

## Navigating the Future of Speciality Pharmacies in Health Systems



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The speciality pharmacy market is undergoing significant transformation, driven by an ageing population, innovative therapies and rising medication costs. These shifts pose challenges but also create opportunities for health systems to optimise patient care and operational performance. Integrated speciality pharmacy programmes are emerging as pivotal in addressing these market dynamics, enhancing patient outcomes and ensuring sustainable growth.

### Addressing Market Dynamics

Over the past decade, the introduction of limited distribution drugs (LDDs) has reshaped the speciality pharmacy landscape. Since 2019, over 200 drugs have been launched through LDD networks, reflecting a 20 per cent increase compared to the previous five years. Often high-cost and complex, these medications necessitate a seamless care model to ensure effective patient management. Integrated pharmacy programmes enable health systems to take advantage of this model by offering centralised coordination of care, which enhances efficiency and patient outcomes.

Simultaneously, changes in the 340B programme, which provides drug discounts to hospitals serving underserved populations, have created further challenges. Drug manufacturers' restrictions have limited contract pharmacies' ability to distribute 340B medications. This has compelled health systems to re-evaluate their operations. By bringing these prescriptions in-house, health systems not only regain control but also improve resource allocation and ensure better service delivery to vulnerable populations. Integrated speciality pharmacies allow health systems to maximise the utility of the 340B programme, supporting broader patient care efforts.

### Opportunities and Challenges of Emerging Therapies

Innovative therapies, such as GLP-1 medications for conditions like Type 2 diabetes and obesity, are gaining prominence. These drugs, including well-known brands like Mounjaro and Ozempic, have shown potential for managing a wide range of conditions. However, their emergence also highlights the complexities of introducing new treatments to the market. Health systems must invest in infrastructure to support these therapies, including educational resources for patients and clinicians, financial assistance mechanisms and robust data-sharing frameworks.

The rise of new treatments underscores the dynamic nature of the speciality pharmacy sector. Health systems face the challenge of developing adaptable patient access pathways for emerging therapies, particularly for rare and orphan diseases. Conditions such as metabolic dysfunction-associated steatohepatitis (MASH) are among those that demand specialised approaches to care. Integrated pharmacy programmes are critical in addressing these needs by providing high-touch, personalised care and navigating the intricate regulatory and logistical hurdles associated with new therapies.

Moreover, the limited distribution nature of many speciality drugs highlights manufacturers' reliance on health systems for effective distribution. Health systems with robust speciality pharmacy capabilities are uniquely positioned to meet this demand, ensuring patients have access to life-changing treatments. This mutually beneficial relationship further cements the role of integrated pharmacies as key players in the healthcare value chain.

### New Partnership Models

Collaboration between health systems, insurers and pharmacy benefit managers (PBMs) is becoming increasingly vital. These partnerships aim to tackle rising costs and improve patient outcomes by combining expertise and resources. For example, PBMs play a significant role in managing prescription drug benefits, while health systems bring specialised knowledge of patient care and therapy management. Together, these entities create a comprehensive support system for patients navigating complex treatment regimes.

By integrating services, health systems and their partners can offer personalised solutions such as medication adherence programmes, care coordination and assistance with insurance navigation. These initiatives not only enhance patient satisfaction but also ensure more efficient use

of healthcare resources. Additionally, such partnerships foster a more sustainable healthcare ecosystem by aligning incentives across traditionally separated entities. Health systems with strong speciality pharmacy programmes are well-placed to lead this transformation, demonstrating their value in an increasingly interconnected healthcare landscape.

The future of the speciality pharmacy sector is linked to the ability of health systems to adapt to shifting market dynamics and emerging opportunities. Integrated speciality pharmacy programmes provide a framework for managing challenges such as rising costs, regulatory changes and the introduction of innovative therapies. By centralising operations, promoting strategic partnerships and investing in patient-focused care models, health systems can achieve better outcomes while maintaining financial sustainability.

As the market for speciality medications continues to grow, health systems are uniquely positioned to expand their reach and impact. These programmes not only improve access to care but also enable health systems to play a critical role in the evolving healthcare ecosystem. The integrated speciality pharmacy model holds immense potential for enhancing the quality of care, reducing costs and ensuring that patients receive the support they need to manage complex conditions.

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