



Managed Markets

Commercial Health Plans: Contracting Landscape and Manufacturer Competitive Assessment

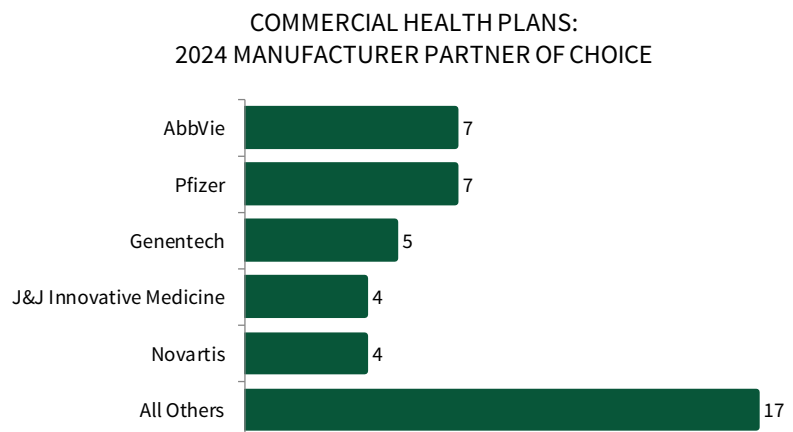
Market access in the commercial health plan segment remains critical as plans seek alternative contracting approaches and opportunities to meaningfully collaborate with pharmaceutical manufacturers. HIRC's report, *Commercial Health Plans: Contracting Landscape and Manufacturer Competitive Assessment*, reviews pharmacy and medical directors' evaluation of pharmaceutical firms and focuses on trends in contracting. The report addresses the following questions:

- Which manufacturers are most often nominated as plans' overall "Partner of Choice"?
- Which manufacturers do commercial health plans rate as most willing to contract? Which firms are most willing to contract for medications covered under the pharmacy and medical benefit?
- Which contract types are most frequently executed across therapeutic areas and what are the most common rebate/discount amounts offered? Which contracts are most valuable?
- How common are portfolio, indication, and risk-based contracts in the commercial segment and in which therapeutic areas are they observed?

Key Finding: Over 40% of HIRC's commercial health plan panel report having at least one portfolio-based contract and/or risk/outcomes-based contract in-place in 2024.

AbbVie and Pfizer Lead as Commercial Health Plans' Top Partners of Choice in 2024

AbbVie and Pfizer are most often nominated as commercial health plans' overall partners of choice in 2024, followed by Genentech, J&J, and Novartis. The primary factors driving nominations include account management support/personnel, willingness to contract, and the quality of programs and/or resources.

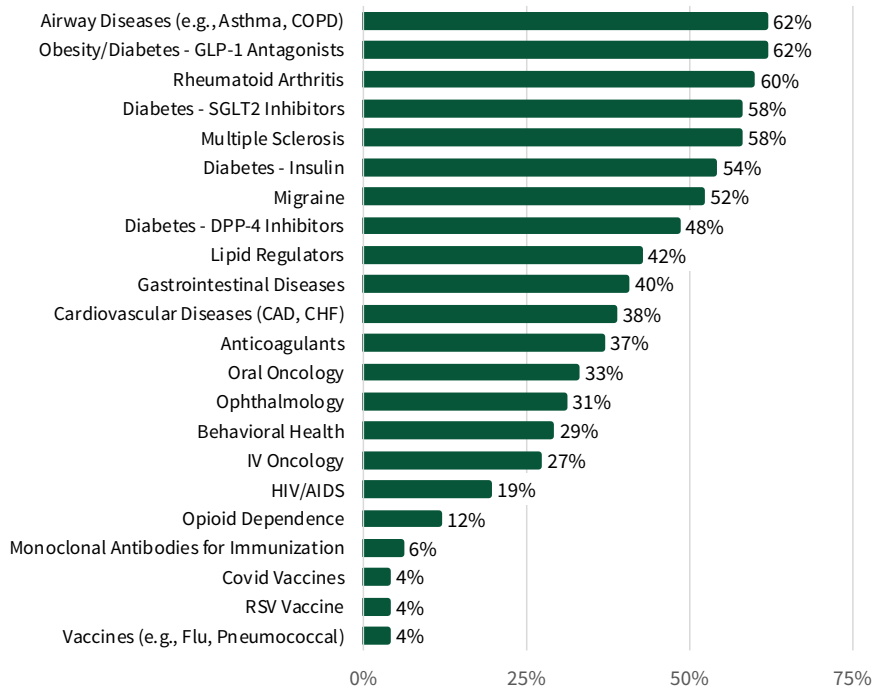


The full report provides a complete listing of manufacturer partner of choice nominations in 2024 and examines the rationale for commercial MCO ratings in detail.

Commercial Health Plans Report that Contracts are Most Common for Airway Disease Products & GLP-1 Antagonists

Commercial health plan key decision-makers were asked to consider a list of 20+ therapeutic areas and indicate if their organization has a contract in-place or has been offered a contract in the past 12-18 months. Panelists most frequently report contracts for airway diseases (e.g., asthma, COPD), GLP-1 antagonists, RA drugs, SGLT2 inhibitors, and multiple sclerosis medications.

% of Commercial Health Plans Indicating Contract In-Place or Offered in the Last 12-18 Months: BY THERAPEUTIC AREA



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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Research Methodology and Report Availability

In December 2023 and January 2024, HIRC surveyed 52 commercial health plan pharmacy and medical directors from national, regional, and BCBS plans. Online surveys and follow-up telephone interviews were used to gather information. The complete report, *Commercial Health Plans: Contracting Landscape and Manufacturer Competitive Assessment*, is available now to HIRC's Managed Markets subscribers at www.hirc.com.