



Managed Markets

Managed Markets Headcount and Organization Study 2025/2026

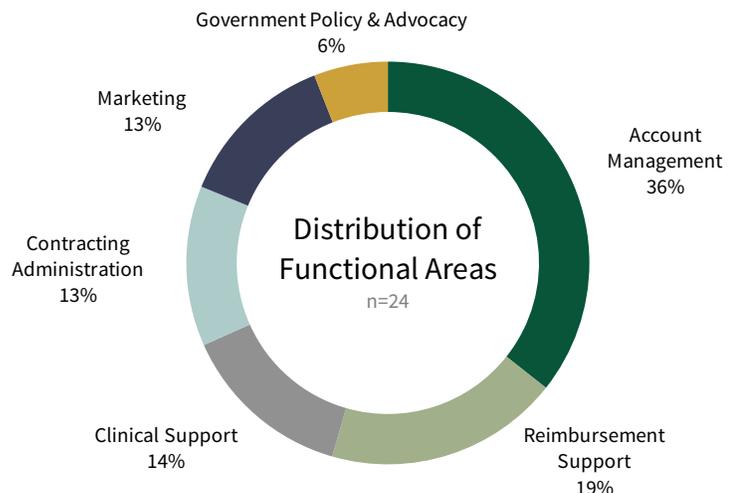
Pharmaceutical manufacturers continue to evolve managed markets staffing structures to align with customer needs amid regulatory and policy-driven market changes. HIRC's report, *Managed Markets Headcount and Organization Study*, assists pharmaceutical manufacturers in understanding trends in headcount across very large, large, and mid-size firms. The report addresses the following questions:

- What is the average headcount across U.S. pharmaceutical organizations today, and how is headcount evolving?
- How is managed markets headcount distributed across six core functional areas?
- How does managed markets headcount vary across very large (>\$22B U.S. sales), large (\$6-\$22B), and mid-size (<\$6B) pharmaceutical firms?
- Which market trends have the highest potential to limit access in 2026?

Key Finding: Repeat firm headcount increased by about 13% year-over-year, with notable increases observed in Account Management, Clinical Support, and Marketing. Account Management represents the largest portion of manufacturer headcount.

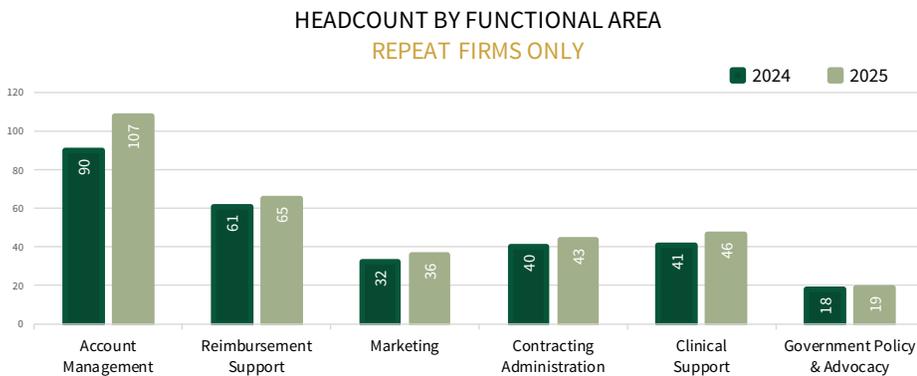
Account Management and Reimbursement Staff Comprise Over Half of the Typical Managed Markets Organization

Pharmaceutical managed markets organizations are comprised mostly of Account Management and Reimbursement Support staff, together accounting for 55% of total managed markets personnel in 2025, followed by Clinical Support (14%), Contracting Administration (13%), Marketing (13%), and Government Policy & Advocacy (6%).



Repeat Pharmaceutical Firms' Experience 13% Increase in Total Headcount Year-Over-Year

Overall headcount across repeat pharmaceutical firms in HIRCs sample (22 firms) increased from 281 full time employees (FTEs) in 2024, to 317 FTEs in 2025, or about a 13% increase year-over-year. Increases in repeat firm headcount are observed in Account Management (+20%), followed by Clinical Support (+14%), Marketing (+10%), Reimbursement Support (+8%), Contracting Administration (+8%), and Government Policy & Advocacy (+5%).



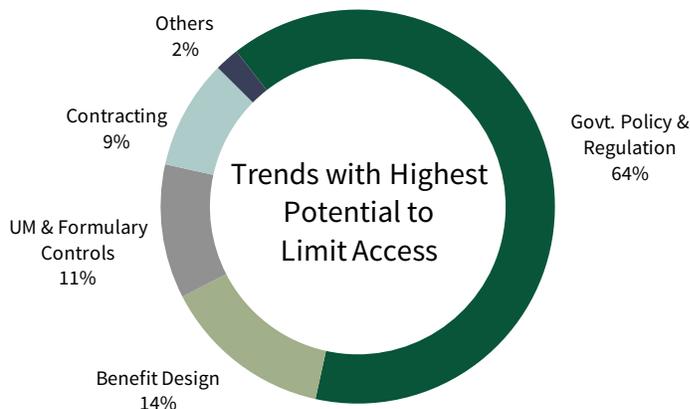
The Managed Markets Service provides strategic and tactical information, including customers' assessments of manufacturers' contracting and resources within four commercial and government market segments; market landscape trends and activity influencing the availability, price, and utilization of pharmaceuticals; 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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Panelists Identify Government Policy & Regulations as Top Market Trend with Potential to Limit Access

Market access trends can have a direct impact on organizational headcount. In 2026, respondents most frequently cite *Government Policy & Regulations* as the leading trend with potential to constrain access and shape managed markets staffing decisions.



Research Methodology and Report Availability

HIRC surveyed leading pharmaceutical companies in December 2025 to gain insights concerning their managed markets headcount, organizational structures, and the key issues driving their staffing investments. Each company's data are privacy-protected, and results are only reported in aggregate to ensure confidentiality. The complete report, *Managed Markets Headcount and Organization Study*, is available now to HIRC's Managed Markets subscribers at www.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.

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