

PNC PHARMA & LIFE SCIENCES

Monthly News Brief

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[Novo, Lilly Sputter as Hims Launches Knockoff GLP-1 Pill](#) *(BioPharma Dive)*

Hims & Hers has begun selling a compounded version of Novo Nordisk's oral Wegovy pill as part of a weight-loss program that is offered at a much lower cost than Novo's original medication. Novo blasted the move as illegal mass compounding and deceptive advertising, calling the product an unapproved and untested knockoff and warning it plans legal and regulatory action. FDA Commissioner said the agency will act swiftly against companies mass-marketing copycat GLP-1 drugs, noting the FDA cannot verify the quality or safety of such compounded products. Hims claims its formulation is different, but regulators emphasize that GLP-1 shortages have eased, making mass compounding no longer justified.

[White House's Online Services For Drug Sales Debuts With Limited Impact On Prices](#) *(Healthcare Dive)*

The Trump administration has launched TrumpRx, a White House-backed website that advertises steep cash-pay discounts on 43 brand-name drugs, featured in "most favored nation" pricing agreements. The site lists direct-to-consumer manufacturer offers and coupons, yet often fails to disclose cheaper generic alternatives, meaning patients may still pay more than necessary. Experts note that TrumpRx's discounts largely mirror pre-existing manufacturer programs, and in some cases the platform's prices are higher than deals available on other discount sites. While the service could offer some financial relief to people who pay cash for drugs, it will have little effect on the vast majority of people whose medications are covered by health insurance.

[GOP's 'Big Beautiful Bill' Erases 12 Years of Solvency for Medicare Trust Fund: CBO](#) *(Healthcare Dive)*

The Congressional Budget Office ("CBO") now projects Medicare's Hospital Insurance trust fund will be depleted in 2040, 12 years earlier than previously expected, largely because the "Big Beautiful Bill" cut tax revenues that feed the fund. Demographic pressure — more seniors entering Medicare and fewer workers paying into it — along with higher spending in both traditional Medicare and Medicare Advantage if the fund runs dry, Medicare would be forced to reduce Part A payments, affecting hospital, skilled nursing, and hospice care for about 70MM beneficiaries. Experts caution that focusing solely on Part A insolvency may obscure a broader fiscal reality: overall Medicare spending—especially Parts B and D—is growing rapidly, requiring ever larger general-revenue subsidies and premium contributions. Even if Part A's depletion date shifts, Medicare as a whole continues to exert severe long-term pressure on the federal budget.

[FDA Breakthrough Program Starts FY2026 at Steady Pace](#) *(Medtech Dive)*

The FDA's breakthrough program gives a special designation to devices that potentially provide a more effective treatment or diagnosis for life-threatening or irreversibly debilitating conditions, and is intended to speed up patient access to such devices. The program is off to a stable start in FY2026, issuing 42 designations in the first quarter, a pace that would total about 168 designations for the year, consistent with the annual range seen since 2022. Clinical areas leading the designations remain unchanged: cardiovascular, neurology, and orthopedics, with orthopedics the most active specialty in late 2025. The program continues to support faster access to promising technologies, while industry groups push for faster Medicare coverage for these devices.

[HHS Scraps 340B Rebate Pilot in Win for Hospitals](#) *(Healthcare Dive)*

HHS has scrapped its planned 340B rebate pilot, ending the controversial effort before launch. The pilot would have replaced longstanding upfront 340B drug discounts with post-sale rebates, requiring hospitals to pay full price first and seek reimbursement later. Hospitals sued in December, arguing the agency illegally rushed the pilot, ignored provider concerns, and risked imposing hundreds of millions in new costs on safety-net hospitals. A federal judge blocked the pilot in late December, and after an appeals court upheld the ruling, HHS agreed that continuing litigation wouldn't be useful and moved to vacate the program.

[AbbVie to Build New API Manufacturing Facilities in North Chicago](#) *(Contract Pharma)*

AbbVie is investing \$380MM to build two new active pharmaceutical ingredient ("API") manufacturing facilities at its North Chicago campus, using advanced and AI-enabled technologies to support future neuroscience and obesity drugs. Construction begins in spring 2026, with operations expected in 2029, and the expansion will add 300 jobs across engineering, scientific, and manufacturing roles. This expansion further underscores AbbVie's long-term strategy to bolster domestic manufacturing capacity, marking clear progress against its recently announced \$100B commitment to U.S. R&D and capital investments over the next decade.

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