VYTLONE

Insights Report

Published June 2026

Historical trend insights | Product solutions
Market trends | Case studies | Drug pipeline

VytlOne Clinical Insights

VytlOne provides pharmacy solutions for health systems, hospitals, health centers, and employers — with a focused commitment to financial performance, revenue optimization, and clinical effectiveness across pharmacy benefit management, integrated pharmacy operations, and specialty pharmacy management.

This Insights Report draws on VytlOne's internal utilization and cost analytics to deliver a clear, data-driven picture of what is driving pharmacy trend today — and what will shape plan spend tomorrow. It examines both traditional and specialty drug dynamics, contextualizes them within broader market developments, and surfaces the emerging risks and opportunities plan sponsors must prepare for.

What the Data Shows

The findings reveal a market in structural transition. Traditional medications — representing over 54% of total spend — are experiencing sustained upward pressure, driven by mix shifts toward higher-cost therapies. Diabetes alone accounts for 38% of traditional PMPM spend, with GLP-1 receptor agonists, high-cost migraine therapies, and newer mental health medications accelerating this trend.

Specialty medications tell an equally compelling story: less than 2% of claim volume, yet approximately 46% of total pharmacy spend. Biosimilar adoption exceeding 90% market share has delivered meaningful cost improvements in key inflammatory categories — but continued growth in oncology, rare disease, and chronic inflammatory therapies is increasing volume-driven pressure.

The Broader Market Context

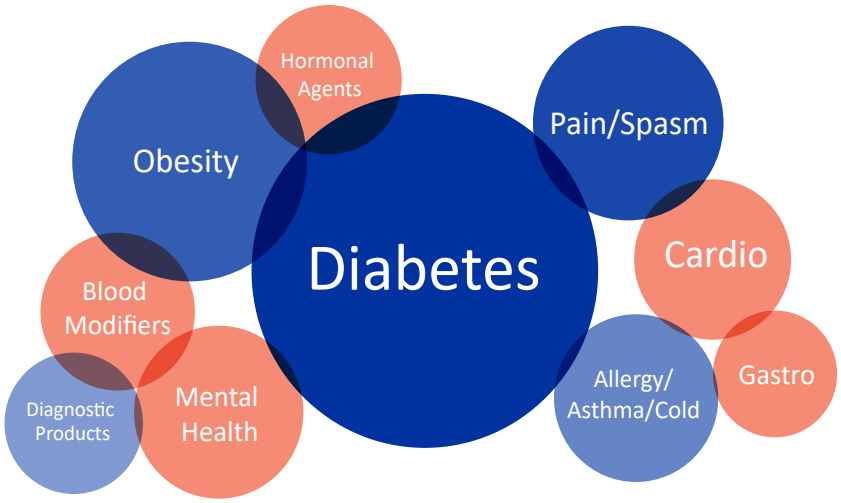
Five key forces are reshaping the pharmacy landscape: the patent cliff opening significant generic and biosimilar savings opportunities; a pipeline increasingly concentrated on rare and orphan diseases (over 50% of 2025 approvals); evolving biosimilar policy; IRA-driven shifts toward value-based drug pricing; and growing AI integration enabling more precise cost management.

Demonstrated Impact

These dynamics are not simply market forces to monitor — they are levers to act on. A VytlOne case study demonstrated that proactive, integrated clinical and financial interventions can drive a 19% overall PMPM cost reduction while improving outcomes, including a 7% reduction in long-acting opioid use and lower member out-of-pocket costs.

This report is designed to help clients do exactly that: tackle the challenges driving pharmacy spend, optimize trend, and navigate a rapidly evolving market with confidence.

Traditional/ Non-specialty Insights



Top 10 VytlOne Non-Specialty (Traditional) Classes[1]

Utilization

54%

Plan spend

98.5%

Claims

Diabetes

Diabetes continues to be a major cost driver in both medical and pharmacy spend, increasing 7.7% year-over-year (1% PMPM trend 23 versus 24). GLP-1 receptor agonists (RAs)—led by Mounjaro®—are reshaping the treatment landscape with benefits extending beyond glycemic control to weight loss and cardiovascular protection. Meanwhile, legacy GLP-1s such as Ozempic®, Trulicity®, and Rybelsus® are experiencing slight market share declines. Utilization management strategies remain essential to curb off-label use for weight loss.

#1	10.8%	7.7%
Traditional Plan Cost PMPM Ranking	Traditional Utilizers	Trend

#1
Traditional Class Ranking

7.7%
Overall Trend

Cost Drivers

6.73%	1.05%	-0.50%	0.45%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

Key Insights

- Mounjaro continues to dominate category growth and spend, driving a 50% PMPM trend increase. The surge reflects strong utilization momentum as members transition away from other GLP-1 RAs and legacy diabetic therapies.
- Continued decrease in insulin and DPP-4 utilization with slight market share increase of SGLT-2 inhibitors, Jardiance and Farxiga, due to their known cardiovascular and renal-protective benefits.

↗	GLP-1 RAs	SGLT-2 Inhibitors
↘	Insulin	Antidiabetic combinations

Diabetes Top 5 Drugs: Mounjaro, Ozempic, Jardiance®, Farxiga®, Trulicity®

What to watch

As GLP-1 utilization continues to expand across diabetes, obesity, and cardiometabolic risk reduction, plan sponsors will increasingly need to evaluate cross benefit management strategies, coverage alignment, and guardrails for off-label use to balance access with affordability.

Obesity

While the year-over-year trend moderated in 2025, absolute spend remains elevated, and anti-obesity medications (AOM) continue to represent one of the fastest growing contributors to pharmacy PMPM. Coverage of AOM GLP-1 therapies Wegovy® and Zepbound® continues to redefine the obesity care landscape. The ongoing utilization and successful clinical weight loss continues to fuel the AOM trend, which posted a **56.5% plan-paid PMPM trend** in CY 2025—moderating from the extraordinary 162% surge seen in CY 2024. There has been a reduction in overall book of business trend as more plans have begun to modify coverage options for 2026 and shift cost share to members as additional dosage forms and coverage options become available.[2]

#2
Traditional Class Ranking

56.5%
Overall Trend

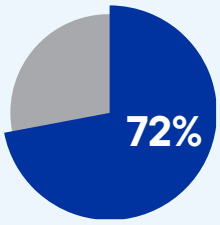
Cost Drivers

3.79%	53.99%	0.33%	-1.57%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

Obesity Top 5 Drugs: Zepbound, Wegovy, Saxenda®, Contrave®, phentermine

Key Insights

- AOM costs are increasingly driven by rising volume—primarily from Zepbound (122% plan paid PMPM trend)—with additional costs emerging from a gradual shift and drug mix and shifting toward higher cost agents.



Zepbound Market Share

What to watch Coverage redesigns, member cost sharing strategies, and emerging oral or alternative formulations will be key variables influencing 2026–2027 obesity spend trajectory.

Migraine/CGRP

Calcitonin gene-related peptide (CGRP) receptor agents used in the treatment of migraine rank as the #3 traditional drug category for the second year. The CGRP uptake since introduction over 5 years ago (circa 2018) has grown consistently. These agents offer both acute and preventive utility and are better tolerated than many traditional migraine preventives which is evidenced by the steady increase in utilization driver (26.6%)

#3
Traditional Class Ranking

33.1%
Overall Trend

Cost Drivers

2.70%	26.64%	2.02%	1.73%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

Migraine/CGRP Top 5 Drugs: Nurtec®, Qulipta®, Ubrelvy®, Emgality®, Ajovy®

Key Insights

- Considered first line option for migraine prevention, oral CGRP therapies have steadily gained market share with Nurtec®, Qulipta®, and Ubrelvy® leading as the top three in the category.[3]
- Nurtec is the overall leader in PMPM spend touting a 37.9% trend and primarily driven by utilization however, PMPM trend of Qulipta is gaining at 50.3%

What to watch The continued adoption of CGRP therapies as first-line treatments signals migraine management is prioritizing tolerability and prevention, but this comes with substantial cost implications given current use patterns.

Mental Health

With a moderate upward trend of 15.4%, mental health spend continues to accelerate largely driven by drug mix shifts to newer market entrants. Members are moving away from lower-cost therapies and toward higher cost agents—often ranging from $500 to $1,700 per prescription—creating sustained pressure on overall pharmacy trend.

#4
Traditional Class Ranking

15.4%
Overall Trend

Cost Drivers

12.93%	2.75%	0.32%	-0.60%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

Mental Health Top 5 Drugs: Vraylar®, Rexulti®, Trintellix®, Auvelity®, Caplyta®

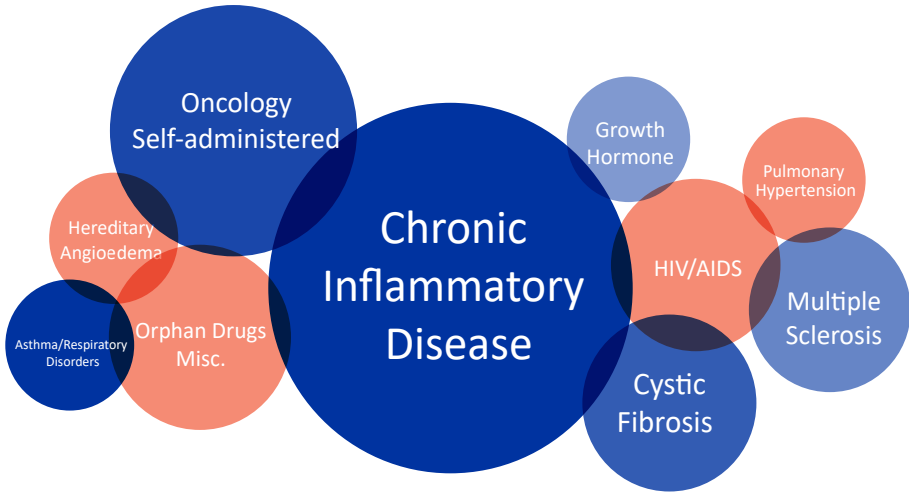
Key Insights

- Vraylar and Auvelity show the largest increases in overall PMPM spend, reflecting their growing utilization and higher net costs within behavioral health pharmacotherapy.
- Rexulti® and Caplyta® are experiencing sustained increases in prescription volume, indicating expanding utilization across psychiatric treatment segments.
- Vraylar's market share and total spend continues to rise due to a combination of factors including broad FDA-approved indications.
- Maintaining a steady trend and PMPM, Trintellix offers a unique multimodal serotonin mechanism and cognitive benefits not typically seen with standard SSRIs/SNRIs, while maintaining comparable antidepressant efficacy.[4]

What to watch

Mental health trend growth reflects a broader shift toward newer mechanisms of action and expanded indications, positioning behavioral health pharmacotherapy as a sustained contributor to pharmacy trend rather than a short-term surge.

Specialty Insights



Top 10 VytlOne Specialty Classes[1]

Utilization

- Although specialty medications continue to account for a disproportionate share of pharmacy spend, their relative contribution declined modestly in 2025. This shift reflects increased adoption of lower cost biosimilars in inflammatory conditions alongside rapid growth in traditional therapies, most notably GLP-1 RAs, which are reshaping overall drug spend dynamics.

46%

Plan spend

1.5%

Claims

Chronic Inflammatory Diseases

Chronic inflammatory therapies remain the top driver of specialty spend, accounting for 54% of specialty PMPM. The decrease in mix indicates a shift towards lower-cost therapies within the class while the increase in volume points to an increase in members using therapies.

#1
Specialty Class Ranking

7.0%
Overall Trend

Cost Drivers

-12.02%	14.38%	-0.01%	4.57%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

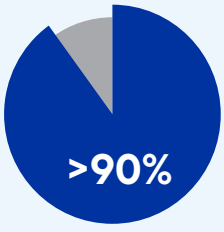
Chronic Inflammatory Top 5 Drugs: Skyrizi®, Humira®, Stelara®, Rinvoq®, Enbrel®

What to watch

Continued biosimilar adoption, increased formulary competition among next-generation immunology therapies, and payer-driven site-of-care optimization will remain key levers in managing spend within this category.

Key Insights

- The uptake of Humira biosimilars has significantly affected the spend in the anti-tumor necrosis factor (TNF) inhibitor category. This is evidenced by a 56% reduction in PMPM trend with a significant portion of that being tied to mix within the class.
- Anti-psoriatic agents accounted for 59% of the total Specialty PMPM spend, driven primarily by increased utilization of Skyrizi, Bimzelx®, and Tremfya®.
- Eczema therapies continued their upward trend driven largely by increased utilization. Ebglyss®, launched in Q4 2024 and incorporated into prescribing guidelines, along with Dupixent®, which expanded into two new indications in 2025, contributed the highest PMPM spend within this category.[5]



Humira Biosimilar Uptake

Oncology

Oncology remains a major driver of specialty pharmacy spend, ranking as the second-highest category, accounting for 14% of specialty PMPM. In 2025, 18 novel oncology therapies received FDA approval, carrying an average annual cost of approximately $438,000. Continued growth in precision treatments is expected to further influence cost and care delivery while improving patient outcomes.[6]

$438,000 **Average annual cost for newly approved therapies**

#2
Specialty Class Ranking

2.9%
Overall Trend

Cost Drivers

2.11%	-1.97%	-0.25%	3.05%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

Oncology Top 5 Drugs: Verzenio®, lenalidomide, Kisqali®, Ibrance®, Lynparza®

Key Insights

- The cyclin-dependent kinase 4/6 inhibitor continued an upward trend. Kisqali growth was driven by increased utilization while Verzenio saw a decrease in utilization over the year. Side effect profile may help drive patients to Kisqali as it has less gastrointestinal impact and a cyclic dosing schedule.[7,8]
- Voranigo®, approved in late 2024 as the first systemic treatment for certain gliomas[9], saw triple-digit trend that was driven by increased utilization and volume.

What to watch As oncology drug development increasingly targets narrower biomarker-defined populations, plans will face higher per patient costs despite relatively small utilization cohorts.

Orphan Drugs

Orphan drugs continue to play an increasingly prominent role in the pharmaceutical landscape, moving up two spots to secure the third-highest specialty spend in 2025. This increase was mainly driven by a 22% increase in script volume.

Increase from 5th to 3rd in specialty class ranking

#3
Specialty Class Ranking

28.2%
Overall Trend

Cost Drivers

-0.27%	22.63%	-0.37%	6.15%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

Orphan Drugs Top 5 Drugs: Xywav®, Wakix®, sodium oxybate, Daybue®, Jynarque®

What to watch The continued acceleration of orphan and rare disease therapies underscores a structural shift in pharmaceutical innovation – one that concentrates spend among smaller patient populations with limited therapeutic alternatives.

Key Insights

- Anti-cataplectic agents had the highest PMPM spend in this category, with a 10% upward trend. Xyrem® use declined due to its high sodium content and twice nightly dosing, while Xywav—a lower sodium alternative—saw increased utilization. Lumryz®, a once-nightly option, experienced triple-digit PMPM growth as patients shifted toward more convenient dosing.[10]
- Livdelzi® and Iqirvo®, both used to treat primary biliary cholangitis, saw triple digit increases in utilization and volume. These newer therapies average 20% higher cost per script than Ocaliva®, which was removed from the market in September 2025.
- Complement inhibitor therapies accounted for 21% of the orphan drug PMPM spend.

NASH/MASH

This class experienced triple-digit trend driven by a spike in volume after one full year of Rezdiffra® availability on the U.S. market.

591% Trend

Key Insights

- According to the manufacturer, Rezdiffra reached nearly $1 billion in net sales over the first full year of launch.[11]

#23
Specialty Class Ranking

591.4%
Overall Trend

Cost Drivers

-26.51%	503.73%	-27.69%	141.78%
Mix Factor	Volume Factor	Quantity Factor	RX Pricing Factor

NASH/MASH Top Drug: Rezdiffra (only one drug in this specialty class)

What to watch

The NASH/MASH category is expected to remain a high growth specialty class driven primarily by rapid patient uptake of a single, first-to-market therapy and increasing diagnosis rates. Near-term cost pressure will be driven more by utilization expansion than pricing with limited mitigation until additional competitors enter the market. Payers should plan for continued budget volatility while evaluating utilization management, reporting, and future pipeline activity to better manage long-term impact.

Key Market Trends

Understanding pharmacy trends is essential in our rapidly evolving marketplace. Below are key drivers that can help you get the information you need to make smarter strategic decisions.

Lifecycle Strategy and Patents

The patent-cliff will accelerate in 2026, with several blockbuster therapies – including Januvia®, Xeljanz®, and Adempas® - scheduled to lose market exclusivity and face generic competition. As the market navigates this unprecedented period, manufacturers are increasingly deploying aggressive lifecycle management strategies to protect revenue, including expanded indications, next-generation formulations, and shifts toward newer branded therapies. These approaches have often offset anticipated savings from loss of exclusivity; for example, following the launch of Humira biosimilars, newer immunology agents such as Skyrizi and Rinvoq experienced sales growth exceeding 30% in 2025,[12] underscoring how innovation and strategic repositioning continue to influence spend even amid rising biosimilar competition. While biosimilar adoption has grown, meaningful gaps remain in the development pipeline, with more than 100 biologics expected to lose patent protection over the next decade and only approximately 10% currently having a biosimilar in development. Anticipated FDA updates to biosimilarity and interchangeability guidance in 2026—along with potential legislation to automatically designate biosimilars as interchangeable—could accelerate market entry and expand access to lower-cost alternatives. This positions health plans that proactively manage biosimilar adoption through formulary strategy, provider engagement, and education to achieve more sustainable long-term savings.[13]

Technology & AI

AI and advanced technology are being applied in increasingly sophisticated ways across the PBM landscape, evolving beyond operational efficiency to support more clinically informed decision-making. Expanded biomarker testing and stronger integration of medical and pharmacy data are enabling more precise therapy selection and utilization management, while digital therapeutics are emerging as complementary tools to drive member engagement and improve outcomes. Collectively, these advancements position PBMs to better balance innovation, clinical effectiveness, and sustainable cost management.

New Policy & Legislation

Drug pricing and access are increasingly being shaped by federal policy and market-driven innovation. The Inflation Reduction Act (IRA) of 2022 granted Medicare the authority to negotiate prices for select high-cost therapies beginning in 2026, signaling a structural shift in how drug costs may be managed over time. In 2025, the expansion of the orphan drug exemption preserved incentives for rare disease innovation by shielding these therapies from price negotiation eligibility. Concurrently, value-based pricing models continue to gain traction, linking reimbursement to demonstrated clinical outcomes and reinforcing a broader shift toward paying for therapeutic value rather than volume.[14]

Pharmacy Spend Management Solutions

Organizations are adapting to a rapidly changing healthcare landscape driven by direct-to-consumer (DTC) purchasing, expanded telehealth, and pharmacy-led models that are reshaping traditional distribution channels. Growing demand for pricing transparency and alternative purchasing approaches accelerates the adoption of value-based solutions and greater accountability for outcomes. At the same time, increasing complexity regarding pharmacy versus medical benefit billing and the emergence of integrated point solutions are driving more coordinated, data-enabled benefit designs focused on managing cost while improving access and continuity of care.

Product Solutions

VytlOne continues to introduce products that meet the changing landscape of pharmacy spend, clinical innovation, and health system sustainability.

Disease Management

The VytlOne **Care Improvement Program Plus** is a powerful combination of pharmacy analytics and insights. These work together to provide a holistic view of a member's health to identify opportunities to improve health outcomes.

360° Member View

Risk models and member analytics will guide clinical decisions for provider and/or member outreach. By identifying members with the highest risk who would be most likely to accept outreach and change behavior, we can offer creative solutions to help address individual member challenges.

Specialty Site of Care Network offers personalized care and assists employers in managing high-cost, specialty drug infusions. With this program, members using infusion drugs can choose comfortable care at home or in a local infusion center.

Optimization

The Better Choice Program focuses on lowest net cost and excludes certain high-cost, low-value medications deemed to have little to no clinical value when compared to others within the same therapeutic class.

$2.50 - $6.50
Better Choice Program
PMPM Client Savings

True Spend Solutions provides an accurate or a "true" view of a member's out-of-pocket medication costs. The program captures mail order and retail data. True Spend Solutions helps employers to budget for pharmacy costs and set premiums appropriately and prevents members from unexpected, high medication costs.

For a smart way to save on cancer medications, there is the **Oncology Split Fill Program**. This program minimizes drug waste if patients can't tolerate the prescribed dose of their medication or if they require frequent dosing adjustments.

Digital Communication

VytlOne employs a multifaceted approach to engage members including **myVytlOneLink™** and **Dynamic Discounts.** Monthly wellness messages, targeted disease state information, and opportunities for cost-share savings are shared through a secure link delivered through a mobile messaging platform. These education and adherence messages encourage members to engage with their pharmacy benefits and optimize health outcomes.

$55-$60
Dynamic Discounts Average Member Savings Per Fill

15%-19%
Dynamic Discounts Improved Adherence

Financial Support

VytlOne's **Value Based Arrangements** captures medical pharmacy rebates for medication claims in 30 key therapeutic categories that are processed through a client's medical claim benefit. Our medical rebate offering strengthens the financial performance of our clients, leveraging innovative technology and clinical solutions.

The **VytlOne RxDiscount Program** is a powerful cost saving solution designed to reduce prescription drug costs and provide members with automatic competitive pricing at participating pharmacies. Members can save up to 80% on prescriptions.*

**Savings vary by medication and pharmacy*

The **VytlOne Managed Copay Solutions Program** helps our clients align the value of manufacturer copay programs in specific markets to support your plan formulary. It helps to decrease the cost of your plan with zero copay for members. This program is also designed to help you use Manufacturer Copay Assistance on claims to achieve savings earlier in the plan year.

$0
Copay for Members

Weight Management

For members looking for weight management support, the **Welldoc®** app helps build long-term weight management and support. It's a data-driven approach that connects health and care for weight management, including GLP-1 medication support.

As we continue product development, our future offerings will include next-generation, tiered bundled pricing products for health system clients. This new offering is designed to deliver greater flexibility, predictability, and alignment with organizational need and financial objectives.

Some products may not be available for all clients.

Case Study

Helping Health Systems Balance Financial Sustainability

Health systems face increasing pressure from rising pharmacy spend driven by specialty growth, expanded indications, and pricing inflation. Traditional formulary and benefit management approaches often lack the agility and integration needed to respond, leading to fragmented decisions, inconsistent utilization, and missed opportunities to improve adherence, affordability, and outcomes.

Dynamic Discounts	**$46** Average Member Savings Per Script
Managed Copay Solutions	**$9.64** PMPM
CIP+	**$4.54** PMPM
Better Choice Program	**$7.44** PMPM
Opioid Safety	**7%** Decrease in Long-Acting Opioid Script
Clinical Utilization Management	**$16.69** PMPM
myVytlOneLink	**3,132** Messages Sent

Case Study

Closing Statin Gaps in Diabetes Care

Improving Cardiovascular Outcomes through Evidence-Based Intervention

Cardiovascular disease remains one of the leading causes of morbidity and mortality among people with diabetes. Current American Diabetes Association (ADA) guidelines recommend initiation of statin therapy for adults aged 40 years and older with diabetes to reduce the risk of atherosclerotic cardiovascular disease, including myocardial infarction and stroke. Despite strong clinical evidence supporting statin use, gaps in initiation persist. Closing these gaps represents a meaningful opportunity to improve outcomes while aligning care with established, evidence-based standards.[15]

The Care Improvement Program+ reviews member utilization and clinical data to identify statin care gaps and conducts targeted provider outreach with evidence-based guidance to support informed prescribing while respecting provider judgment.

Program Impact and Outcomes

For clients who have participated in the Care Improvement Program+ for two or more years, statin gaps accounted for approximately 10% of all identified clinical intervention cases, highlighting the ongoing relevance of cardiovascular risk management within diabetes care. Among members identified for a statin gap, 22% initiated statin therapy, effectively closing the clinical gap and aligning treatment with ADA recommendations. Importantly, follow-up monitoring demonstrated durable success: 89% of members who initiated statin therapy remained adherent through the end of the most recent reporting period.

Clinical and Plan Value

This case study underscores the impact of proactive, data-driven interventions in closing gaps in care for high-risk populations. By supporting alignment with evidence-based guidelines, the program helps reduce long-term cardiovascular risk while fostering sustained adherence to newly initiated therapy. For payers, these interventions contribute to lower total cost of care over time by reducing the likelihood of avoidable cardiovascular events, hospitalizations, and downstream medical spend—while improving quality of care, health outcomes, and chronic disease management.

Results

10%

Of all identified clinical intervention cases were related to statin gaps, highlighting a persistent and actionable care opportunity

22%

Of members identified with a statin gap-initiated therapy, effectively closing the guideline recommended care gap

89%

Adherence rate was sustained through the end of the reporting period among members who initiated statins, indicating durable clinical impact opportunity

Decrease cardiovascular risk.

Decrease in total cost of care.

Pipeline

46
Novel Therapies Approved in 2025
8% decrease in approvals from 2024[16]

12
Novel Therapies Approved in 2026
As of April 2026

33
Novel Therapy Approvals
Anticipated for approval in 2026

Jascayd® (Q3 2025)
Novel treatment approved for both idiopathic pulmonary fibrosis (October) and progressive pulmonary fibrosis (December), ($115M sales in 2025[17])

Wegovy tablet (December 2025)
First oral GLP-1 for weight loss was approved and launched (Annual therapy cost of $16,414 with lower cost direct-to-consumer offers available[18])

Zycubo® (January 2026)
First and only treatment for Menkes disease, a rare pediatric disease (Annual therapy cost ranges from $681,455 to $1,362,910 depending on the age and dose for the patient[19]). (IPD Analytics. New Drug Review: Zycubo. January 2026)

Icotyde® (March 2026)
First oral IL-23 blocker to treat plaque psoriasis. May offer an alternative to highly utilized injectable therapies like Tremfya and Skyrizi.[20]

AD109
Aroxybutynin/Atomoxetine (Q4 2026)
First and only oral therapy to treat underlying cause of obstructive sleep apnea ($10,000-$20,000 annual cost;[21])

Xolair® biosimilar launch (2026)
This launch will mark the first biosimilar in the asthma biologic space (Omlyclo™ has been approved as an interchangeable biosimilar for the same indications as Xolair[22]).

26
Drugs with Orphan Designation Approved in 2025[23]

In 2025, over half of FDA novel drug approvals were designated for rare diseases, highlighting the industry's focus on developing therapies for populations with an unmet need.

Generics on the Rise/Patent Cliff

Several highly utilized medications will lose patent protection in 2026, opening the door for lower-cost generic versions. This can greatly expand access for patients while lowering spend for employers.

Drug/manufacturer	Indication	Estimated Launch	2025 U.S. Sales[24]
Trintellix®/Takeda	Major depressive disorder	26-Dec	*~$1.4 B*
Bridion®/Merck Specialty	Reversal of neuromuscular blockade	26-Jul	*~$2.1 B*
Briviact®/UCB Specialty	Partial-onset seizures	26-Feb	*~$878 M*
Neudexta®/Otsuka Specialty	Pseudobulbar affect	26-Jul	*~$223M*
Januvia®/Merck	Glycemic control in T2DM	26-May	*~$3.2B*
Janumet XR®/Merck	Glycemic control in T2DM	26-Jul	*~$362M*
Tradjenta®/ BI	Glycemic control in T2DM	H2 2026	*~$1.3B*
Xeljanz®/XR/Pfizer Specialty	Inflammatory conditions	Q2 2026	*~$4.4 B*
Injectafer®/Daichi Sankyo	Iron supplement	26-Jul	*~$717M*
Ofev®/BI*	Idiopathic pulmonary fibrosis	26-Apr	*~$3.8B**
Opsumit®/J&J Specialty	Pulmonary arterial hypertension	Q2 2026	*~$1.7B*
Adempas®/Bayer Specialty	Pulmonary arterial hypertension	Q4 2026	*~$1.1B*

*Worldwide sales[17]

References

1. VytlOne, VytlOne Insights Historical Utilization Data, Commercial Segment, Year to Date 2024 versus 2025.
2. WTW (Willis Towers Watson) – "GLP1 Drugs in 2025: Cost, Access, and the Future of Obesity Treatment
3. Association of Migraine Disorders. American Headache Society position statement on CGRP-targeting therapies. Accessed March 23, 2026. https://www.migrainedisorders.org/ahs-statement-cgrp
4. I-Chen Huang, Tsui-San Chang, Chiehfeng Chen, Jia-Ying Sung, Effect of Vortioxetine on Cognitive Impairment in Patients With Major Depressive Disorder: A Systematic Review and Meta-analysis of Randomized Controlled Trials, *International Journal of Neuropsychopharmacology*, Volume 25, Issue 12, December 2022, Pages 969–978, https://doi.org/10.1093/ijnp/pyac054
5. Davis D, Frazer-Green L, Alikhan A. Focused update: Guidelines of care for the management of atopic dermatitis in adults. Journal of the American Academy of Dermatology, 2025; 93, 745.e1-745.e7
6. IPD Analytics (2026). Life Cycle Insights. Accessed March 23, 2026. https.//secure.ipdanalytics.com
7. Kisqali (ribociclib) Prescribing Information. Novartis. U.S. Food and Drug Administration; December 2025. Accessed March 23, 2026. https://www.accessdata.fda.gov/drugsatfda_docs/label/2024/209092s018lbl.pdf
8. Verzenio (abemaciclib) Prescribing Information. Eli Lilly. U.S. Food and Drug Administration; August 2025. Accessed March 23, 2026. https://www.accessdata.fda.gov/drugsatfda_docs/label/2025/208716s019lbl.pdf
9. FDA Approval: FDA approves vorasidenib for Grade 2 astrocytoma or oligodendroglioma with a susceptible IDH1 or IDH2 mutation | FDA
10. Avadel Lumryz approval. Avadel Pharmaceuticals Announces Final FDA Approval of LUMRYZ™ (sodium oxybate) for Extended-Release Oral Suspension as the First and Only Once-at-Bedtime Oxybate for Cataplexy or Excessive Daytime Sleepiness in Adults with Narcolepsy
11. Madrigal Pharmaceuticals Reports Fourth-Quarter and Full-year 2025 Financial Results. Madrigal Pharmaceuticals. February 16, 2026. Accessed March 23, 2026. https://ir.madrigalpharma.com/node/17211/pdf
12. AbbVie Inc. Annual report on Form 10-K for the fiscal year ended December 31, 2025. U.S. Securities and Exchange Commission; 2026. Accessed March 23, 2026. https://www.sec.gov/Archives/edgar/data/1551152/000155115226000008/abbv-20251231.htm
13. Association for Accessible Medicines. 2025 Generic and Biosimilar Medicines Savings Report. Accessed March 23, 2026. https://accessiblemeds.org/wp-content/uploads/2025/09/AAM-2025-Generic-Biosimilar-Medicines-Savings-Report-WEB.pdf
14. IPD Analytics. Rx Insights: Drug Management. Rare Disease Drug Approvals. Feb 2026
15. Reference: Roger S. Blumenthal,Pamela B. Morris,Mario Gaudino,Heather M. et al, 2026 ACC/AHA/AACVPR/ABC/ACPM/ADA/AGS/APhA/ASPC/NLA/PCNA Guideline on the Management of Dyslipidemia: A Report of the American College of Cardiology/American Heart Association Joint Committee on Clinical Practice Guidelines, Circulation, 0, 0, (2026)./doi/10.1161/CIR.0000000000001423
16. Center for Drug Evaluation and Research. New Drug Therapy Approvals 2025. 2025 New Drug Therapy Approvals Annual Report
17. Published March 25, 2026. Accessed March 23, 2026. https://www.boehringer-ingelheim.com/about-us/who-we-are/2025-pipeline-key-product-launches-sales-growth
18. Novo Nordisk Inc. Wegovy® price guide. NovoCare®. Published January 2026. Accessed March 23, 2026. https://www.novocare.com/content/dam/novonordisk/novocare/redesign/pdf/Wegovy_Price_Guide.pdf
19. IPD Analytics. New Drug Review: Zycubo. January 2026
20. Johnson & Johnson. FDA approval of ICOTYDE™ (icotrokinra) ushers in new era for first-line systemic treatment of plaque psoriasis with a targeted oral peptide. Published March 18, 2026. Accessed March 23, 2026. https://www.jnj.com/media-center/press-releases/fda-approval-of-icotyde-icotrokinra-ushers-in-new-era-for-first-line-systemic-treatment-of-plaque-psoriasis-with-a-targeted-oral-peptide
21. IPD Analytics (2026) Life Cycle Insights: Pipeline Drugs. Accessed March 23, 2026. https.//secure.ipdanalytics.com
22. Janssen Biotech, Inc. OMLYCLO® (omalizumab-igec) injection, prescribing information. U.S. Food and Drug Administration; 2025. Accessed March 23, 2026. https://www.accessdata.fda.gov/drugsatfda_docs/label/2025/761399s004lbl.pdf
23. Center for Drug Evaluation and Research. New Drug Therapy Approvals 2025. 2025 New Drug Therapy Approvals Annual Report)
24. IPD Analytics (2026). Life Cycle Insights. Drug Spend 2025. Accessed March 24, 2026. https.//secure.ipdanalytics.com

VytlOne.com

For more information:
ClinicalAnalytics@vytlone.com
VytlOneProductDevelopmentInbox@vytlone.com

Authors

Michelle Brisco Fields, PharmD, MBA, MHA
Vice President, Clinical Analytics and Product Development

Cara Coladonato, PharmD, BCMTMS
Director, Clinical Analytics and Innovation

Contributors

Jay Koirala
Senior Clinical Business Analyst

Joe Cornago
Senior Clinical Business Analyst

Lorna Wassmer
Clinical Case Management Analyst