



Access & Partnership Landscape for Key PBM-Owned Group Purchasing Organization Accounts, 2025

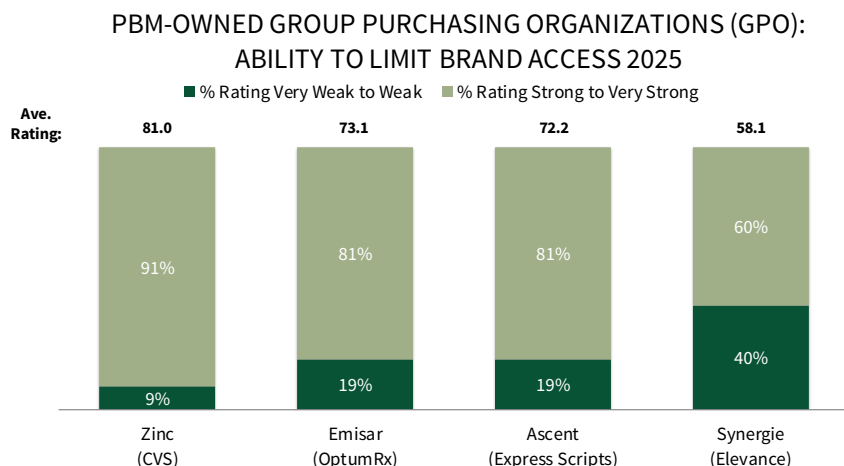
Vertical integration between Plans, PBMs, GPOs, Specialty Pharmacies, and Providers continues to challenge pharmaceutical manufacturer access and partnership opportunities. An understanding of the access and partnership landscape for key accounts is critical for effective account planning and strategy development. HIRC's report, *Market Access and Partnership Landscape*, provides manufacturer ratings of select customers' ability to limit brand access and willingness to partner. The report addresses the following questions:

- Which PBM-owned GPO accounts are rated by manufacturers as most able to limit brand access? Why?
- Which PBM-owned GPO accounts are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of PBM-owned GPOs with a strong ability to limit brand access?
- What are the key characteristics of PBM-owned GPOs that are the most willing to partner?

Key Finding: Firms with the strongest ability to limit brand access are typically characterized by their size and ability to impact market share/contracting power, vertical integration, strong UM & formulary control, and expanded use of excluded or preferred drug lists.

Zinc Leads with Highest Ability to Limit Brand Access in the PBM-Owned GPO Segment

Managed markets respondents from leading pharmaceutical firms rate Zinc (CVS Caremark) highest in ability to limit brand access in the PBM-owned GPO segment, with panelists noting their size and client network, as well as their consolidation and vertical integration of retail, mail, specialty pharmacy, and group purchasing organization entities.



Panelists Identify the Inflation Reduction 340B Reform as Top Market Trends in 2025

Managed markets respondents from leading pharmaceutical firms were asked to list the top market trends/disruptors with the highest potential to limit access to customers. Respondents identify the Inflation Reduction Act followed as the top market trend for the third year in a row. Secondary trends include 340B reform, expanded use of excluded or preferred drug lists, formation of PBM-owned GPOs, and expanded use of copay accumulators and copay maximizers. The full report includes a complete listing of pharmaceutical firms' most disruptive market trends in 2025.

MOST DISRUPTIVE MARKET TRENDS

MARKET TREND	TOTAL
Inflation Reduction Act	21%
340B Reform	12%
Expanded Use of Excluded or Preferred Drug Lists	10%
Formation of PBM GPOs	10%
Expanded use of Copay Accumulators & Maximizers	7%
Consolidation & Vertical Integration	6%
High Deductible Health Plan Design	5%

The full report, *Market Access and Partnership Landscape*, provides manufacturer ratings of customers' ability to limit brand access and willingness to partner, as well as the factors driving ratings across the following key channels:

- **Pharmacy Benefit Managers (PBMs)**
- **PBM-Owned Group Purchasing Organizations (GPOs)**
- **Managed Care Organizations (MCOs)**
- **Medical Benefits Managers**

Research Methodology and Report Availability

In January, HIRC surveyed 107 respondents at 38 pharmaceutical firms. Online surveys were used to gather quantitative and qualitative information. The complete report, *Market Access and Partnership Landscape*, is available now to HIRC's Managed Markets subscribers at www.hirc.com.

The Managed Markets Service provides strategic and tactical information, including customers' assessments of manufacturers' contracting and resources within four commercial and government market segments; market landscape trends and activity influencing the availability, price, and utilization of pharmaceuticals; managed markets headcounts and organizational trends based on confidential data from industry leading pharmaceutical companies; and the access and partnership landscape of key accounts.



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HEALTH INDUSTRIES RESEARCH CENTER (HIRC) is an independent, nonpartisan organization that conducts strategic market research on trends in health care, pharmaceuticals and managed care businesses. HIRC's benchmark studies focus on the marketing needs of pharmaceutical companies by providing research critical to the development of successful customer-focused marketing strategies.

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