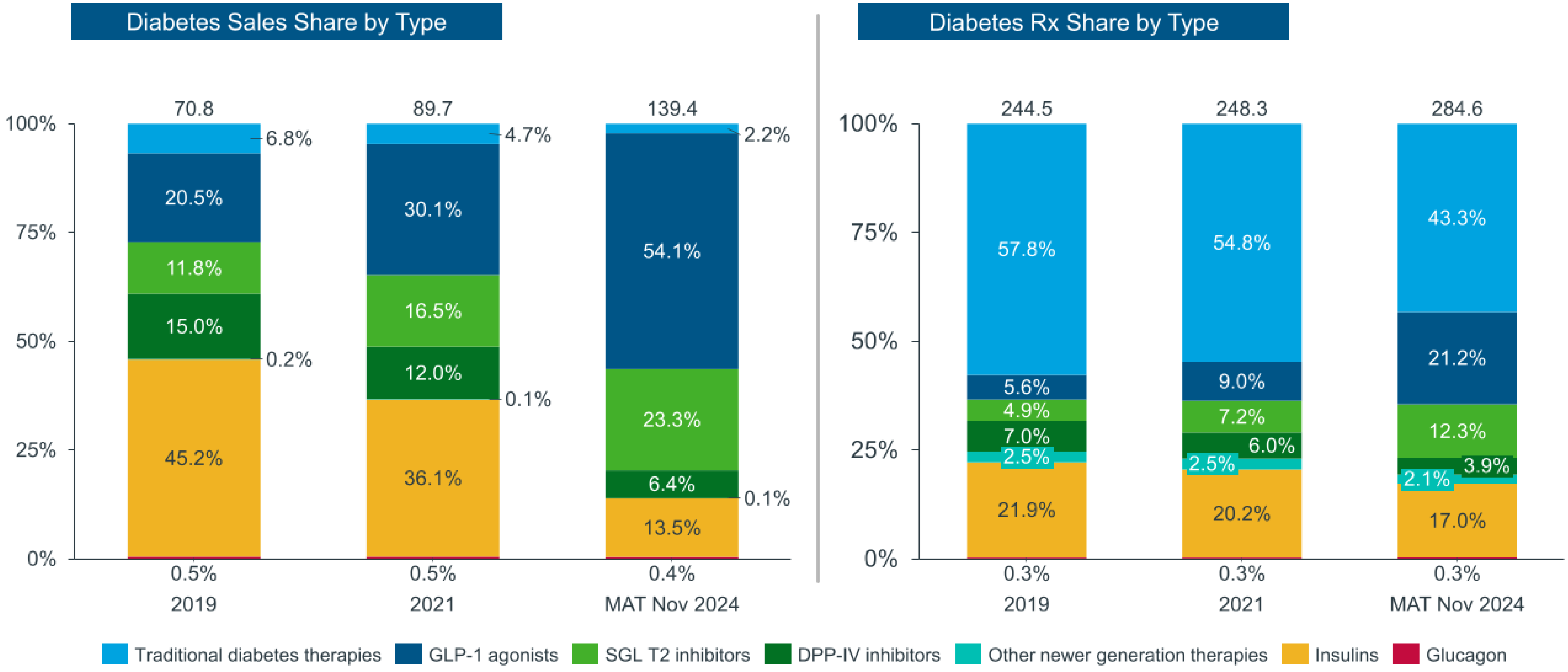
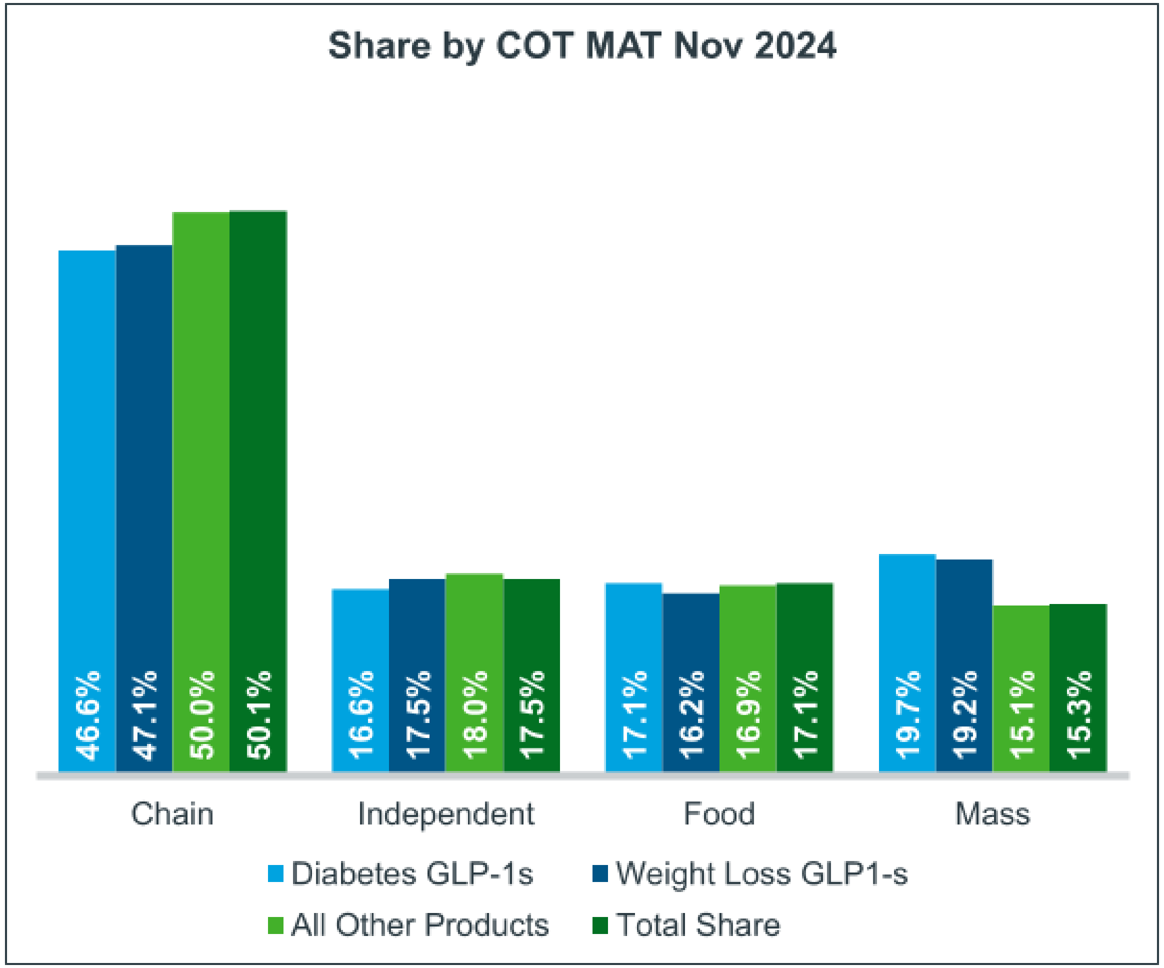
Women held a higher proportion of Weight Loss GLP-1 prescriptions in comparison to diabetes GLP-1 prescriptions

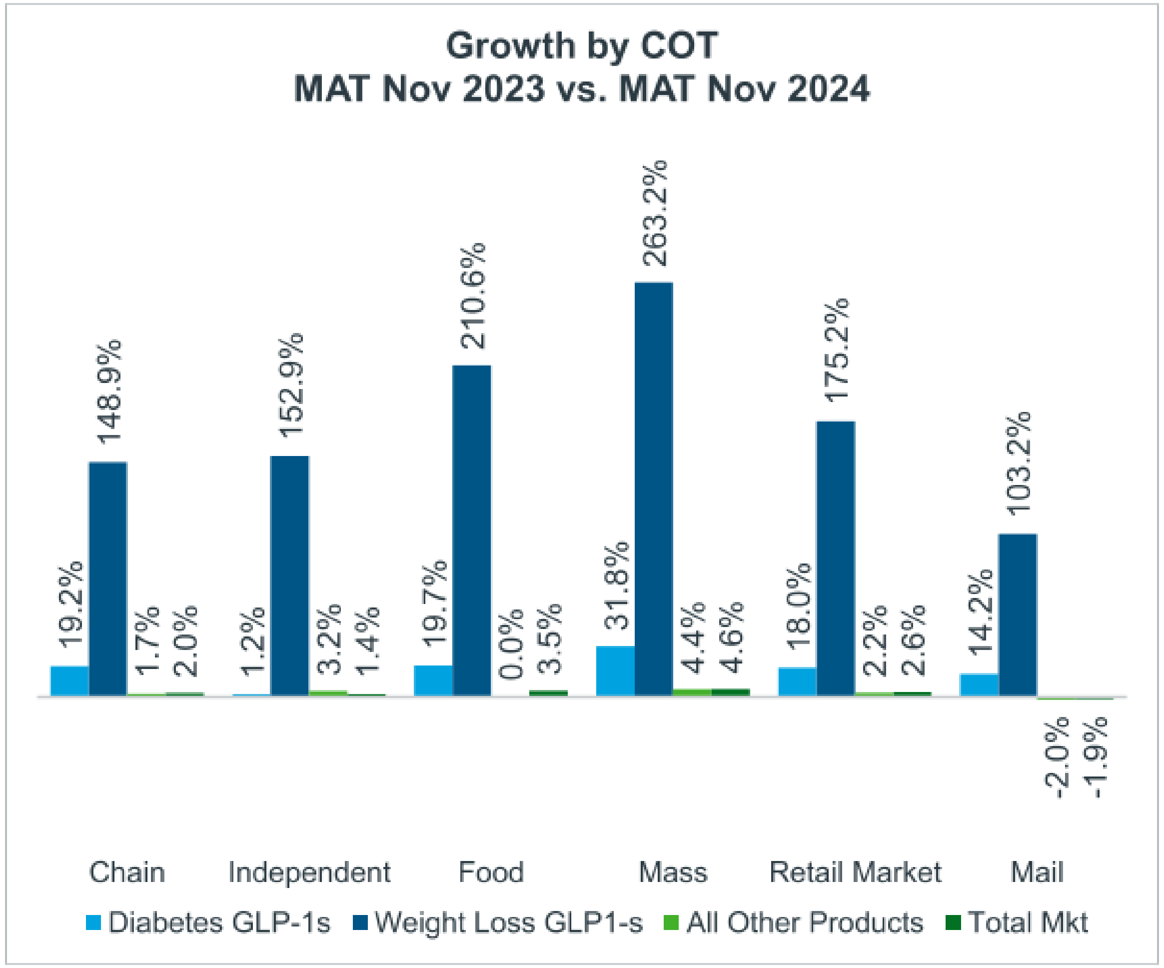


GLP-1 agonists made up over 54% of sales in the diabetes market while insulins sales share dropped to 13.5%



Food and Mass saw highest year over year Weight Loss GLP-1 prescription growth

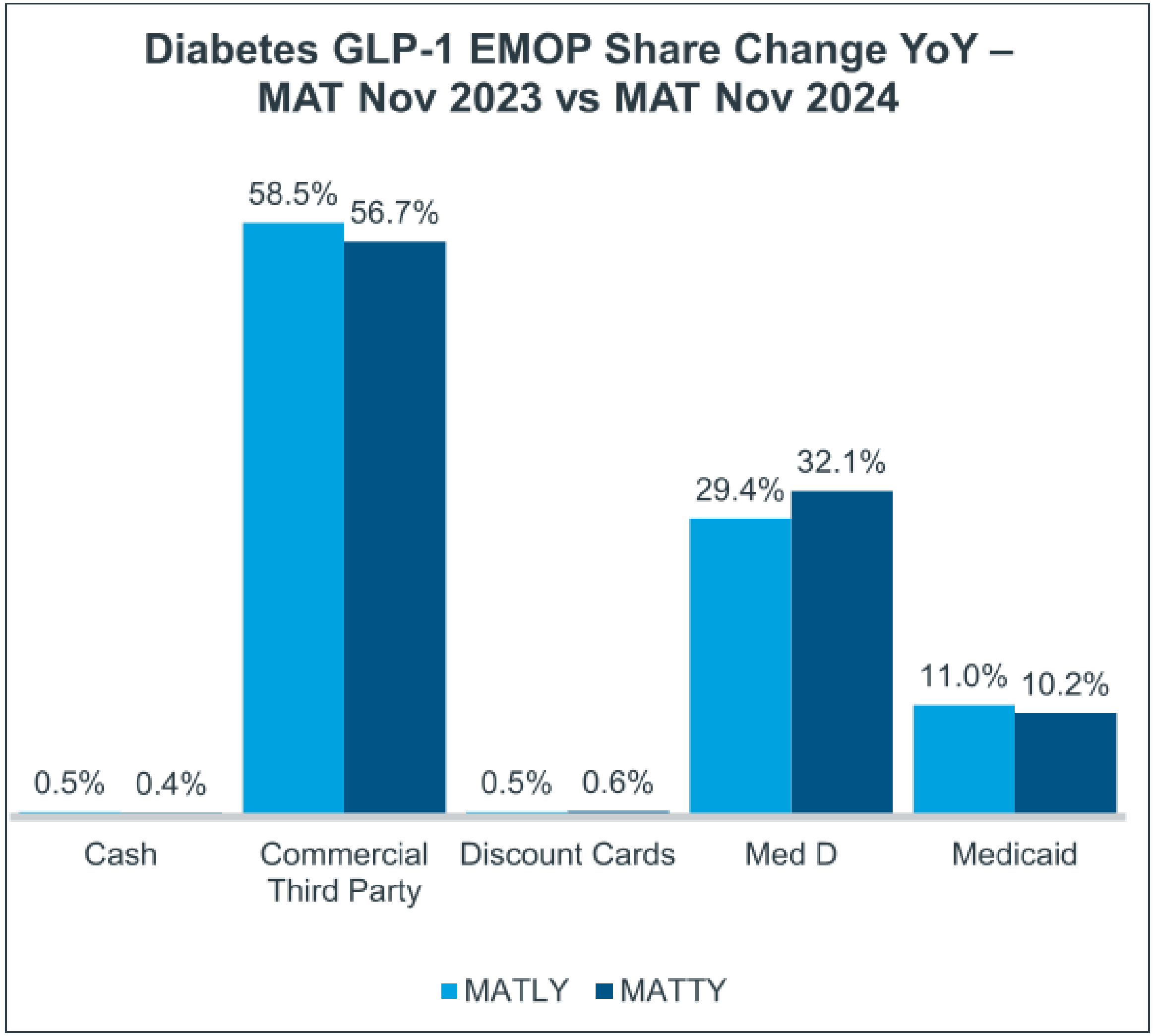


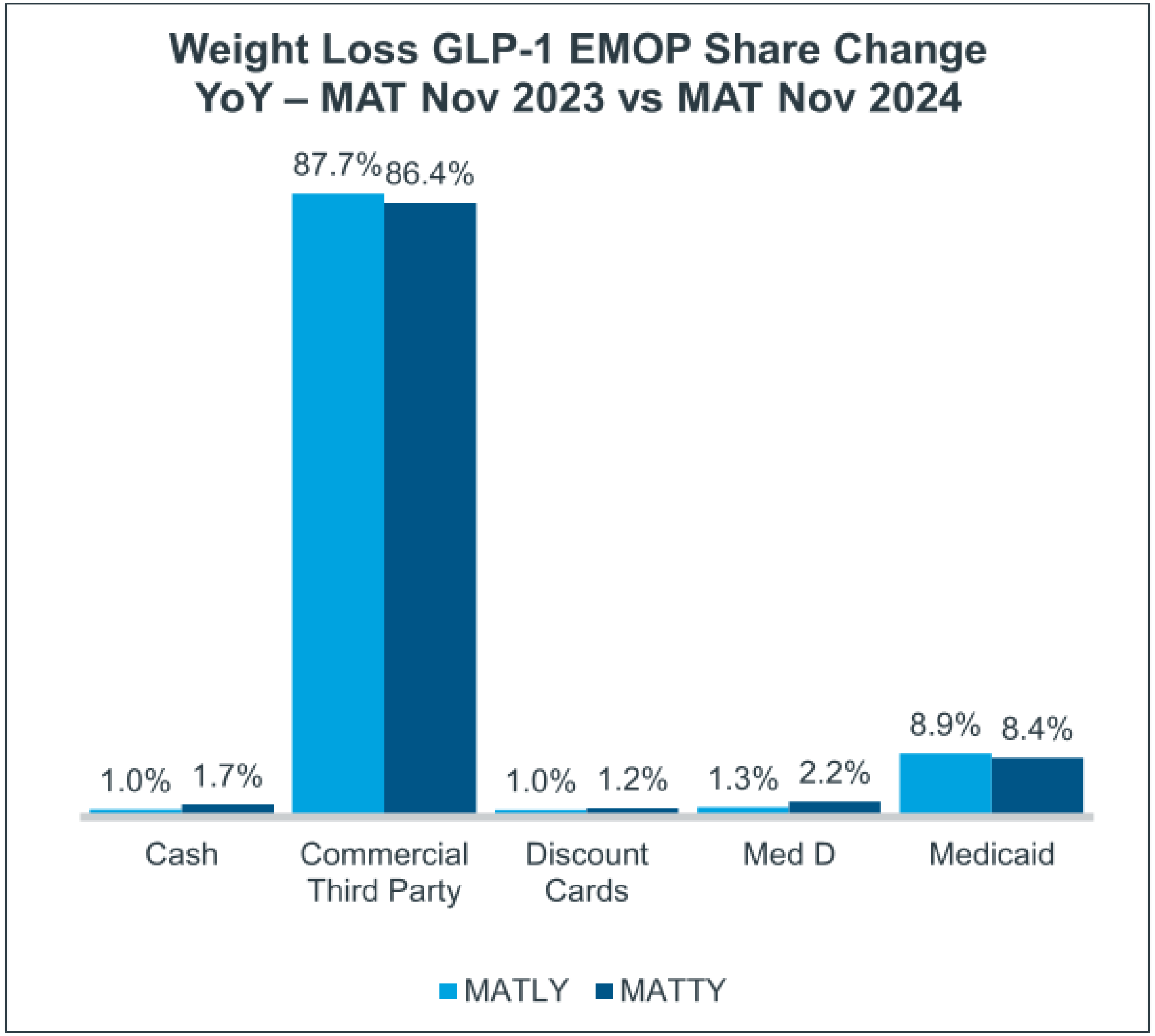


Charts based on Adjusted Rxs; Includes all Rxs, OTCS, and OTC Insulins

Retail Only

Cash, Discount Cards, and Med D gained share in Weight Loss GLP-1s





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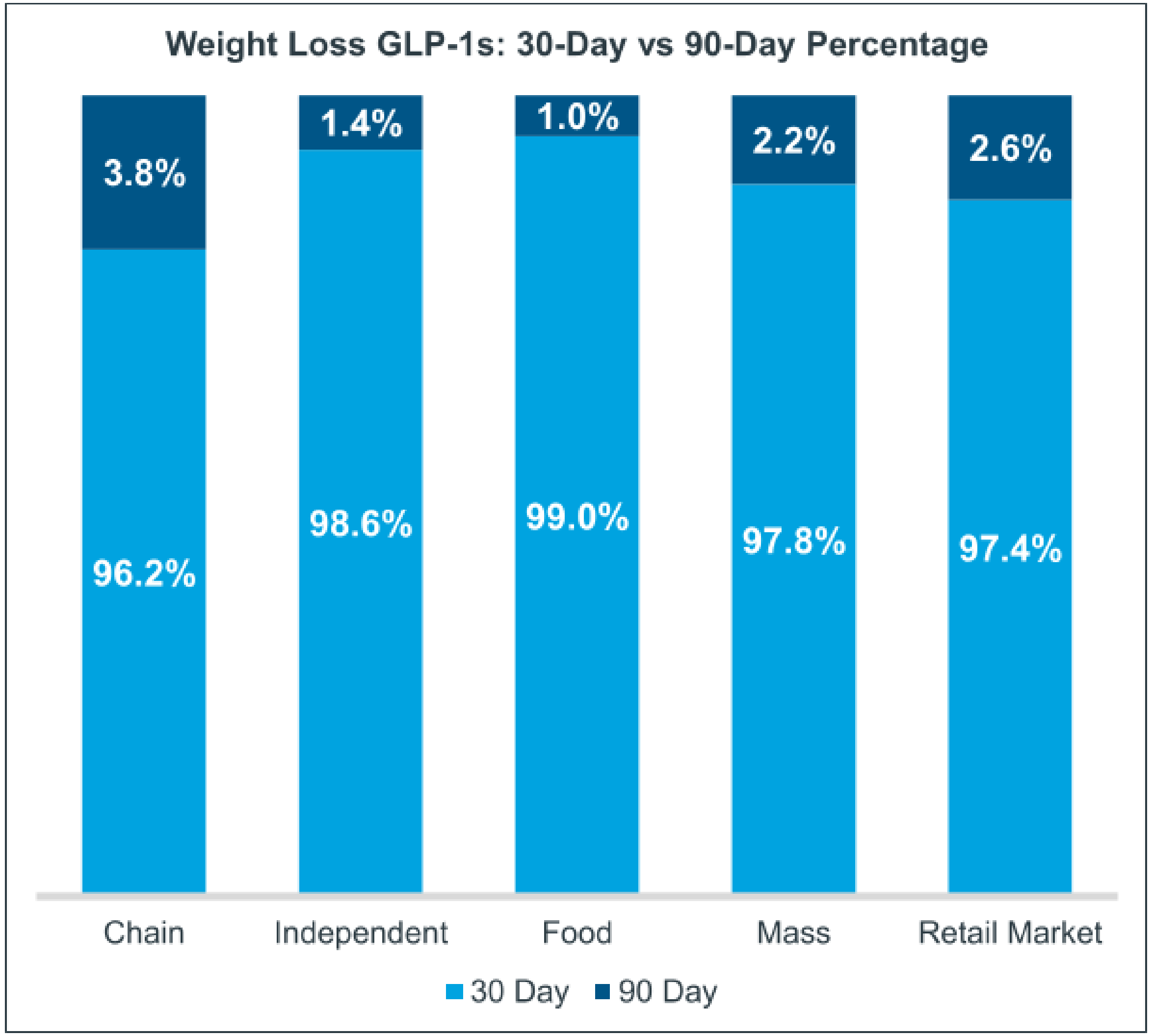
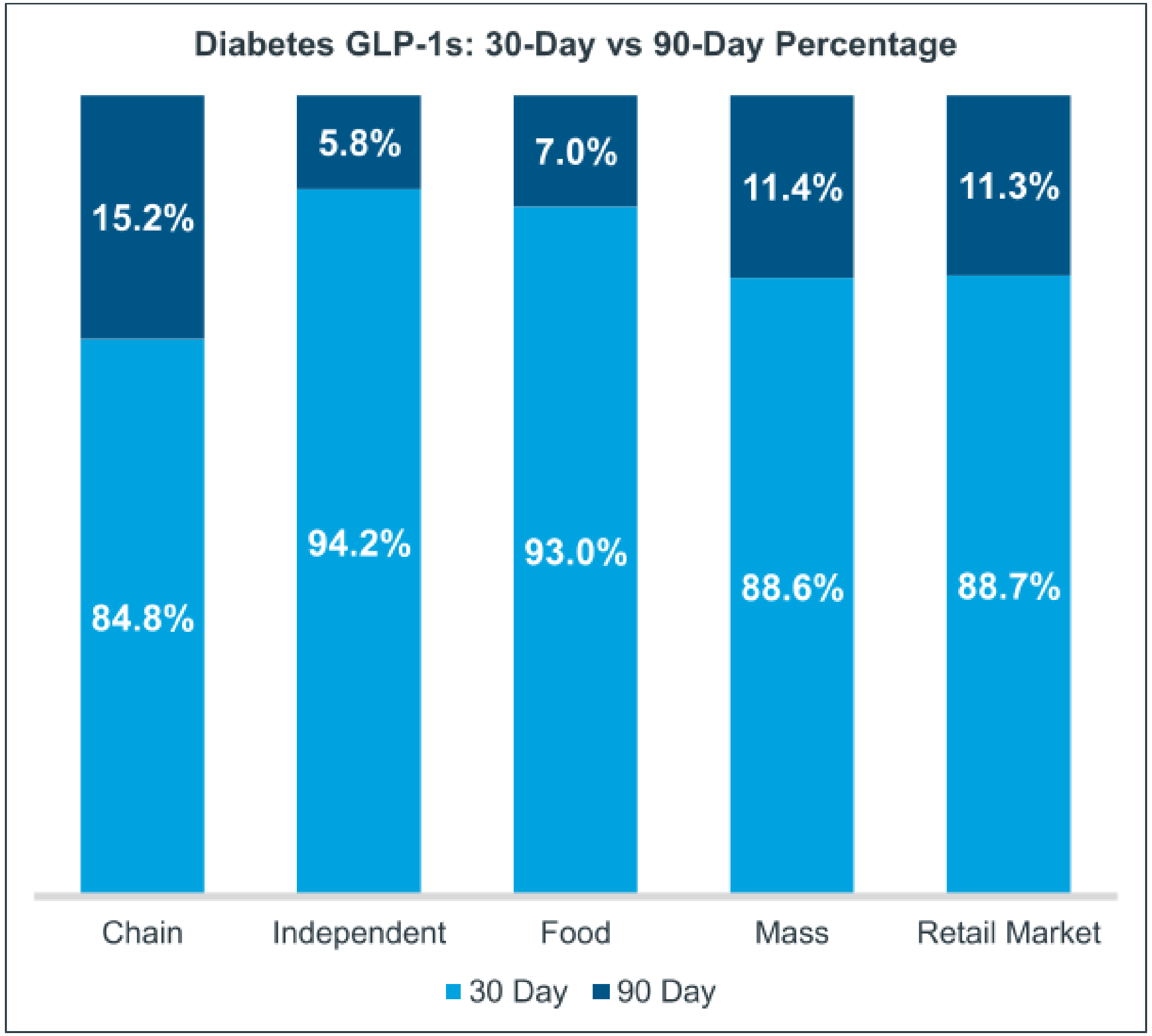
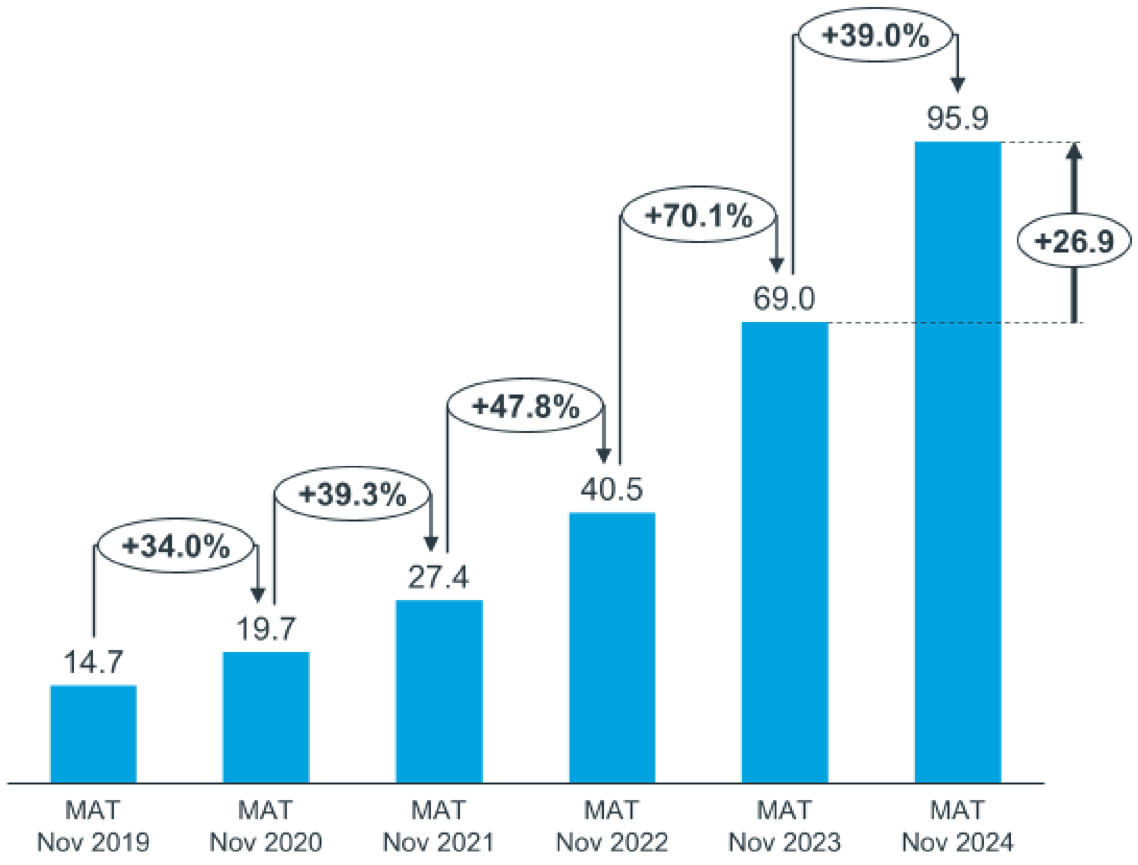
All COT had a 30-day percentage over 95% with Weight Loss GLP-1s



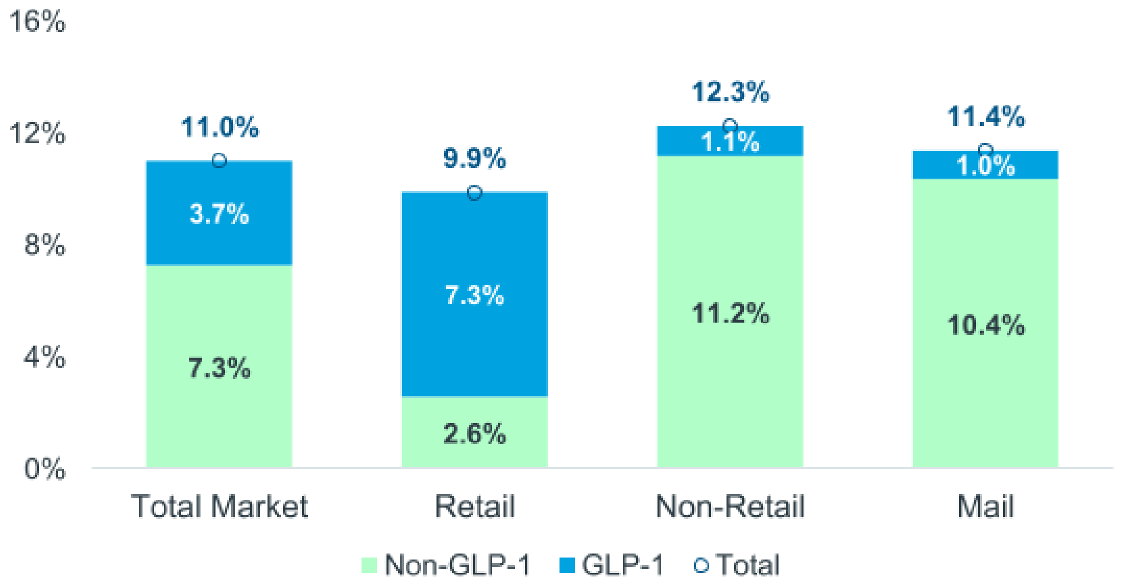


GLP-1s grew 39% over the last 12 months; 73.9% of Retail sales growth comes from GLP-1s

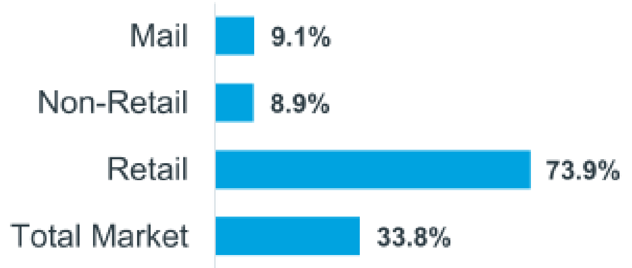
Moving Annual Total GLP-1 Sales Dollars (Billions)



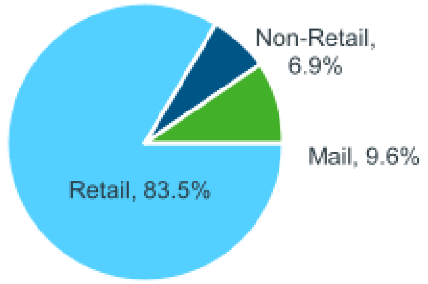
Moving Annual Total Sales Contribution to Growth



What % of sales growth are GLP-1s?



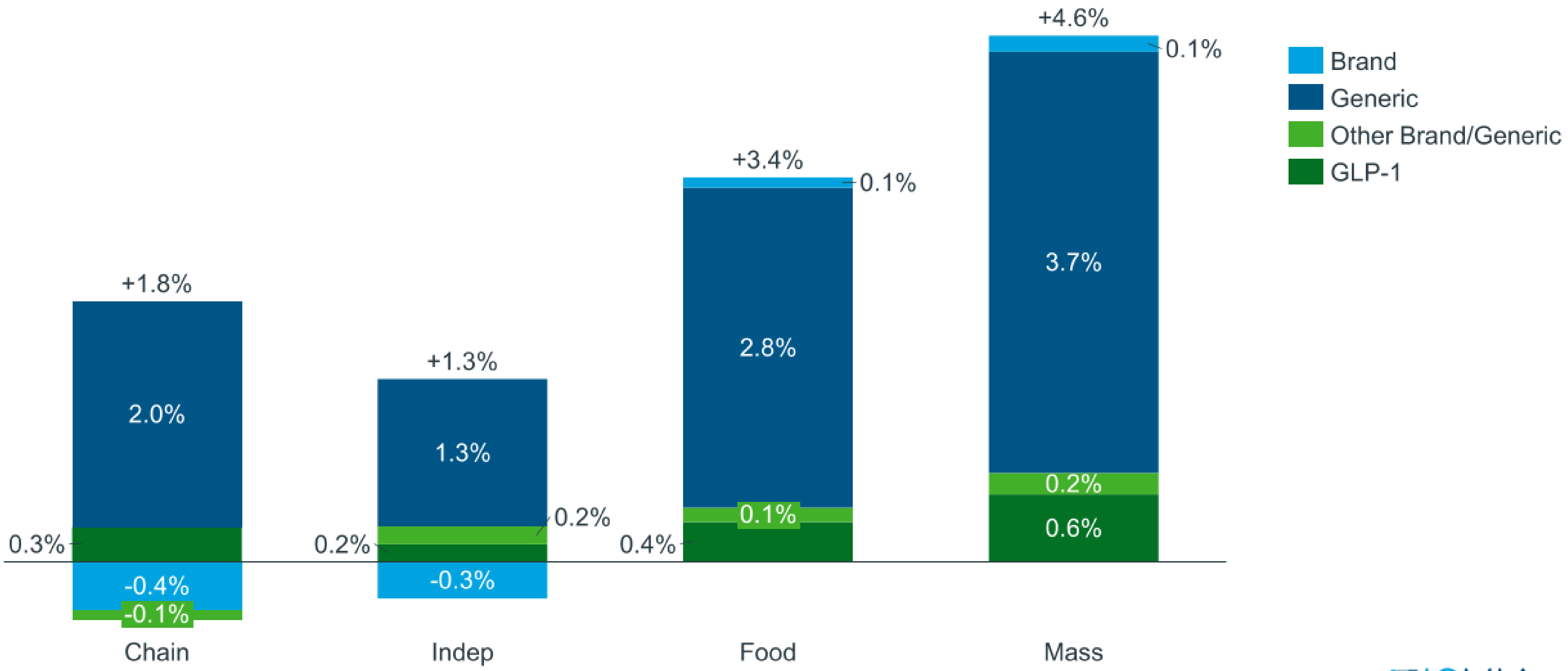
Where are the sales coming from?



Updated with November 2024 Data

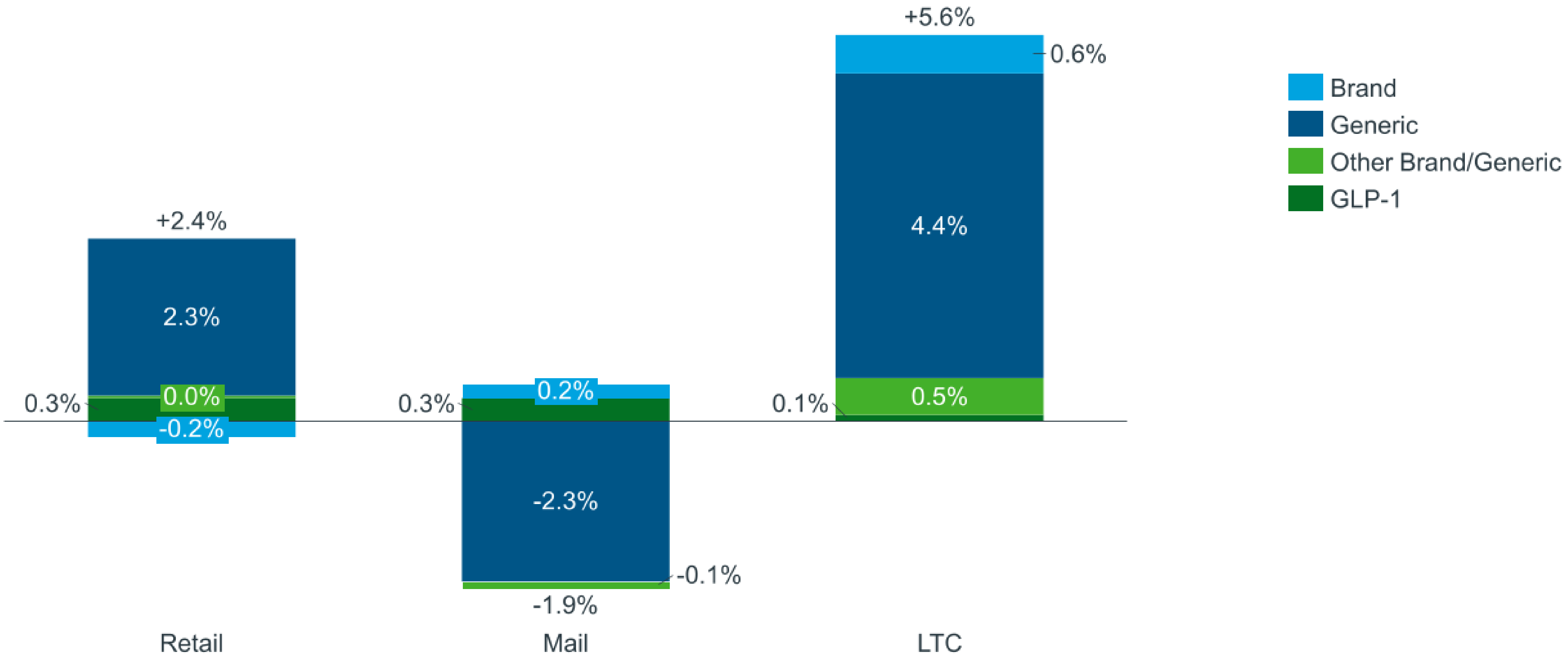
Generics were the largest contributor to growth for each retail COT

Product Type Growth Contribution by Class of Trade (Adjusted Rxs)



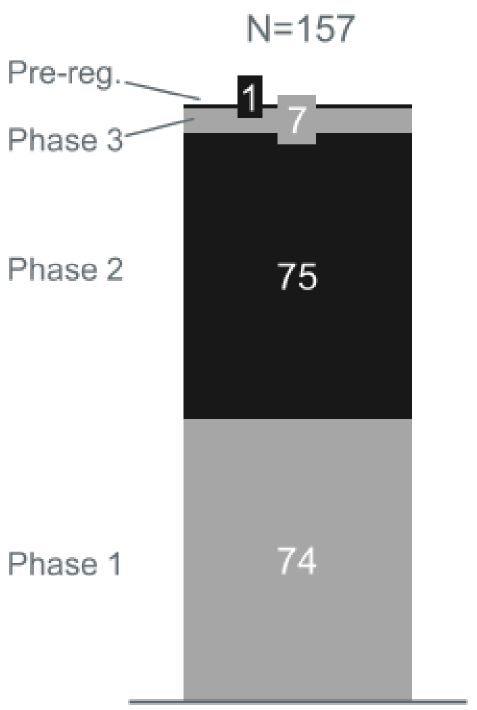
Generics heavily contributed to Retail and LTC Rx growth while also driving the Mail decline

Product Type Growth Contribution by Channel (Adjusted Rxs)

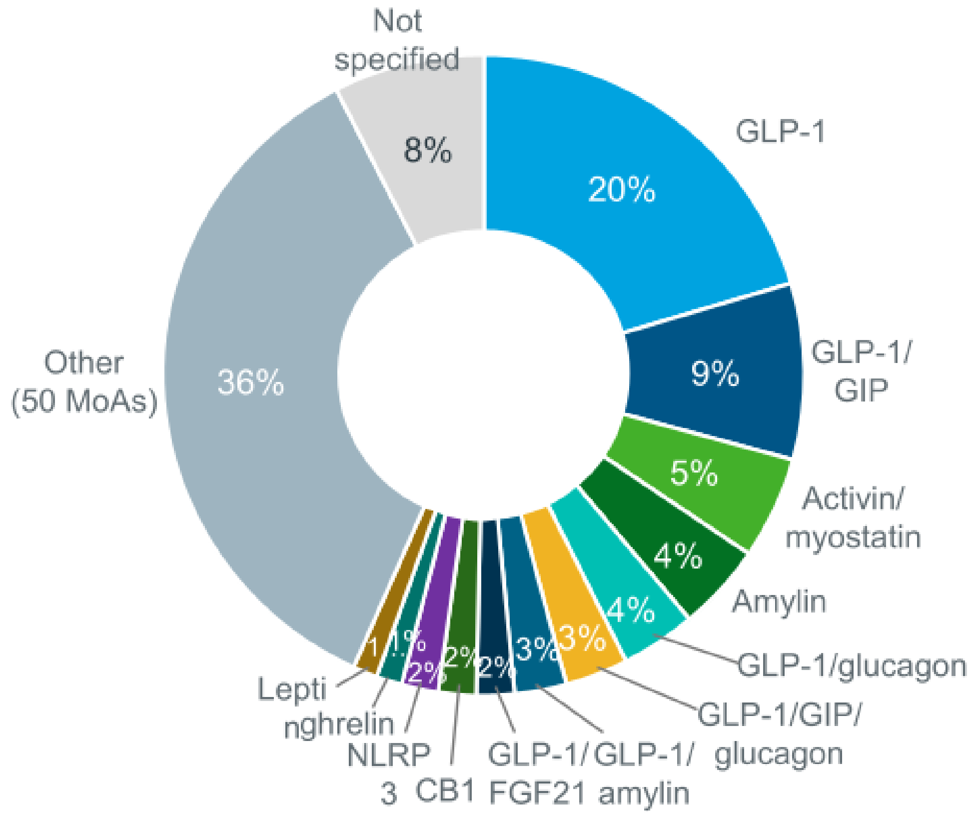


The Obesity pipeline is crowded: 157 new assets, 50+ MoAs and 70+ companies behind them

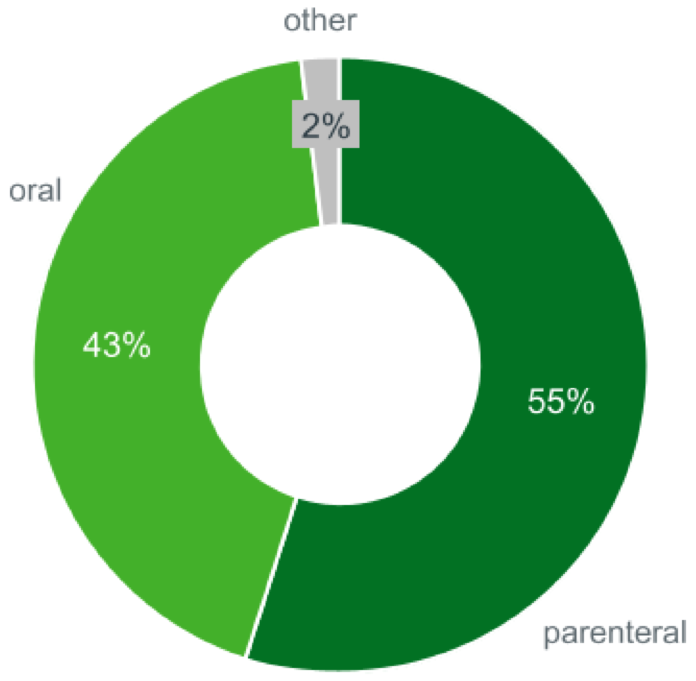
By phase
(Number of active assets)



By mechanism of action
(phase 1-pre−registration; N = 157)



By route of administration
(phase 1-pre−registration; N = 157)

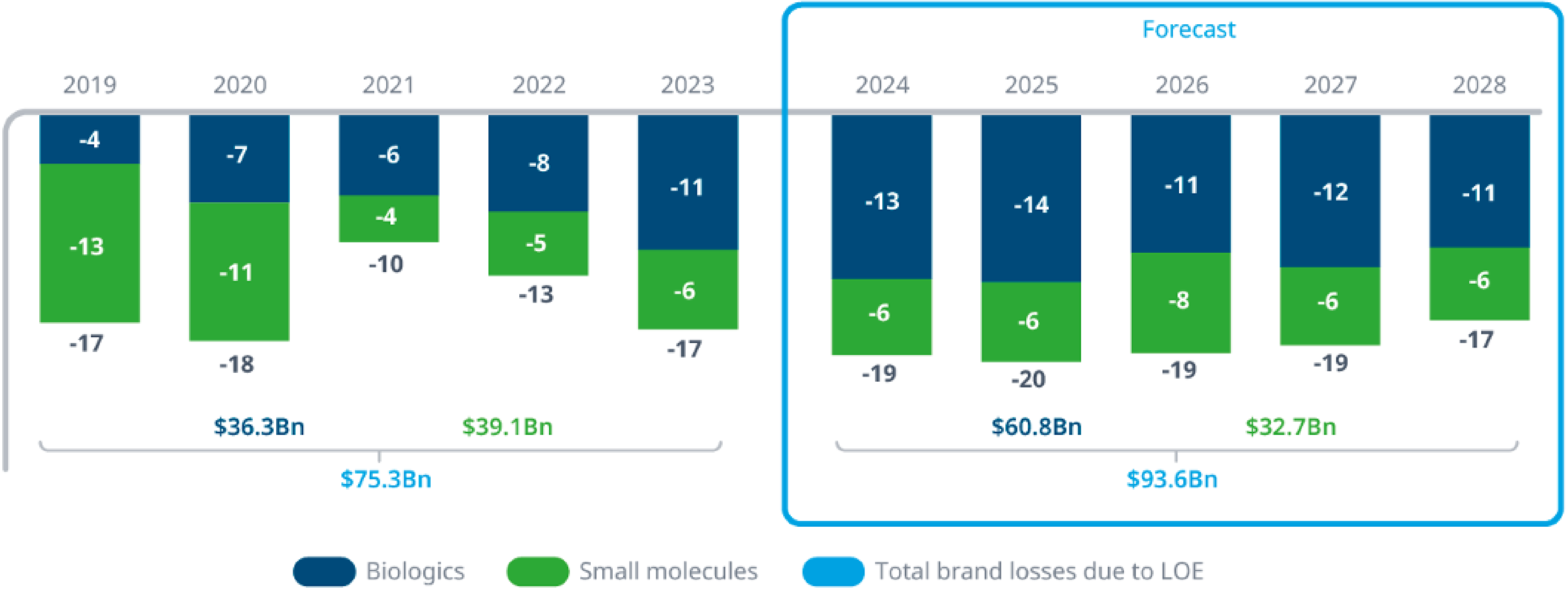


Many companies in Obesity, from large to emergent

Outlook

The impact of exclusivity losses reached $75Bn on a net revenue basis over the past 5 years including a large biosimilars impact

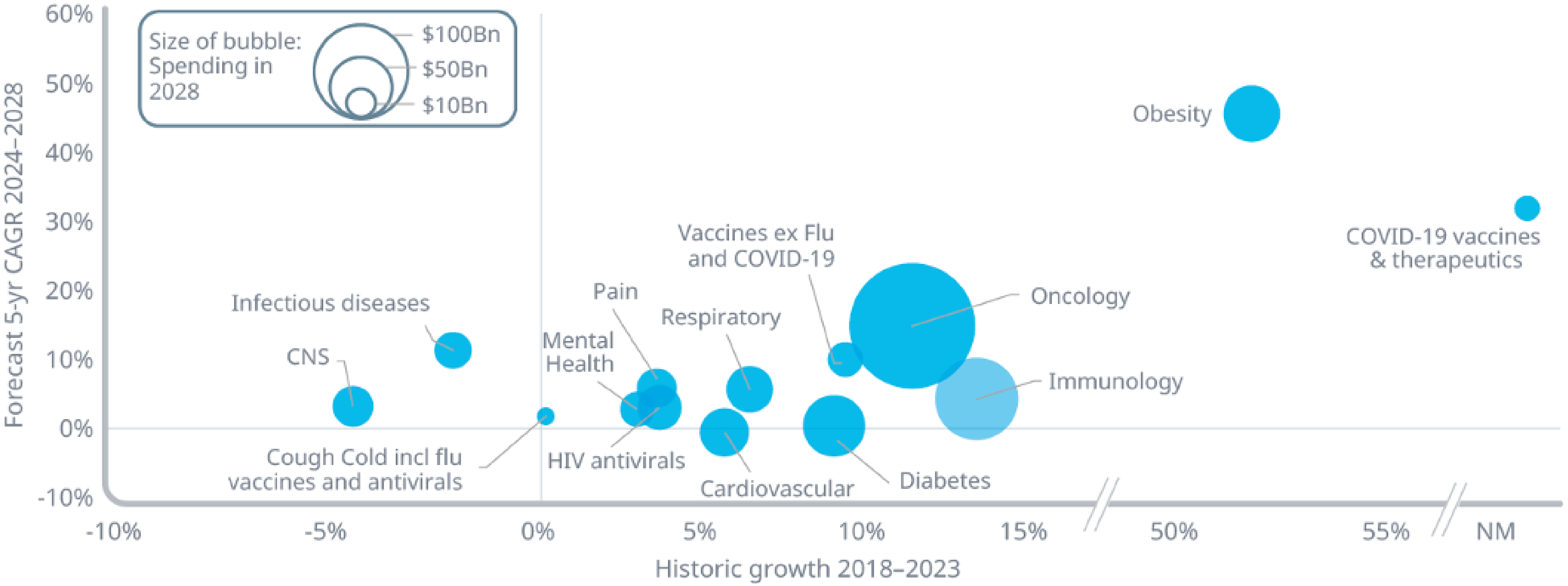
U.S. impact of brand losses of exclusivity 2019–2028, US$Bn



Source: IQVIA Market Prognosis, Mar 2024; IQVIA Institute, Mar 2024.
Notes: Lower brand spending based on invoice prices. Forecast impacts are modeled by projecting individual products sales growth to the point of patent expiry and then modeling expected impact based on historical analogues and actual data for in-progress events. Chart totals may not sum due to rounding. Estimates are based on manufacturer net price levels and estimated future evolution of associated discounts and rebates.
Report: The Use of Medicines in the U.S. 2024: Usage and Spending Trends, and Outlook to 2028. IQVIA Institute for Human Data Science, April 2024.

Oncology and Obesity drive growth through 2028 while diabetes, immunology and COVID-19 contribute to slowing

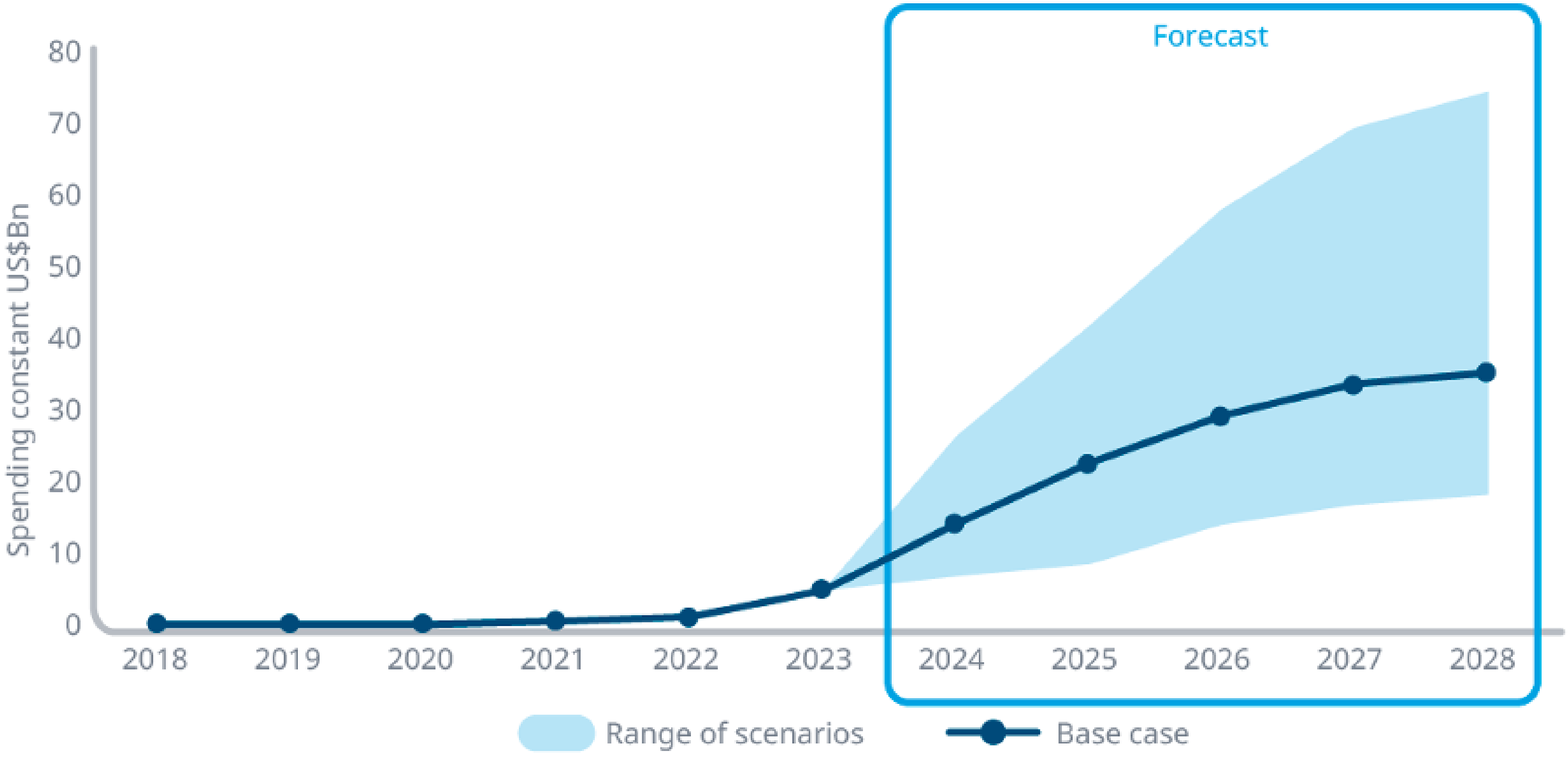
Historic and forecast net spending growth for leading therapy areas



Source: IQVIA Institute, Mar 2024.
Notes: NM = not meaningful, where COVID-19 5-year compound annual growth would reflect a not meaningful growth comparator to the other classes. Selected therapy areas shown. IQVIA Forecast Link modeling of company reported and analyst consensus forecasts has been utilized for therapies with the exception of oncology, immunology, diabetes, and COVID-19 which have been modeled separately by the IQVIA Institute.
Report: The Use of Medicines in the U.S. 2024: Usage and Spending Trends, and Outlook to 2028. IQVIA Institute for Human Data Science, April 2024.

Spending on Obesity drugs has accelerated in the past two years from novel GLP-1 inhibitors with upside if more widely reimbursed

Obesity spending at estimated manufacturer net prices, US$Bn



2024–2028 Key metrics

High scenario $200Bn+ invoice spending / net $73Bn based on significant expansion in usage and reimbursement

Base case $96Bn invoice spending / net $35Bn as a mix of patient payment, industry assistance, new care delivery paradigms augment limited traditional payer reimbursement

Low scenario $50bn invoice spending / net $18Bn in low scenario where access remains limited and costly to patients

Source: IQVIA Institute, Mar 2024.
Notes: Obesity includes medicines specifically indicated for the treatment of obesity excluding dietetics or medical foods.
Report: The Use of Medicines in the U.S. 2024: Usage and Spending Trends, and Outlook to 2028. IQVIA Institute for Human Data Science, April 2024.

The role of the pharmacist continues to expand

Pharmacy Services Overview

Information provided by NACDS, January 14, 2025

Tobacco Cessation Services

+1 **21** states authorize Pharmacists to initiate tobacco cessation therapies, including nicotine-replacement products and/or FDA- approved cessation aids

Test & Initiation of Treatment Services

+2 **22** states allow Pharmacists to provide appropriate treatment to patients based on results of point-of-care tests for common conditions including but not limited to flu and strep throat via statewide protocols and collaborative practice agreements

Naloxone Services

50 states allow Pharmacists to furnish and dispense naloxone within all, via varying forms of authority

Hormonal Contraception Services

+11 **32** states recognize Pharmacists' ability to independently initiate and dispense contraceptives

HIV Prevention Services

+8 **21** states authorize Pharmacists to initiate HIV prevention therapies (pre-exposure and/or post-exposure prophylaxis

Tuberculosis (TB) Testing

4 states allow Pharmacists to conduct TB testing without a collaborative practice agreement

Pharmacy Immunization Authority

Pharmacists in all
50 states can provide vaccines, to some degree, pursuant to state-specific laws and regulations

+24 *To date,*
31 states recognize or have recently updated laws to fully align with the scope of authority of the Public Readiness and Emergency Preparedness Act (PREP Act)

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Executive Summary

On a sales basis the total market grew 10% over the last 12 months

Generic deflation is slowing

Drug Shortages are mainly generics and almost 60% have been going on for over two years

Adalimumab biosimilars are making slow headway

Specialty continues to grow and is now 51.7% of the total market sales

Retail pharmacy closings are down over 2,500 locations in the last two years

Launches are not as successful in today's landscape and generics are slower to enter the market

Flu and COVID are down on a year-over-year basis

The Diabetes category is being impacted by reduced Insulin prices and GLP-1s

U.S Progress Point

https://www.iqvia.com/progresspoint

*A curation of **IQVIA's best thinking** on **topics** and **trends** driving change, disruption, and **progress** in the United States healthcare market.*

Market insights

- The IQVIA U.S. Launch Quarterly
- The IQVIA Monthly Launch Tracker
- Pharmaceutical Market and MedTech Trends
- Next Generation Payor Segmentation

Person-centric health

- Impact of Medicare Part D Cost Sharing
- Health Equity in the Time of COVID-19
- Advancing Outcomes with Home Healthcare

Engagement innovation

- HCP Consent at Scale
- Hidden Peer-to-Peer Learning Communities
- Importance of End-to-End Data in Physician Marketing

Presentations like this could not be completed without the help of many teams across the IQVIA organization

THANK YOU!

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