

# Resources for pharmacy program members

[www.vizientinc.com/PharmacySolutions](http://www.vizientinc.com/PharmacySolutions)

Visit our pharmacy webpage for web-based resources and the latest updates

*Log into My Dashboard on our website to access*

Contact us at [PharmacyQuestions@vizientinc.com](mailto:PharmacyQuestions@vizientinc.com)

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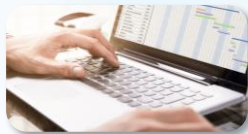


We are here to help



## Pharmacy Solutions

Sourcing, clinical and ambulatory support



## Analytics

Drug spend and clinical analytics platform



## Consulting Services

Operations, ambulatory, 340B, clinical



## Aggregation Groups

Pharmacy group purchasing & oncology network



## Behind the scenes: Payer and provider insights on specialty pharmacy

*Keeping you at the forefront of drug price projections and market developments*

Vizient Pharmacy Solutions Market Intelligence  
October 25, 2023

**vizient.**<sup>®</sup>

# Expert insights for pharmacy planning

Pharmacy Market Outlook webinar series

## Oct. 4: Oncology insights: New therapies and drug shortages

Insights on advancements in oncology therapy and practice challenges related to current drug shortages of cancer agents

Guest speaker: **Erin Fox**, PharmD, BCPS, Associate Chief Pharmacy Officer, **University of Utah Health**

Watch on demand



TODAY

## Oct. 25: Behind the scenes: Payer & provider insights on specialty pharmacy 1 p.m. CT

Insights on operationalizing specialty medications and what factors to consider regarding biosimilar adoption.

Guest speakers:

**Eric Tichy**, PharmD, MBA

Vice Chair Pharmacy Formulary, **Mayo Clinic**

**Susan Wescott**, RPh, MBA

Executive Lead Clinical Services, **Alluma** and Senior Director of Pharmacy, **Mayo Clinic**

# Housekeeping

- This call is being **recorded**
- Because of the large number of participants, all lines will be kept in **listen-only mode**
- **Questions** will be managed through the Q & A box



# Download the Pharmacy Market Outlook

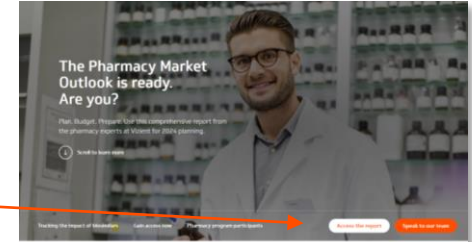


Visit the Pharmacy Market Outlook webpage where you can access and download the report as well as other resources



[info.vizientinc.com/pharmacy-market-outlook-member-details](https://info.vizientinc.com/pharmacy-market-outlook-member-details)

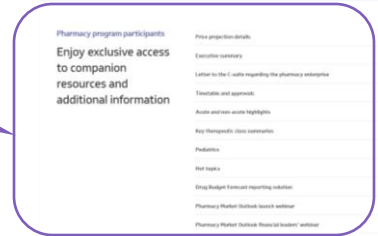
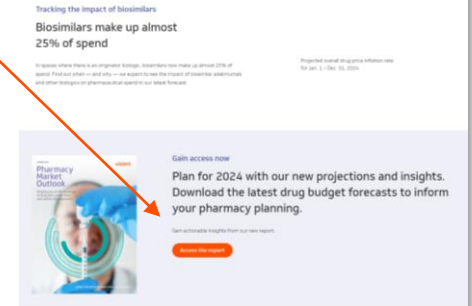
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Pharmacy program participants

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# Antibiotic Awareness Week

## Save the dates

Date	Topic	Presenters
Nov. 16 1 – 2:00 pm CT	USAAW 2023: CDC Updates on Antibiotic Stewardship and Required Antimicrobial Use and Resistance Reporting	<ul style="list-style-type: none"><li>• Melinda Neuhauser, PharmD, MPH, FCCP, FASHP, FIDP</li><li>• Amy Webb, MPH</li></ul>
Nov. 17 1 – 2:30 pm CT	Updates in RSV Prevention	<ul style="list-style-type: none"><li>• Petrea Cober, PharmD, BCNSP, BCPPS, FASPEN</li><li>• Lea Eiland, PharmD, BCPS, BCPPS, FASHP, FPPA</li></ul>
Nov. 20 1 – 2:00 pm CT	Fine Tuning our Antimicrobials: Navigating Therapeutic Drug Monitoring and Optimizing Administration Strategies	<ul style="list-style-type: none"><li>• Kathryn DeSear, PharmD, BCIDP, AAHIVP, FIDSA</li><li>• Ethan Smith, PharmD, BCIDP</li></ul>
Nov. 21 1 – 2:00 pm CT	Optimizing EPIC for Antimicrobial Stewardship: The Stanford Health Care Experience	<ul style="list-style-type: none"><li>• Amy Chang, MD, PharmD</li><li>• Mary Smith, MD, MPH</li></ul>

# Today's presenters



**Jeni Hayes**

**PharmD, MS, BCPS**  
Pharmacy Executive  
Vizient Inc.



**Eric Tichy**

**PharmD, MBA, FCCP**  
Division Chair, Pharmacy  
Supply Solutions  
Mayo Clinic



**Susan Westcott**

**RPh, MBA**  
Senior Director of Pharmacy,  
Managed Care  
Mayo Clinic  
Executive Lead, Clinical Services  
Alluma



# Methodology and overall numbers



# Price projection methodology overview

Based on Vizient pharmacy program participant data

- Projections 6 to 18 months forward; for price only
- Overall summary, therapeutic class, generic
- Query purchase and price history of member facilities
  - Inclusions: All classes of trade
  - Exclusions: 340B, direct purchases, nondrug purchases
- Determine top 85% of products, based on aggregate spend
- Team makes projections at national drug code (NDC) level
  - Contract products and noncontract products from contract manufacturers: assigned to portfolio executives
  - Other noncontract products: outside data sources



Top

**85%**

of pharmaceutical  
purchases

# Projected drug price inflation

January 1 through December 31, 2024

The projected inflation rate is lower than previous years and **demonstrates a slowing of overall inflation**

Estimated inflation rates will continue to balance the drug price increases and high launch prices for novel, branded specialty medications with cost saving generic and biosimilar entrants

Across all classes of trade, **four drugs combined totaled more than \$5 billion dollars in spend**

- **Adalimumab** (Humira) remains the top-ranking drug
- **Immune globulin** (IVIG) has moved to the second rank position followed by **ustekinumab** (Stelara) ranking third
- **Pembrolizumab** (Keytruda) was bumped out of the top 3 ranking for the first time in several years to fourth

**3.42%**

Projected overall drug price inflation rate



## Non-acute care: Top medication spend

Rank	Generic		Brand
1	Adalimumab	S	Humira
2	Ustekinumab	S P	Stelara
3	Pembrolizumab	P	Keytruda
4	Denosumab	S	Prolia, Xgeva
5	Ocrelizumab	P	Ocrevus
6	Nivolumab	P	Opdivo
7	Etanercept	S	Enbrel
8	Dupilumab	S	Dupixent
9	Semaglutide	R	Ozempic, Rybelsus, Wegovy
10	Daratumumab-hyaluronidase-fihj	P	Darzalex Faspro
11	Risankizumab-rzaa	S	Skyrizi
12	Bictegravir / emtricitabine / tenofovir alafenamide fumarate	R	Biktarvy
13	Vedolizumab	P	Entyvio
14	Apixaban	R	Eliquis
15	Pegfilgrastim	S P	Neulasta

Source: Vizient pharmacy program participant data, April 2022-March 2023

# Topics for today

Gastroenterology

Dermatology

Oncology

Specialty and beyond



# Gastroenterology

Autoimmune and inflammatory diseases

3.68%

Projected inflation rate

20.56%

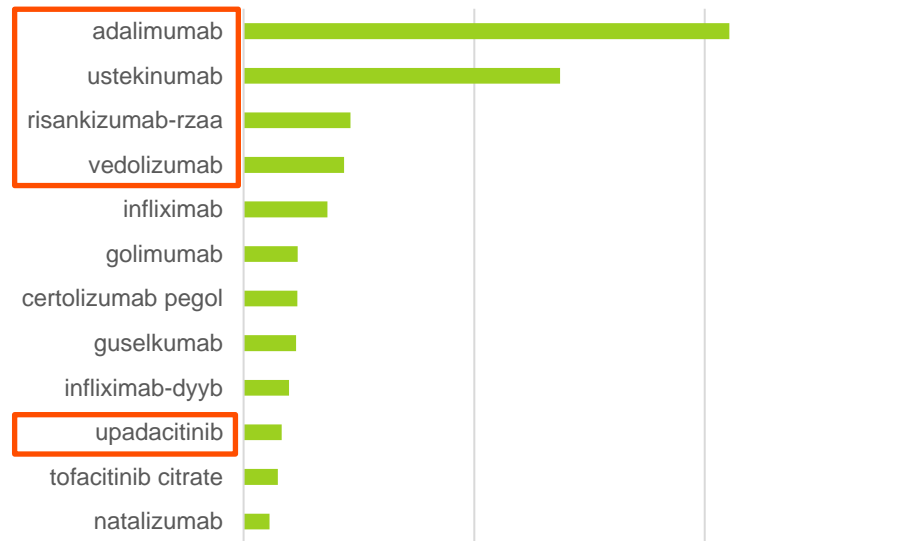
Portion of drug spend

## Medications included in gastroenterology spend by Vizient pharmacy program participants

Interleukins	JAK inhibitors
Guselkumab (IL-23)	Tofacitinib
Risankizumab-rzaa (IL-23)	Upadacitinib
Ustekinumab (IL-23 & IL-12)	
TNF alpha	Other
Adalimumab	Natalizumab
Certolizumab	Ozanimod
Golimumab	Vedolizumab
Infliximab	

Source: Facts and Comparisons eAnswers. Wolters Kluwer

## Spend for medications used in gastroenterology



Source: Vizient pharmacy program participant data, April 2022-March 2023

# Gastroenterology

Specialty hot topics

Autoimmune and inflammatory diseases

**3.68%**

Projected inflation rate

**20.56%**

Portion of drug spend

**Biosimilar  
influence**

**Humira**

**Stelara**

**Medical vs.  
Pharmacy Benefit**

**Entyvio**

**Stelara**

**New indications**

**Rinvoq**

**Skyrizi**

**Operations**

**PBM**

**Fear of  
flare**

# Gastroenterology

## Adalimumab biosimilars

### Low concentration (50 mg/mL), with citrate

- Hadlima (Organon)
- Hyrimoz (Sandoz)

### Low concentration (50 mg/mL), citrate-free

- Abrilada (Pfizer)
- Amjevita (Amgen)
- Cyltezo (BI)
- Hulio (Biocon)
- Idacio (Fresenius)
- Yusimry (Coherus)

### High concentration (100 mg/mL), citrate-free

- Hadlima HC (Organon)
- Hyrimoz HC (Sandoz)
- Yuflyma (Celltrion)

### PENDING

- AVT02 (Teva / Alvotech)
- Amjevita (Amgen)

# Gastroenterology

Specialty hot topics

Autoimmune and inflammatory diseases

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Projected inflation rate

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# Dermatology

## Autoimmune and inflammatory diseases

Autoimmune and inflammatory diseases

**3.68%**

Projected inflation rate

**20.56%**

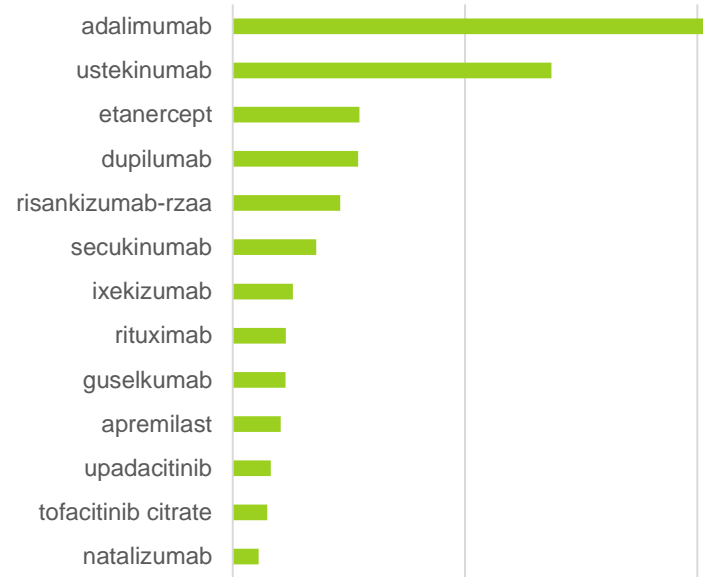
Portion of drug spend

### Medications included in dermatology spend by Vizient pharmacy program participants

Interleukins		TNF alpha	
Brodalumab (IL-17)		Adalimumab	
Dupilumab (IL-4 & IL-13)		Etanercept	
Guselkumab (IL-23)		Rituximab	
Ixekizumab (IL-17)			
Risankizumab-rzaa (IL-23)		JAK inhibitors	
Secukinumab (IL-17)		Abrocitinib	
Tildrakizumab-asmn (IL-23)		Baricitinib	
Tralokinumab-ldrm (IL-13)		Deucravacitinib	
Ustekinumab (IL-23 & IL-12)		Upadacitinib	
		Other	
		Apremilast	
		Omalizumab	

Source: Facts and Comparisons eAnswers. Wolters Kluwer

### Spend for medications used in dermatology



Source: Vizient pharmacy program participant data, April 2022-March 2023

# Dermatology

## Specialty hot topics



### Dupixent

- New indications
- Increased utilization / spending



### Atopic dermatitis

- Dupixent
- Rinvoq



### Plaque psoriasis

- Cosentyx
- Skyrizi
- Sotyktu
- Stelara
- Taltz

# Oncology

## Top oral antineoplastic spend

Rank	Generic	Brand	Indication
1	Ruxolitinib	Jakafi	GVHD, Myelofibrosis
2	Ibrutinib	Imbruvica	CLL, GVHD
3	Palbociclib	Ibrance	Breast cancer
4	Enzalutamide	Xtandi	Prostate cancer
5	Osimertinib	Tagrisso	NSCLC
6	Dasatanib	Sprycel	ALL, CML
7	Venetoclax	Venclexta	AML, CLL, Multiple myeloma
8	Cabozantinib	Cabometyx	Hepatocellular carcinoma, RCC, thyroid cancer
9	Abemaciclib	Verzenio	Breast Cancer
10	Acalabrutinib	Calquence	CLL, Mantle cell lymphoma
11	Lenvatinib	Lenvima	Thyroid cancer
12	Lenalidomide	Revlimid	Multiple myeloma, MDS

Source: Vizient pharmacy program participant spend, April 2021-March 2022 vs. April 2022-March 2023

### Oncology

**3.67%**

Projected inflation rate

**22.47%**

Portion of drug spend

### Oral antineoplastic medications with greatest change in program participant spend and utilization



Rank	Drug name	% Change spend	% Change Utilization
26	Abemaciclib (Verzenio)	44.33%	40.66%
28	Acalabrutinib (Calquence)	25.95%	23.96%
54	Ribociclib (Kisqali)	69.82%	65.12%
60	Zanubrutinib (Brukinsa)	39.77%	38.71%

# Specialty and beyond

## High coordination of care

Alzheimer's

- Lecanemab
- Donanemab
  - Anticipated approval 2023

# Specialty and beyond

## High coordination of care

Alzheimer's

- Lecanemab
- Donanemab
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## Specialty light

GLP-1 for diabetes and obesity

- Semaglutide
- Tirzepatide

# Diabetes and Obesity – GLP-1

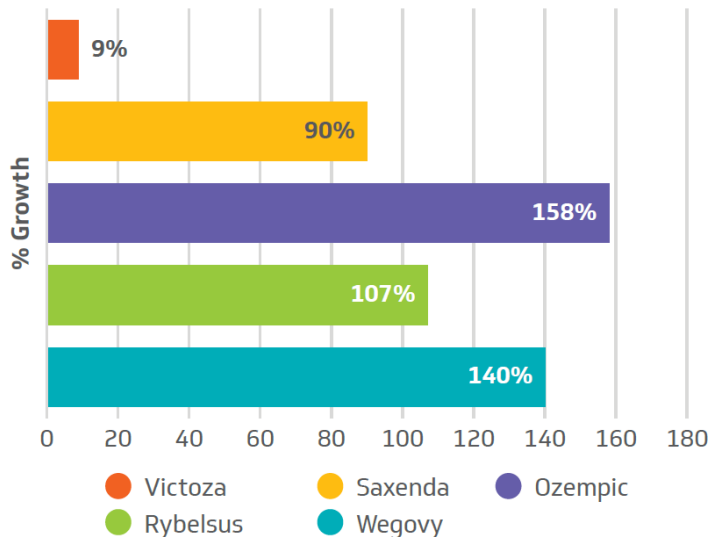
**3.03%**

Projected inflation rate

**4.76%**

Portion of drug spend

Growth in spend for GLP-1 agents



Source: Vizient pharmacy program participant spend, April 2021-March 2022 vs. April 2022-March 2023

## GLP-1 indications for diabetes and weight loss

Semaglutide	Ozempic Wegovy Rybelsus
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Liraglutide	Saxenda Victoza
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## GLP-1 indications for diabetes only

Lixisenatide	Adlyxin
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Exenatide	Bydureon Byetta
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Dulaglutide	Trulicity
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Tirzepatide	Mounjaro
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# Specialty and beyond

## High coordination of care

Alzheimer's

- Lecanemab
- Donanemab
  - Anticipated approval 2023

## Specialty light

GLP-1 for diabetes and obesity

- Semaglutide
- Tirzepatide

## Ultra specialty

Gene and cellular therapy

- Hemgenix
- Roctavian
- Skysona
- Exa-cel & Lovo-cel
  - Anticipated approval 2023

# Questions?





# Pharmacy program resources

# Vizient Pharmacy analytics solutions

## Webinar series

Learn how our pharmacy analytics solutions can empower you to efficiently oversee your pharmacy operations including identifying cost savings

Empowering the pharmacy enterprise through integrated data and insights



### Sept. 14 - Recording available!

Review of Vizient's clinical, operational and financial pharmacy analytics

### Oct. 26, 1:00 p.m. CT

Clinical, operational and financial metrics to evaluate organizational performance in the pharmacy

Questions? Contact [learningprograms@vizientinc.com](mailto:learningprograms@vizientinc.com)

Scan &  
register now!



# Drug Budget Forecast

## Vizient Savings Actualyzer for Pharmacy

### Personalizes Pharmacy Market Outlook projections with your spend data

- High level projection analysis and overview
- Free, detailed report with data filters and dynamic fields
- Editable within portal and exportable
- Access essential medication spend and export purchase history

Available to *all* organizations that participate in the Vizient Pharmacy program

Sign into the [vizientinc.com](https://vizientinc.com) website and then locate the **Vizient Savings Actualyzer - Pharmacy tool** under Quick Links on 'My Dashboard'

In the tool, navigate to the **Monitor section** to find the Drug Budget Forecast

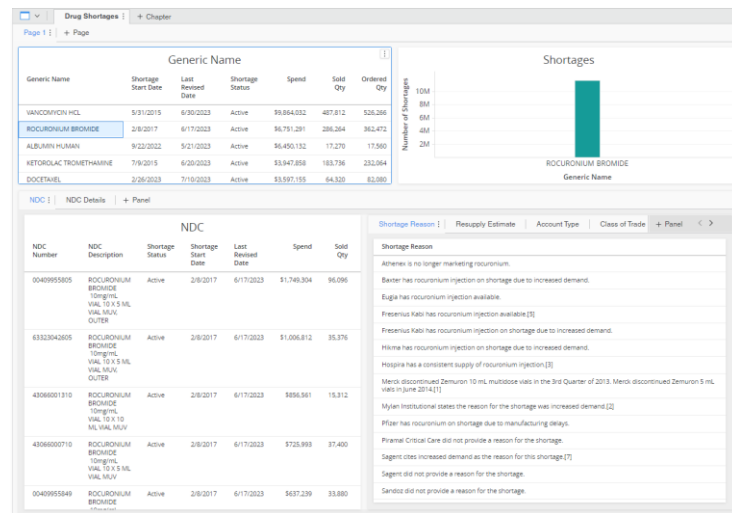
Contact [PharmacyQuestions@vizientinc.com](mailto:PharmacyQuestions@vizientinc.com)

# Drug Shortage Report

## Vizient Savings Actualyzer – Pharmacy

A centralized location to view information on identified drug shortages that may be impacting your organization

- View currently identified drug shortages – including NDCs for which you do not have reported spend
- Determine how current shortages may be impacting your organization
- Customize a specific dashboard tailored to your organization's needs regarding drug shortage analytics



[Learn more](#) about pharmacy analytics insights and reports available through the Savings Actualyzer – Pharmacy. [vizientinc.com/learning-center/pharmacy-analytics-resources](http://vizientinc.com/learning-center/pharmacy-analytics-resources)

# Download the Pharmacy Market Outlook

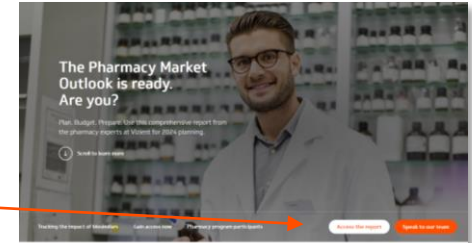


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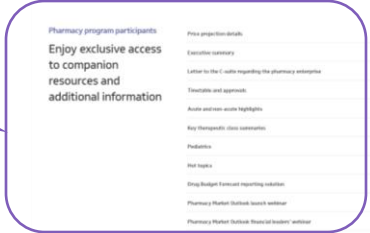
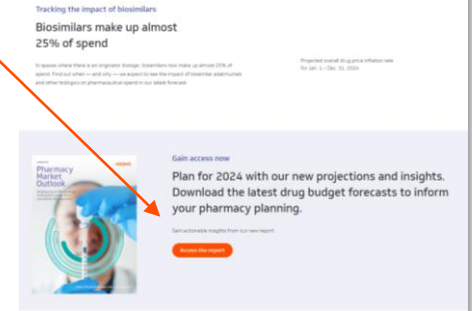
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# Helpful communications

<b>Pharmacy Hot Info</b>	Weekly newsletter with contract price changes, advocacy updates, upcoming webinars
<b>Pharmacy Monitor</b>	Monthly clinical insights
<b>Pharmacy Sourcing Forum call</b>	<ul style="list-style-type: none"><li>• Third Wednesday of every month</li><li>• Contract updates and other important news related to vaccines, drug shortages, product access</li></ul>
<b>Pharmacy Institute</b>	Pharmacy Solutions training and overview for new members or individuals new to their role
<b>VerifiedRx</b>	<ul style="list-style-type: none"><li>• Pharmacy podcast with the latest news to support the strategic role of pharmacy</li><li>• New episodes second Tuesday of each month</li></ul>
<b>Vizient member newsletters</b>	<ul style="list-style-type: none"><li>• Supply Chain Management News</li><li>• Clinical and Care Delivery News</li><li>• Research and Insights News</li></ul>

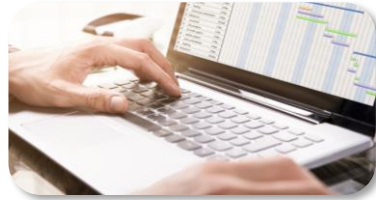
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# Let's work together

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