



Managed Markets & National Accounts Service

Novo Nordisk is Ranked #1 by Specialty Pharmacy Providers (SPPs) and LTC Consultant Pharmacies while Boehringer Ingelheim is the Leader with Retail Drug Chains (RDCs)

The leading manufacturers in 2014 for value-added resources, contracting and quality of AMs in each of the three provider managed markets are shown in the table below. Of note is **Novo Nordisk's** exceptional performance as the company ranked among the leading manufacturers in all three provider markets and was also a favored Partner of Choice.

Key Finding:

Novo Nordisk is recognized as a leading pharmaceutical company in all three provider markets.

- **Novo Nordisk** is rated highly by all three provider markets for its approach to **contracting, the value of its resources and strong account management team**. **Novo Nordisk** is also the **leading Partner of Choice** for Retail Drug Chains and LTC Consultant Pharmacists.
- **BI** is the leader with RDCs and achieved the highest ratings from RDCs for both the **quality of its account managers** and **value of its resources**.

In addition, a number of other companies performed well in select provider managed markets:

- **GSK** ranked #2 overall with SPPs and was also rated highly for its value-added resources providing **patient support across a broad range of disease categories**.
- **AbbVie** is #2 overall with RDCs and also ranked 2nd for both the quality of its account managers and value-added resources including **educational programs for Humira**.
- **Forest Labs** is #2 overall in the LTC market and also **rated highly for both its approach to contracting and resources**.

PROVIDER MARKETS: OVERVIEW OF HIGHEST RATED COMPANIES, 2014

Category	Provider Markets		
	Specialty Pharmacy Providers (SPPs) N=14	Retail Drug Chains (RDCs) N=14	LTC Consultant Pharmacists N=24
Leading Companies Overall	Novo Nordisk, GSK, Merck	BI, AbbVie, Novo Nordisk	Novo Nordisk, Forest Labs, Novartis
Companies Most Willing to Negotiate Contracts	Novo Nordisk, GSK, Novartis	NA	Novo Nordisk, Novartis, Forest Labs
Companies with Highest Quality of Account Managers	NA	BI, AbbVie, Teva	NA
Companies with Most Valued Resources	Novo Nordisk, Merck, Pfizer	BI, AbbVie, Novo Nordisk	Novo Nordisk, Forest Labs, Novartis
Most "Partner of Choice" Nominations (#)	Celgene (3), Merck (3)	Novo Nordisk (3)	Novo Nordisk (8)

NA = Not Applicable or Not Asked

Providers Value Manufacturers' Contracting Approaches for Specialty Drugs and Resources That Directly Impact Their Businesses' Success

Contracts and resources that are clearly aligned with providers' business priorities are rated highest for the value they provide to these key customer segments.

- Contract terms that address providers' concerns about the rising cost and utilization of specialty drugs are coveted by RDCs, LTC Consultant Pharmacists and Specialty Pharmacy Providers.
- From a resource perspective:
 - Specialty Pharmacy Providers are eager to facilitate their patients' access to high cost specialty drugs by collaborating with manufacturers to provide patient reimbursement assistance programs.
 - Retail Drug Chains are expanding their role in providing vaccinations for adults as consumers are becoming more aware of the broad portfolio of vaccines targeted for their preventive health care needs.
 - For LTC Consultant Pharmacists, manufacturers' support for their efforts to reduce hospital readmission rates is a welcomed result of health care reform.

**HIGHEST VALUE RESOURCES/CONTRACTS
ACROSS PROVIDER MARKETS, 2014**

Panel	Most Valued Contracting	Most Valued Resources
Specialty Pharmacy Providers (SPPs)	<ul style="list-style-type: none">• Specialty Rx: Data Agreements• Traditional Rx: Price Protection• Specialty Rx: Price Protection	<ul style="list-style-type: none">• Patient Reimbursement Assistance• REMS Agreements• Patient Education
Retail Drug Chains (RDCs)	<ul style="list-style-type: none">• Specialty Rx: Discounts Tied to Dollar Volume	<ul style="list-style-type: none">• Medication Compliance• Vaccine Resources• DM/Care Management Support
LTC Consultant Pharmacists	<ul style="list-style-type: none">• Specialty Rx: Price Protection	<ul style="list-style-type: none">• Nursing Education• Appropriate Drug Utilization• Reducing Hospital Readmissions

Research Methodology and Report Availability

HIRC's Provider Market research was conducted in the first half of 2014 through a combination of surveys, interviews and extensive secondary research. The full report, **Provider Markets**, is available to subscribers at www.hirc.com.

The Managed Markets & National Accounts Service provides a wealth of strategic and tactical information, including benchmarking, competitive intelligence, customer needs and emerging issues within eleven separate markets; environmental assessments of market segments that influence the availability, price and utilization of pharmaceuticals; and managed markets headcounts and organizational trends based on confidential data from 30 pharmaceutical companies.

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