

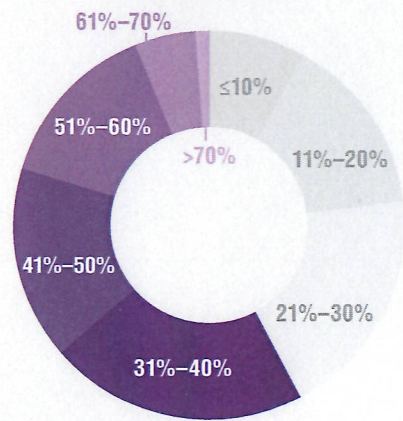
Medicare Part D Price Negotiation

What industry executives believe the impact will be



1 Negotiation discount

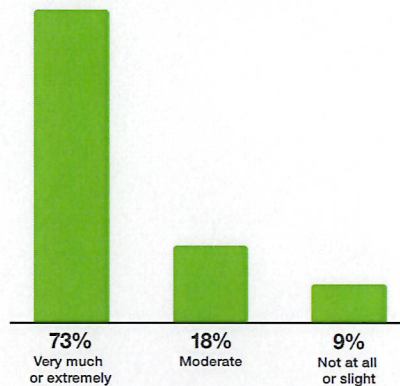
Significant price reductions are expected



Over half believe discounts will exceed 31%. (N=73)

2 Impact on non-selected drugs

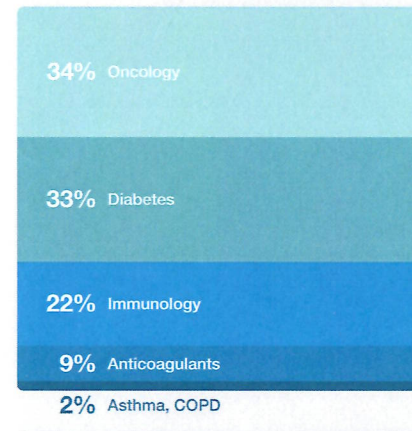
Negotiated maximum fair price will significantly impact same-category brands



91% believe that same-category drugs will be at least moderately impacted. (N=84)

3 Expected areas of impact

Oncology and diabetes will be hit hardest



Oncology, diabetes, and immunology categories are expected to be the areas most likely impacted. (N=82)

4 Key takeaways

- BOTTOM-LINE REALITY:** Price reductions are likely to have a significant impact on manufacturer profitability
- WIDESPREAD IMPACT:** Pricing for drugs in the same class as a negotiated drug is likely to be affected
- AN ONGOING CONCERN:** The process will continue with additional drug selections in future years
- A SHORT TIME FRAME:** Companies will have just one month after the selection of their drugs to prepare their price justifications
- ACT NOW:** Advance preparation should play an important role in managing the impact

Source: ICON webinar survey responses

5 Attendee statistics

Roles represented

- Market Research
- Real World Evidence
- Regulatory Affairs
- Clinical experts
- Market Access
- Government Affairs
- Health Economics and Outcomes Research (HEOR)

Organization type

- Biotech/pharma
- Government
- Academia/education services
- Pharmaceutical service providers

Learn how ICON can assist your valuation efforts to prepare your organization for the upcoming changes and a more successful negotiation with the Centers for Medicare & Medicaid Services (CMS).

Missed the webinar? Catch the recording [here](#)

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We look forward to learning about your needs and exploring how we can support you. For additional information on our team and customizable solutions to fit your needs, visit [ICONplc.com/access](https://iconplc.com/access) or contact us at [ICONplc.com/contact](https://iconplc.com/contact)