



2026 HPOR

The State of Hospital
Pharmacy Operations

12th Annual Hospital Pharmacy Operations Report

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Introduction

The healthcare landscape has reached a critical inflection point, where care complexity, sustained workforce shortages, and rising regulatory expectations are fundamentally reshaping hospital operations.

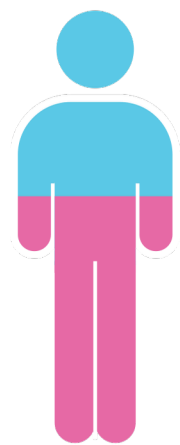
As pharmacy leaders navigate this high-stakes environment, the business of pharmacy has evolved from a cost center to a patient-centered, technology-driven service hub, with the potential to provide much-needed organizational stability. But success in 2026 requires intelligent systems that maximize operational efficiency, financial outcomes, and regulatory compliance.

The 12th Annual Hospital Pharmacy Operations Report (HPOR) provides a deep dive into how leading organizations are shifting their mindsets toward strategic intelligence to build resilience in an ever-changing market.

Methodology & Survey Demographics

The findings in this report are based on a comprehensive survey of 437 hospital pharmacy professionals conducted in January and February of 2026. The data reflects a highly experienced workforce, with over 54% of respondents boasting 11 or more years of hospital pharmacy experience and 73% having 6 or more years of experience.

Respondents also represent a wide range of disciplines, including: pharmacy managers, directors, or VPs (31.1%), diversion specialists (14.4%), pharmacy buyers (9.5%), and more. This depth of expertise and specialty ensures the insights gathered represent a mature perspective on the most pressing challenges and innovative strategies currently shaping the pharmacy industry.



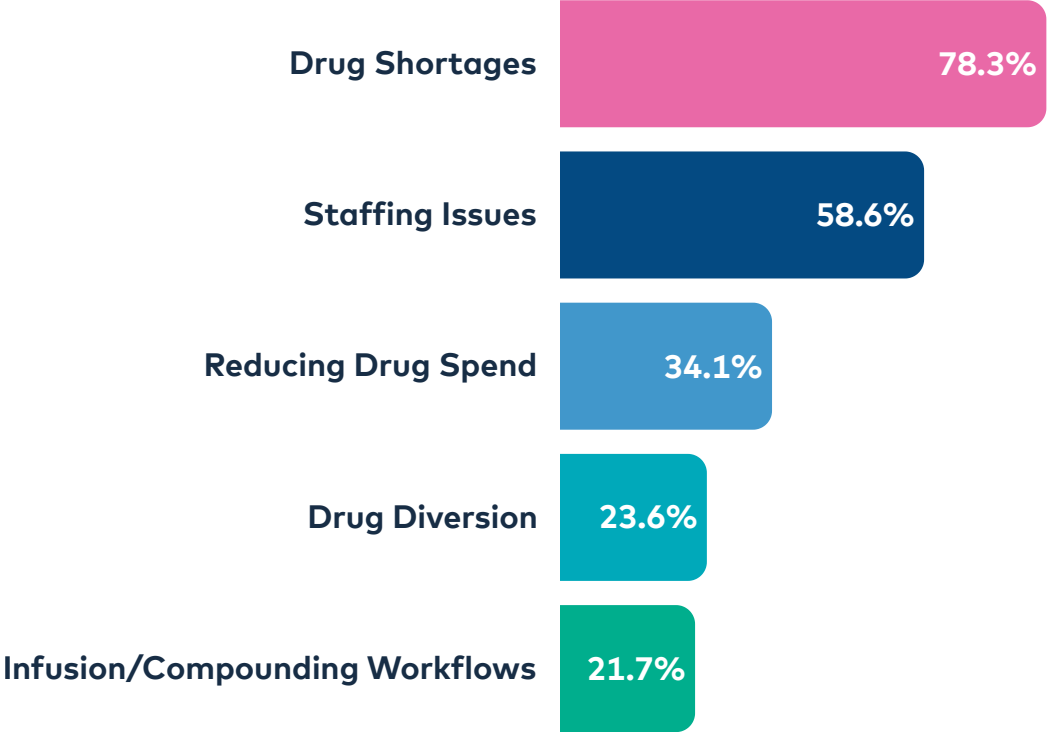
Over 54% of respondents had 11+ years of pharmacy experience

High-Level Industry Trends and Strategic Priorities

The 2026 HPOR data reveals a pharmacy landscape defined by persistent operational hurdles and a clear shift toward clinical automation. While the familiar challenges of supply and staffing remain, leaders are increasingly prioritizing technology that directly impacts patient safety and clinical workflows.

The Biggest Challenges Facing Pharmacies Today

For the seventh consecutive year, **Drug Shortages** remain the most pressing concern for hospital pharmacies, cited by **78.3%** of respondents. This is followed by systemic workforce challenges and financial pressures. When asked to choose their three top challenges, respondents selected:



Top Technology Initiatives for 2026

2026 pharmacy investment strategies are heavily focused on high-risk clinical areas. IV prep tracking and clean room automation moved to the top priority this year, narrowly surpassing smart pumps. Drug shortage management software and kit and tray management also landed in the top five, with both seeing year-over-year growth in interest.

- **IV Prep Tracking / Clean Room Automation:** 31.6%
- **Smart Pumps:** 30.4%
- **Drug Shortage Management Software:** 27.0%
- **Kit and Tray Management:** 26.8%
- **Automated Dispensing Cabinets (ADCs):** 25.2%

Factors Influencing Budget Approval

The appetite for investing in new technology has sharply declined in 2026. Half of respondents (50.7%) were 'very' or 'somewhat likely' to implement new pharmacy technology initiatives in the next 12 months, down from 76% last year. Among those unlikely to invest in new technology, 59% cited limited budget as the reason – a jump from only 33% in 2025.

For those who do pursue funding for new technology, clinical outcomes significantly outweigh financial gains. **Protecting patient safety** remains the undisputed primary driver for budget approval, while revenue generation is viewed as the least influential factor.

- **Protect Patient Safety:** Ranked 'Most Important' by 62.6% of leaders.
- **Reduce Costs:** Ranked as a 'Most Important' by 17.7%.
- **Increase Regulatory Compliance:** Ranked as 'Most Important' by 11.8%.
- **Drive Additional Revenue:** Ranked 'Least Important' by 41.7% of respondents.

The Rise of AI in Pharmacy

AI has crossed a meaningful threshold in hospital pharmacy, with the 2026 data revealing that it has rapidly become a practical tool.

Nearly half of the surveyed professionals (48.5%) now use AI in some capacity – and among those who do, the adoption is well past the experimental stage. 23.7% of respondents reported using AI every day, while 18.8% reported using it every week, suggesting a deep integration into pharmacy workflows.

Top Use Cases for AI

The application of AI in 2026 is concentrated in areas requiring heavy data synthesis or specialized monitoring:



Communications and Reporting

The most common use is creating internal communications, reports, or presentations (31.8%).



Diversion Detection

AI-driven detection of drug diversion has emerged as a major functional application, used by 24.8% of respondents.



Data Synthesis

11.8% of respondents use AI to synthesize complex data from technology platforms and vendors.

Shortage Prediction

There is high demand for advanced analytics in supply chain management, with 56.1% of respondents ranking the ability to predict shortages using machine learning as a "Very Important" feature - but only 9% of respondents use AI to manage drug shortages today.

Barriers to AI Adoption

Despite this momentum, significant hurdles remain that prevent universal AI adoption:



Accuracy and Trust

32.4% of respondents cite concerns about the accuracy of AI outputs.



Privacy and Validation

Significant concerns persist regarding data privacy (28.2%) and the lack of approved or validated AI tools (28.2%) within the clinical environment.



Policy Restrictions

21.5% of organizations have IT or organizational policies that currently restrict AI use.

The use of AI is rapidly solidifying its place as a practical tool within the hospital pharmacy, moving beyond a futuristic concept to support workflows for many pharmacy professionals.

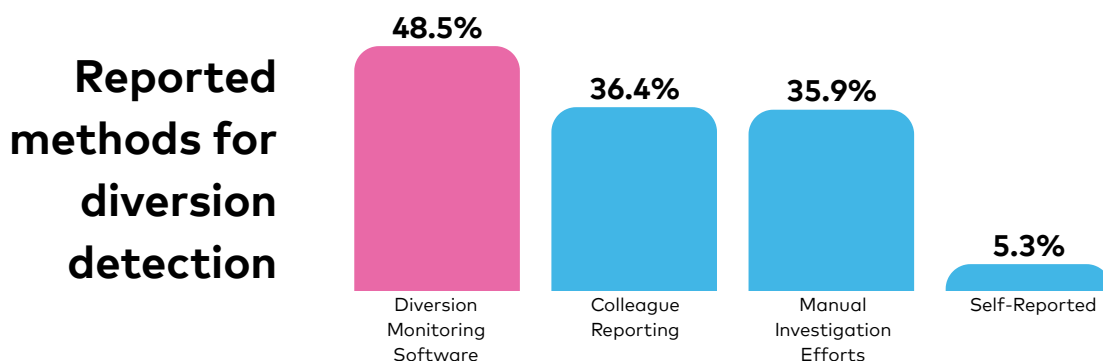
While its current applications are concentrated in areas like communications and diversion detection, its long-term strategic potential is evident. The feedback emerging is one of cautious optimism. Pharmacy leaders see value, but hesitate to move faster than their confidence in the technology's accuracy or their organization's policies.

Drug Diversion: From Manual Audits to Real-Time Monitoring

Drug diversion continues to be a persistent threat to hospital safety and compliance, with **62.7%** of respondents reporting at least one confirmed diversion event within the past year. The shift away from manual auditing towards automated, collaborative approaches also continues, with 94.4% of respondents using diversion monitoring technology and 83% having a diversion committee in place.

Identifying Diversion: The Shift to Software

The 2026 data shows that diversion monitoring software has become the leading method for identifying events, now accounting for 48.5% of all detections. This represents a continued shift toward proactive surveillance compared to traditional detection methods:



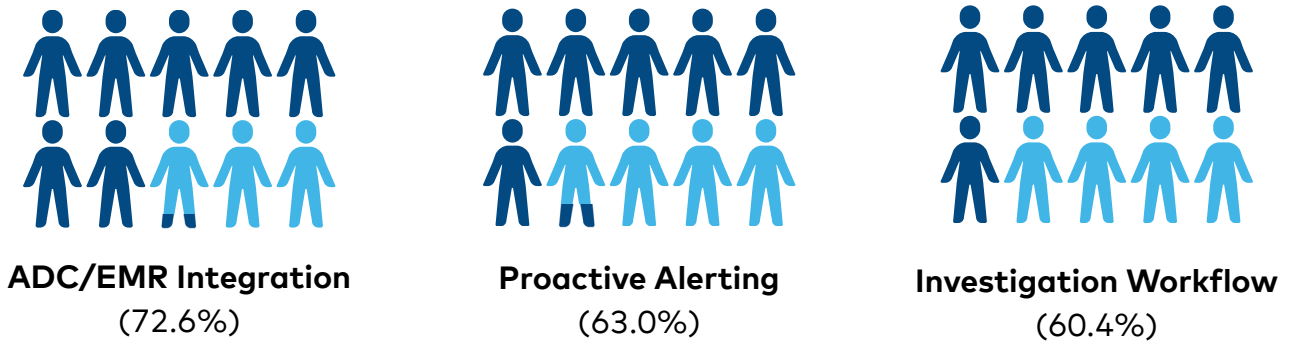
Perception vs. Awareness

A notable gap exists between how difficult professionals *believe* it is to divert and their actual awareness of incidents. While **28.4%** of respondents are personally aware of a colleague who has diverted opioids, the vast majority still perceive their internal controls as strong, with **64.6%** believing it is "Very Difficult" or "Difficult" to divert opioids in their organization, and just **5.3%** believing it would be "Easy". This disconnect suggests that some organizations may underestimate their own exposure to drug diversion.

The Operational Burden of Prevention

Managing a drug diversion program requires a significant labor investment. Nearly **60%** of teams spend more than **5 hours per week** identifying and resolving controlled substance discrepancies. To mitigate this burden, leaders are prioritizing advanced software features that streamline investigations.

Top Software Features Ranked as Very Important:



Measuring Success

For the second consecutive year, organizations are defining diversion program success by compliance and standardization measures, rather than the number of diversion events uncovered:

- **Process improvements to drive compliance:** Cited as a success metric by **81.6%** of respondents.
- **Standardization across the health system:** Cited by **59.9%** of respondents.
- **Readiness for DEA audits:** Cited by **50.0%** of respondents.

With drug diversion persisting, the industry is moving away from manual efforts toward automated detection. Fortunately, success is increasingly measured by the adoption of advanced software features that drive compliance and standardization across the health system.

Drug Purchasing and Procurement Workflows

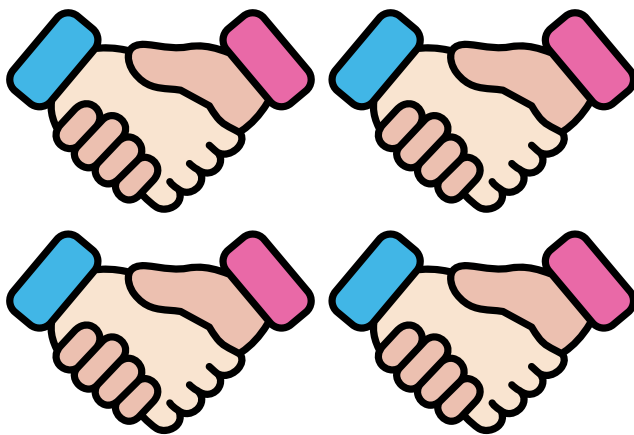
In 2026, pharmacy procurement is no longer a simple transactional task; it has become a complex exercise in supply chain management and financial strategy. With health system margins remaining thin, the ability to streamline purchasing operations is a high priority for nearly 70% of pharmacy leaders.

The Complexity of Sourcing

The modern pharmacy buyer must navigate a fragmented marketplace to ensure supply continuity. The 2026 data shows that the majority of hospitals are managing multiple vendor relationships simultaneously, with 80% using 4 or more partners:

- **4–6 Trading Partners:** 40.0% of hospitals
- **7–9 Trading Partners:** 20.9% of hospitals
- **10 or More Partners:** 19.1% of hospitals

Navigating this many relationships complicates contract fidelity and increases the manual labor required to manage invoices and NDCs.



80%

of respondents are using **4 or more** trading partners

The Biggest Procurement Challenges

While financial pressure is high, operational disruptions remain the primary concern for procurement teams. When asked to select their top issues, respondents identified shortages (88.3%), cost containment (62.2%), 340B compliance (28.8%), and GPO compliance (19.8%) as focus areas.

Financial Goals and Initiatives

Pharmacy teams are under increasing pressure to contribute directly to their organization's bottom line. For 2026, the primary financial initiatives focus on aggressive cost management and operational leanings:

- **Reducing Drug Spend:** Cited by 72.0% of organizations.
- **Improving Operational Efficiency:** A priority for 47.7%.
- **Health System Buying Standardization:** Targeted by 35.5%.

These initiatives are often tied to specific performance targets. Among those with a defined cost-savings goal, 79.1% are tasked with finding \$250,000 or more in savings this year.

79.1% of
respondents are
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\$250,000+

The Software Landscape

To manage this complexity, pharmacies are moving toward specialized analytics, though many still rely on a patchwork of tools:

- **Specialized Procurement Software:** 28.2%
- **Wholesaler/Vendor Tools Only:** 26.4%
- **Multiple Software Platforms:** 23.6%
- **Purchasing Analytics Software:** 10.9%

Drug Shortage Management: The Era of Persistent Scarcity

"Persistent scarcity" has become the baseline for hospital pharmacies in 2026. Drug shortages remain the #1 challenge facing pharmacy leaders for the seventh consecutive year, with **78.3%** of respondents ranking it among their top concerns. While the total number of active shortages has decreased from historical peaks, the complexity of managing those that remain – particularly essential generics and sterile injectables – continues to drain institutional resources.



The Volume of Disruption

The 2026 data highlights a pharmacy workforce under constant siege by supply gaps. The majority of pharmacies are now balancing dozens of active shortages at once.

When asked how many medication shortages are currently impacting their pharmacy, respondents indicated:

10+ active shortages **60%**

20+ active shortages **23.6%**

30+ active shortages **10%**

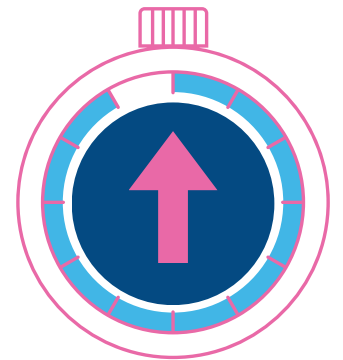
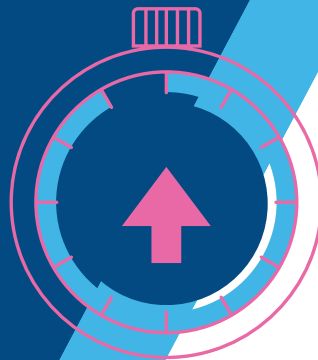
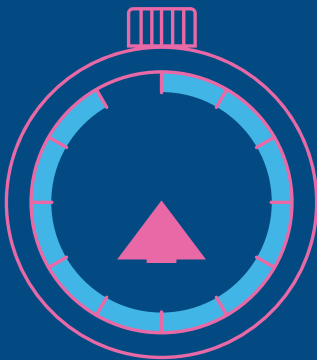
The Hidden Labor Tax

Managing these gaps is no longer a part-time task – it has become a dedicated operational function. The labor required to source alternatives, communicate with clinical teams, and update EHRs represents a significant "tax" on pharmacy time:

- **3-10 hours per week:** 47.3% of teams spend this time exclusively on shortage management.
- **11-20 hours per week:** 19.1% of teams devote half of an employee's time to shortages.
- **21-30 hours per week:** 2.7% of respondents spend this time exclusively on shortage management.
- **30+ hours per week:** 9.1% of respondents spend almost a full employee's worth of time every week just keeping medications on the shelf.

11+ hours

Nearly one third of respondents spent over 11 hours per week actively managing drug shortages



Current Toolkit: The Manual Trap

Despite the critical nature of the problem, the 2026 findings reveal a heavy reliance on outdated, manual processes that offer little to no predictive capability:

- **Spreadsheets and Manual Tracking:** Still the primary tool for **69.7%** of pharmacies.
- **ASHP Shortage Database:** Utilized by **59.6%** of teams for external and reactive guidance.
- **Dedicated Shortage Software:** Adoption remains low at roughly **16.5%**, creating a massive opportunity for organizations to reclaim labor hours through automation.

The Future: Demand for Strategic Intelligence

Pharmacy leaders are no longer satisfied with reactive shortage alerts. For 2026, the demand is for "intelligence" that allows teams to act *before* a shortage reaches the patient floor:

- **Predictive Analytics:** **56.1%** of respondents rank shortage prediction via machine learning as "Very Important."
- **Marketplace Visibility:** **50.9%** rank visibility into alternative available supply across the marketplace as "Very Important."
- **Days-on-Hand Calculations:** **45.4%** view real-time calculations of current stock longevity as a critical software feature.

Integrated, comprehensive tools to enable proactive shortage management are becoming a necessity in order to decrease manual work and the labor tax associated with shortages.



Respondents rank shortage prediction via machine learning as "Very Important"

340B Program Management: Navigating the Rebate Model

The 340B Drug Pricing Program, a long-standing financial cornerstone for safety-net providers, is currently navigating its most turbulent period of regulatory and operational change since inception. While the much-anticipated **340B Rebate Model Pilot** – which would shift upfront discounts to back-end reimbursements – was vacated and remanded by a federal court in February 2026, the signal from regulators is clear: the program is under active review and covered entities must prepare for a fundamentally different financial model.

The Looming Rebate Reality

Despite the current legal stay, pharmacy leaders view the transition to a rebate model as their primary operational hurdle.

66.7% of respondents who are responsible for managing any aspect of their organization's 340B program identify "Responding to the new 340B rebate model pilot" as their most pressing concern. Other top concerns include:

- Addressing manufacturer restrictions or rebate-related charges (53.8%)
- Ensuring accurate split billing and inventory management (51.3%)
- Audit preparation and HRSA compliance (48.7%)

With these challenges mounting, how organizations are planning to respond is split almost evenly between familiar resources and new innovation:

- 52.6% of organizations are expecting their Third-Party Administrator (TPA) or existing vendors to handle the transition.
- While 47.4% are looking toward new technology solutions from innovators.

The Audit Gap vs. Regulatory Expectations

There is a stark misalignment between the anticipated level of federal oversight and the current state of internal surveillance. While the vast majority of leaders expect scrutiny to intensify, actual auditing practices remain largely retrospective and limited in scope.



- **Anticipated Oversight:** 62.2% of specialists expect regulatory oversight to increase over the next 2–3 years.
- **Audit Scope:** Despite this expectation, 31.6% of covered entities still audit less than 25% of their routine claims.
- **Audit Frequency:** Only 10.5% of organizations perform daily surveillance, with monthly reviews cited as the most common cadence (34.2%).

Critical Compliance Vulnerabilities

As HRSA (Health Resources and Services Administration) continues to uncover compliance issues related to recordkeeping, discounts, diversion, and more, pharmacy teams are identifying specific areas where they feel most exposed:

- **Audit-Readiness Gaps:** Leaders feel least confident in their ability to hold up to an audit regarding the Maintenance of the Medicare cost report (30.6%) and self-audited claims (22.2%).
- **Operational Pressures:** 53.9% are struggling with manufacturer-imposed restrictions or rebate-related changes, and 51.3% cite the ongoing difficulty of ensuring accurate split billing.

The Path Forward: Real-Time Integrity

To thrive in 2026, the focus is shifting from "pay-and-hope" to "real-time" auditing. Organizations are moving away from retrospective snapshots and toward automated solutions that provide 100% transaction validation, ensuring every claim is defensible before it ever reaches an external auditor.

Medication Inventory Management: Expanding Beyond Central Pharmacy

The pharmacy's footprint has expanded far beyond the four walls of the central pharmacy. As health systems continue to support a growing network of remote care sites, the challenge of maintaining inventory visibility has become a critical operational hurdle.

Managing medication inventory now requires a sophisticated balancing act between decentralized access and centralized control.

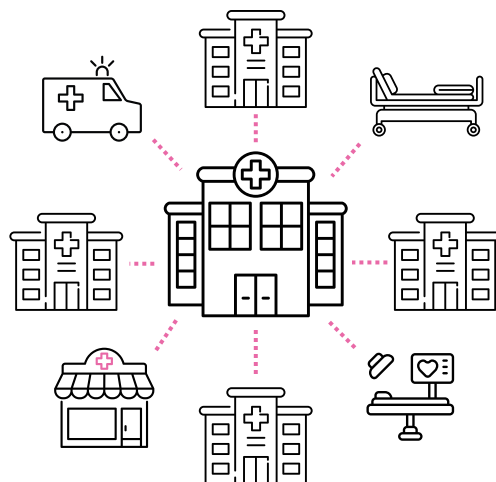
The Expansion of Remote Care

The modern hospital pharmacy now serves as a distribution hub for a diverse and growing range of clinical locations. The 2026 data show that stocking medication outside of the central pharmacy is now the standard, with many systems managing high-volume distribution networks:

- **21+ Remote Locations:** 36.7% of respondents – up from 13% last year.
- **11-20 Locations:** 14.8% of respondents.
- **Central Support Only:** Only 7.0% of respondents report stocking zero locations outside of the central pharmacy.

 **23.7%**

year-over-year increase in respondents who stock medication at **21+ sites** outside of the central pharmacy



The Visibility Gap: A System-Level Risk

Visibility into drug inventory varies drastically depending on the location, creating significant blind spots for pharmacy leaders. While central pharmacy operations are well-monitored, visibility drops off sharply in outpatient, retail, and clinic sites:

- **Central Pharmacy:** Boasts the highest "High Visibility" rating at 75.2%.
- **Sterile Compounding:** 60.6% of teams report high visibility into sterile compounding and clean rooms.
- **Retail and Specialty Pharmacies:** Visibility reaches a critical low, with 60.0% of respondents reporting no visibility into retail pharmacy inventory and 65.6% reporting no visibility into specialty pharmacy locations.
- **Ambulatory Clinics:** Over 54% of leaders report having no visibility into drug inventory in ambulatory clinics.

The Rise of RFID Tracking

To close the visibility gap, hospitals are increasingly turning to RFID technology to **automate tracking and reduce manual errors.**

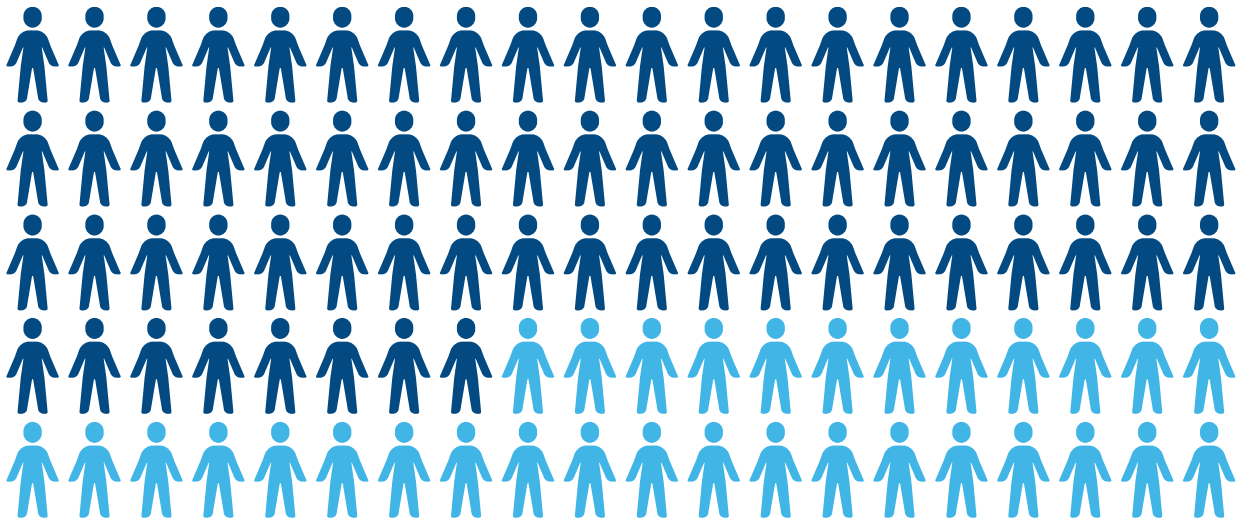
- **Adoption Momentum:** 56.7% of facilities are currently using RFID technology or planning to implement it within the next 12 months.
- **Primary Use Cases:** RFID is currently most utilized for Crash Carts (57.0%), Auxiliary Kits (48.3%), and OR procedural kits and trays (32.5%).
- **The Future Demand:** Looking ahead, leaders want RFID coverage to expand into controlled substances (65.0%), chemotherapy (35.0%), and vaccines (30.0%).

The Imperative for Kit and Tray Optimization

As pharmacy teams manage more remote locations, standardization is emerging as the most practical approach. When evaluating technology to manage these distributed kits and trays, pharmacy leaders prioritize accuracy and speed above all else:

- **Accuracy:** 66.9% rank "Easy and accurate restocking" as an extremely important capability.
- **Safety:** 39.7% view recall mitigation as a very important feature.
- **Standardization:** 58.9% of organizations report that their kit and tray templates are already standardized, with another 12.4% intending to standardize in the coming year.

When evaluating Kit & Tray Solutions...



...67% of respondents rank
"Easy and Accurate Restocking"
as an extremely important capability.

Conclusion and The Future of Hospital Pharmacy

The findings of the 2026 Hospital Pharmacy Operations Report capture a fundamental shift in the industry: pharmacy is no longer a cost center to be managed, but a strategic lever essential for the financial and clinical survival of the health system. The data from this year's survey confirms that the "new normal" of 2026 is defined by persistent supply chain gaps, radical regulatory shifts in 340B, and an urgent need for clinical automation.

Key Takeaways for 2026

- **Technology Headwinds:** While pharmacy teams are longing for automation and strategic intelligence to overcome persistent challenges, headwinds like limited budget, staff hour constraints, and organizational policies that restrict AI use are becoming common.
- **AI as a Pragmatic Asset:** With nearly half (48.5%) of pharmacy professionals now utilizing AI, the technology has moved beyond hype to become a practical tool for diversion detection and data synthesis.
- **The Visibility Mandate:** As pharmacies expand to support 21+ remote locations, the critical visibility gaps in retail and specialty areas represent a systemic risk that can only be closed through RFID, smart tracking, and standardized kit-and-tray management.
- **Proactive Resilience:** Success in 2026 is defined by the ability to act before a crisis hits, whether through 90-day predictive shortage windows or 100% real-time transaction auditing for 340B compliance.

Moving Toward a Unified Strategy

Managing cost, supply, and compliance in isolation has led to "decision whiplash" – a cycle of reactive firefighting that drains labor and compromises patient care. The most resilient organizations are those rejecting a passive stance on disruptions. Instead, they are investing in proactive, strategic intelligence – a connected ecosystem where every purchasing decision is weighed against its financial impact, supply chain stability, and regulatory risk.

By unifying these pillars, pharmacy leaders can move beyond transactional management to build a data-driven operation that protects every patient and optimizes every dollar. In an era of thin margins and persistent volatility, this connected approach is the only sustainable path forward.

About Bluesight®

Bluesight powers hospital and pharmacy operations with intelligence that simplifies inventory management, procurement, and compliance. Through its suite of industry-leading solutions, Bluesight ensures that health systems protect every patient and optimize every dollar. Over 3,000 United States and Canadian hospitals rely on Bluesight every day to have efficient and safe operations.

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