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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 35+ 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 15 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 into 2025, commercial MCOs would like to see greater provision of data demonstrating the value of specialty drugs, education in newer/rare disease areas, a willingness to explore risk/outcomes-based contracting, and more meaningful rebate value.

AbbVie and Pfizer 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 and Pfizer 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

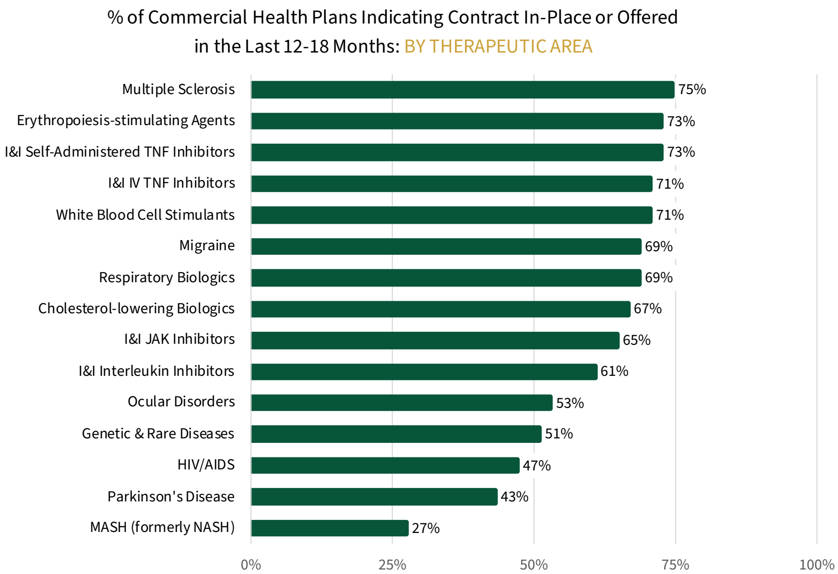
Overall Partner of Choice	Best Programs/ Resources	Most Willing to Contract
AbbVie	Genentech	AbbVie
Pfizer	Pfizer	Pfizer
Genentech	AbbVie	Amgen
Boehringer Ingelheim, Novartis*	J&J Innovative Medicine, Merck*	J&J Innovative Medicine

*Indicates a Tie

The full report provides benchmark ratings of 35+ manufacturers in specialty account engagement with commercial plans.

Commercial Plans Report the Most Contracting Activity in MS, I&I, and Cancer Supportive Therapies

The contracting environment for specialty medications is very active but varies by therapeutic area and contract type. Commercial plans most frequently report contracts in crowded/competitive categories with generic and biosimilar entries, such as multiple sclerosis, inflammation & immunology, and cancer supportive therapies. Flat access rebates tied to preferred position + price protection is most commonly reported across the therapeutic areas queried.



The full report provides a deep dive into contracting for the above therapeutic classes, including prevalence, contract types/approaches, most common rebate/discount amounts, and trends over time. 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 122 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:

Danielle Snook
Research Director
408-884-8560
dsnook@hirc.com

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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.

224 Walnut Avenue, Suite C
Santa Cruz, California 95060
P: 408-884-8560 • F: 408-884-8561

www.hirc.com