



Private Market Policy Update

GIPC Fall Event, November 4th 2025

Joe Farago Executive Director Market Access

September 2025, C.D. Howe released report based on pharmacare workshop that included policymakers, industry leaders, and health experts.

- “Fiscally responsible fill the gaps” consensus conclusion: focus on public programs
- Current single payer approach needs to be rethought
- Emphasis on avoiding the disruption of 27 million Canadians with private drug coverage and public funding/budget realities
- Explore expanding existing provincial programs or QC-style universal coverage program
- Importance of maintaining Canada’s attractiveness for new drug launches

Public Payers Taking Actions to Accelerate Access



Ontario launches Funding Accelerated for Specific Treatments (FAST) Program to shorten the time it takes for patients to access certain new medicines.

pCPA explores *Early Negotiation Pathway* (ENP) a new pathway designed to reduce negotiation time by several months by starting negotiations before a final HTA recommendation.

Quebec announces *Pour le patient — Vers une accélération de la négociation et de l'inscription des médicaments pour le Québec* to accelerate drug price negotiations and improve patient access to innovative medicines



Manufacturers and Private Payers need to explore opportunities to collaborate across industries to protect the value of private benefits and improve access by co-creating an accelerated access pathway in 2026.

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- **Tariffs:** President Trump has signaled possible tariff of pharmaceuticals from 100 to 250%. If applied to Canada, this could impact billions of Canadian exports.
 - **MFN:** A May 2025 Executive Order introducing a Most Favored Nation pricing policy puts significant pressure on Canada to improve its system and contribute more to the cost of innovation. New product launches in Canada are currently under high scrutiny and currently at risk.