



Managed Markets

Access & Partnership Landscape for Key Pharmacy Benefit Manager Accounts, 2026

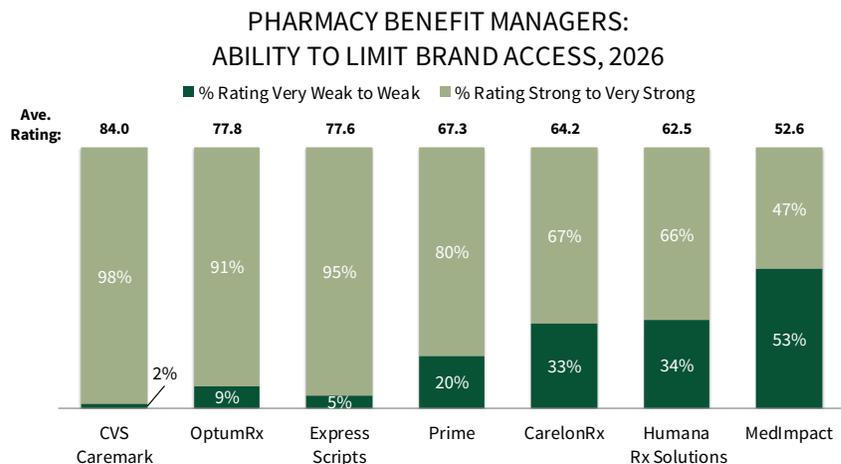
Payers' strong utilization management and formulary control, combined with their size and ability to impact market share, continue to challenge pharmaceutical manufacturers' access and partnership opportunities. An understanding of the access and partnership landscape for key accounts is critical for 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 accounts are rated by manufacturers as most able to limit brand access? Why?
- Which PBM accounts are rated by manufacturers as most willing to partner? Why?
- What are the key characteristics of PBMs with a strong ability to limit brand access?
- What are the key characteristics of PBMs that are the most willing to partner?

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

CVS Caremark Leads with Highest Ability to Limit Brand Access in the PBM Segment

Managed markets respondents from leading pharmaceutical firms rate CVS Caremark highest in ability to limit brand access in the pharmacy benefit manager segment, with panelists noting their strong utilization management and formulary control/alignment, size and ability to impact market share, as well as their expansive use of excluded and/or preferred drug lists.



Panelists Identify MFP, and MFN/TrumpRx/DTP as Top Market Trends in 2026

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's *Maximum Fair Pricing* as the top market trend in 2026, followed by *Most Favored Nation/TrumpRx/DTP* and *340B* reform. Secondary trends include alternative funding programs/specialty carve-out vendors, PBM reform and transparency, and expanded use of excluded or preferred drug lists. The full report includes a complete listing of pharmaceutical firms' most disruptive market trends in 2026.

MOST DISRUPTIVE MARKET TRENDS

MARKET TREND	TOTAL
Inflation Reduction Act - Maximum Fair Pricing	20%
Most Favored Nation/ TrumpRx / DTP	17%
340B	14%
Alternative Funding Programs/Specialty Carve-out Vendors	7%
PBM Reform and Transparency	6%
Expanded use of Excluded or Preferred Drug Lists	6%

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 (MBMs)**

Research Methodology and Report Availability

In January, HIRC surveyed 73 respondents at 33 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.



Josh Mader
Vice President
408-884-8560
jmader@hirc.com

hirc

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

www.hirc.com