



## Specialty Pharmaceuticals

### Specialty Pharmacy Providers: Manufacturer Engagement and Contracting Trends

Specialty pharmacy providers' (SPP) regular and direct contact with patients make them uniquely positioned to be strong clinical & data partners that can enhance market access and the brand experience. HIRC's report, *Specialty Pharmacy Providers: Manufacturer Engagement and Contracting Trends*, examines SPPs' evaluation of manufacturers and reviews contracting approaches with specialty pharmacies. The report addresses:

- Which pharmaceutical firms are most frequently nominated as SPPs' overall "Partner of Choice"? What factors drive panelist selections?
- What types of clinical and data collaborations occur between manufacturers and specialty pharmacies to support brands? Which manufacturers most successfully engage SPPs in collaborative partnerships?
- Which manufacturers are most often nominated as having the best account managers calling on SPPs? What characteristics describe the best-in-class?
- How do 40+ manufacturers benchmark with SPPs in account management support and willingness to contract?
- How common are enhanced service and pricing/performance-based contracts between manufacturers and SPPs? How does this differ by therapeutic area and type of specialty pharmacy?

**Key Finding:** Leading manufacturers in specialty pharmacy engagement distinguish themselves through a combination of experienced account personnel, collaborations that improve patient outcomes, and a willingness to financially support SPP services.

### AstraZeneca Emerges as a Leader in Specialty Pharmacy Engagement in 2025

Specialty pharmacy provider executives were asked to consider and nominate a pharmaceutical manufacturer in three categories: (1) Overall Partner of Choice, (2) Best-in-Class Clinical and Data Collaboration Initiatives, and (3) Best-in-Class Account Manager. AstraZeneca earns a top spot across categories, suggesting strong specialty pharmacy engagement to support its portfolio especially with health system-owned SPPs.

#### TOP MANUFACTURERS IN SPECIALTY PHARMACY PROVIDER ENGAGEMENT,

Ranked by Number of Nominations in Each Category

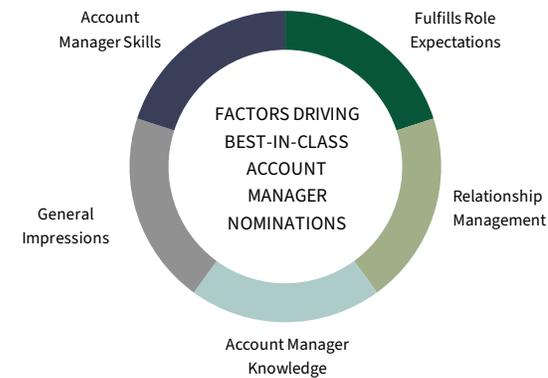
Overall Partner of Choice	Best-in-Class Collaborations	Best-in-Class Account Managers
<ul style="list-style-type: none"> <li>• AstraZeneca</li> <li>• Bristol Myers Squibb*</li> <li>• J&amp;J Innovative Medicine*</li> <li>• Pfizer*</li> </ul>	<ul style="list-style-type: none"> <li>• Pfizer</li> <li>• AbbVie</li> <li>• AstraZeneca</li> </ul>	<ul style="list-style-type: none"> <li>• Takeda</li> <li>• AbbVie*</li> <li>• AstraZeneca*</li> <li>• Genentech*</li> <li>• Sanofi*</li> </ul>

\*Indicates a Tie

The complete report provides the full listing of all companies nominated, as well as benchmark ratings for a listing of 40+ companies in account support and contracting.

## Five Categories Operationally Define the Best-in-Class Specialty Pharmacy Account Managers

Specialty pharmacy providers were asked to nominate a best account manager calling on their organization from Very Large, Large, and Mid-size pharmaceutical firms, as well



as explain the rationale for their nominations. Analyses reveal five categories that describe the best-in-class: 1) Fulfills Role Expectations (how well AMs perform in their role), 2) Relationship Management, 3) Knowledge, 4) General Impressions, and 5) Skills. The best SPP channel account managers work towards collaborative solutions and are responsive and accessible.

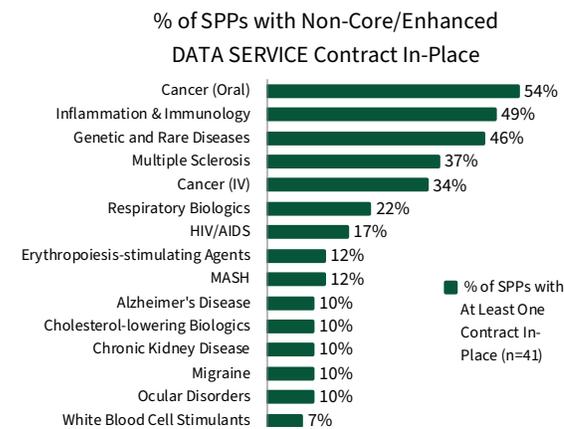
The Specialty Pharmaceuticals Service monitors managed care trends related to specialty medication management, such as payers' formulary & utilization management approaches and trends in contracting. Issues in specialty pharmacy distribution and engagement are also reviewed. The service examines specialty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



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## Approaches to Contracting with Specialty Pharmacies

Manufacturers engage specialty pharmacies in a variety of contracting arrangements depending on the needs of the product. HIRC's research reviews the status of two types



of enhanced service contract types and two types of pricing/performance-based contract arrangements. When it comes to non-core/ enhanced data service contracts (e.g., data insights beyond the pharmacy's core offering), 54% of SPPs report at least one contract in-place for oral oncology medications, and nearly half report data contracts in I&I (49%) and rare disease (46%).

The full report examines analyzes all best-in-class, benchmarking, and contracting data across three SPP ownership types:

- PBM/Health Plan-owned SPPs
- Independent/Other SPPs (includes retail/drugstore chain, wholesalers)
- Health System-owned SPPs

## Research Methodology and Report Availability

In March and April, HIRC surveyed 41 specialty pharmacy provider executives, representing a variety of ownership types. Online surveys and follow-up telephone interviews were used to gather information. The report, *Specialty Pharmacy Providers: Manufacturer Engagement and Contracting Trends*, is part of the Specialty Pharmaceuticals Service, and is now available to subscribers at [www.hirc.com](http://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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