



PIA

Pharmacy Industry Trends
March 15, 2024

Presented by: Doug Long

The challenges facing our industry today are numerous

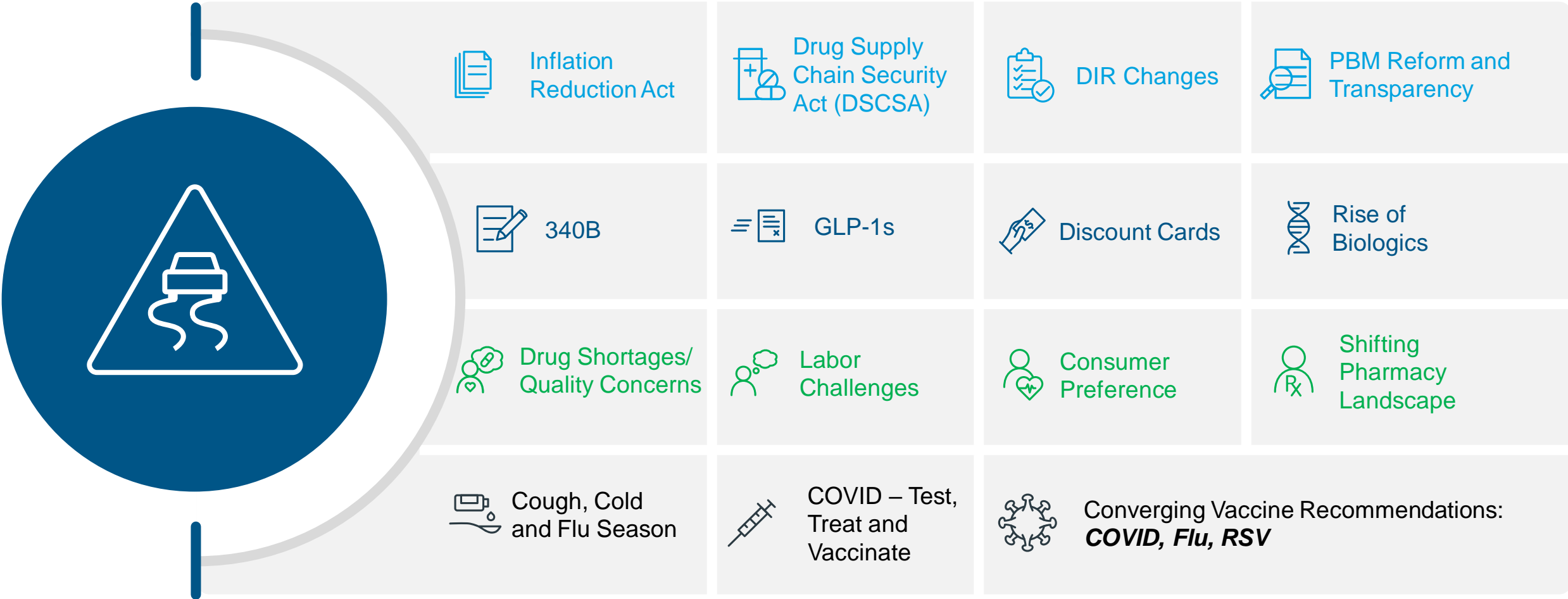




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Market Trends: Utilization

Medical claims/activity



Antibiotic Use and Rising Antimicrobial Resistance

- **ADHD medicine** use **grew 11%** over the last 5 years to over 3Bn days of therapy in 2022
- **Women aged 20–64** now **account for 33%** of prescriptions, up from 27% in 2018

- **2.4Bn antibiotic days of therapy** in 2022 down 7% from pre-pandemic
- use in **children and older adults up 8%** in Q4 2022 from historic seasonal levels

Stimulant Use and Related Shortages



- **Mental health prescriptions** reached **567Mn** in 2022 up 9% since 2019
- Mental health prescriptions in **girls under 19 up 33%** since pre-pandemic to 17Mn in 2022



Mental Health in Young People

Source: IQVIA Institute, Apr 2023

- **Over 500k GLP-1 agonist** new prescriptions across diabetes and obesity in February 2023, **up 152%** compared to prior year

Rising Use of Novel Obesity Drugs



- Per capita prescription **opioid use down 64%** since the peak in 2011
- Opioid overdose **deaths up 253%** since 2011

Concerning Gaps in Women's Health



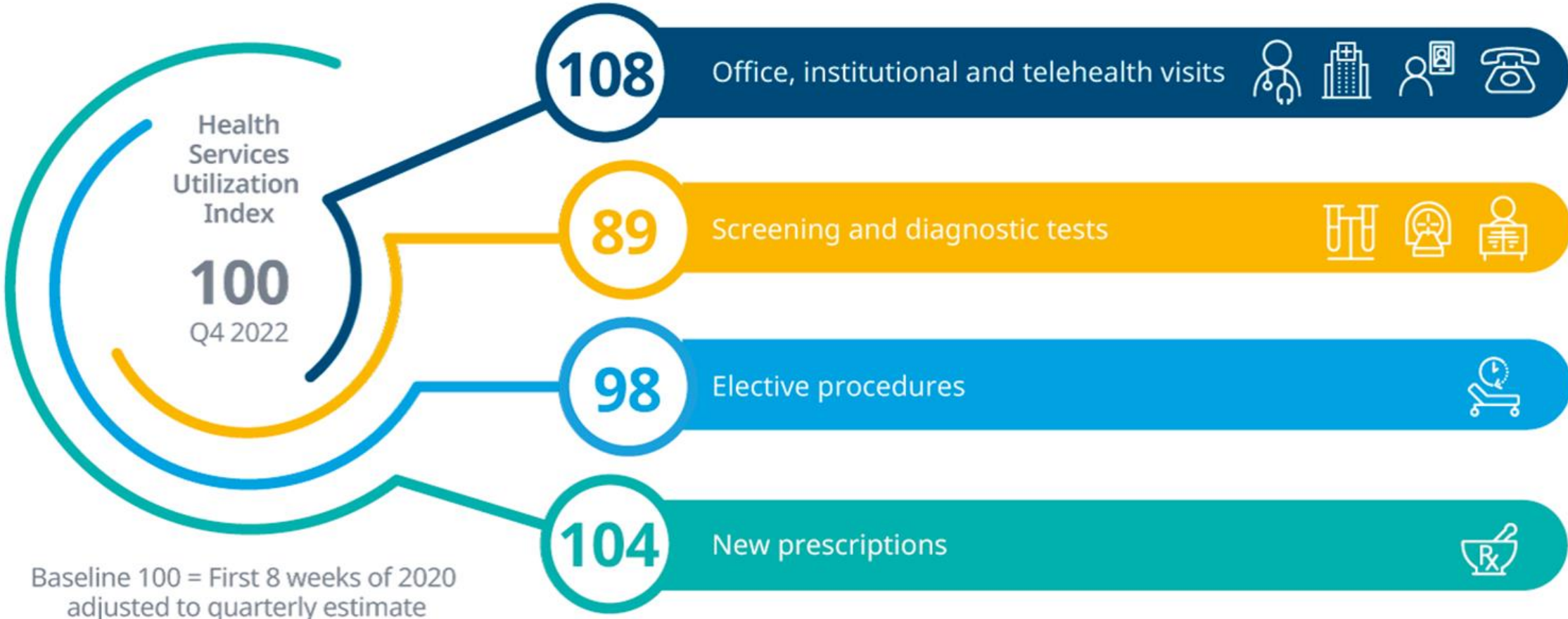
- **Contraception use down 6%** in 2022 with **100Mn fewer** days of therapy
- **Lower use of long-acting** birth control, such as IUDs and injectables



Combating the Opioid Overdose Epidemic

The Health Services Utilization Index indicates the U.S. is operating at pre-COVID-19 levels with shifts in utilization

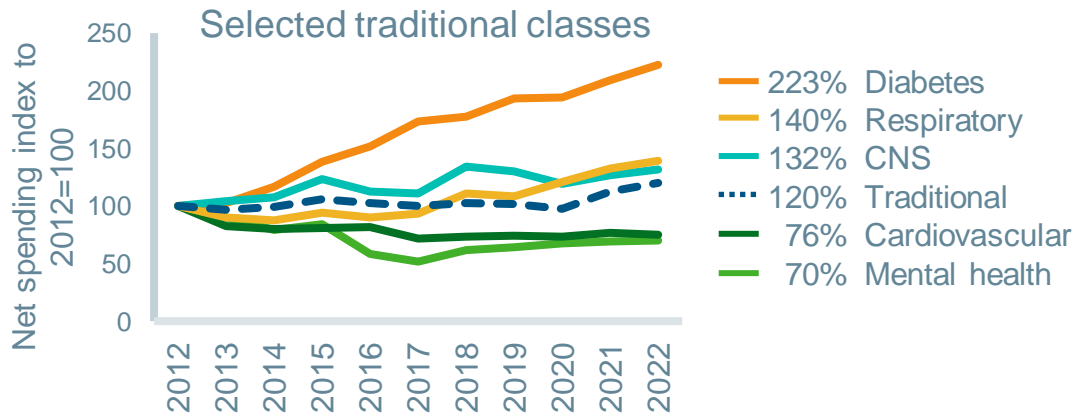
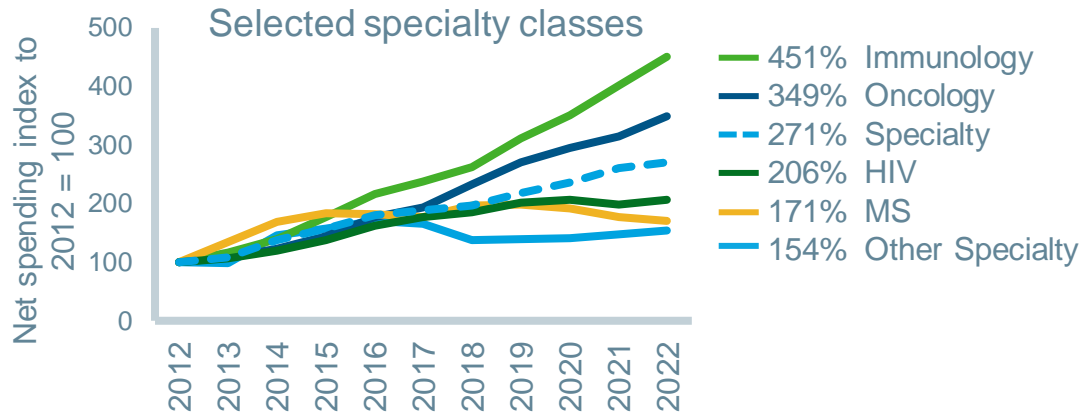
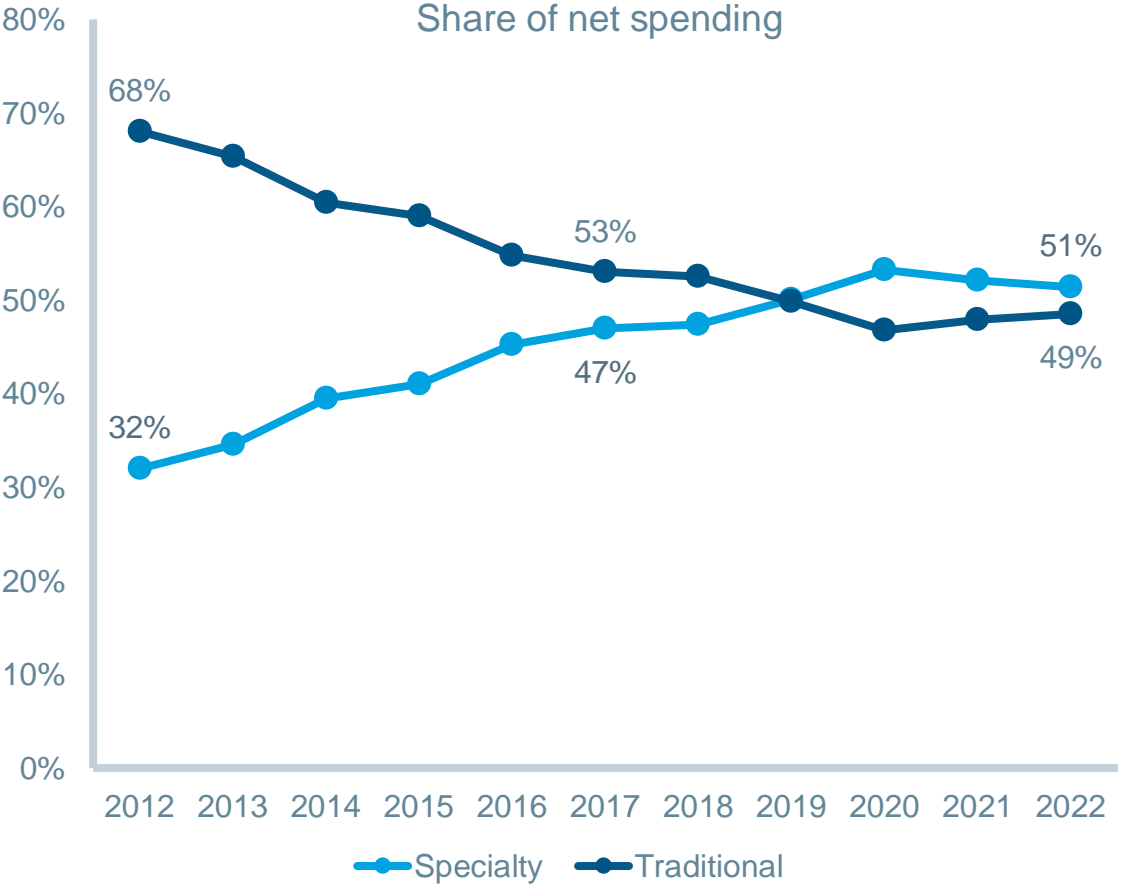
Overview of Health Services Utilization Index



Source: IQVIA Institute; IQVIA Medical Claims Data; LAAD Prescription data, week ending 12/30/2022.
The Use of Medicines in the U.S. 2023: Usage and Spending Trends and Outlook to 2027. Report by the IQVIA Institute for Human Data Science.
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Specialty medicines now account for 51% of spending, stable in the past 3 years as COVID treatments have lifted traditional

Share of spending at estimated net manufacturer prices



Source: IQVIA Institute, Mar 2023. The Use of Medicines in the U.S. 2023: Usage and Spending Trends and Outlook to 2027. Report by the IQVIA Institute for Human Data Science. ©2024 IQVIA and Affiliates. Do not reproduce without permission.

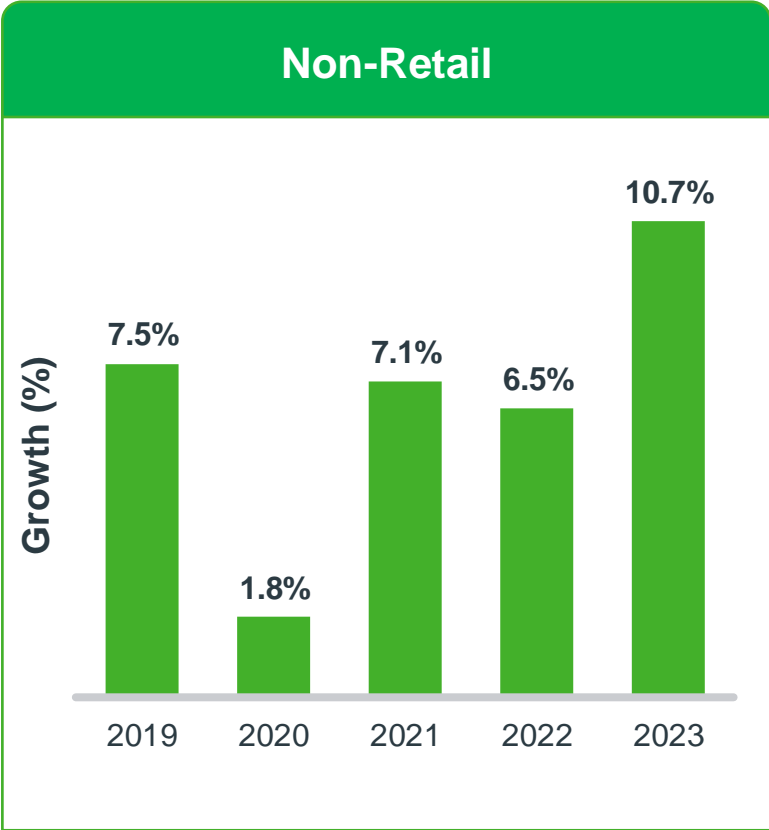
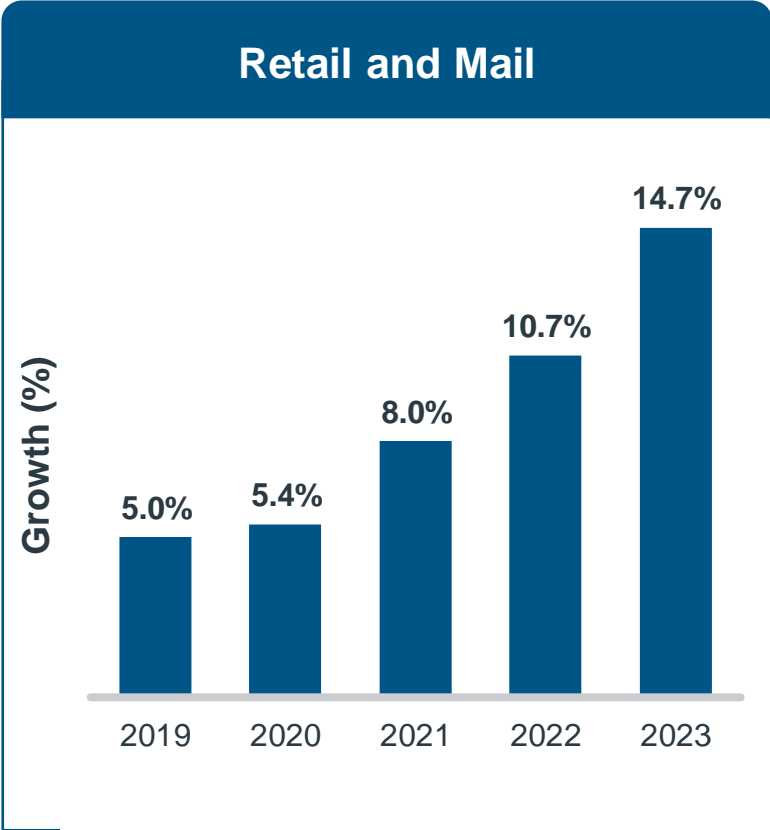
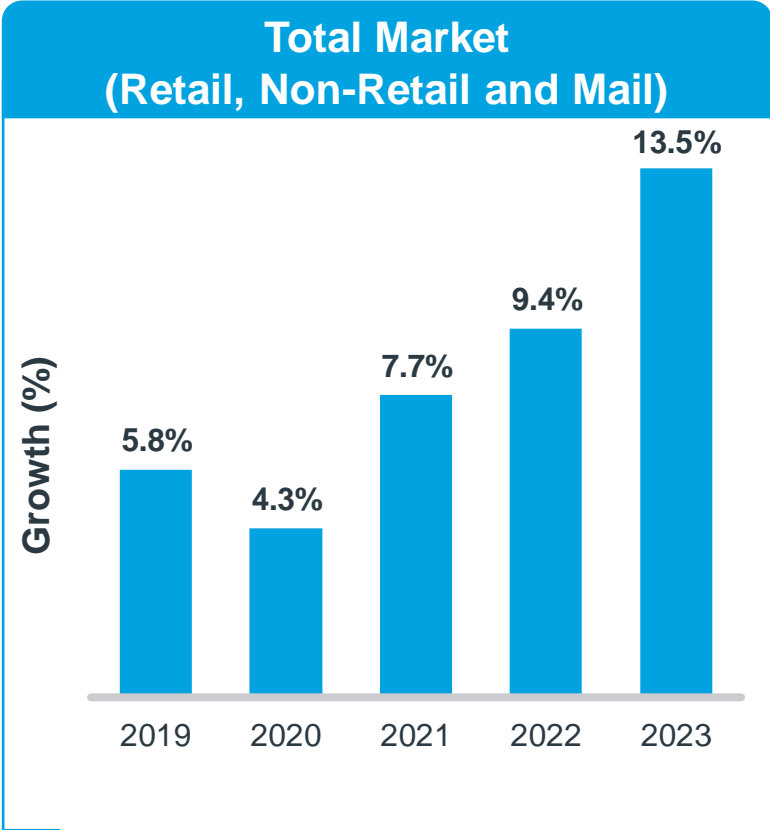


Where are we now?



The Non-Retail channel is recovering from effects of COVID-19

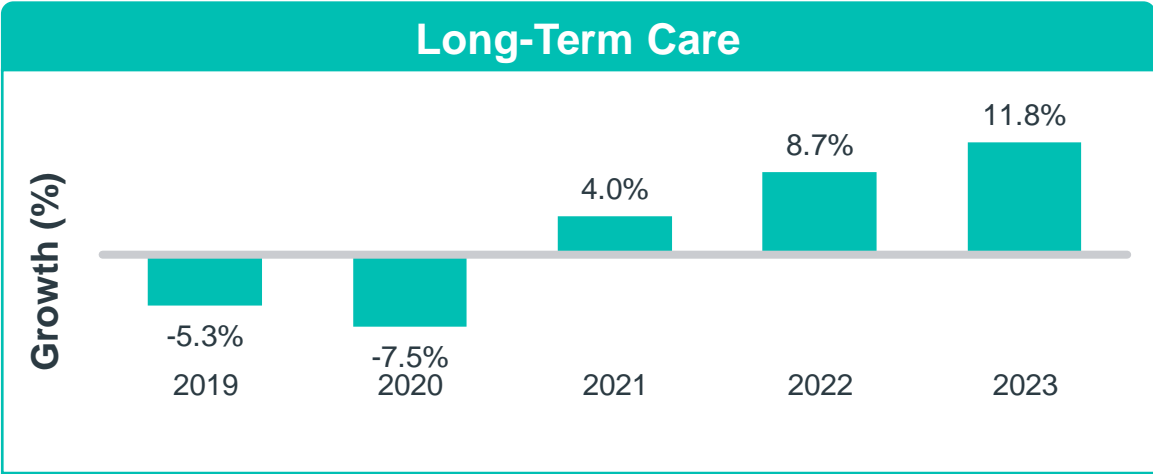
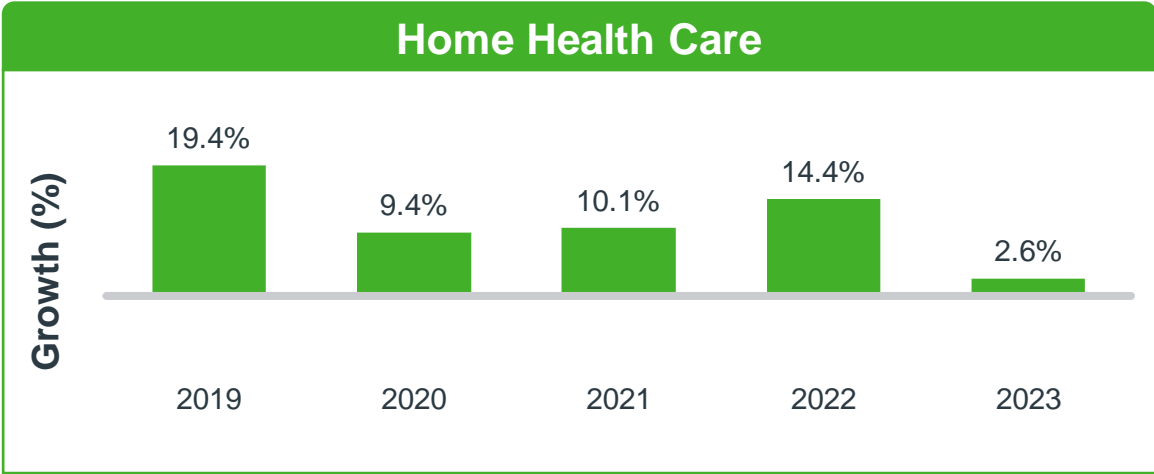
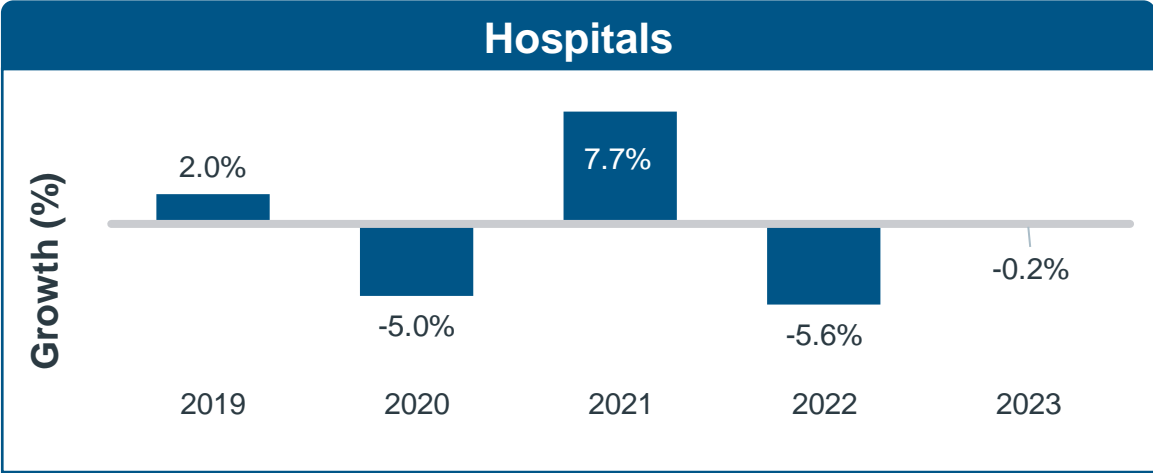
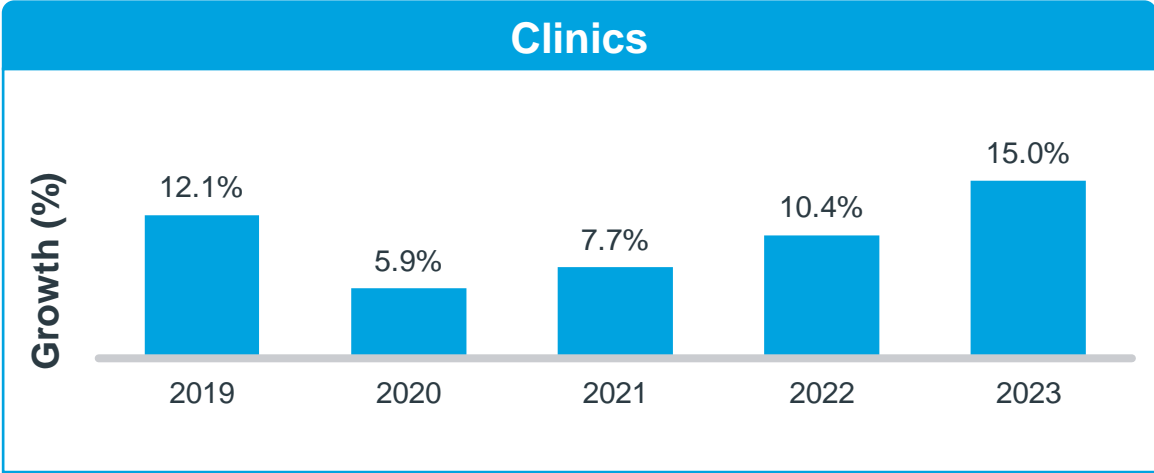
Growth (%) of Sales



Source: IQVIA, National Sales Perspectives, December 2023
Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

Clinics and Long-Term Care sales growth is strong while Hospitals and Home Health Care are weak

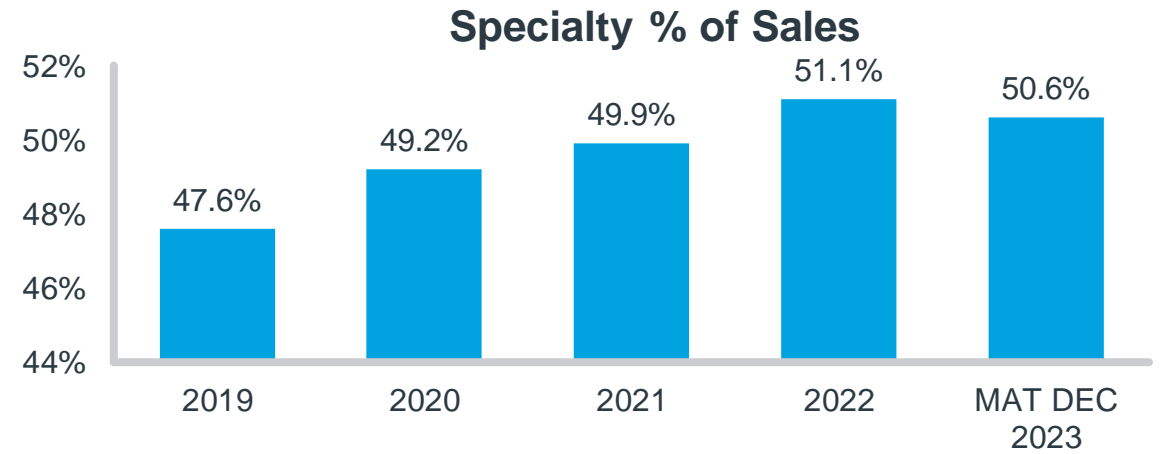
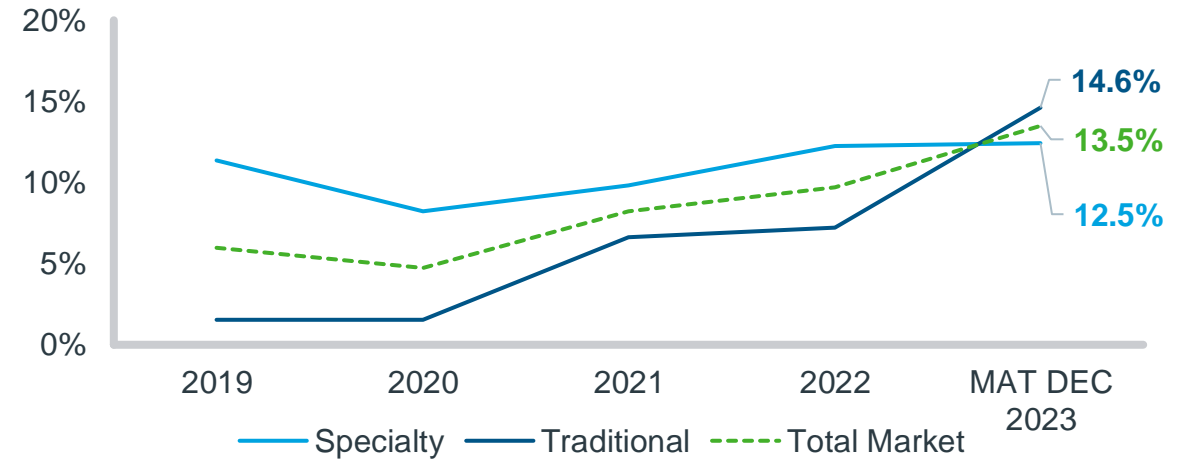
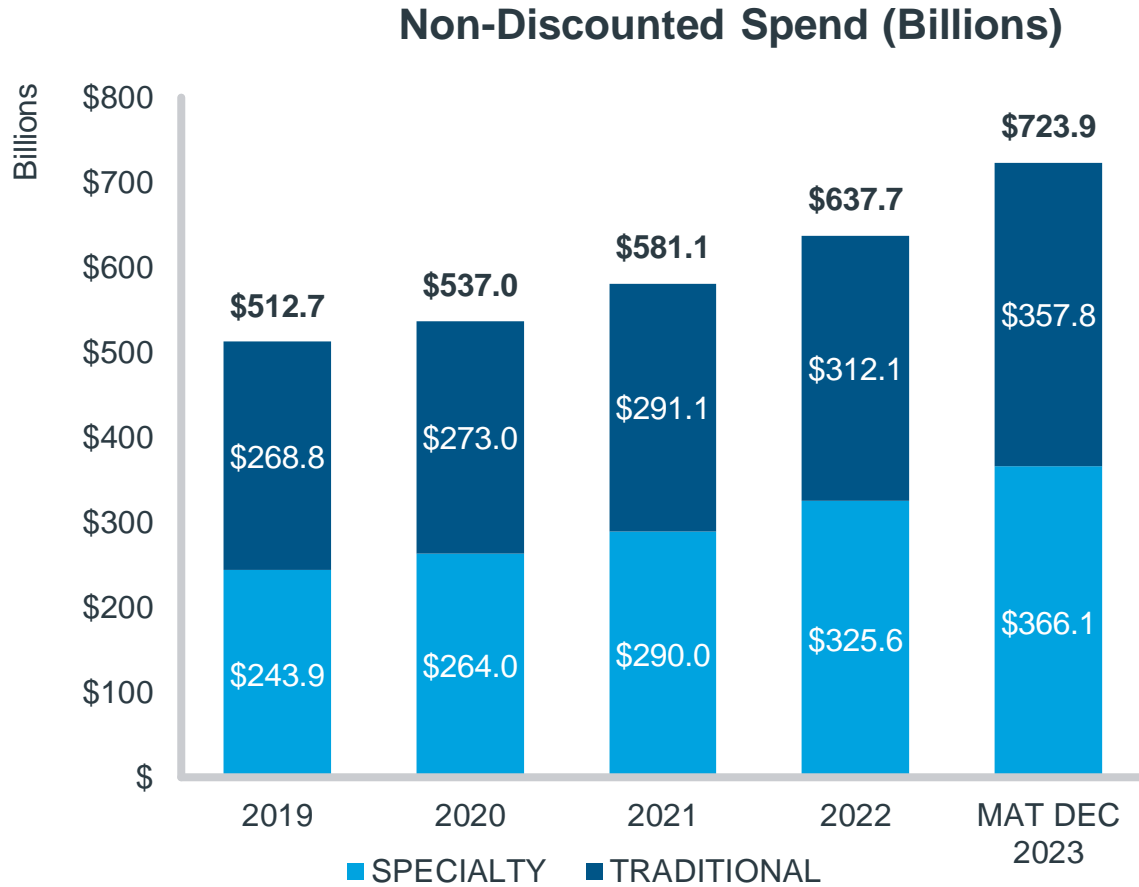
Growth (%) of Sales



Source: IQVIA, National Sales Perspectives, December 2023
 Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

For the total market, specialty growth is weaker than traditional growth for MAT Dec 2023

In MAT December 2023, specialty spend grew by 12.5% while traditional growth grew 14.6%



Source: IQVIA, National Sales Perspectives, December 2023

IQVIA Definition of a Specialty Drug

Specialty drugs at IQVIA are classified as products that meet the following criteria



Treats chronic, rare and/or complex diseases



Expensive (USD \$6K annual cost of therapy)



Initiated and maintained by a specialist



Unique distribution



Generally injectable and/or not self-administered



Requires extensive or in-depth monitoring/patient counseling



Products that require an additional level of care in their chain of custody



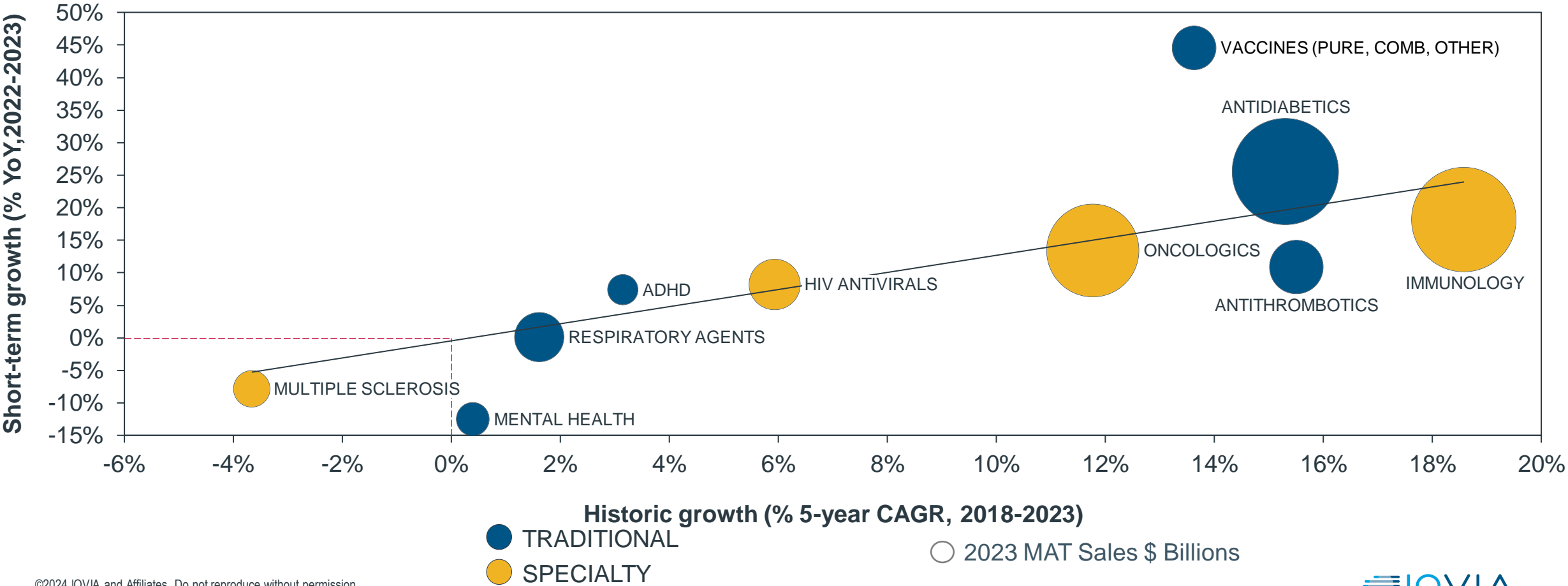
Requires reimbursement assistance

Immunology and Antithrombotics lead long-term growth

Vaccines lead short-term growth

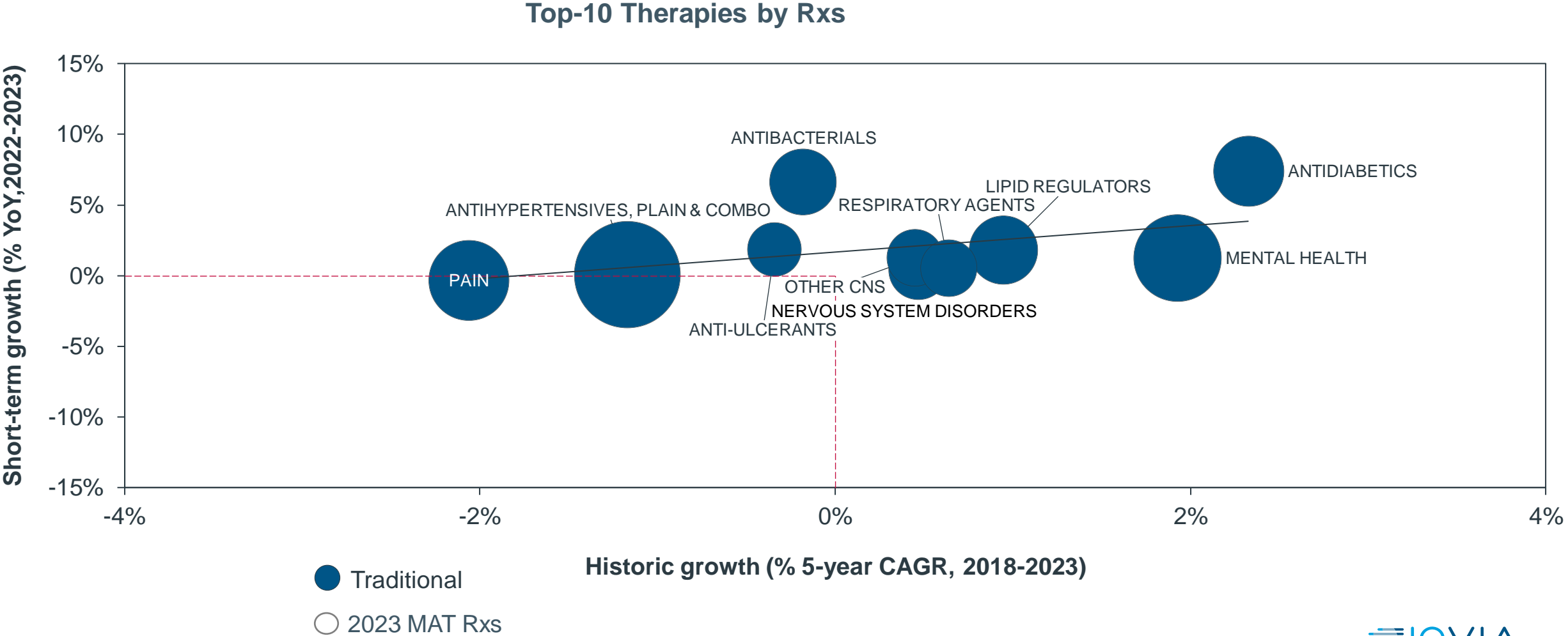
COVID-19 Vaccines are not included in Sales

Top-10 Therapies by Sales (\$)

























Antidiabetics and Mental Health lead long-term growth while Antidiabetics lead short-term growth

Traditional therapies command the Top 10 therapies by prescription



The top 10 therapy areas are growing at 15.7% and account for 72.8% market share

Rank	Therapy Area	Non-Discounted Spend (US\$ BNs)			
		MAT DEC 2023	Market Share	ABS Growth	Growth
1	ANTIDIABETICS	\$130.1	 18.0%	\$27.4	 26.7%
2	IMMUNOLOGY	\$129.1	 17.8%	\$19.8	 18.2%
3	ONCOLOGICS	\$101.6	 14.0%	\$12.1	 13.5%
4	RESPIRATORY AGENTS	\$34.7	 4.8%	\$1.2	 3.5%
5	ANTITHROMBOTICS	\$33.9	 4.7%	\$3.3	 10.9%
6	HIV ANTIVIRALS	\$30.1	 4.2%	\$2.3	 8.2%
7	VACCINES (PURE, COMB, OTHER)	\$22.3	 3.1%	\$6.9	 44.6%
8	MENTAL HEALTH	\$18.8	 2.6%	-\$1.0	-5.2% 
9	MULTIPLE SCLEROSIS	\$15.4	 2.1%	-\$1.3	-7.9% 
10	ADHD	\$10.8	 1.5%	\$0.7	 7.4%
TOP 10		\$526.9	 72.8%	\$71.4	 15.7%

Source: IQVIA, National Sales Perspectives, December 2023
 Limited to Rx and OTC Insulins
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The top 20 therapy areas are growing at 15.5% and account for 85.2% market share

Rank	Therapy Area	Non-Discounted Spend (US\$ BNs)			
		MAT DEC 2023	Market Share	ABS Growth	Growth
11	PAIN	\$10.7	1.5%	-\$0.5	-4.6%
12	OTHER CNS	\$10.1	1.5%	\$1.5	16.1%
13	MIGRAINE	\$9.8	1.4%	\$2.2	26.8%
14	GI PRODUCTS	\$9.7	1.4%	\$0.5	5.2%
15	ANTIHYPERTENSIVES, PLAIN & COMBO	\$9.6	1.4%	\$1.0	11.6%
16	ANTI-OBESITY PREPS, EXCL. DIETETICS	\$8.9	1.3%	\$6.4	230.3%
17	OTHER CARDIOVASCULARS	\$7.8	1.2%	\$0.5	5.6%
18	NERVOUS SYSTEM DISORDERS	\$7.3	1.1%	-\$0.8	-9.5%
19	DERMATOLOGICS	\$6.4	0.9%	\$0.1	0.9%
20	BLOOD COAGULATION	\$6.3	0.9%	\$0.3	5.7%
TOP 20		\$592.0	85.2%	\$82.5	15.5%

Source: IQVIA, National Sales Perspectives, December 2023

Limited to Rx and OTC Insulins

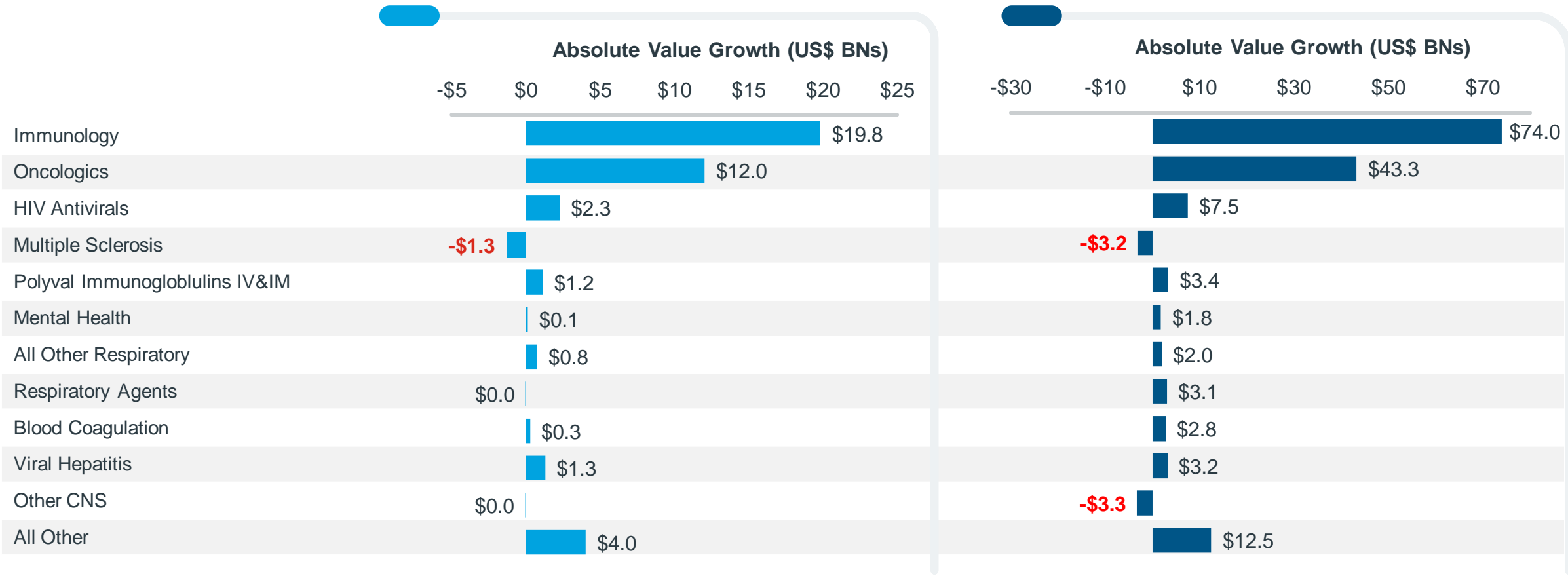
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Immunology and Oncologic contributed the most absolute value growth for specialty therapy areas

Absolute Value Growth for Top Specialty Therapy Areas

ΔChange from MAT DEC 2022 to MAT DEC 2023

ΔChange from 2018 to MAT DEC 2023



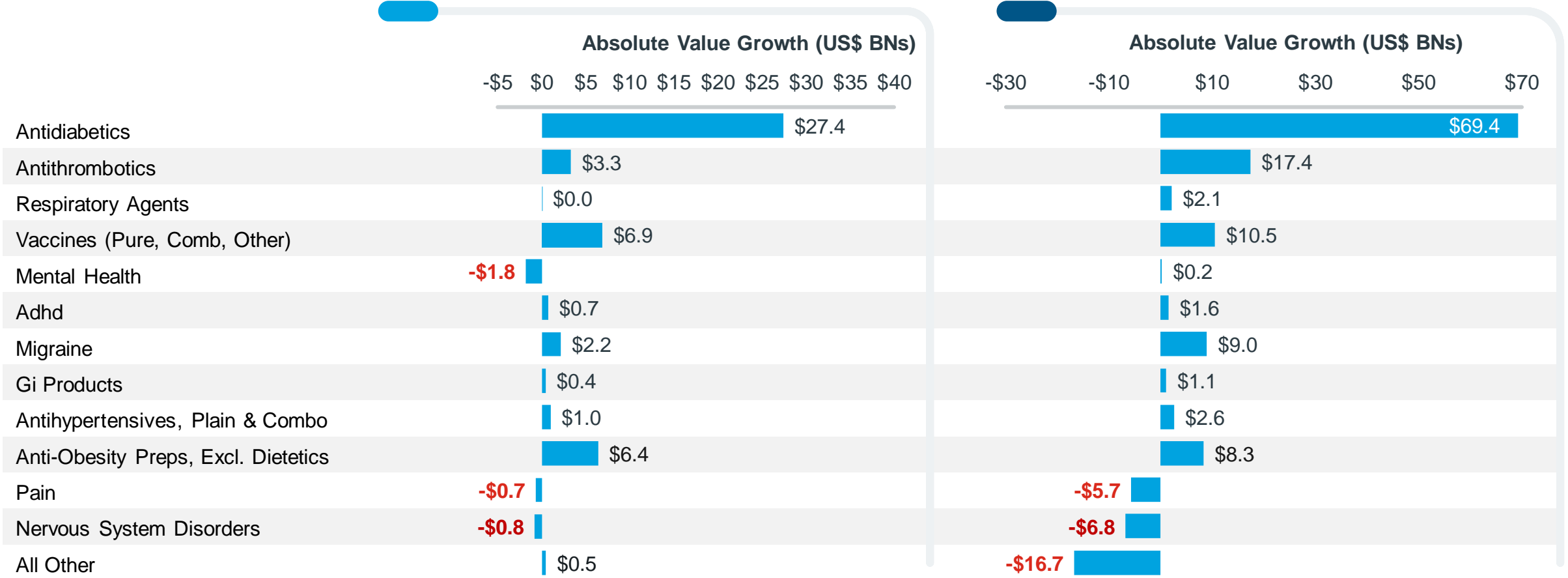
Source: IQVIA, National Sales Perspectives, December 2023
 Note: top therapy areas ranked on MAT December 2022 non-discounted spend
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Antidiabetics and Antithrombotics lead absolute value growth for traditional therapy areas

Absolute Value Growth for Top Traditional Therapy Areas

ΔChange from MAT DEC 2022 to MAT DEC 2023

ΔChange from 2018 to MAT DEC 2023



Source: IQVIA, National Sales Perspectives, December 2023
 Note: top therapy areas ranked on MAT December 2022 non-discounted spend
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The top 10 products are growing at 30.1% and account for 25.4% market share

Rank	Product	Non-Discounted Spend (US\$ BNs)			
		MAT DEC 2023	Market Share	ABS Growth	Growth
1	HUMIRA	\$34.2	4.7%	\$2.9	9.3%
2	OZEMPIC	\$26.8	3.7%	\$11.8	78.7%
3	ELIQUIS	\$22.1	3.1%	\$3.2	17.1%
4	TRULICITY	\$16.3	2.3%	\$0.8	5.1%
5	JARDIANCE	\$15.9	2.2%	\$4.0	34.0%
6	STELARA	\$15.9	2.2%	\$1.9	14.0%
7	KEYTRUDA	\$15.4	2.1%	\$2.5	19.1%
8	BIKTARVY	\$13.2	1.8%	\$1.6	14.2%
9	MOUNJARO	\$13.0	1.8%	\$10.3	368.8%
10	DUPIXENT	\$11.5	1.6%	\$3.6	44.9%
TOP 10		\$184.2	25.4%	\$42.6	30.1%

Source: IQVIA, National Sales Perspectives, December 2023

Limited to Rx and OTC Insulins

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The top 20 products are growing at 30.4% and account for 35.3% market share

Rank	Product	Non-Discounted Spend (US\$ BNs)			
		MAT DEC 2023	Market Share	ABS Growth	Growth
11	SKYRIZI	\$10.1	1.4%	\$5.2	106.3%
12	ENBREL	\$9.5	1.3%	\$0.6	6.9%
13	XARELTO	\$8.3	1.1%	\$0.2	1.9%
14	FARXIGA	\$7.9	1.1%	\$2.3	41.8%
15	WEGOVY	\$7.8	1.1%	\$6.2	409.6%
16	JANUVIA	\$5.7	0.8%	-\$0.6	-9.4%
17	TRELEGY ELLIPTA	\$5.7	0.8%	\$1.3	28.8%
18	OPDIVO	\$5.4	0.8%	\$0.5	9.8%
19	TALTZ	\$5.3	0.7%	\$0.7	16.2%
20	OCREVUS	\$5.3	0.7%	\$0.5	11.0%
TOP 20		\$255.2	35.3%	\$59.6	30.4%

Source: IQVIA, National Sales Perspectives, December 2023

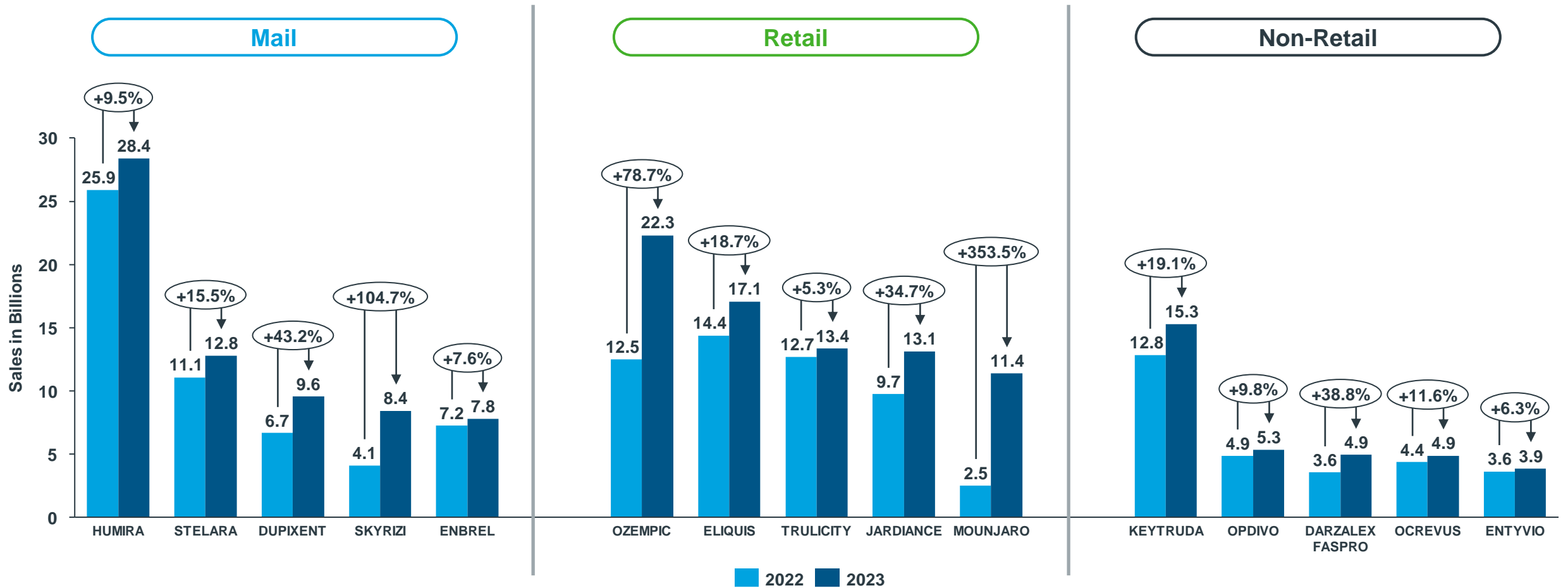
Limited to Rx and OTC Insulins

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Humira is the top product in Mail, while it is Ozempic in Retail and Keytruda in Non-Retail

Top 5 Products by Channel based on Sales



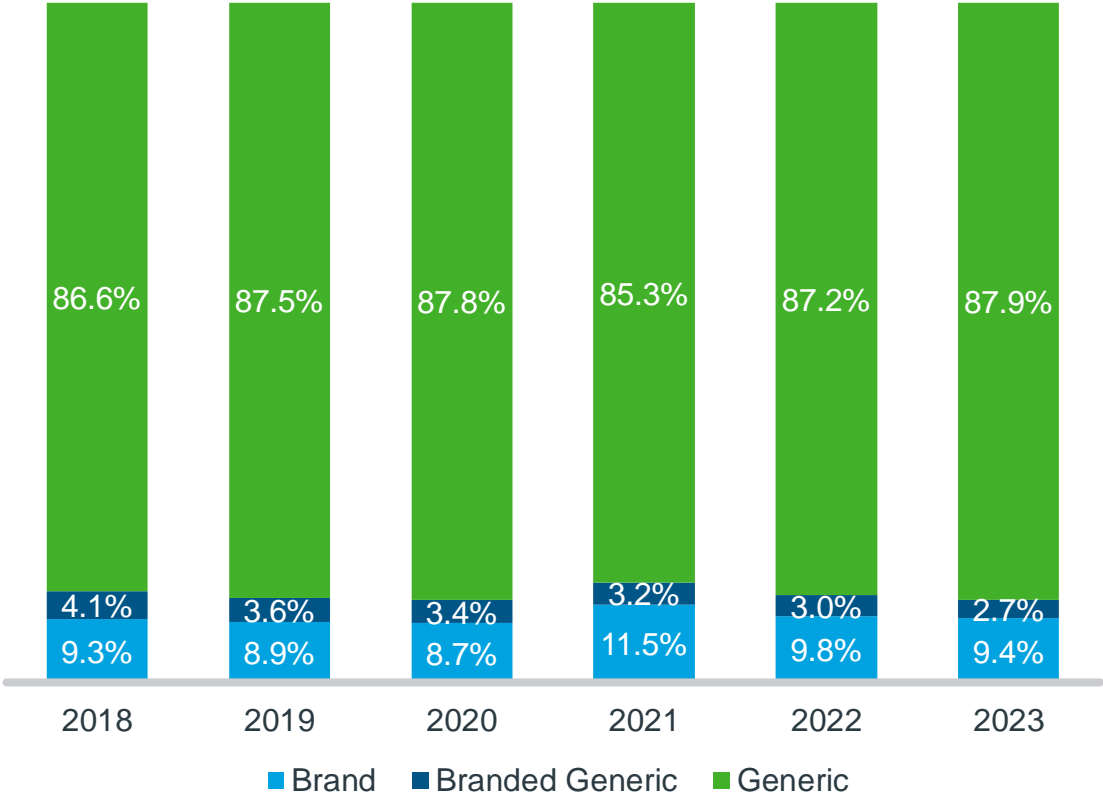
Generics



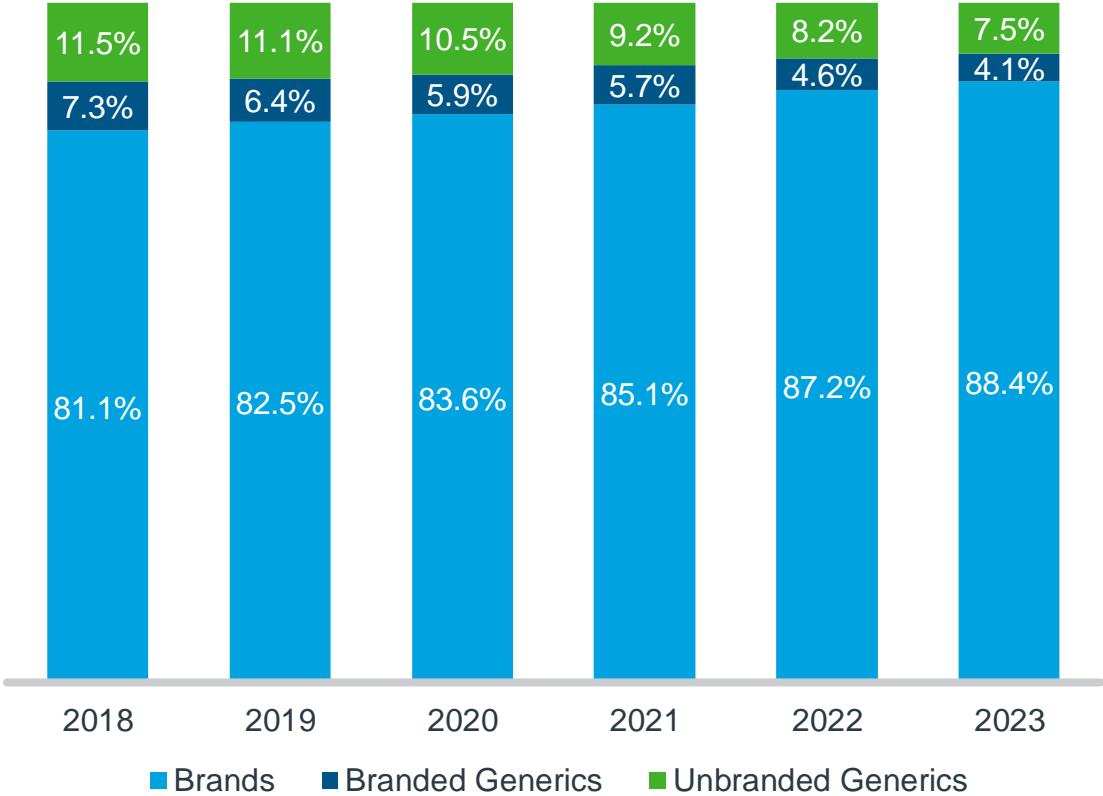
87.9% of prescriptions in the US are dispensed as generics (Adjusted)

Unbranded Generics account for 7.5% of spending

Adjusted Prescriptions (%)



Dollars (%)

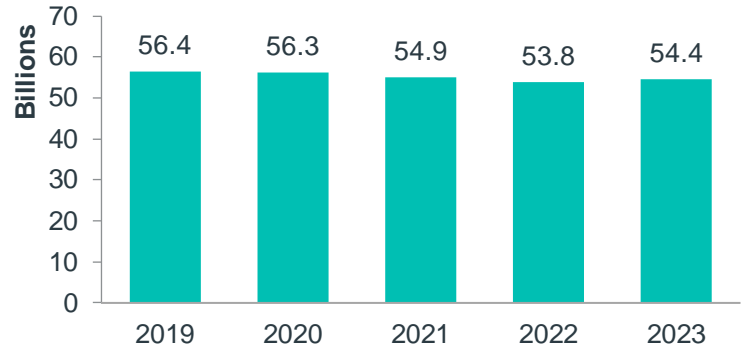


Source: IQVIA, National Sales Perspectives, National Prescription Audit, December 2023
 Note: Numbers may not add exactly to 100% due to rounding

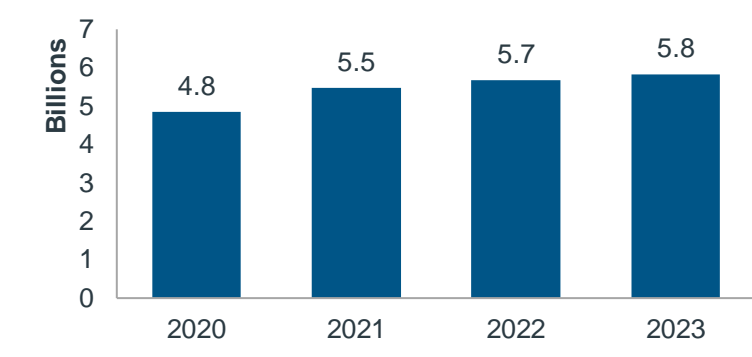
Unbranded Generics sales and Rxs are positive

Unbranded Generics

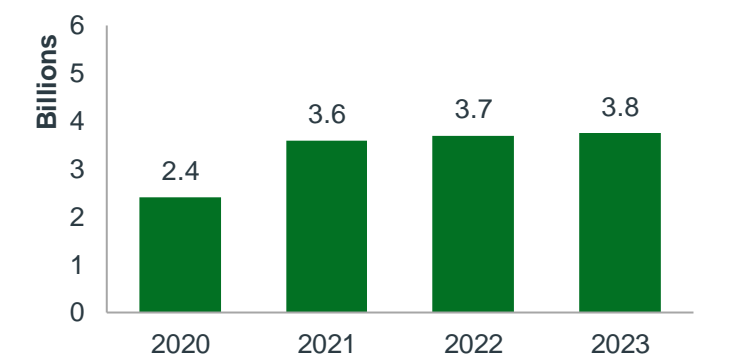
Sales



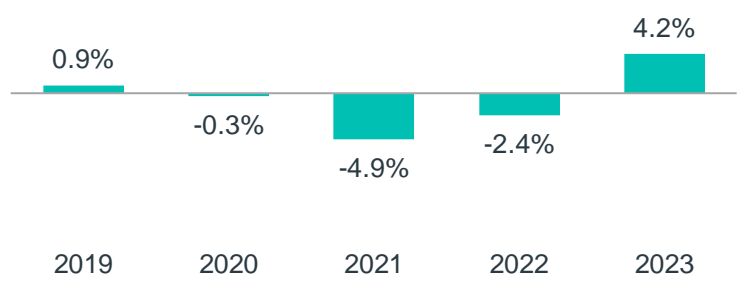
Adjusted Rxs



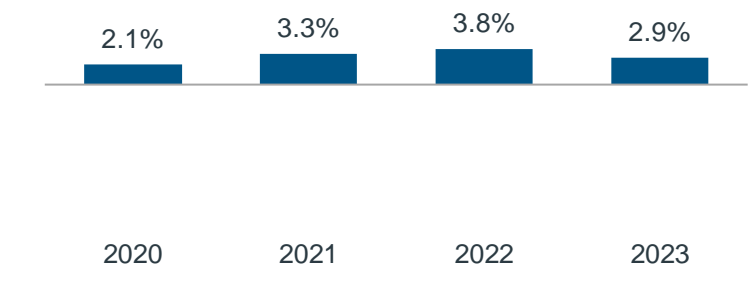
Unadjusted Rxs



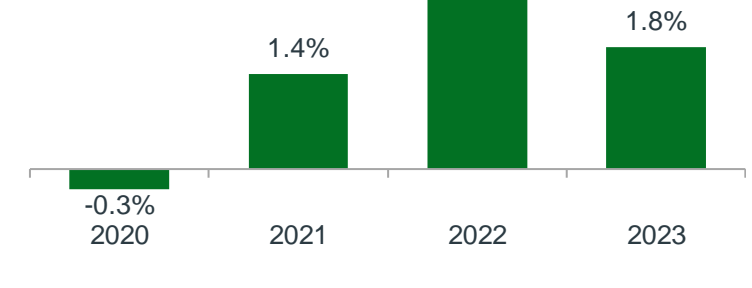
YoY Growth



Adjusted Rxs YoY Growth



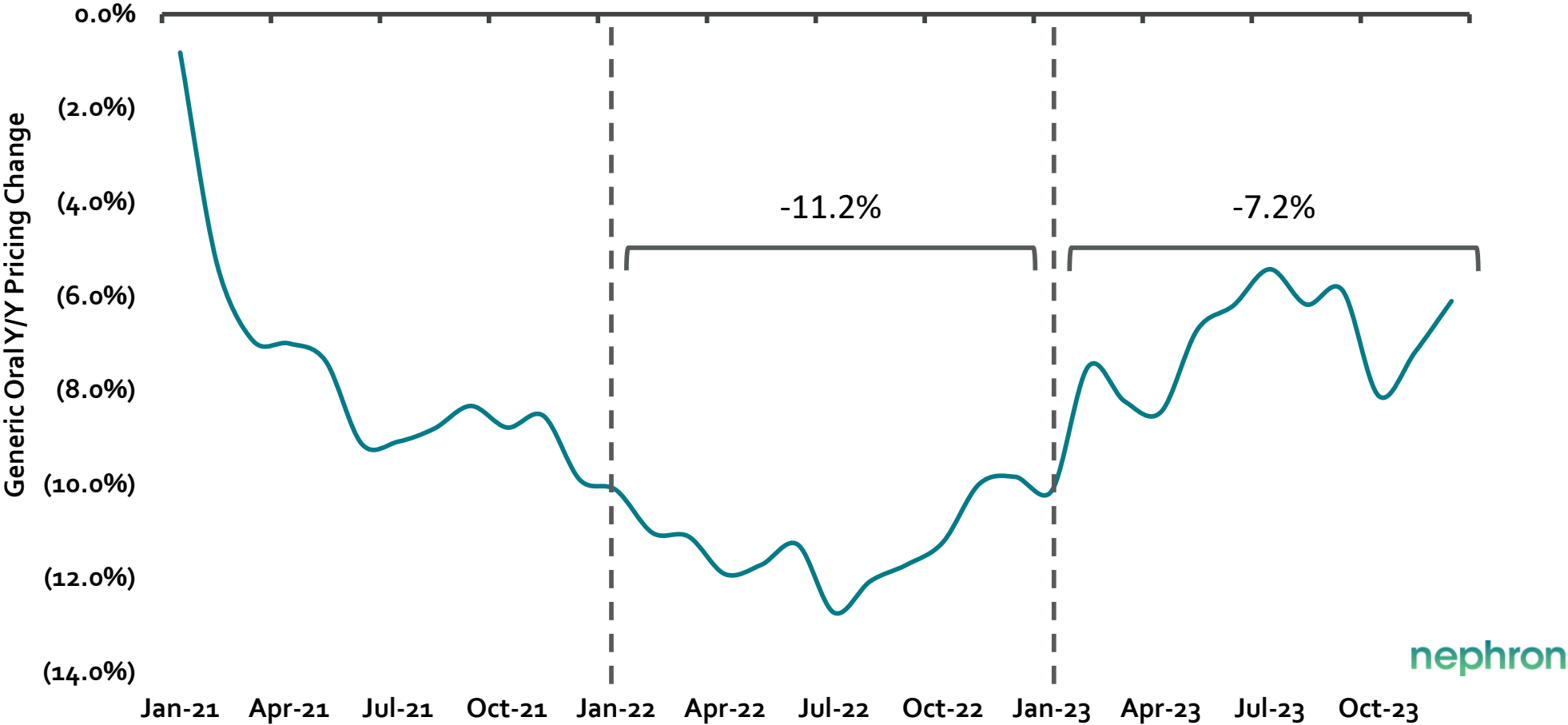
Unadjusted Rxs YoY Growth



Source: IQVIA, National Sales Perspectives and RxInsights, 2023
 Note: Limited to Rx and OTC Insulins; Includes Retail, Non-Retail and Mail

Generic price deflation is slowing

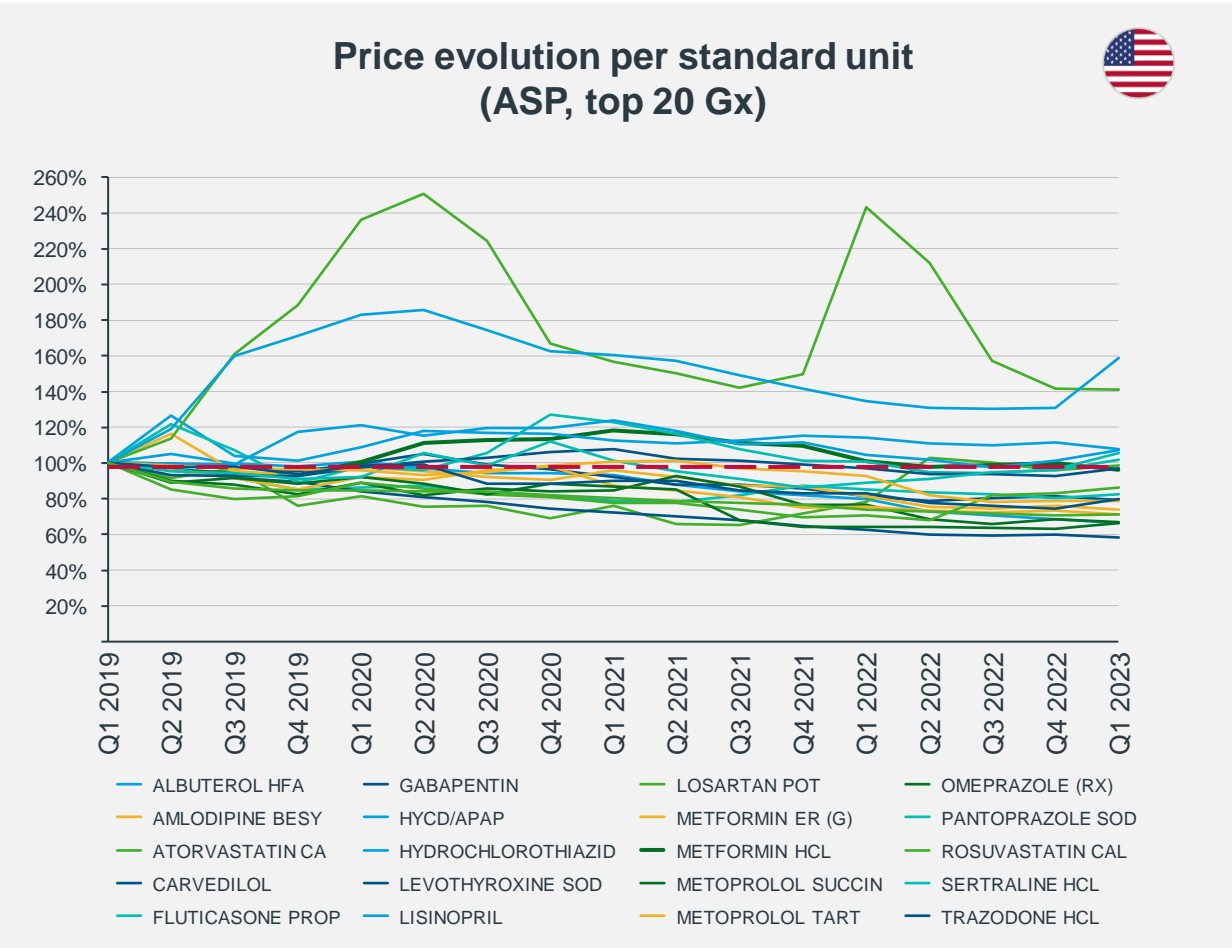
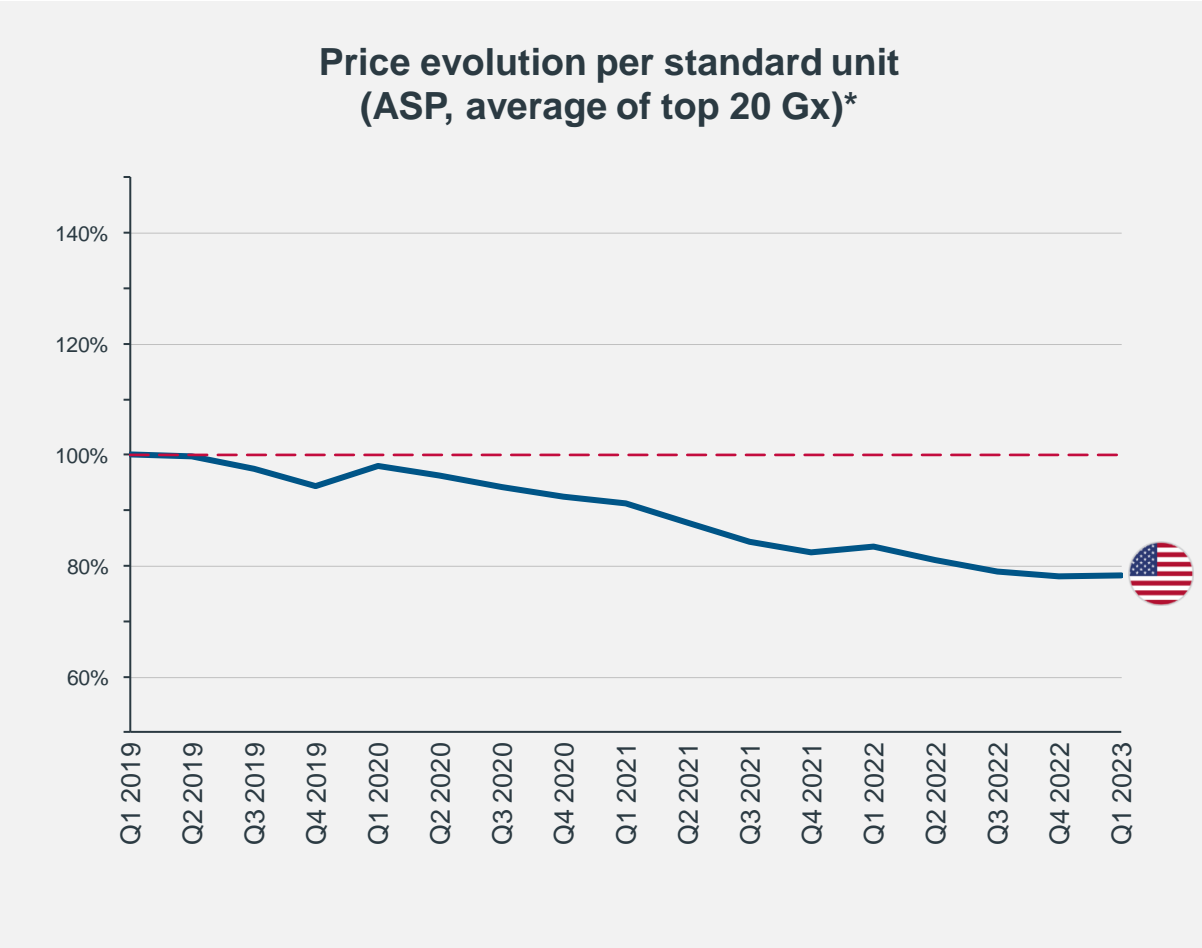
Y/Y Mature Oral Generic Price Trend



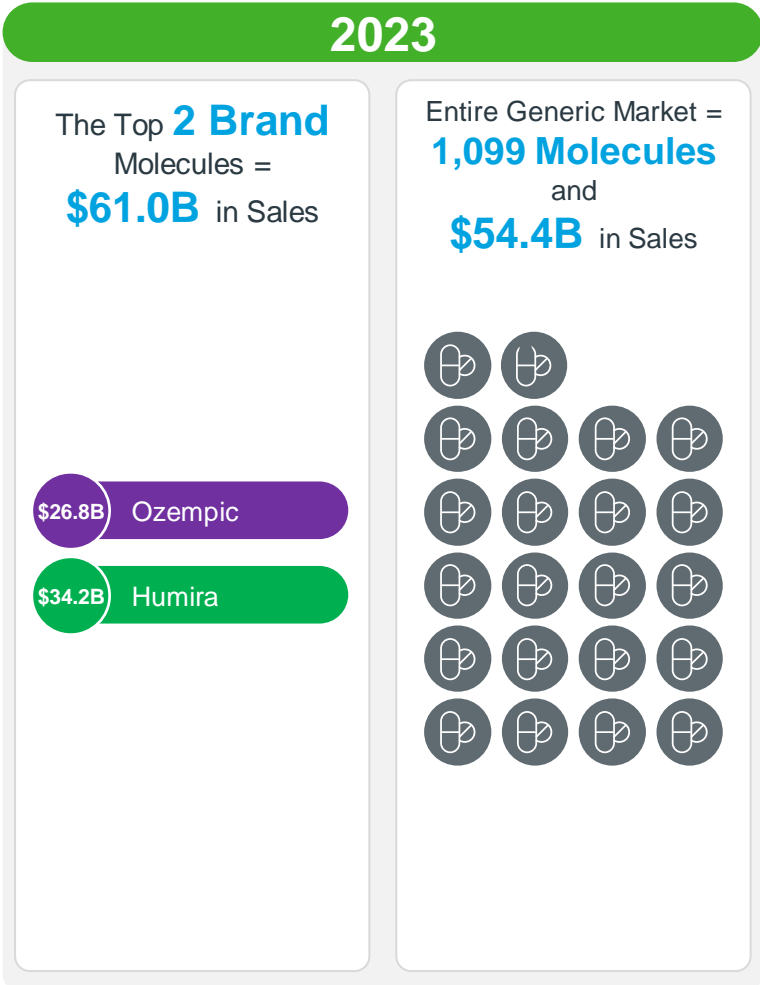
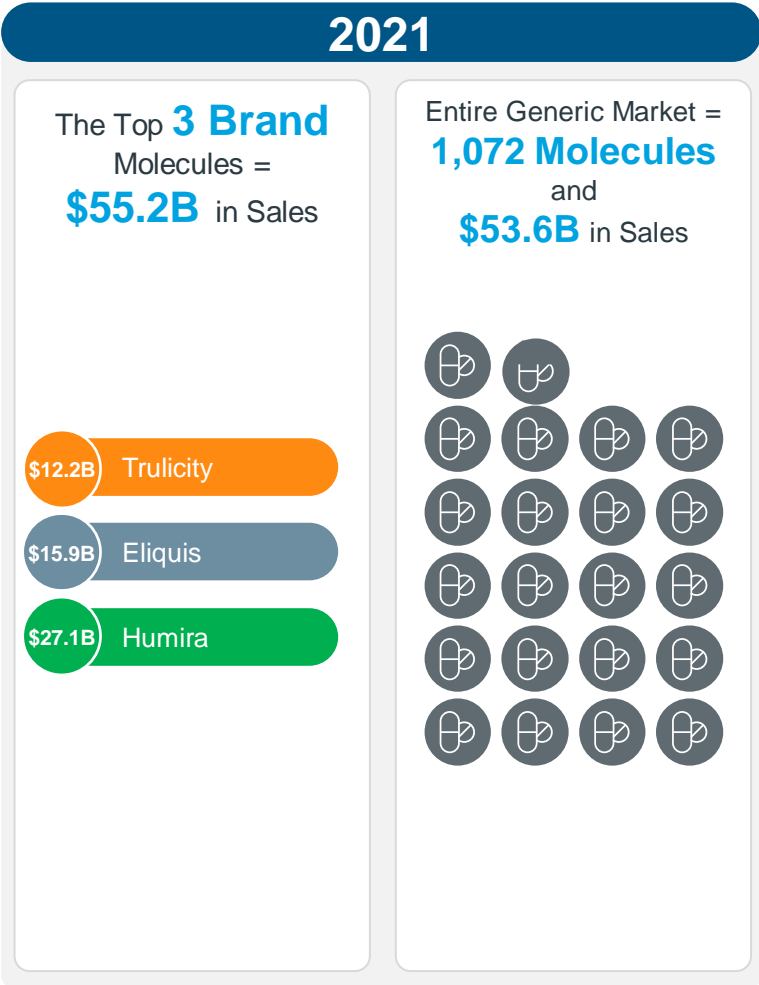
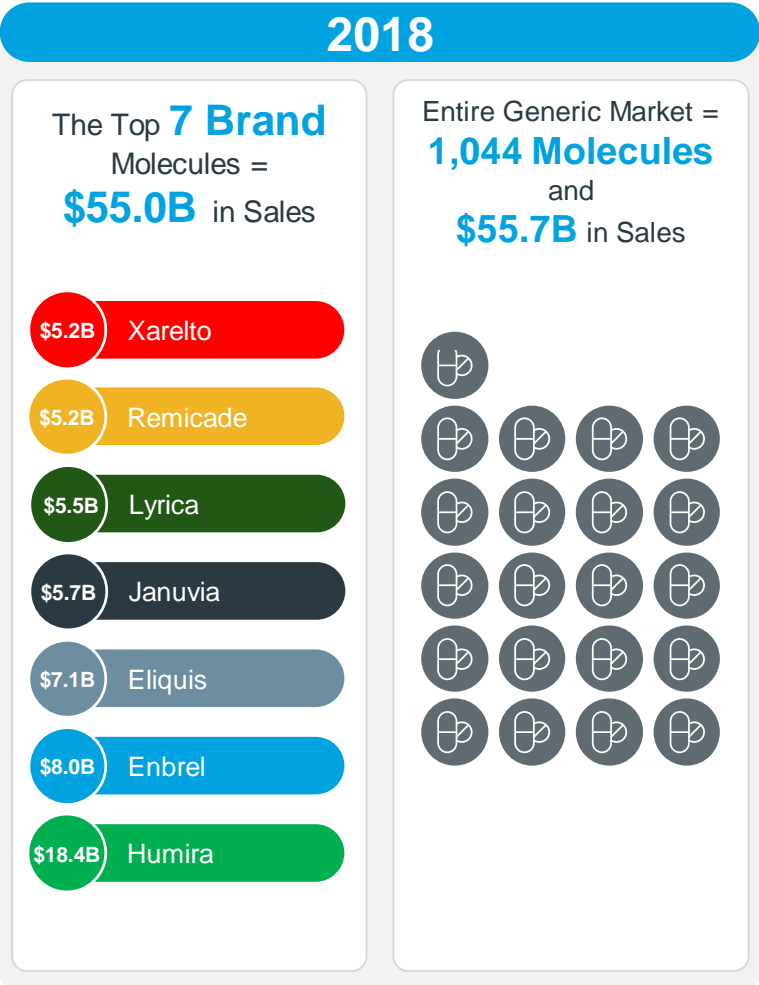
Source: Nephron Research, IQVIA, Glass Box Analytics

In the US, the price of generics has fallen by ~20% since 2019

- Shortages were behind fluctuating prices for losartan and hydrochlorothiazide



In 2018, it took seven Brand drugs to equal the total Generic business; in 2023 it only takes two



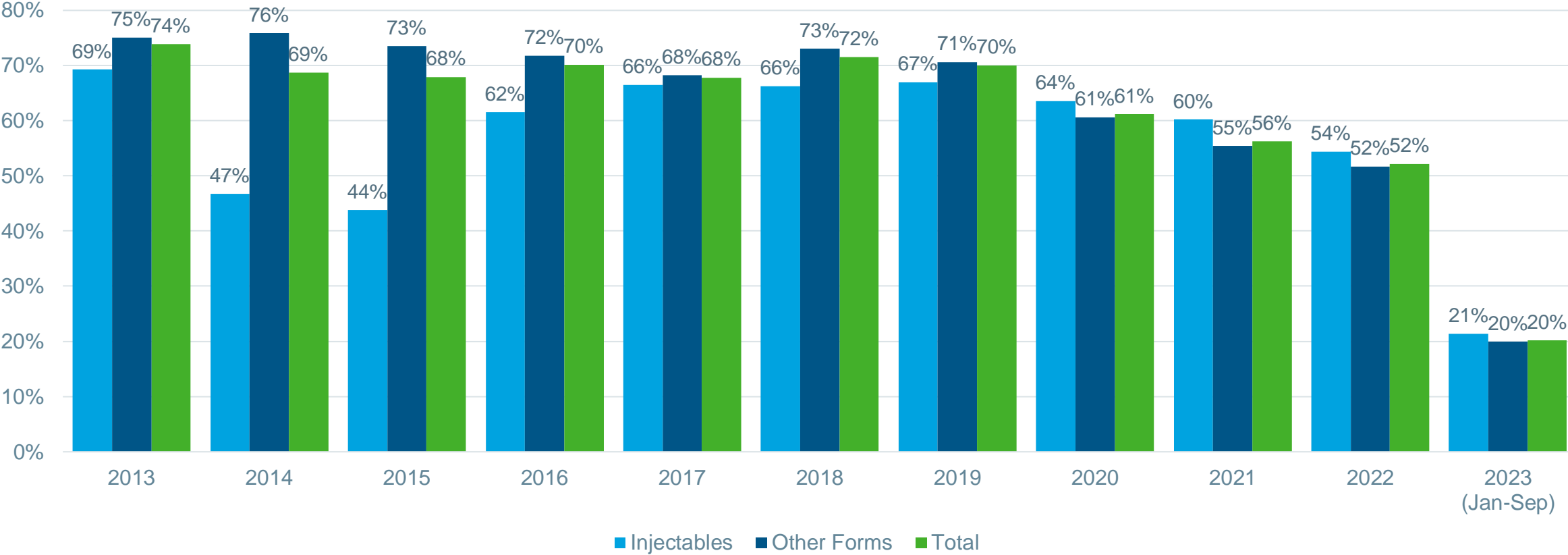
 = 50 Generic Molecules

Data based on the Moving Annual Total month of December

Unlaunched ANDAs account for 39% of approvals since 2013, 42% of injectables and 33% of other forms

A rise in trend of the percentage of approved injectable ANDAs launched since 2020

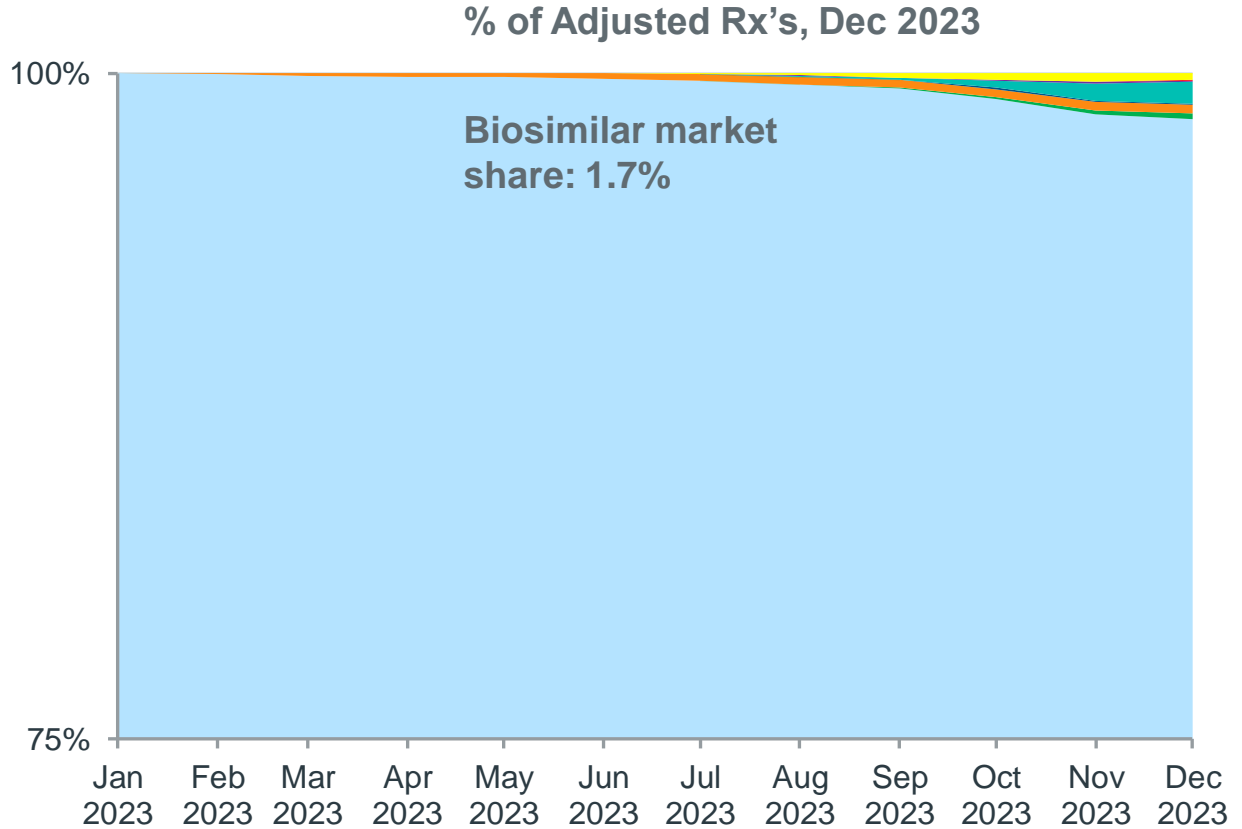
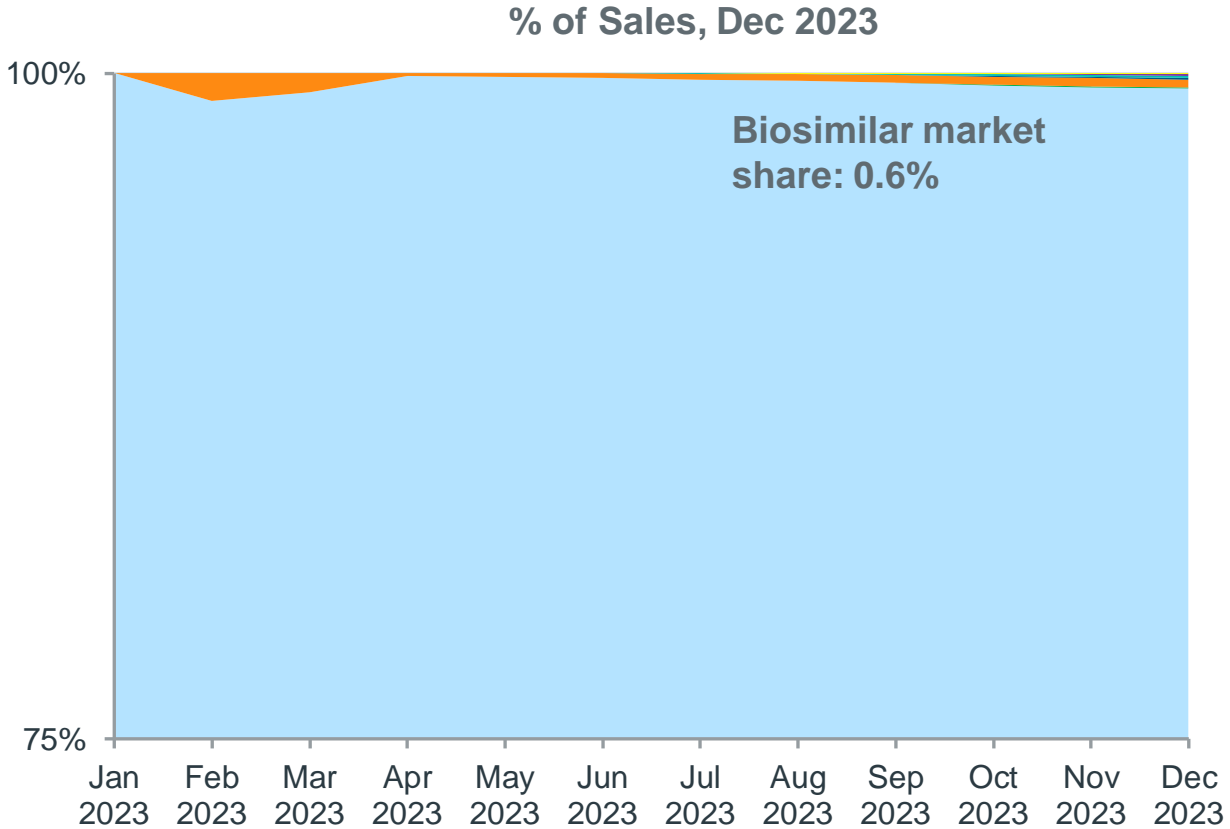
% of ANDAs launched to date by Type



Biosimilar sales are just beginning for Adalimumab (Humira)

■ Originator

US Biosimilar Market Share, Adalimumab (Humira)



- HUMIRA
- ABRILADA
- ADALIMUMAB
- AMJEVITA
- CYLTEZO
- HADLIMA
- HULIO
- HYRIMOZ
- IDACIO
- YUFLYMA
- YUSIMRY

Drug Shortages in the U.S.



Not all drug shortages are created equal

Drug shortages are large and increasing; fewer are being resolved

Some of the impact of **injectable shortages** is **driven by demand**, where some purchasers have **increased orders to buffer the expected disruptions**.

Not all purchasers are able to pursue these approaches and shortages have impacted some differently than others.

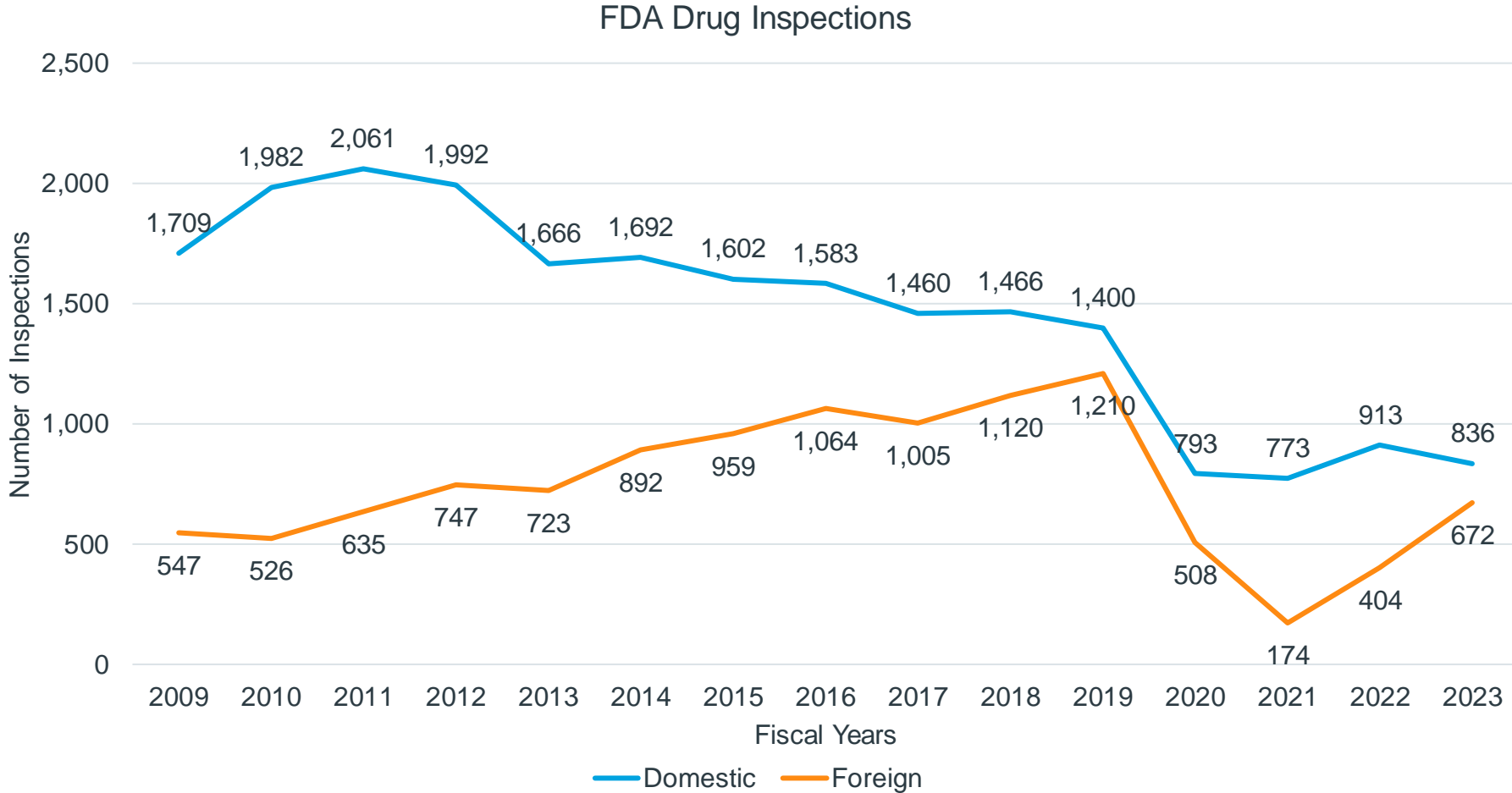
There are **more shortages in generics and injectables; Orals and brand** shortages are due to demand.

Key drugs in shortage include cancer medications **cisplatin** and **carboplatin**; a form of the antibiotic **amoxicillin**; **Ozempic**, **Mounjaro** and **Trulicity**; as well as **Adderall**.

Supply issues within the **sterile injectables** include the impacts of dynamic market shifts between manufacturers from **production disruption** (e.g., due to inspection, shortage of active ingredient, natural disasters) which have impacted oncology and antibacterials.

Sources: Michael Kleinrock, IQVIA Institute, [Drug shortages shine spotlight on FDA powers | The Hill](#)

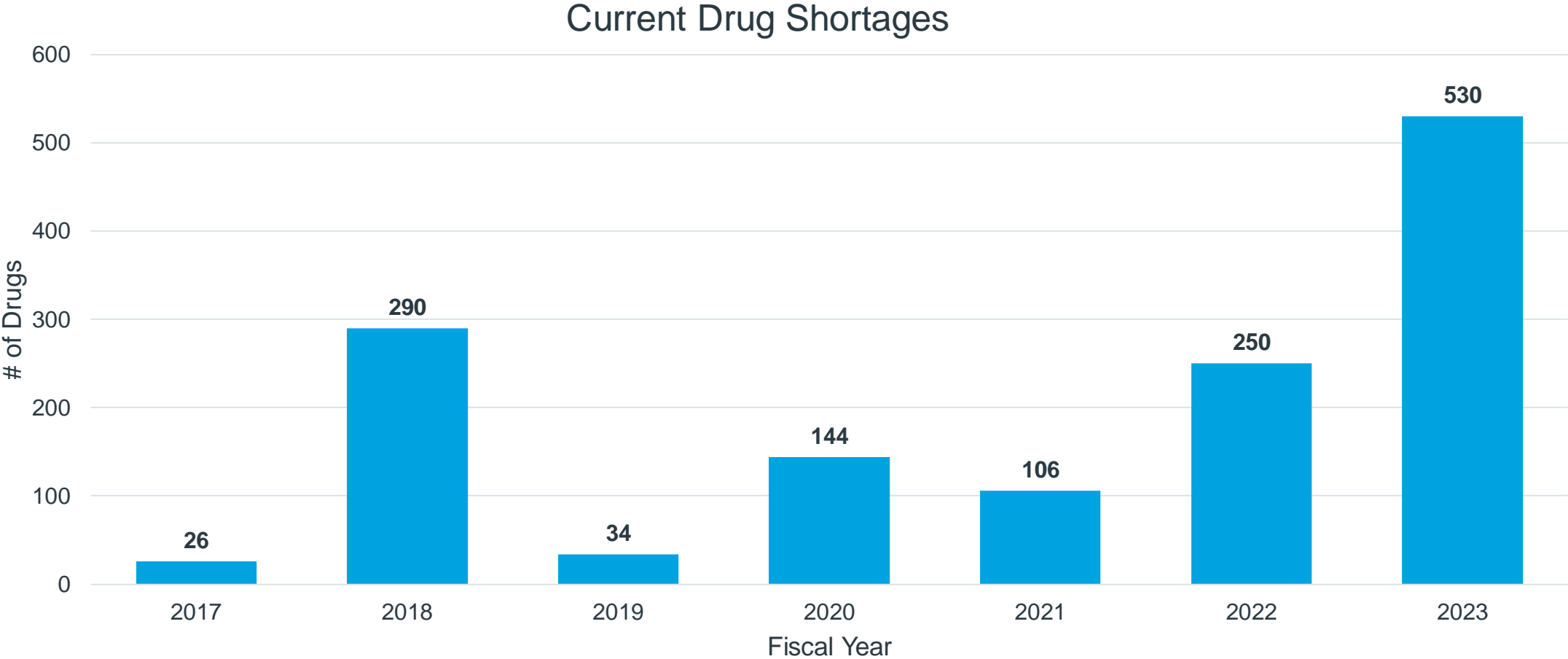
FDA's inspections of pharmaceutical manufacturing facilities have yet to return to pre-COVID levels



- Important Notes:
 - Not all inspections are included in the database. Inspections conducted by States, pre-approval inspections, mammography facility inspections, inspections waiting for a final enforcement action, and inspections of nonclinical labs are not included.
 - The results show final classifications of No Action Indicated (NAI), Voluntary Action Indicated (VAI), Official Action Indicated (OAI) for each project area within an inspection.

The U.S. Government's Fiscal Year runs October 1 through September 30
 Data Source: <https://datadashboard.fda.gov/ora/cd/inspections.htm> , data pulled 1/29/2024

The number of drugs listed in the FDA Drug Shortages data set continues to remain high



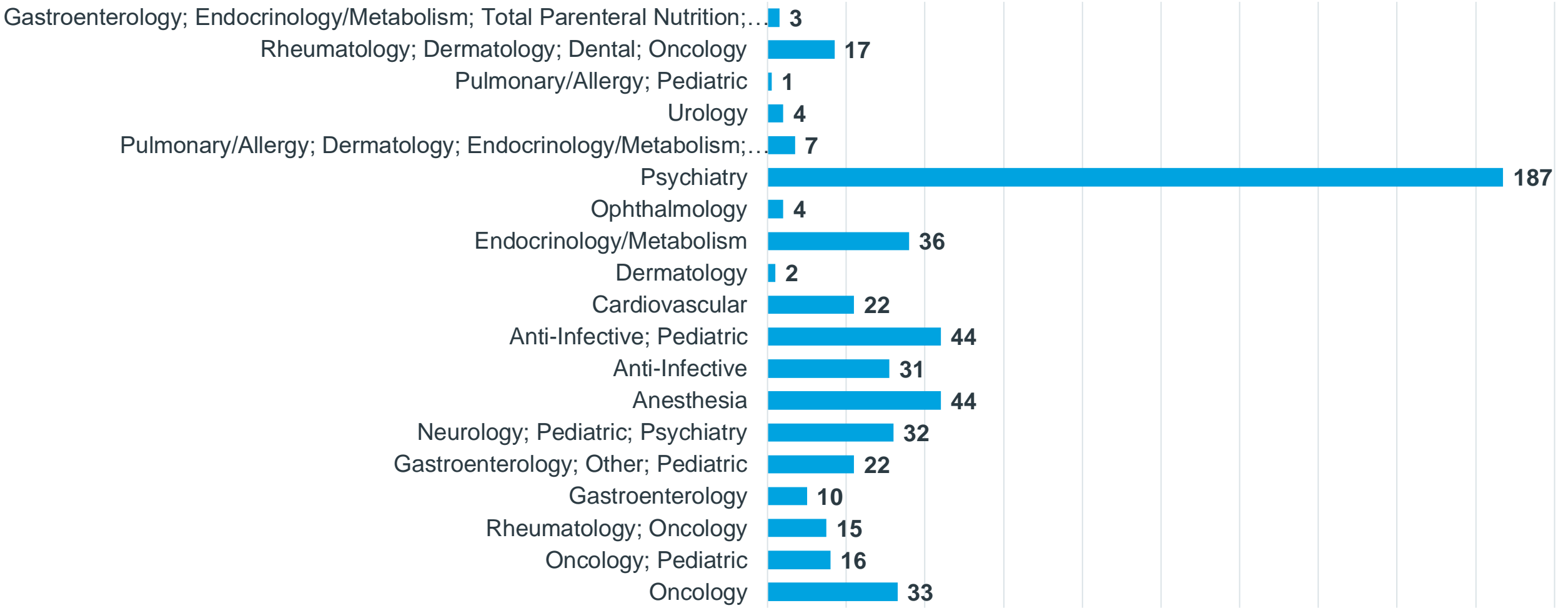
Note: The U.S. Government Fiscal Year runs from Oct 1 through Sep 30 (This slide depicts only three months of the fiscal year for 2024)

Data Source: <https://www.accessdata.fda.gov/scripts/drugshortages/default.cfm>, data pulled 1/29/2024

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Psychiatry drugs have the greatest number of shortages according to the FDA

Drug Shortages by Therapy Area Fiscal Year 2023



Note: The U.S. Government Fiscal Year runs from Oct 1 through Sep 30
 Data Source: <https://www.accessdata.fda.gov/scripts/drugshortages/default.cfm>, data pulled 1/29/2024


New Product Launch Update






Executive Summary

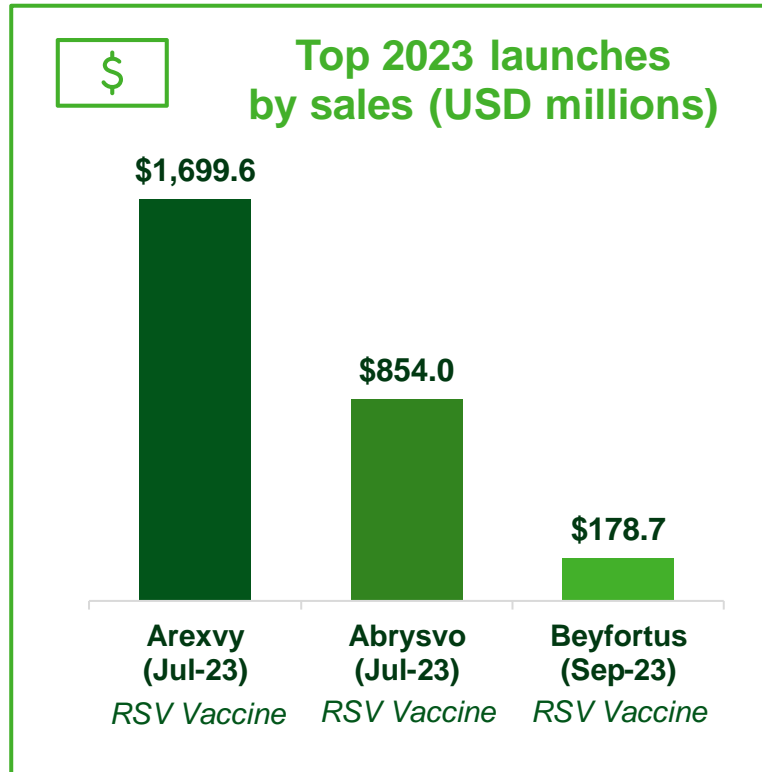
There were 80 launches in 2023, compared to 58 launches in 2022 and 76 launches in 2021
Immunology is the top therapy area in 2023, accounting for 31% of new product launches

80
 Launches in 2023




Top therapy areas of 2023 launches

Immunology	Oncology	Anti-infectives
		
31%	11%	11%



54

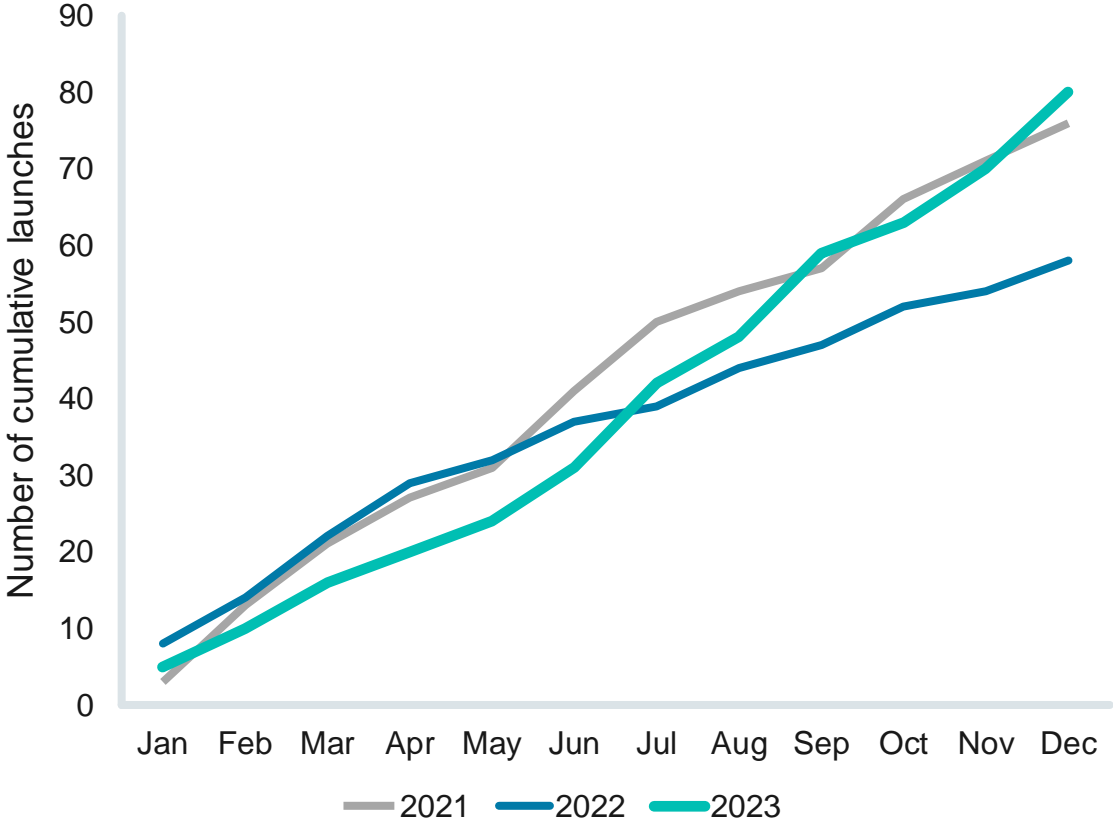


Of the 54 FDA approved New Molecular Entities (NMEs) in 2023, 54 show evidence of launch based on supply in channel or active websites

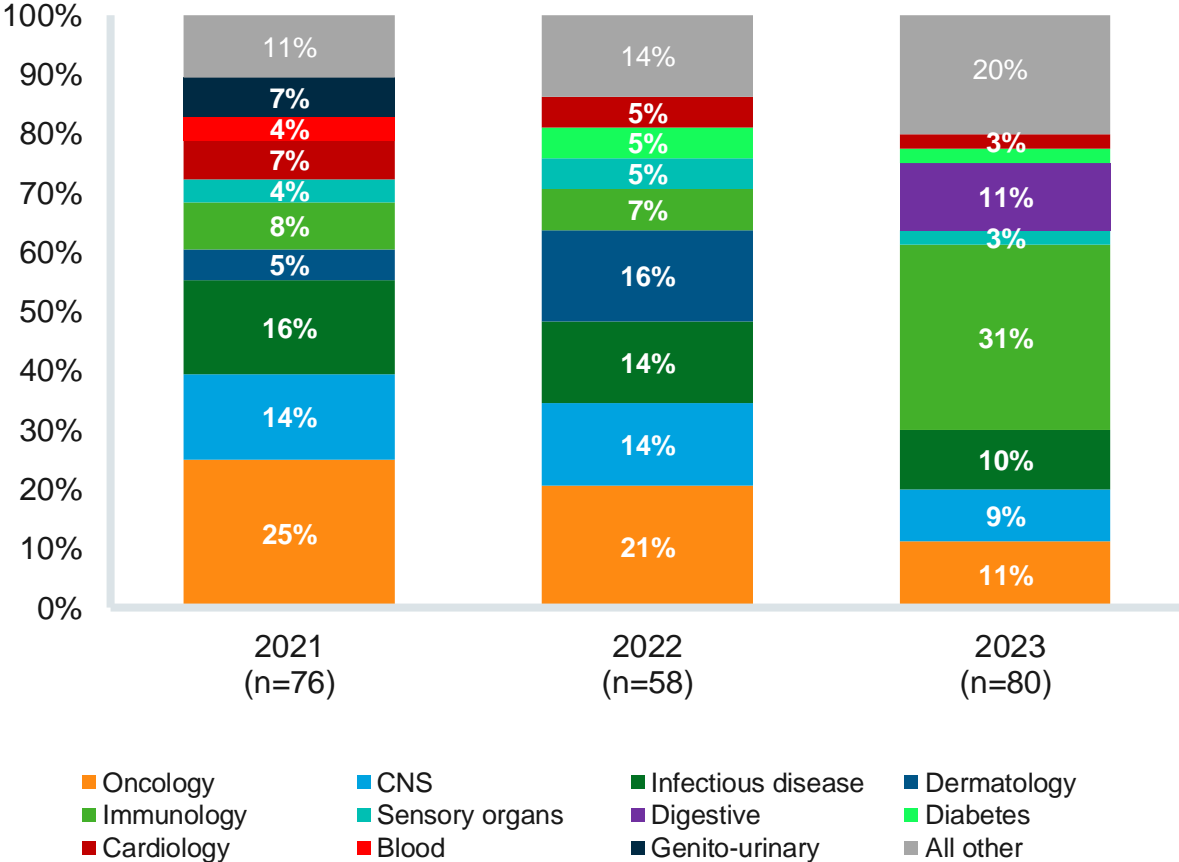
In 2022, the FDA approved 36 New Molecular Entities (NMEs). Of those 33 showed evidence of launch

2023 closed with 80 total launches, surpassing 2022 and 2021. This is largely attributed to a Q3 influx of Humira biosimilars and RSV vaccines

Time-aligned cumulative launches 2021–2023



Launches by therapy area 2021–2023

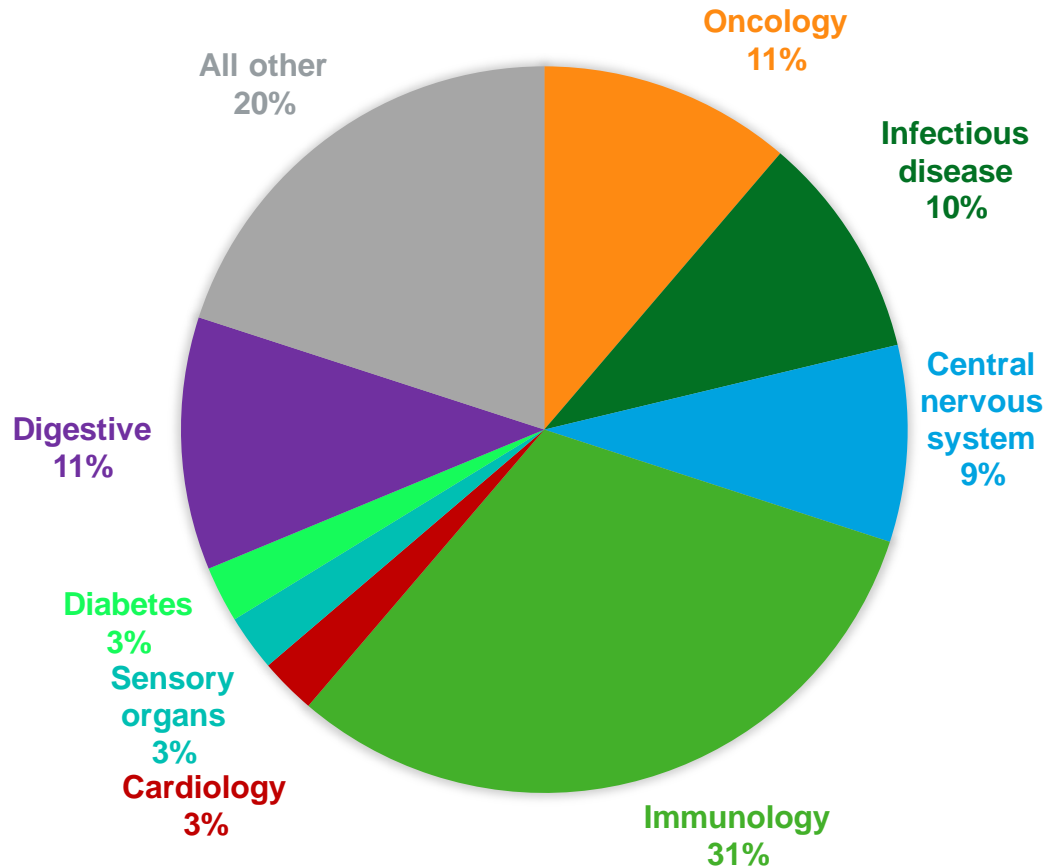


Source: National Sales Perspective; Center of Launch Excellence, IQVIA; publicly available information from the FDA
 Notes: CNS = Central nervous system

2023 sales have been dominated by the GSK and Pfizer RSV vaccines

Lilly's Zepbound (tirzepatide) for obesity has established a presence amongst the top performers within one month

2023 – 80 Launches



2023 – Top 10 Performers

Product	Company	Indication	Launch	First year gross sales (as of Dec-23)	Yr 1 NBRx through 1/5/24
Arexvy <i>RSV vaccine</i>	GSK	Prevention of LRTD caused by RSV (60+)	Jul-23	\$1.7B	6.1M
Abrysvo <i>RSV vaccine</i>	Pfizer	RSV vaccine (0-6m, gest age 32-36wks, 60+)	Jul-23	\$853.9M	2.9M
Beyfortus <i>nirsevimab-alip</i>	Sanofi	RSV vaccine Pediatrics 0-24m	Sep-23	\$178.6M	N/A
Altuviiio <i>Antihemophilic factor recombinant</i>	Sanofi	Hemophilia A	Apr-23	\$145.3M	N/A
Orserdu <i>elacestrant</i>	Stemline	Breast cancer	Feb-23	\$140.7M	N/A
Elahere <i>mirvetuximab soratansine</i>	Immunogen	Ovarian, fallopian tube and peritoneal cancer	Mar-23	\$127.0M	N/A
Zepbound <i>tirzepatide</i>	Lilly	Obesity	Dec-23	\$120.6M	N/A
Amjevita <i>adalimumab</i>	Amgen	RA, PsA, PsO, CD, UC	Feb-23	\$110.9M	N/A
Miebo <i>perfluorohexyloctane ophthalmic solution</i>	Bausch + Lomb	Dry eye disease	Sep-23	\$78.4M	62.8K
Jaypirca <i>pirtobrutinib</i>	Eli Lilly	Mantle cell lymphoma	Feb-23	\$68.9M	N/A

Source: National Sales Perspective; Center of Launch Excellence, IQVIA

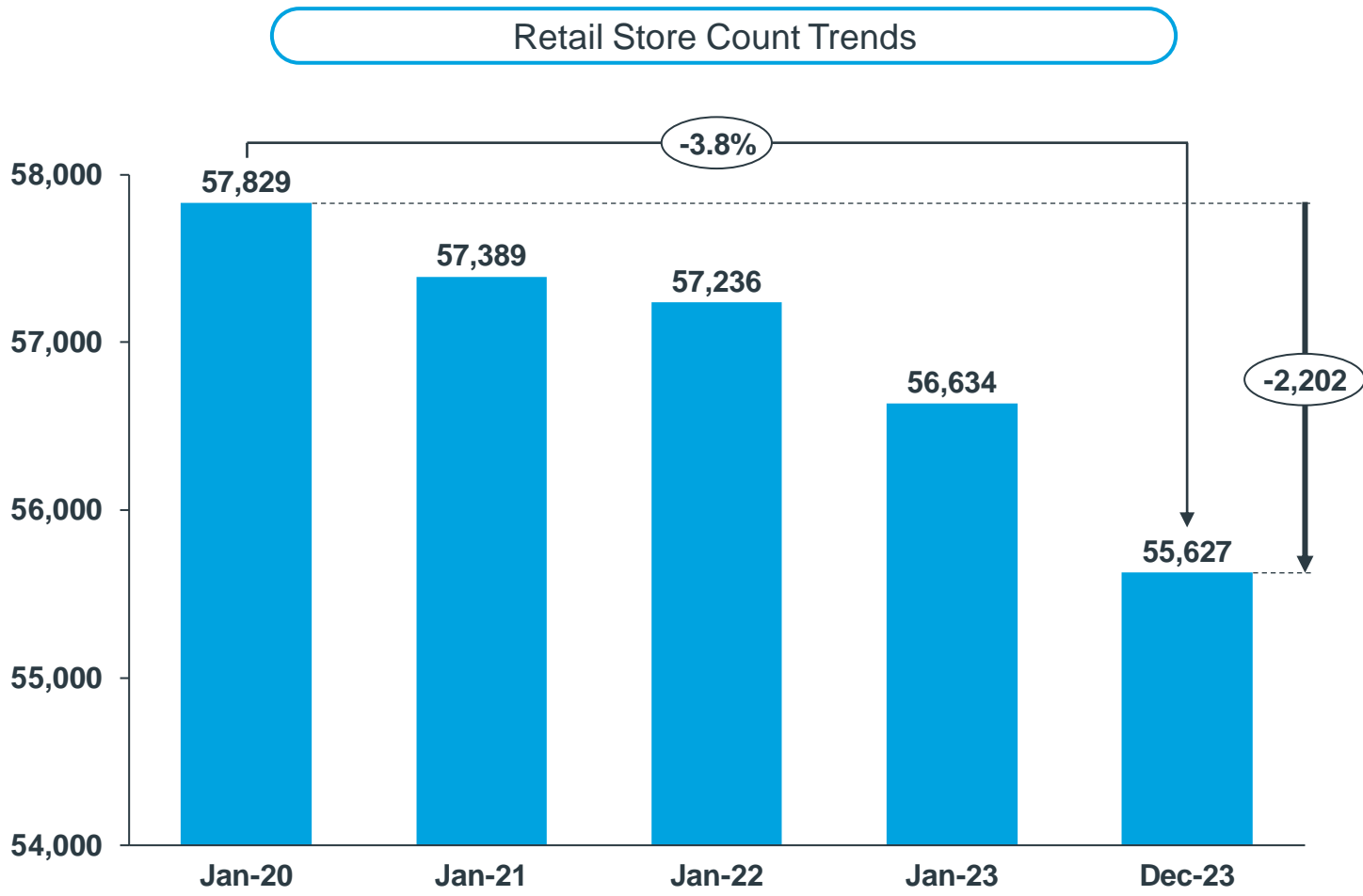
Notes: All sales values are USD. LRTD = Lower Respiratory Tract Disease; RA = rheumatoid arthritis; PsA = psoriatic arthritis; PsO = plaque psoriasis; CD = Crohn's disease; UC = ulcerative colitis
Due to its emergency use authorization, Novavax COVID-19 vaccine was not included in the top 10 performers, although it had sales of \$49M through December 2023

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Retail Class of Trade and Method of Payment Performance



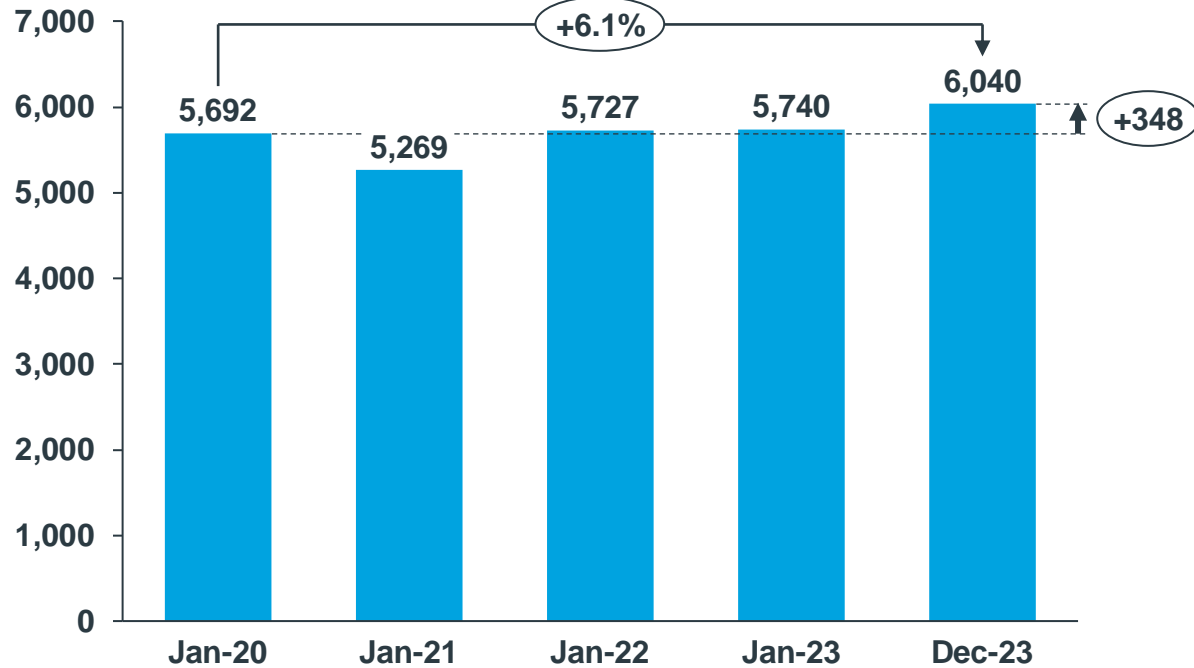
There are over 2,200 fewer retail pharmacies today than four years ago



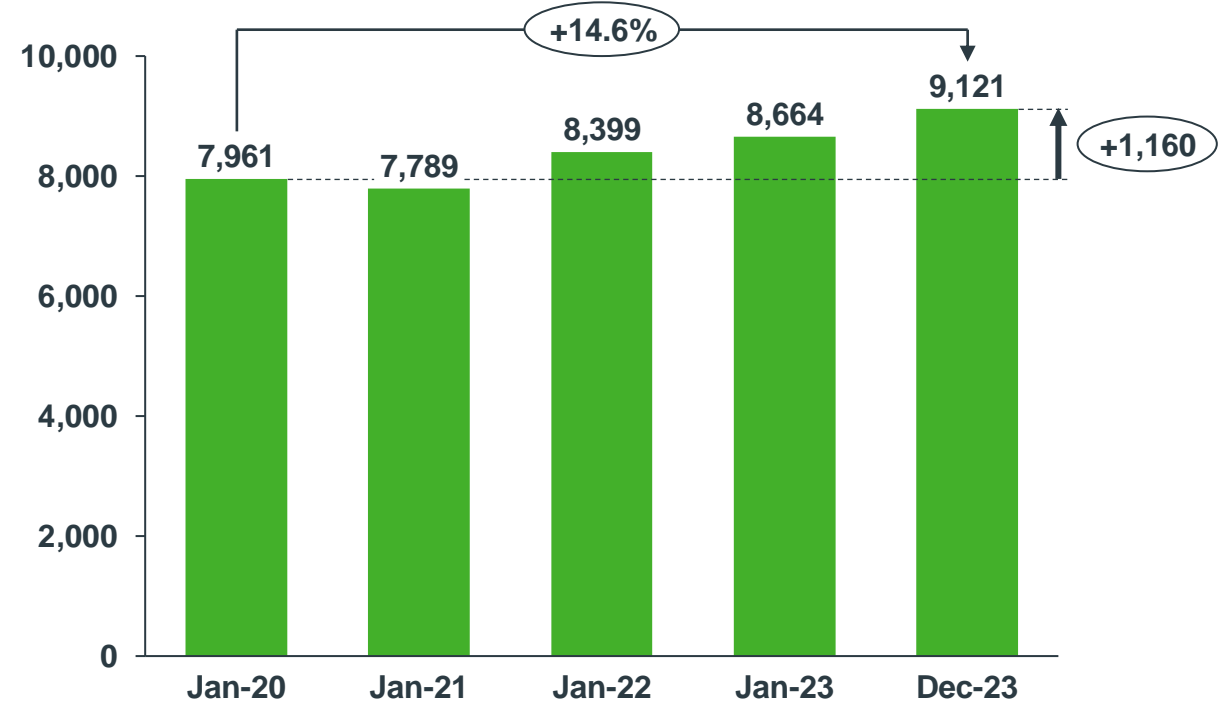
Data Source: The store count data is reflective of the stores in the IQVIA Rx Universe as of December 2023.

Despite store closings, average Rxs per store continue to rise

Avg. Unadj. Rxs per Store per Month

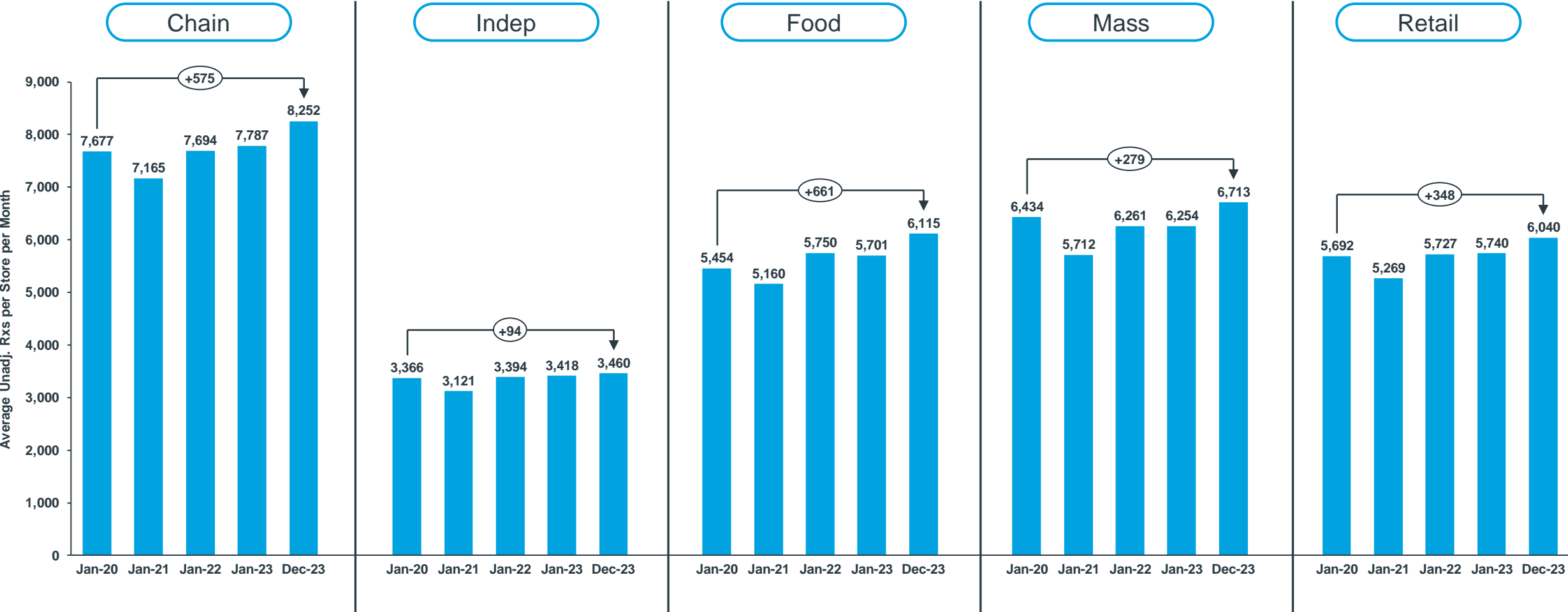


Avg. Adj. Rxs per Store per Month



Data Source: The store count data is reflective of the stores in the IQVIA Rx Universe as of December 2023.

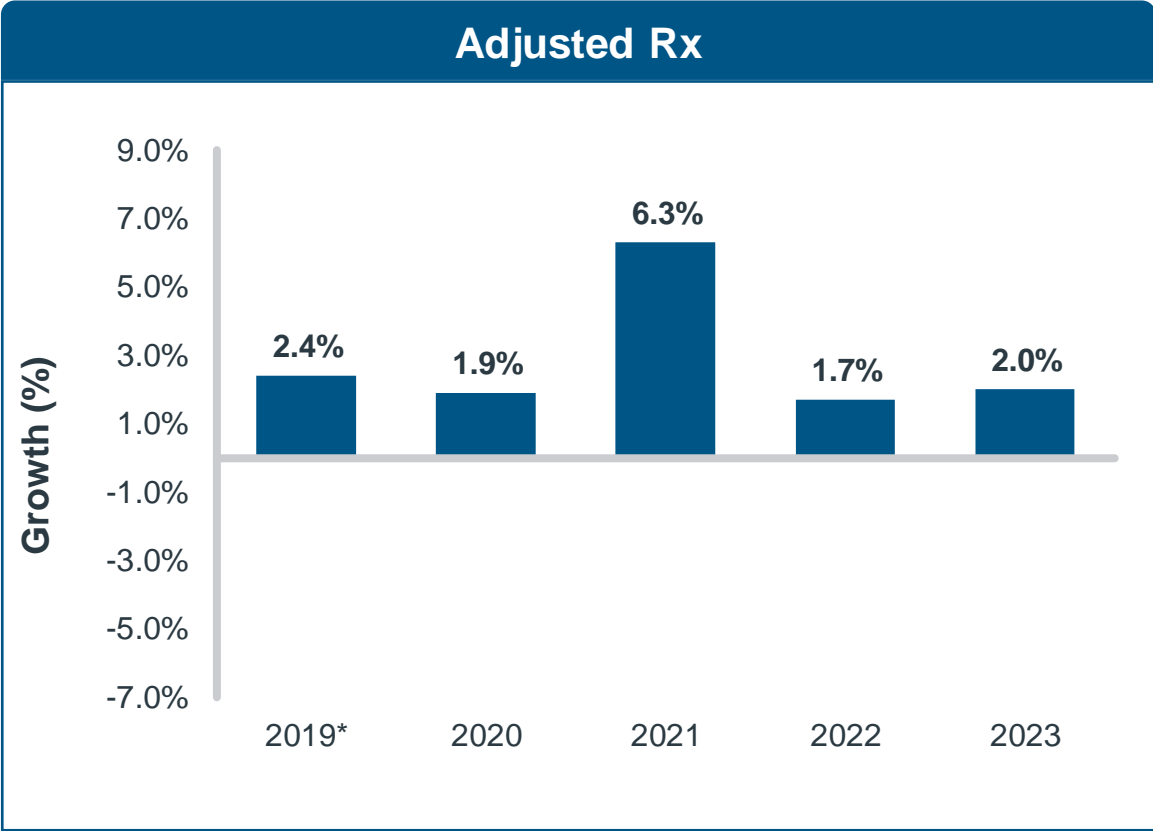
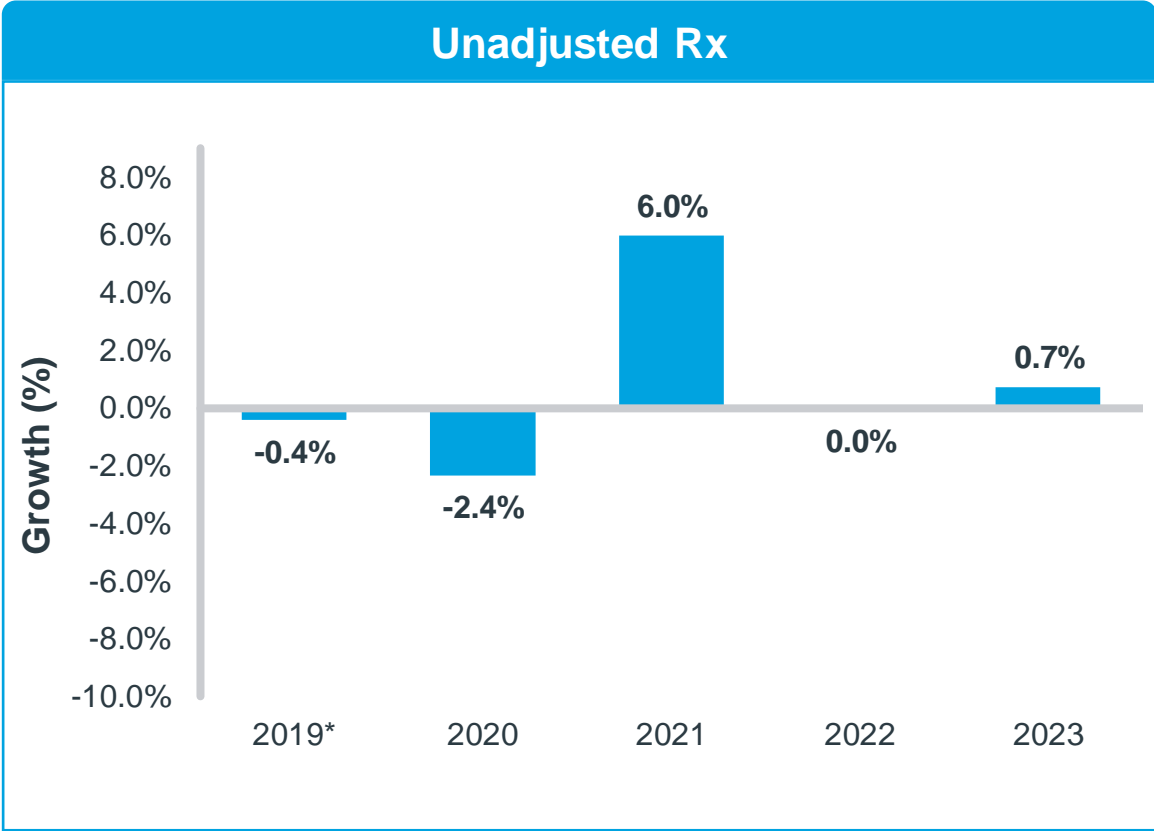
On a monthly basis, Chain stores see the most volume, but all stores have seen large increases since January 2020



Data Source: The store count data is reflective of the stores in the IQVIA Rx Universe as of December 2023.

Unadjusted Rx growth for 2023 is positive, and Adjusted Rx growth is higher for same periods

Growth (%) of Total Market Dispensed Rx



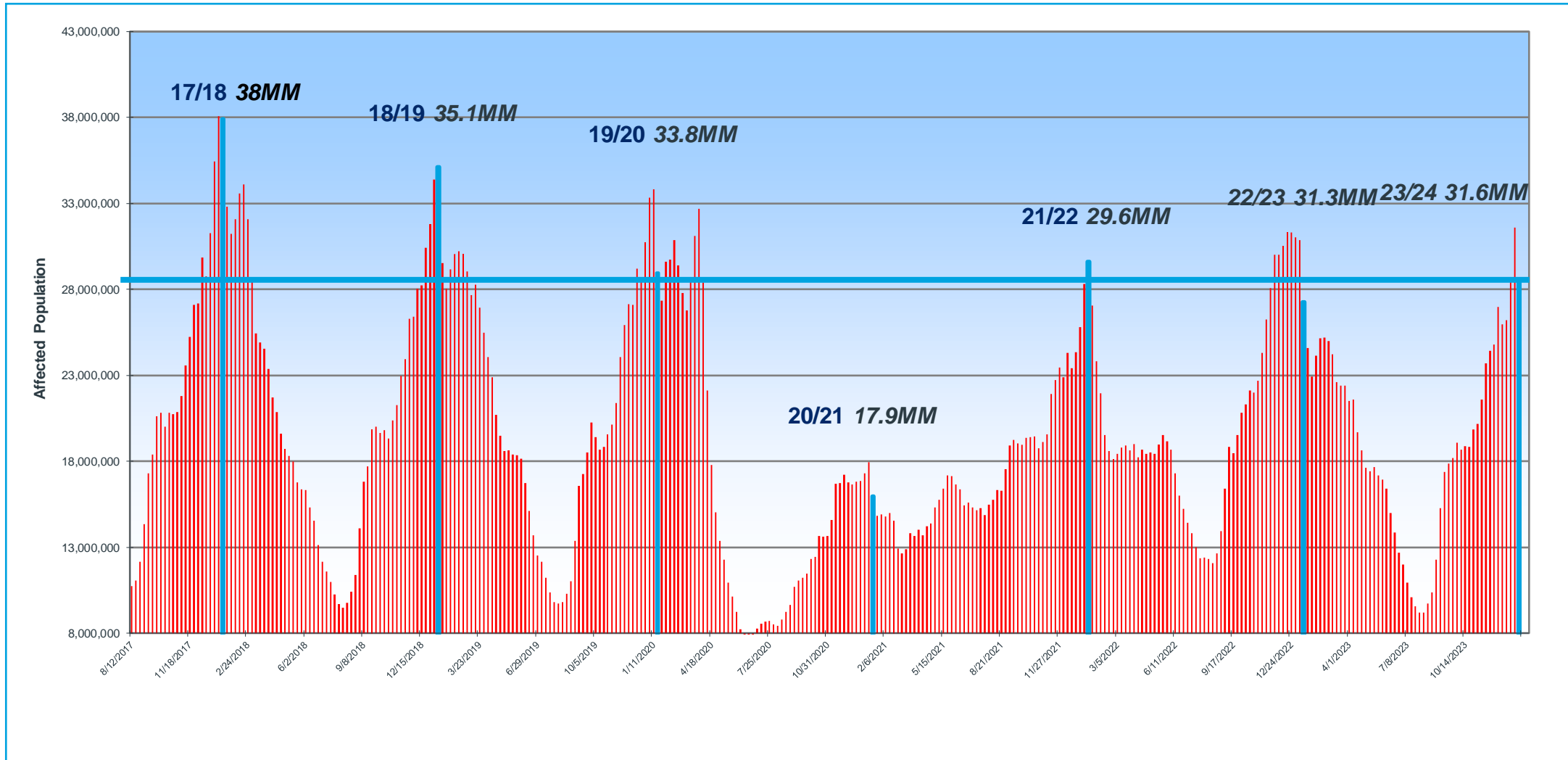
Source: IQVIA, National Prescription Audit & RxInsight, December 2023; Retail, Mail, and LTC limited to Rx and OTC Insulins
*Note: Declines between 2018 and 2019 are due to VRAF enhancement from 2020 onwards

Cough, Cold and Flu Season and Vaccines



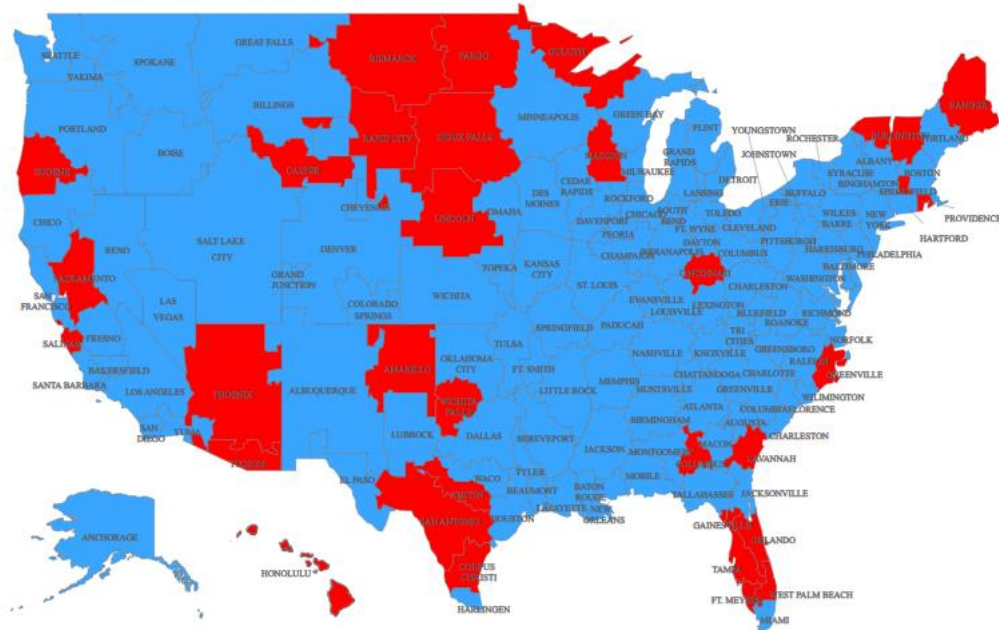
FAN Total Affected Population 2017/18 through 2023/24

- *The current AP levels are trending above prior season by +4.2%.*
- *Expect to see illness rebound as we go into to Q1, however the question is when!*

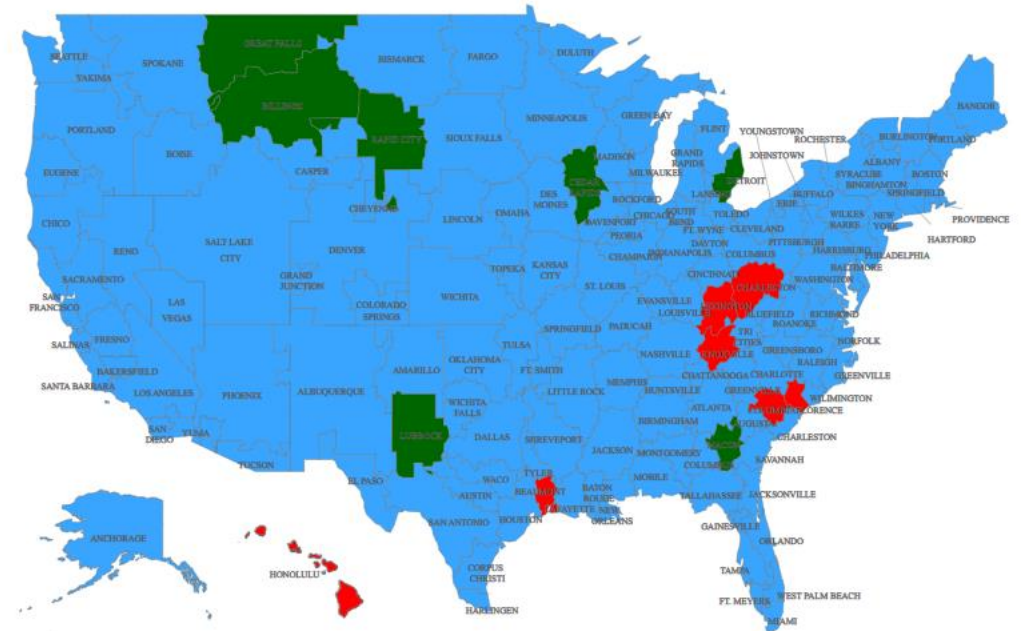


Compared to last season, more of the country is currently in Alert status

Current Season
Week Ending 2/10/24

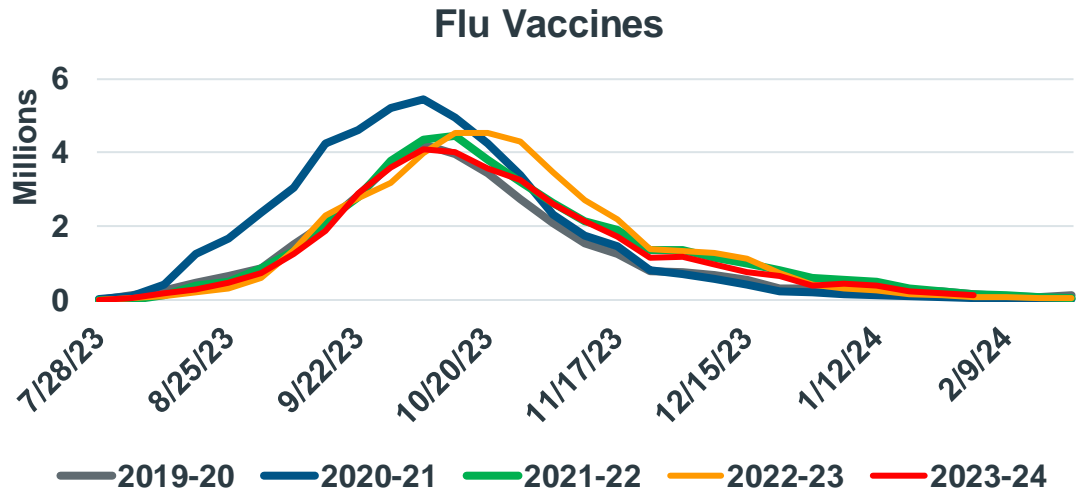
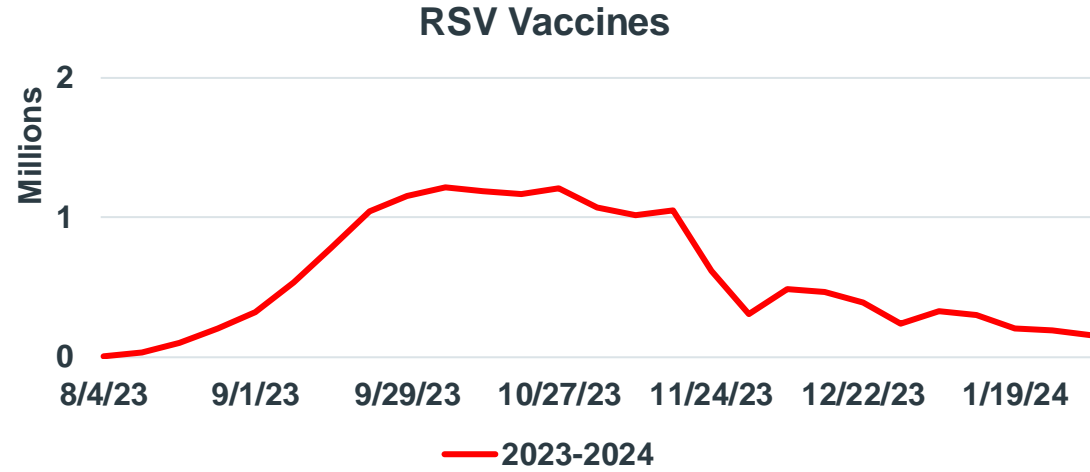
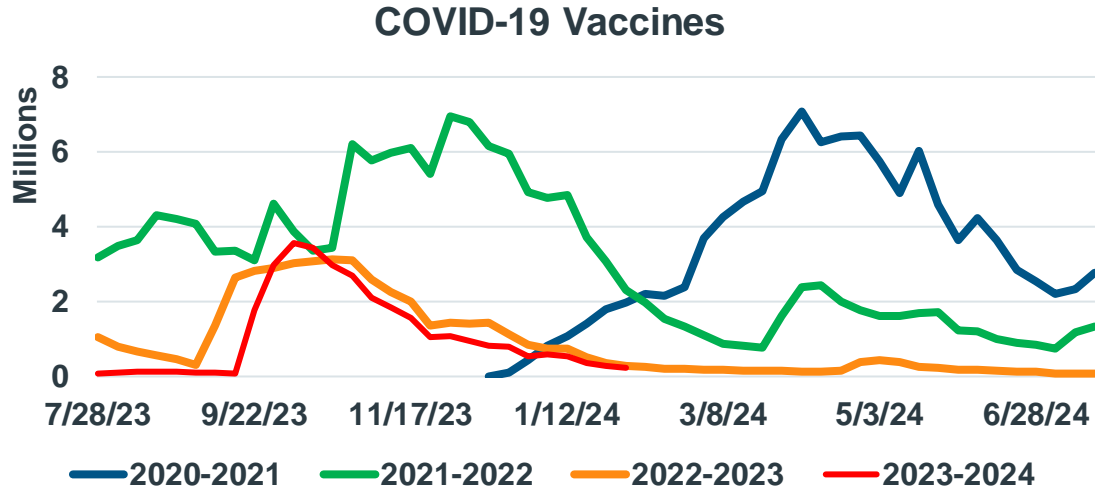


Current Week, Previous Season
Week Ending 2/11/23



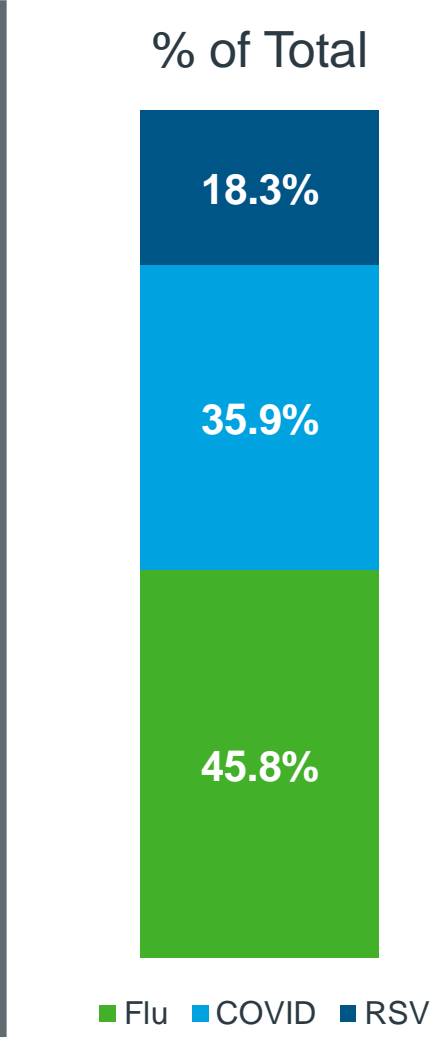
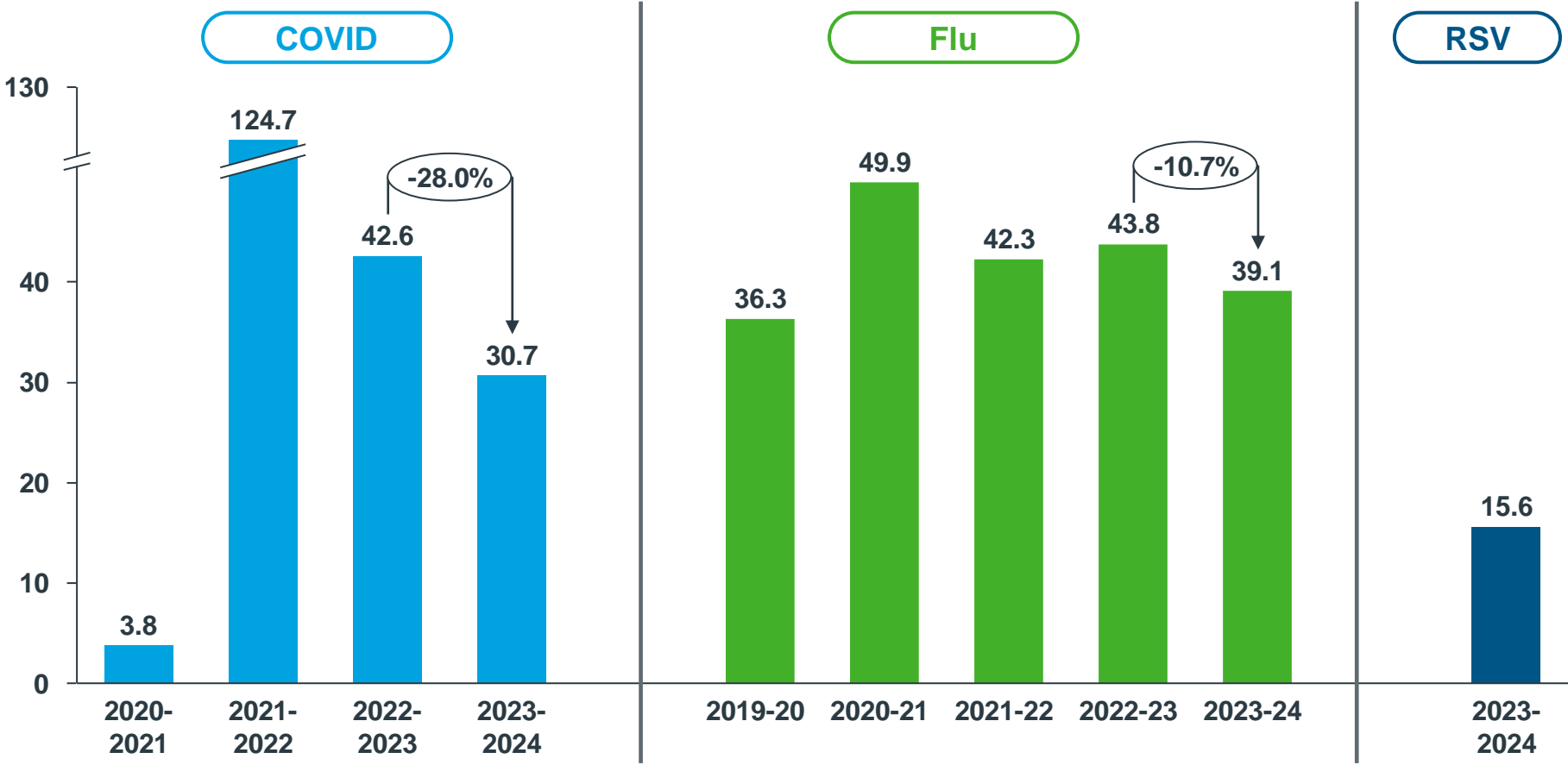
Normal Advisory Up Pre-Alert Alert Advisory Down

COVID-19 and Flu Vaccines are lower this season than prior seasons; RSV Vaccines are new this season



COVID and Flu vaccines at Retail are down on a year over year basis

Season to Date Vaccine Volumes at Retail



- Season to Date is defined as July 28, 2023, through January 26, 2024
- Data represents vaccinations done at retail and processed through the pharmacy’s dispensing system

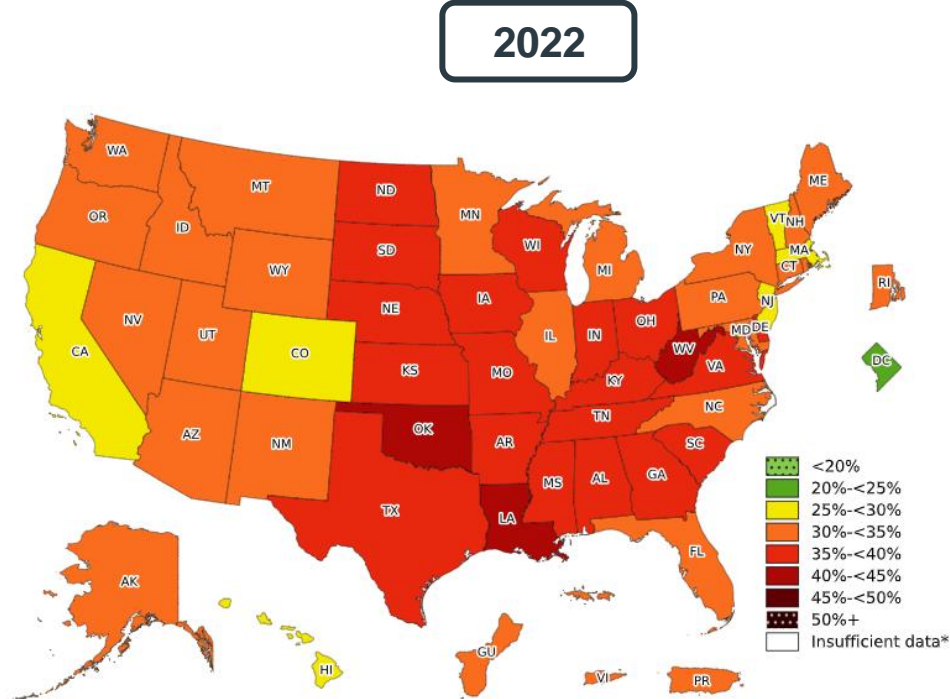
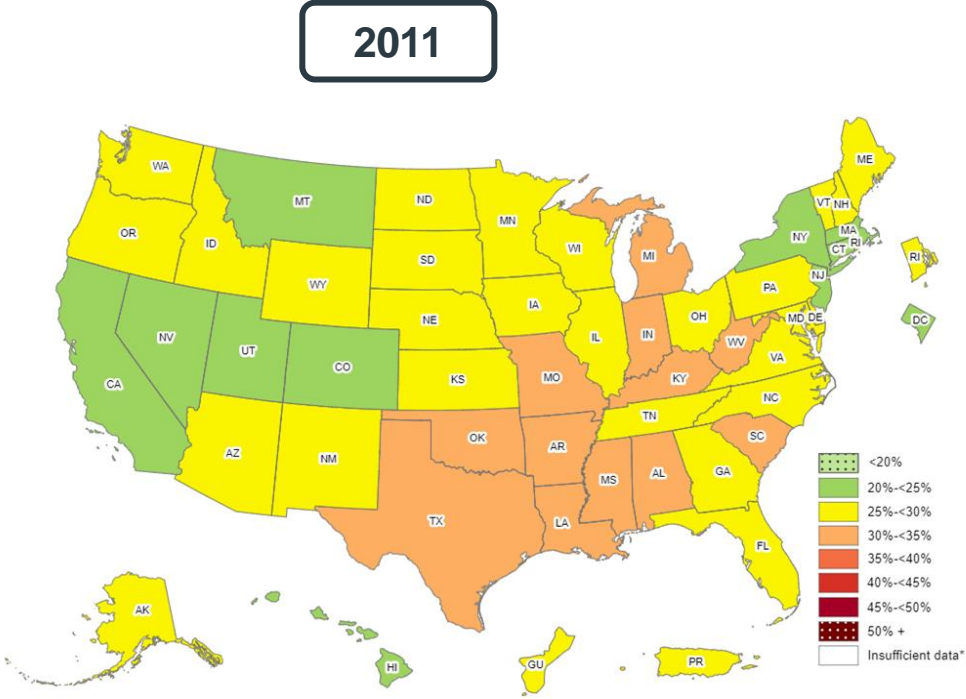
GLP-1s

 **IQVIA**



Self-reported prevalence of obesity has increased significantly in a decade

Prevalence of Self-Reported Obesity Among U.S. Adults by State and Territory
 from the Behavioral Risk Surveillance system (BRFSS)



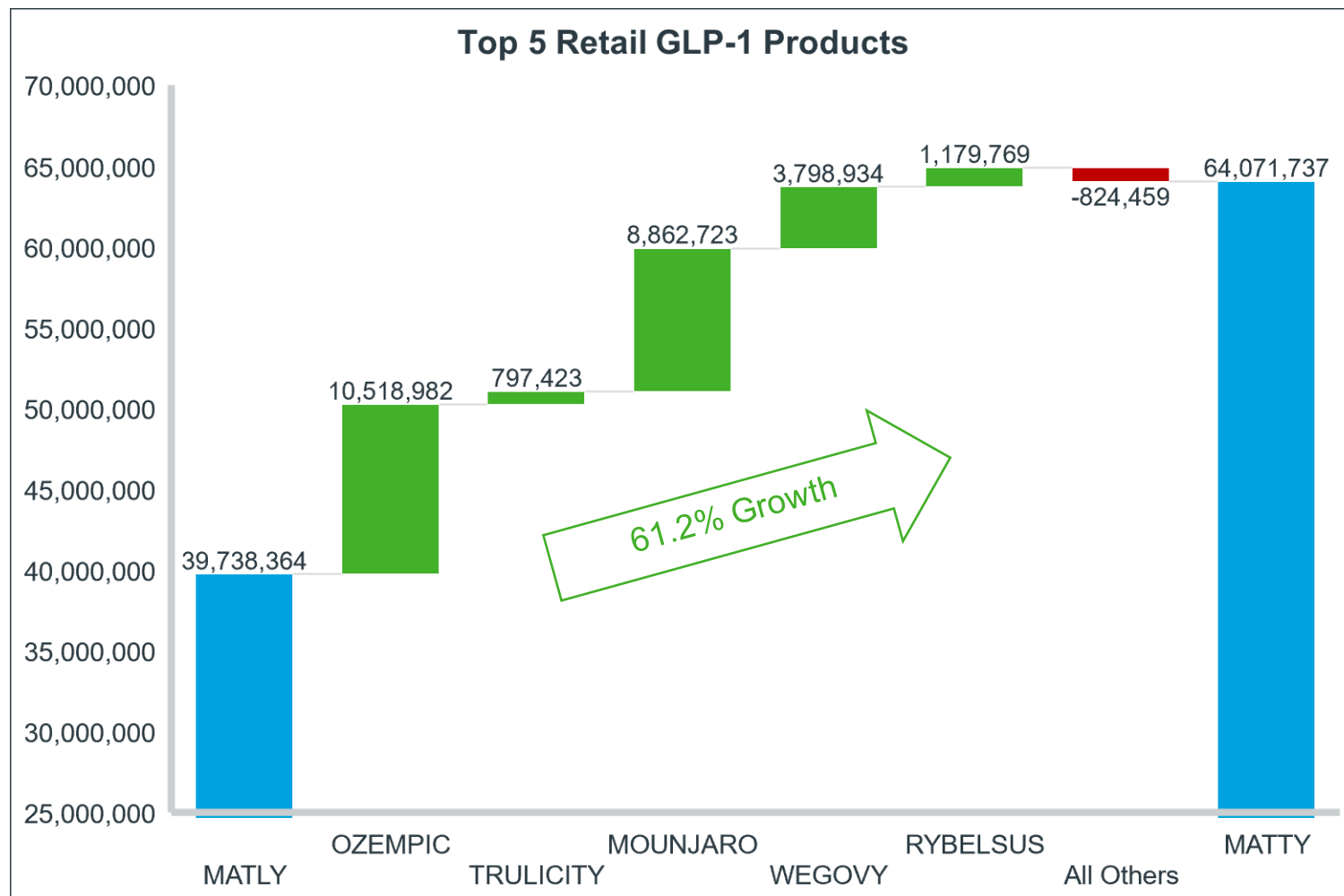
† Prevalence estimates reflect BRFSS methodological changes started in 2011. These estimates should not be compared to prevalence estimates before 2011.

*Sample size <50, the relative standard error (dividing the standard error by the prevalence) ≥30%, or no data in a specific year.

[Source link: Overweight & Obesity | CDC](#)



Ozempic and Mounjaro* drove most of the volume growth among GLP-1s

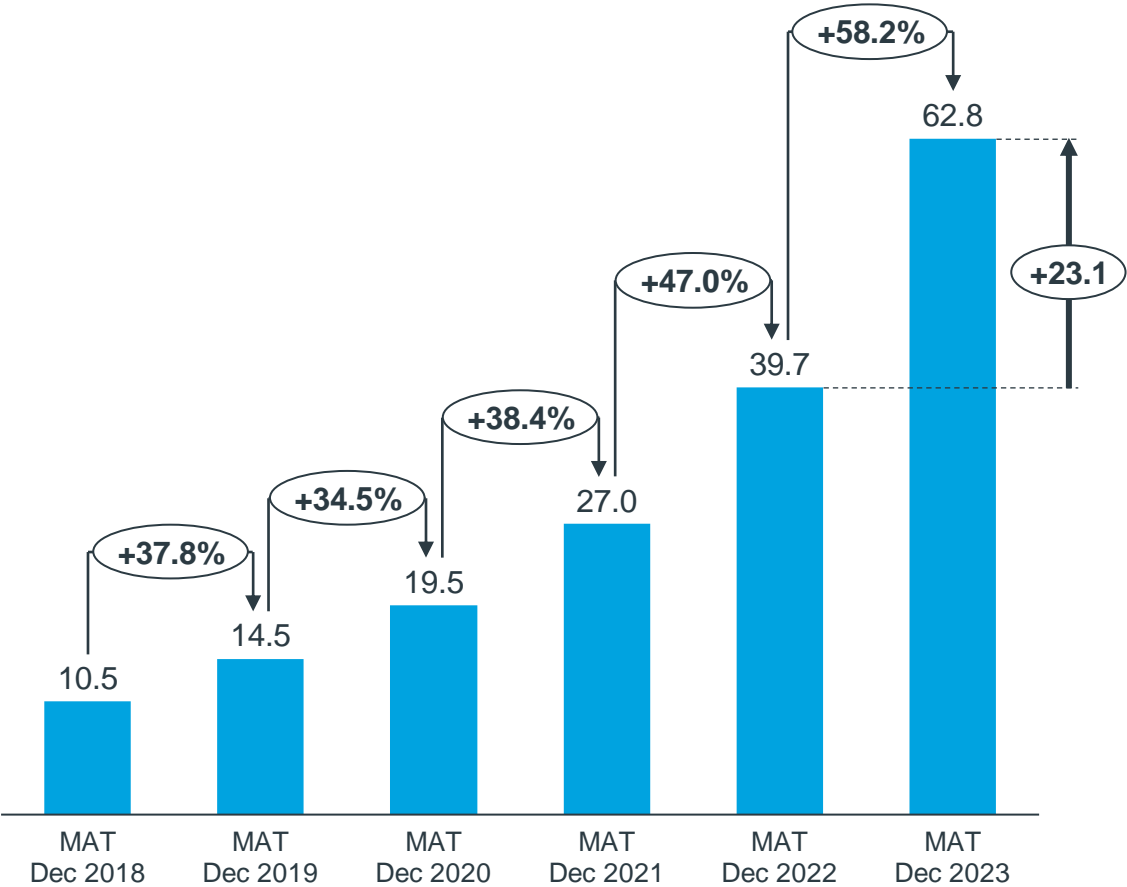


- The Retail sector grew 61.2%, over 24.3M adjusted prescriptions year over year
- All Others combined saw decline

Product	MATTY Adj. Rx's
OZEMPIC	14,491,052
TRULICITY	14,821,516
MOUNJARO	2,413,369
WEGOVY	920,648
RYBELSUS	2,794,394
All Others	4,297,386

GLP-1s have grown ~58% over the last 12 months and ~84% of the sales are in Retail

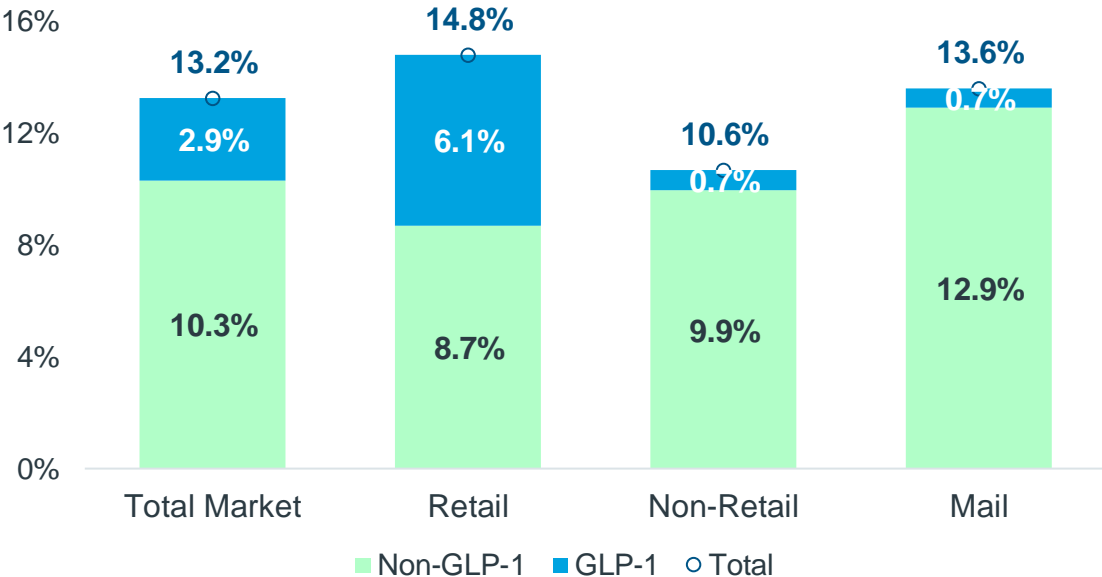
Moving Annual Total GLP-1 Sales Dollars (Billions)



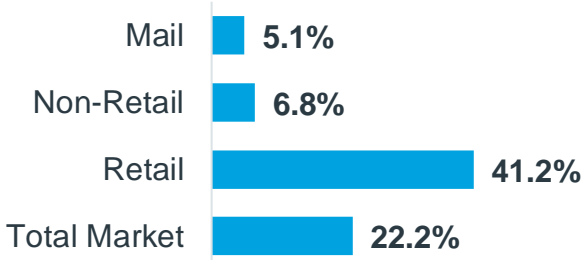
Note: In 2018 there was no Rybelsus, Wegovy or Mounjaro

Updated with December 2023 Data

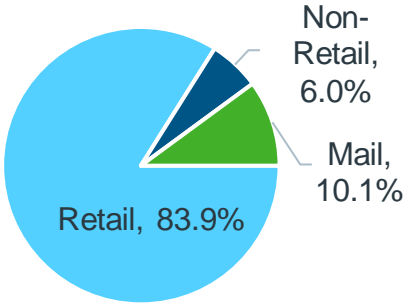
Moving Annual Total Sales Contribution to Growth



What % of sales growth are GLP-1s?



Where are the sales coming from?

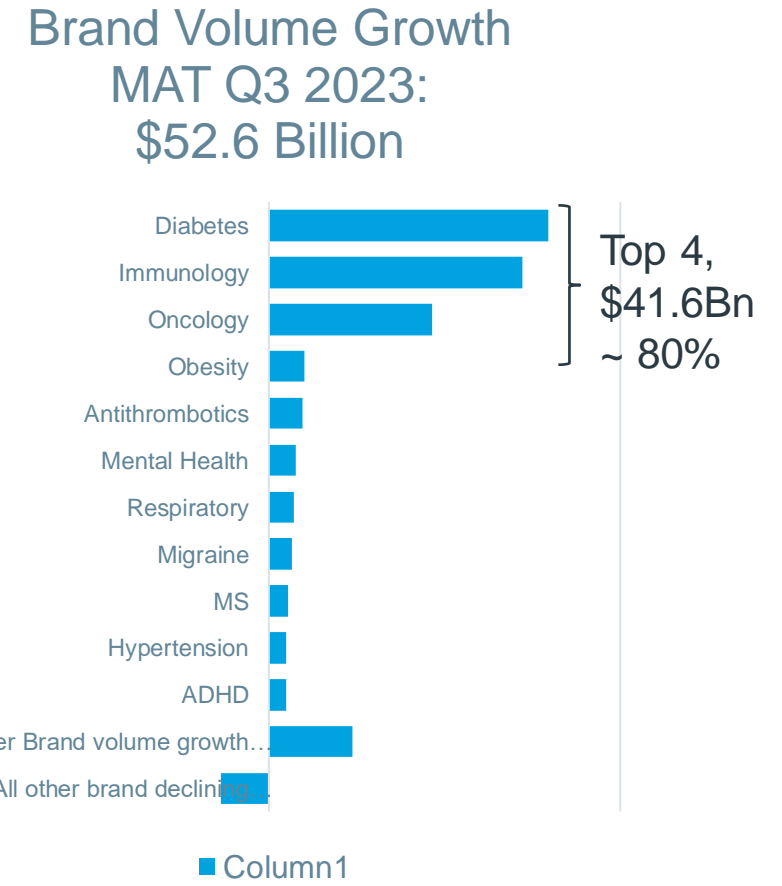
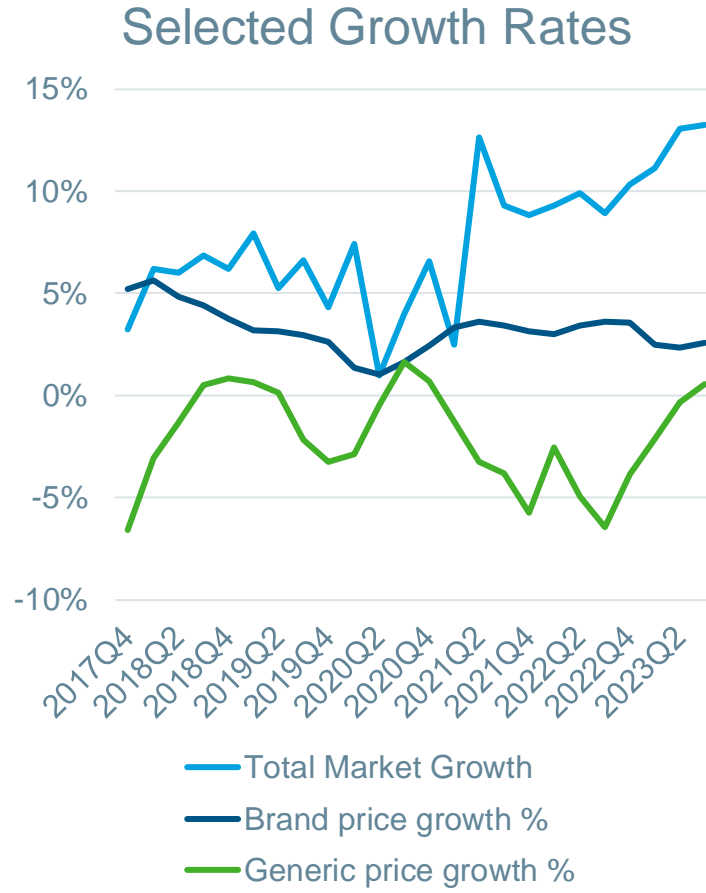
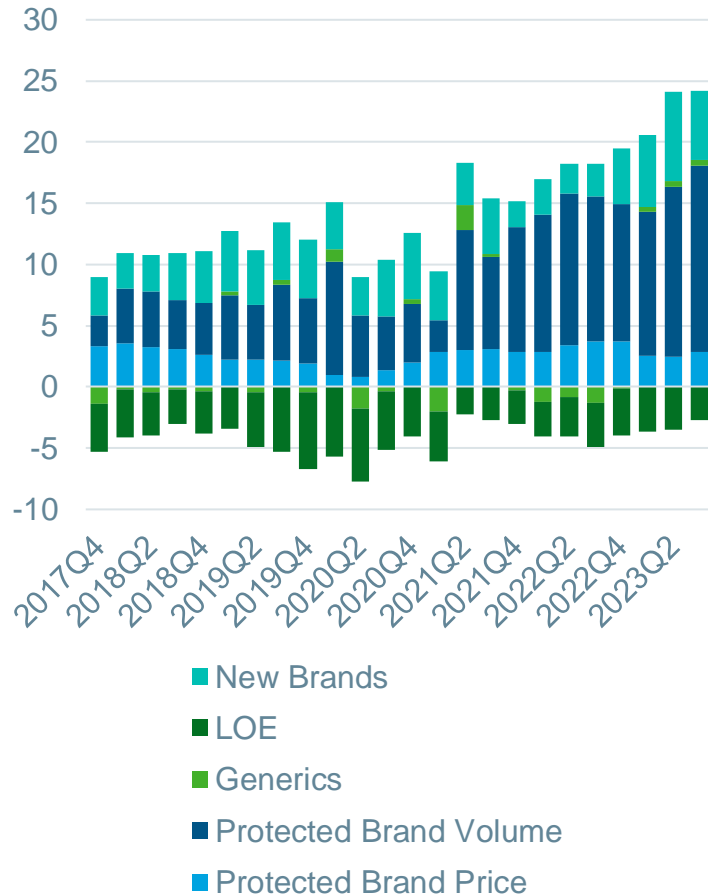


Outlook



US invoice-level growth has accelerated, driven by established brand volume not solely limited to GLP-1s

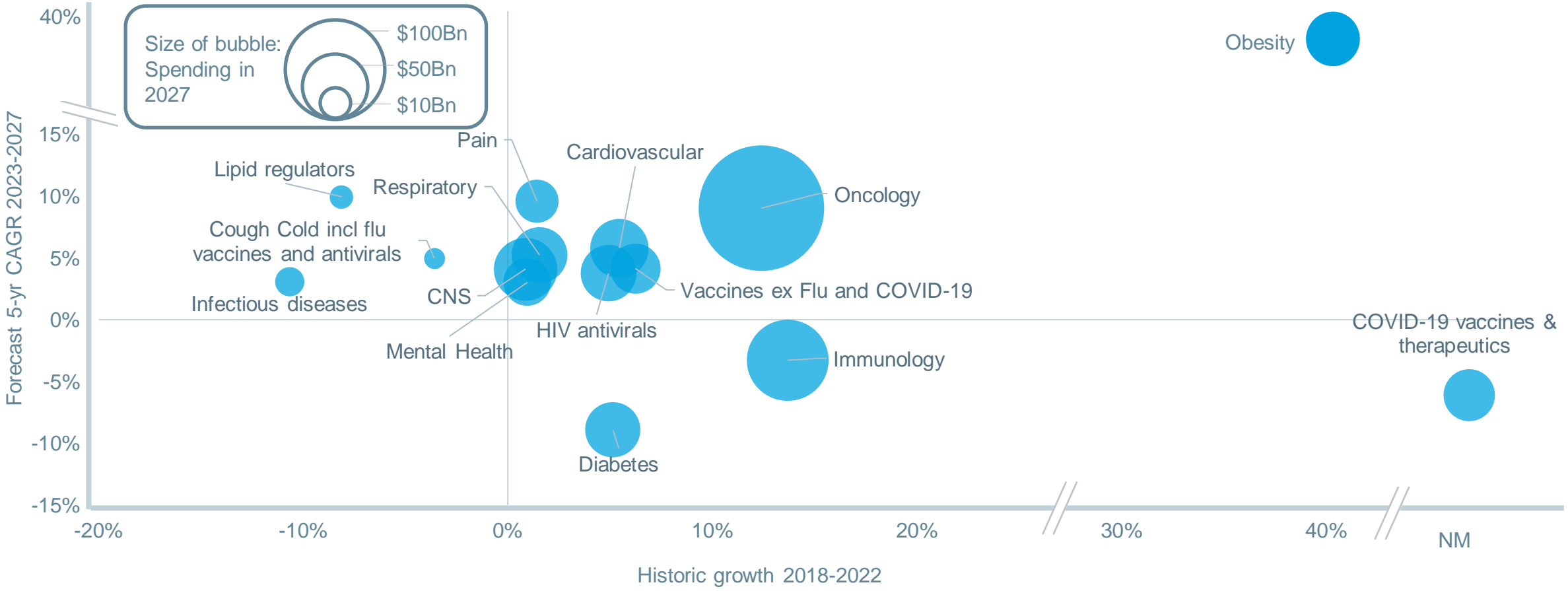
US Absolute Growth by Segment, US\$Bn (Invoice)



Source: IQVIA National Sales Perspectives, Sep 2023

Oncology, neurology and obesity drive growth through 2027 while diabetes, immunology and COVID-19 contribute to slowing

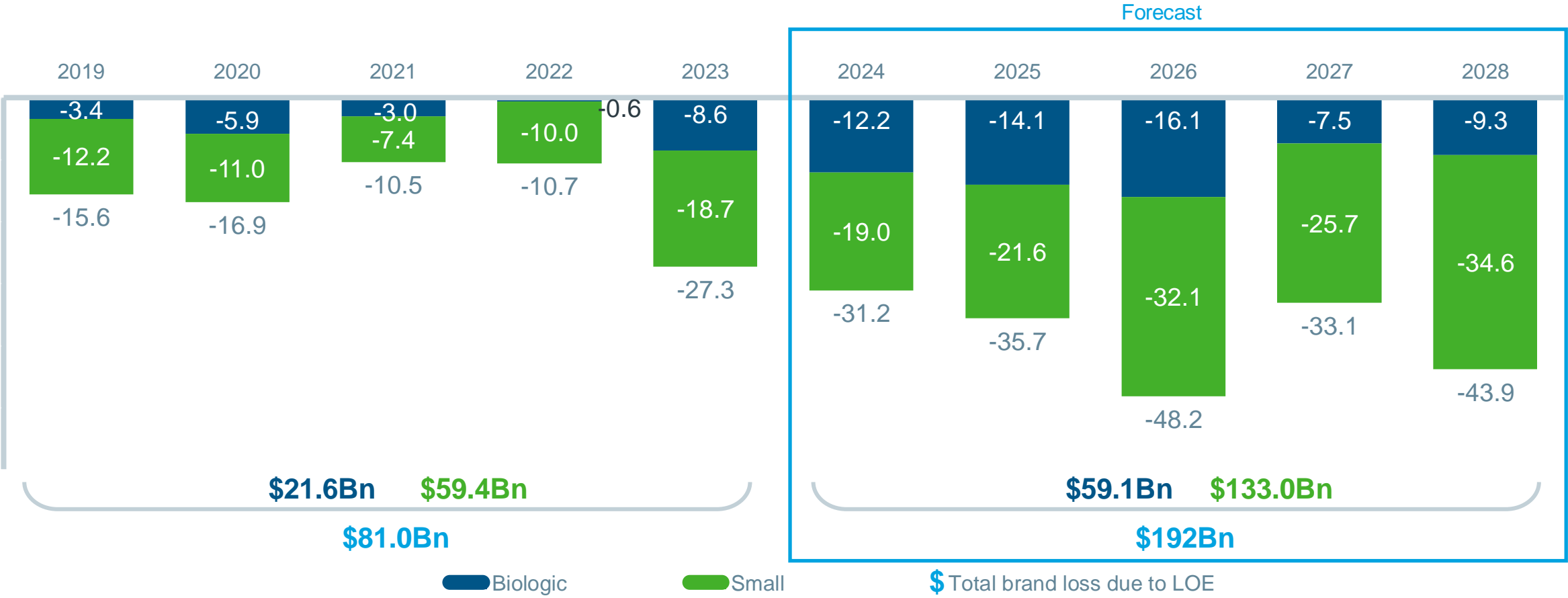
Historic and forecast net spending growth for leading therapy areas



Source: IQVIA Institute, Mar 2023. The Use of Medicines in the U.S. 2023: Usage and Spending Trends and Outlook to 2027. Report by the IQVIA Institute for Human Data Science. ©2024 IQVIA and Affiliates. Do not reproduce without permission.

The impact of exclusivity losses will reach \$192Bn over the next 5 years, with around 30% due to the availability of biosimilars

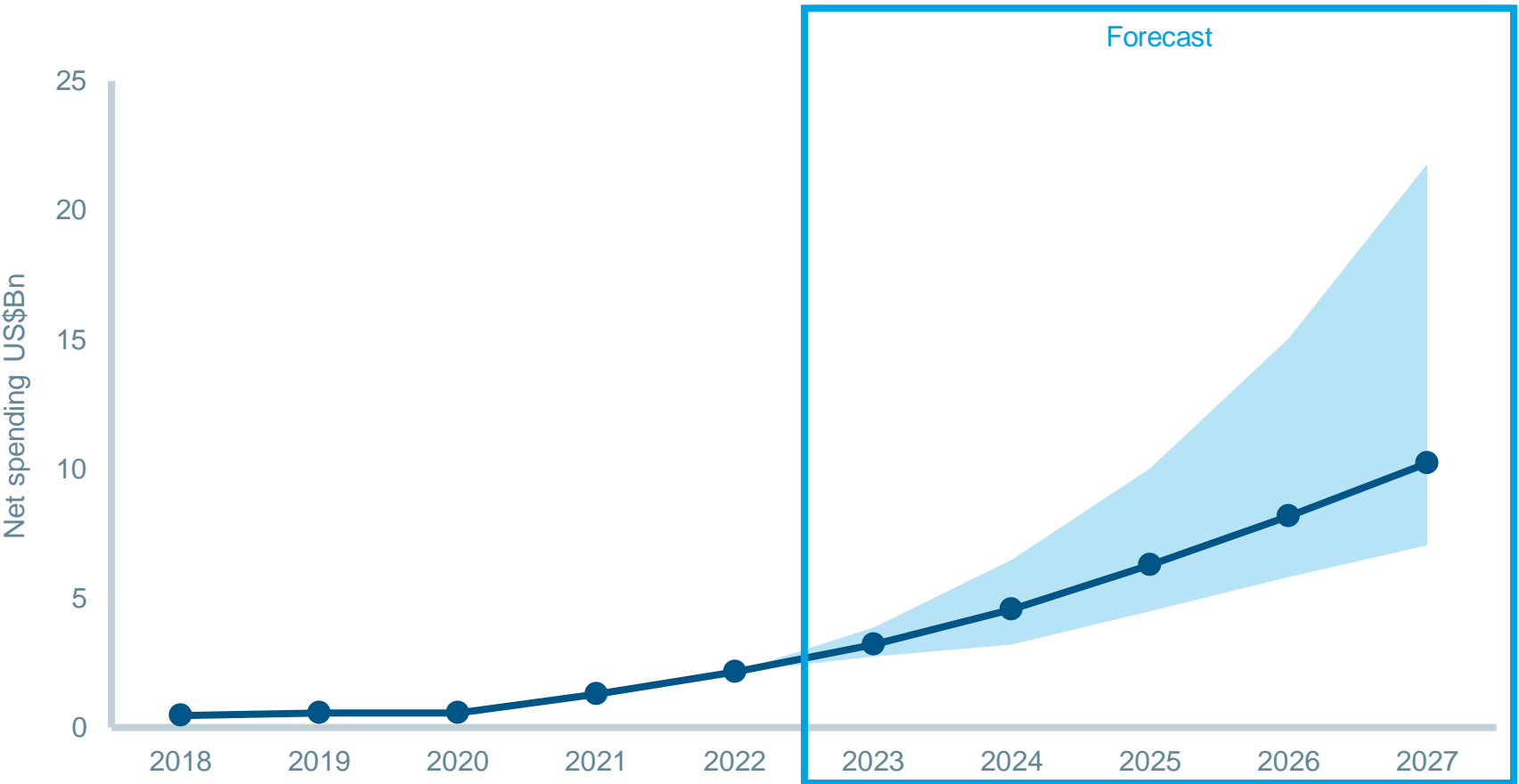
10 developed countries impact of brand losses of exclusivity 2019–2028, US\$Bn



Source: IQVIA Market Prognosis, Sep 2023; IQVIA Institute, Nov 2023. Global Use of Medicines 2024: Outlook to 2028. Report by the IQVIA Institute for Human Data Science.

Spending on obesity drugs has accelerated in the past two years from novel GLP-1 agonists with upside if more widely reimbursed

Obesity spending at estimated manufacturer net prices, US\$Bn



2023–2027 Key metrics

+378% total net spending growth
+\$8.1Bn
(35–38% CAGR)

2–5 new launches, primarily GLP-1 and GLP-1/GIP combo

Further growth upside potential offset by significant off-invoice discounts and rebates

Range of scenarios Base case

Source: IQVIA Institute, Mar 2023. The Use of Medicines in the U.S. 2023: Usage and Spending Trends and Outlook to 2027. Report by the IQVIA Institute for Human Data Science.

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Wrapping it up

1 The number of Retail pharmacies continues to decline

2 Med D prescriptions are driving growth in retail

3 Cough, Cold and Flu Season has been mild, and the RSV Vaccines are new and were not big this season

4 Specialty is now 51% of the total market sales but GLP1s (non specialty) growth is spectacular

5 Unbranded generics are growing on prescriptions but now have modest growth on Dollars

6 Elective procedures are still weak and screenings even weaker

7 The Pharmaceutical benefit Biosimilar wave is upon us with Humira now facing many competitors

8 There are plenty of LOE opportunities going forward both in Small molecules and Biologics

9 There are many Biologics that will not have any biosimilar competition

10 Drug shortages continue to be a real issue and could get worse

11 Non-retail and particularly hospitals and LTC bore the brunt of COVID

12 Opioid usage is back to 2000 levels

U.S Progress Point

<https://www.iqvia.com/progresspoint>

*A curation of IQVIA's best thinking on **topics** and **trends** driving change, disruption, and **progress** in the United States healthcare market.*



Market insights

- The IQVIA U.S. Launch Quarterly
- The IQVIA Monthly Launch Tracker
- Pharmaceutical Market and MedTech Trends
- Next Generation Payor Segmentation



Person-centric health

- Impact of Medicare Part D Cost Sharing
- Health Equity in the Time of COVID-19
- Advancing Outcomes with Home Healthcare



Engagement innovation

- HCP Consent at Scale
- Hidden Peer-to-Peer Learning Communities
- Importance of End-to-End Data in Physician Marketing



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IQVIA is the world's largest pharmaceutical information company. IQVIA offers services to the pharmaceutical industry in over 100 countries around the globe. Doug has been with IQVIA since 1989.

His fundamental task is to help secure data for all existing and new databases supported by IQVIA, manage supplier, manufacturer & association relationships, and develop information for data partners. As direct consequence of his involvement in these areas, Doug has considerable experience with, and a unique perspective on, the changing U.S. and global healthcare marketplace and pharmaceutical distribution.

Doug is a frequent industry speaker and the recipient of many awards from trade groups. Before joining IQVIA Doug held positions at Nielsen Market Research for 16 years in various sales and marketing capacities. A native of Illinois, Doug received a BA from DePauw University and holds an MBA in management from Fairleigh Dickinson University.



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