

The US Specialty Pharmaceutical Market Report: 2013 Edition

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Abstracts

Specialty pharmaceuticals are defined as a new, rapidly growing drugs and biologics that are manufactured as a result of continued advancements in drug technology and design. These pharmaceuticals are specialized, high cost products which can be difficult to administer and may require patient monitoring. Specialty pharmaceuticals are utilized as complex therapies for complex chronic diseases such as cancer, hemophilia, multiple sclerosis, HIV, hepatitis C, apart from others. Some of the specialized drugs that are used for treating such conditions meet all the three H's: High Cost, High Complexity and High Touch and they require extensive education for safe and cost-effective use. The specialty pharmaceuticals are mostly injectable or infused medicines but may also encompass oral medications.

Specialty pharmacy is a special class of provider that are primarily responsible for distributing and dispensing the pharmaceutical as specialty pharmaceutical require specialized shipping and temperature-controlled storing and handling. Specialty pharmacy can be owned by stand-alone companies or large pharmacy chains. However, some drug wholesalers are also capable of shipping the specialty pharmaceuticals. There exists a substantial incentive for companies to research and develop products that address the unmet need of the patients as the specialty pharmaceutical market has the ability to sustain the high cost of these products thereby additionally offering a business perspective for the biopharmaceutical companies.

The key factors driving growth of the US specialty pharmaceutical industry include accelerating US aging population, ameliorating economic condition, increased life expectancy, and increasing healthcare expenditure. Some of the noteworthy trends and developments of this industry include rising Medicare enrollment, novel specialty products in pipeline, conversion of patents to generic drugs, increased spending on

specialty drugs and ongoing merger & acquisition activities. However, the growth of the industry is being hindered by lack of rigorous clinical trials, sluggish pace of innovation and inappropriate use of therapeutic drugs.

The specialty pharmaceutical market witnesses fierce competition with numerous top notch players; such as Amgen, Pfizer, Eli Lilly, Roche, Johnson & Johnson and Novo Nordisk; operating in the market place along with small budding players. The fierce competition prevailing in the US specialty pharmaceutical industry has been studied on a number of parameters such as competing drugs, mail pharmacies and distributors. The company profiles of leading aforementioned players in the market are also presented in the report.

By combining SPSS Inc.'s data integration and analysis capabilities with our relevant findings, we have predicted the future growth of the industry. We employed various significant variables that have an impact on this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables and tests.

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