



Managed Markets

Commercial Health Plans: Contracting Landscape and Manufacturer Competitive Assessment

The commercial health plan contracting environment continues to evolve as manufacturers navigate increasing rebate pressure, emerging government pricing benchmarks, and continued interest in alternative contracting models. 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 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: Where therapeutic competition increases, contracting intensifies – but manufacturers differentiate themselves through credible engagement, strong analytics, and continued interest in alternative contracting models.

Lilly & Pfizer Lead as Plans' Top Partners of Choice in 2026

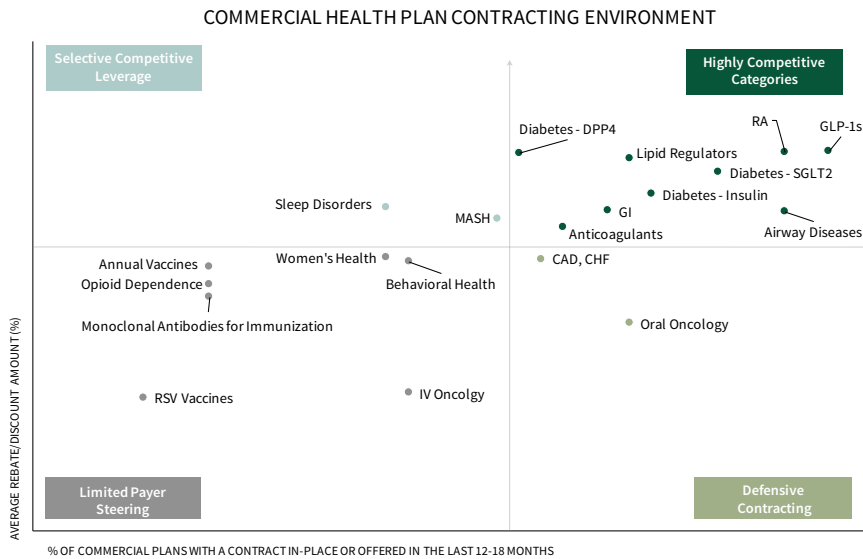
Lilly and Pfizer are most often nominated as commercial health plans' overall Partners of Choice in 2026. The primary factors driving nominations include demonstrating an understanding of customers' business needs & bringing relevant resources, account management support/personnel, and a firms' willingness to contract.



The full report provides a complete listing of Partner of Choice nominations, examines the rationale for ratings, and benchmarks 30+ firms in presence and willingness to contract.

Contracting Environment in the Commercial Health Plan Segment

Data suggests that the most aggressive contracting with commercial health plans is concentrated in categories with high brand competition and therapeutic substitutes, such as GLP-1's for obesity/diabetes and rheumatoid arthritis. Alternatively, categories such as vaccines show minimal payer contracting influence, with utilization largely driven by providers or public health coverage requirements.



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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The full report provides an in-depth exploration of the commercial health plan contracting landscape in 2026, including contracting activity across therapeutic areas, contract types, most common rebate/discount amounts, and status of alternative/novel contracting approaches.

Research Methodology and Report Availability

In December 2025 and January 2026, HIRC surveyed 55 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.



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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