# THE NUMEROF GLOBAL PHARMA OUTLOOK

2027 Edition

## Key Action Steps

- Reevaluate MFN strategies, launch sequencing, evidence planning, and R&D investment to drive product value.
- Redesign commercial models to meet stakeholder requirements.
- Align R&D, Medical Affairs, Commercial functions.
- Craft compelling databased economic & clinical value narratives that ensure differentiation.
- Develop portfolio investment and pricing strategies that reflect lifetime value.
- Engage disciplined strategic, operational, and tactical applications of AI to drive profitability and improve outcomes.

**Device**

Explosion in AI and predictive analytics. More product development collaborations, ***combining drugs, devices, and diagnostics***.

**Retail**

***Retail clinics contract***, and pharmacies increase primary care role. Growing disruption from ***new distribution models***. Focus on chronic disease management, medication adherence & in-home care.

**Physician/ KOL**

***Physicians*** guided by institutional formularies, care paths, less influential in decision making. Engagement requires ***new omnichannel approaches***.

**Healthcare Delivery**

***Financial pressure drives consolidation*** and standardization across care paths, purchasing, and pharmacy – limiting prescribing autonomy. Institutions demand evidence to justify utilization. Focus on ***revenue maximization***, ***chronic disease management, less intensive settings, including home and telehealth***.

**Employer**

***High price specialty drugs crushing budgets***. Interest in reducing total cost of care via digital health solutions and targeted disease programs. Greater willingness to ***restrict coverage or shift costs*** to employees.

**Consumer**

***Rising premiums, deductibles, and OOP costs*** intensify affordability concerns. Growing interest in ***DTC purchasing, alternative distribution, and AI-enabled diagnostics.***

**Private Payer/ PBM**

**PBM reform** challenges the rebate and fee model/ delinking. ***Increased drug price transparency*** at the insurer level. More ***access restrictions***. Demand for **value evidence**, including RWE. ***Restricted formularies***.

**Public Payer/ Benefit Evaluator**

***Stringent requirements for evidence, comparators, access & price. OOP caps, reference/risk-based pricing, harmonization likely***. More EU direct ***drug pricing agreements***. **State level affordability boards** (MFP) add complexity in pricing. National pricing impacts ***global pricing***. ***US political and legislative action*** creates greater risk.

**Regulator (FDA, DOJ, EMA, etc.)**

**IRA, MFN, and EU initiatives obsolete traditional assumptions about *launch sequencing, evidentiary requirements, and risk*. Tariff threats** and reshoring pressures reshape manufacturing strategies. **FDA policies create opportunities** for accelerated approval.

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