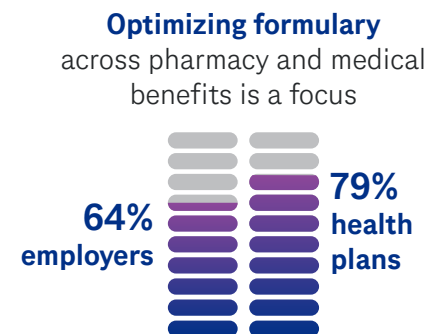
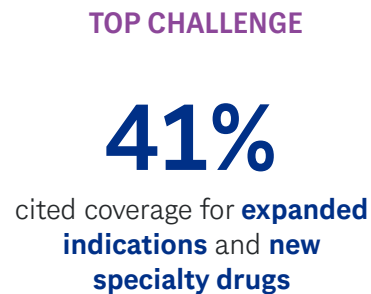


HIGHLIGHTS FROM THE 2026 TRENDS IN SPECIALTY DRUG BENEFITS REPORT*

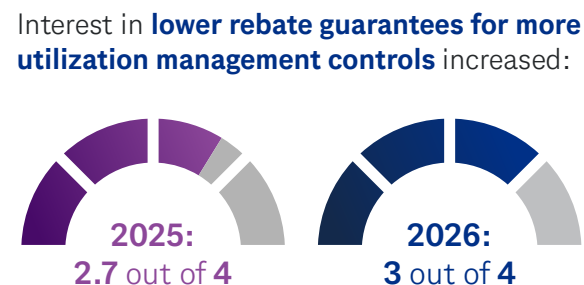
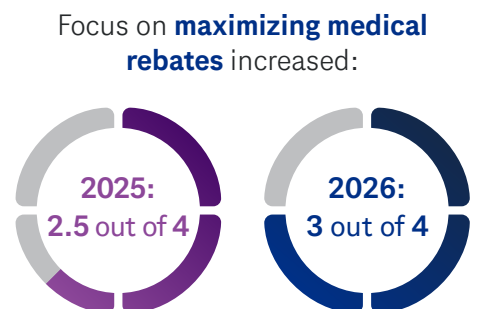
DEVELOPED BY PHARMACEUTICAL STRATEGIES GROUP (PSG), CO-SPONSORED BY GENENTECH

Genentech
A Member of the Roche Group

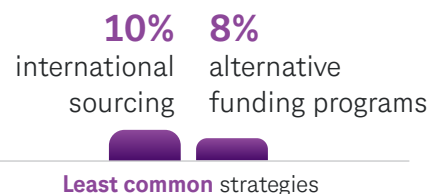
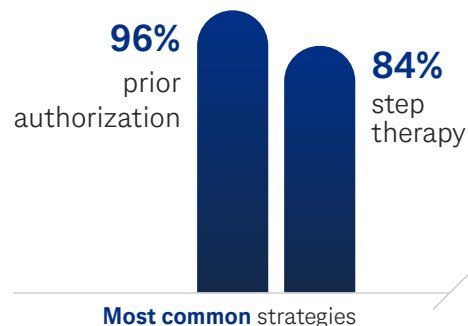
Cost management and formulary optimization



Rebates and alternatives



Utilization management



Greatest **concern for unintended consequences** of utilization management in:

- Oncology
- Hemophilia
- Multiple sclerosis

*Respondents include benefits leaders from 228 employers, health plans and union/Taft-Hartley funds.

PBM=pharmacy benefit manager.

HIGHLIGHTS FROM THE 2026 TRENDS IN SPECIALTY DRUG BENEFITS REPORT (CONT)

DEVELOPED BY
PHARMACEUTICAL
STRATEGIES GROUP
(PSG), CO-SPONSORED
BY GENENTECH

Pharmacy benefit manager (PBM) and specialty pharmacy (SP) arrangements

NEW



see **traditional PBM-owned SP arrangements** as fully aligned with their best interests



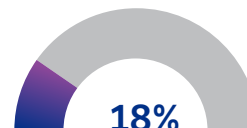
rated their **SP clinical and care management support** as good/very good

5.9 out of 10

SP differentiation in patient care/ services was considered moderate

63%

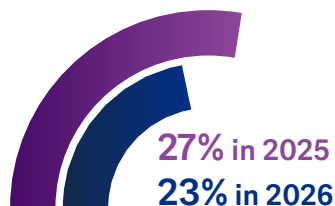
are moderately/very interested in **unbundling options**, such as carving out SP network



contract with **local hospital system SPs**; 340B influences this decision

Oncology spotlight

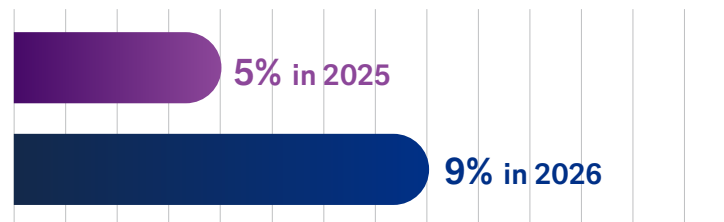
~1 in 4 payers cover **biomarker testing**



Top barriers for not covering:

- Cost/budget
- Lack of clinical evidence on patient outcomes

Oncology **site-of-care strategies** remain uncommon, but have increased



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