



Specialty Pharmaceuticals

Commercial Health Plans: Manufacturer Account Engagement and Contracting for Specialty Medications

MCO account engagement supporting manufacturers' specialty product portfolios is critical as the market landscape grows more competitive across a range of therapeutic classes. HIRC's report, *Commercial Health Plans: Manufacturer Account Engagement and Contracting for Specialty Pharmaceuticals*, examines the current contracting environment and managed care decision-makers' evaluations of pharmaceutical manufacturer account support. The report addresses the following questions:

- Which manufacturers are most often nominated as commercial health plans' overall "Partner of Choice" in specialty? Which specialty-specific program and resource offerings are nominated as best? Which manufacturers are most willing to contract?
- How do 40+ specialty medication manufacturers benchmark in Presence, Willingness to Contract, and Quality of Account Support as it pertains to their specialty portfolios?
- What is the nature of the contracting environment for specialty pharmaceuticals across 16 therapeutic classes? Which contract types are most frequently executed and what are the most common rebate/discount amounts?
- How common are novel contract types for specialty medications, such as risk/outcomes- and indication-based approaches?
- What opportunities exist to enhance account engagement for specialty brands?

Key Finding: Going forward into 2024, commercial MCO decision-makers would like to see greater contracting flexibility and competitiveness, data and information sharing, and partnerships focused on mutually beneficial strategic initiatives.

AbbVie, Pfizer, and J&J Among Leaders in Specialty Portfolio Support for Commercial Health Plans

Managed care decision-makers were asked to nominate a "best" pharmaceutical manufacturer in specialty across three key categories: 1) Overall Partner of Choice, 2) Best Programs/Resources, and 3) Most Willing to Contract. AbbVie, Pfizer, and J&J Innovative Medicine are consistently nominated most across categories, suggesting significant resources dedicated to specialty product market access in the managed care sector.

LEADERS IN COMMERCIAL HEALTH PLAN ENGAGEMENT FOR SPECIALTY PORTFOLIO

Ranked by Number of Nominations in Each Category

Overall Partner of Choice	Best Programs/Resources	Most Willing to Contract
<ul style="list-style-type: none"> • AbbVie • Pfizer • Genentech, GSK, J&J Innovative Medicine, Novartis* 	<ul style="list-style-type: none"> • AbbVie • Pfizer • Genentech • J&J Innovative Medicine 	<ul style="list-style-type: none"> • AbbVie • J&J Innovative Medicine • Amgen • Pfizer

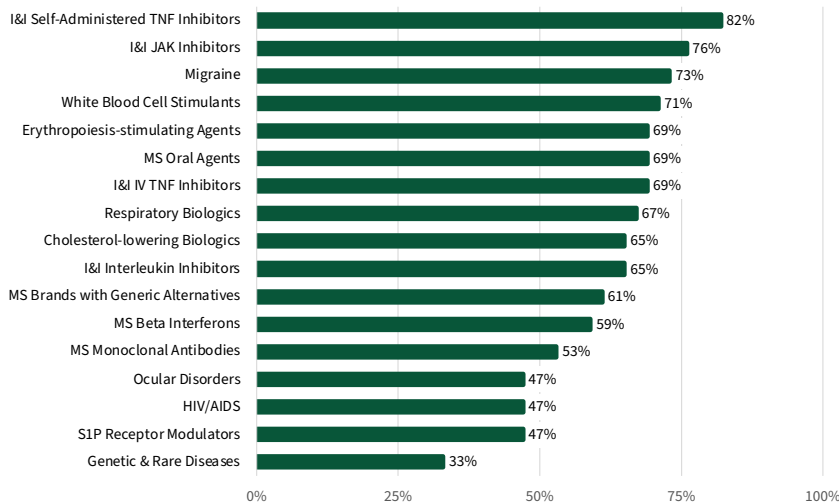
*Indicates a Tie

The full report provides benchmark ratings of 40+ manufacturers in specialty account engagement with commercial plans.

Commercial Plans Report the Most Contracting Activity in I&I and Migraine

The contracting environment for specialty medications is very active but varies by therapeutic area and contract type. Commercial plans most frequently report contracts for I&I self-administered TNF inhibitors, JAK inhibitors, and specialty migraine medications. Flat access rebates tied to preferred position + price protection is the most common contract approach for specialty medications.

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



The full report provides a deep dive into contracting for the above therapeutic classes, including prevalence, contract types/approaches, and most common rebate/discount amounts. The prevalence of alternative contracting approaches, such as portfolio, risk/outcomes, and indication-based contracts, is also examined.

Research Methodology and Report Availability

In January, HIRC surveyed 51 pharmacy and medical directors from national, regional, and BCBS plans representing 99 million lives. Online surveys and follow-up telephone interviews were used to gather information. The *Commercial Health Plans: Manufacturer Account Engagement and Contracting for Specialty Pharmaceuticals* report is part of the Specialty Pharmaceuticals Service, and is now available to subscribers at www.hirc.com.

The Specialty Pharmaceuticals Service monitors managed care trends related to specialty medication management, such as payers' formulary & utilization management approaches and trends in contracting. Issues in specialty pharmacy distribution and engagement are also reviewed. The service examines specialty brands and benchmarks manufacturers across several high profile therapeutic classes. For subscription information please contact:



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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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