

TREND HIGHLIGHTS

EXECUTIVE SUMMARY

Rising pharmacy spend is one of the most complex challenges plan sponsors face. This report provides a clear, data-driven view of where trends are emerging, what is driving them, and what actions you can take to stay ahead.

Recent trend is driven less by volume and more by drug mix and a shift to higher cost medications, concentrated in a few categories. GLP-1 therapies, newer specialty biologics, and misaligned specialty generic reimbursement practices are applying financial pressure.

The goal is to inform plan sponsors of targeted levers—biosimilar-exclusive strategies, proactive generic conversion, tighter GLP-1 management, and specialty price transparency—all of which can materially bend the curve when implemented decisively.

This report is intended to provide clarity and direction: where trend is emerging, why it is happening, and which actions can help you stay ahead.



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TOTAL SPEND AND TREND

 **+16.4%**

Increase in overall spending

The increase prior to rebates was primarily driven by drug mix, reflecting higher utilization of high-cost specialty therapies and weight-management medications. Excluding weight-loss drugs, non-specialty trend is nearly **0%** and overall trend drops below **10%**.



Driven primarily by a
14.2% rise in the cost per claim.

 **+2.0%**

Increase in claim volume

Reflecting more claims for both new and existing patients, adjusted for patient population.

2025 NON-SPECIALTY VS. SPECIALTY SPEND AND TREND HIGHLIGHTS



● Specialty ● Non-Specialty

45% SHARE OF SPECIALTY DRUGS IN TOTAL COSTS

*Specialty would have reached **50% share** if not for the significant increase of **non specialty weight loss medications**.

 **+15.5%**

Increase in non-specialty costs

Driven primarily by higher costs per claim which rose by **13.4%**.

 **+17.6%**

Increase in specialty drug spend

Driven by increases in utilization which grew **13.6%**.

FUTURE OUTLOOK & RECOMMENDATIONS

- ✓ Review current formulary and prioritize the adoption of a biosimilar-exclusive strategy.
- ✓ Implement prior authorization and step therapy protocols for GLP-1 medications and monitor utilization trends.
- ✓ Increase Specialty Price Transparency and Optimize Generic Reimbursement.



Questions?
We've got answers.



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