



New frontiers

2024–25 impact report

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About the pCPA

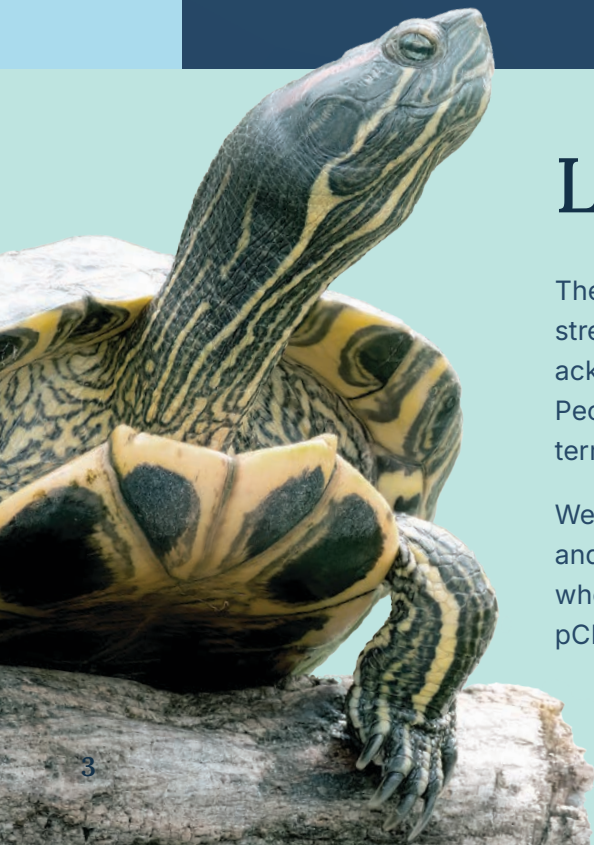
The pan-Canadian Pharmaceutical Alliance (pCPA) is an independent organization whose primary responsibility is to lead and support negotiations with drug manufacturers on behalf of provincial, territorial, and federal drug plans. Our organization is governed by a rare collective of public drug plans in all jurisdictions across the country who come together to act as our Board of Directors.

With the combined negotiating power of these jurisdictions, we work together to achieve better prices for brand-name and generic drugs. The important work we're leading is unique and has never been done on this scale in Canada.

Land acknowledgement

The pCPA recognizes the inherent and treaty rights — as well as the history, strengths, and diversity — of First Nations, Inuit, and Métis Peoples, and we acknowledge the ancestral and unceded territories of Canada's Indigenous Peoples. Our team is located across the country on several traditional territories, and we're grateful to stand, live, and work on these lands.

We also acknowledge and recognize the many challenges and harms, past and present, experienced by First Nations, Inuit, and Métis communities when accessing, or trying to access, Canada's healthcare system. The pCPA works toward improving health outcomes for all people in Canada.



Message from Leadership



Through each stage of our lives, we learn and grow by facing different challenges. There's an excitement in navigating new frontiers, and the more we pilot through life, the better we get at overcoming new obstacles and establishing a roadmap for future responses.

An organization is no different. As we reflect on this past year, there were many instances where the evolving pharmaceutical ecosystem gave us opportunities to support our partners, patients, and Canadians in new and better ways. We've continued to learn and innovate together.

On behalf of the Board of Directors, we're pleased to present this year's impact report. Its theme — new frontiers — reflects the opportunities of an ever-evolving sector, as well as our success in finding new ways to be responsive and to excel in our work.

This past year, together with our partners, we played an active role in shaping the pharmaceutical landscape, both within Canada and abroad. The shifting political environment allows the pCPA to showcase our strength in unity. We remain a non-partisan organization that supports public drug plans from across the country, including all 14 provincial, territorial, and federal governments. Since 2010, we've saved jurisdictions an estimated \$28.8 billion through our negotiations with drug manufacturers, including saving \$4.9 billion this year alone.

The 2024–25 fiscal year kicked off with the launch of our pCPA Temporary Access Process (pTAP). The pilot project allows us to negotiate earlier for promising new drugs, while additional data is being collected. Under this process, public drug plans can give temporary coverage to patients, including for drugs that serve smaller population groups.

Certainly, this is a year to be proud of our successes. Many of these achievements were made possible by the leadership of Dominic Tan, who acted as chief executive officer for part of the year. We want to thank Dominic for his incredible commitment to our mandate of preserving a sustainable publicly funded health system.

As we continue on our journey, we're eager to seize more opportunities. We're supporting the early phases of national pharmacare, and our negotiations allow for the expansion of the common list of drugs under the National Strategy for Drugs for Rare Diseases. As increasingly sophisticated drugs come to the pCPA for negotiation, we're ready.

This coming year, we'll be setting a new course. Our impactful work will continue as we develop our first strategic plan as a stand-alone organization, with the goal of being world-renowned in the value we bring to public health. The new plan will define the next steps for our organization and ensure we're ready for the future.

We look forward to navigating new frontiers together.

A stylized blue ink signature of Robert Shaffer.

Robert Shaffer
Board Chair

A stylized blue ink signature of Mauro Chies.

Mauro Chies
Chief Executive Officer

Year in review

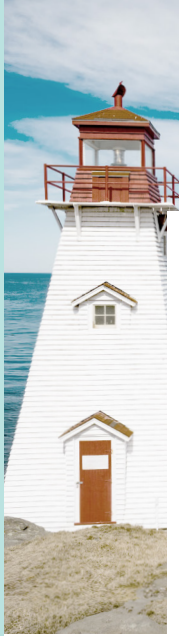
This past year has been one of growth.

We welcomed our new chief executive officer (CEO) and launched a refreshed brand identity, signalling a rejuvenated era for the pCPA.

We introduced innovative analytic tools, developed a pathway to support faster public coverage for promising medicines, and improved the process for generic drug manufacturers to make price change requests.

We explored and developed opportunities to collaborate and strengthen our presence in the pharmaceutical ecosystem, all while rising to meet new challenges.

The pCPA is a significant part of Canada's pharmaceutical landscape. As we move forward, we'll continue to provide solid leadership while exploring new frontiers.



The lighthouse

A lighthouse is a powerful, visible beam that guides ships at sea. It's a beacon for direction, leading the path through uncertain waters. For those in journey at sea, a lighthouse represents trust, perseverance, and a safe harbour.



A new CEO

In many ways, a CEO is the personification of the lighthouse of an organization. They guide their team through challenges and opportunities, highlighting risks and pointing the way through to success.

In February, we welcomed Mauro Chies as our new CEO. Mauro has more than 20 years of leadership experience in the healthcare sector, where he's acted as a guiding light for different organizations. With his wealth of expertise and the recognition he's received for his transformational leadership, partner relations skills, and people-centric approach, we're confident Mauro will be our strong lighthouse through all kinds of weather.



A new brand identity

While a CEO acts as an organization's guiding light, a brand identity is the beacon that's sent out to the world. Like a lighthouse lamp, a brand identity is a reliable, recognizable signal to guide navigation and build trust. In February, we launched our refreshed brand identity, marking a milestone moment in our organization's growth.

This change is an important step in our evolution toward a more modern pCPA. Much thought has gone into this brand update, with our logo being designed to reflect our values. In our new design, the pill capsule shapes are a nod to our core business of negotiating drug prices, while the pills coming together symbolize collaboration, which is central to our work.

We take great pride in the work we do at the pCPA, and our new brand identity reflects this. As we move forward, we have our brand identity to light the way, bringing a new look to communicate who we are to our partners and the public.

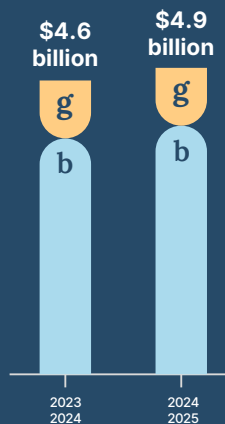
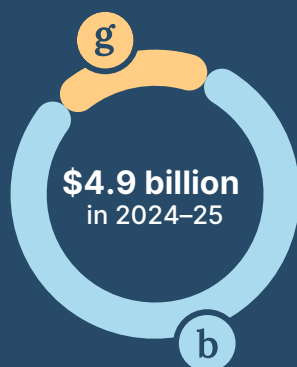


Showing our impact: By the numbers

At the heart of the pCPA's mandate is our commitment to achieve greater value for publicly funded drug programs and patients. We help ensure public drug plans remain sustainable. This year, we entered new frontiers — both in savings and in negotiations.

A significant indicator of the work we lead in partnership with our members is the savings we achieve for public drug plans. That's money governments can reinvest back into systems and programs. The more savings, the more money available to support people in Canada.

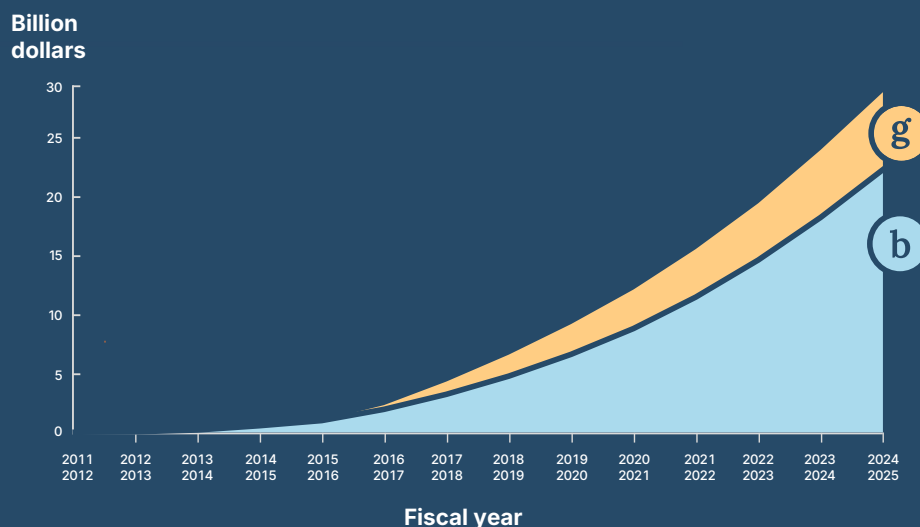
Savings



g Generic drugs

b Brand-name drugs

Overall pCPA savings for public drug plans in 2024-25 are estimated at **\$4.9 billion**. Brand-name drug savings are estimated at **\$3.9 billion**. Generic drug savings are estimated at **\$935 million**.



Overall pCPA savings since 2010 are estimated at **\$28.8 billion**.

Negotiations

Another measure of our work is found within the negotiations we lead. The number of negotiations, the speed at which we and manufacturers negotiate, and the number of agreements are all indicators of how we impact the health system and patients across Canada. In 2024–25, we reached new heights.

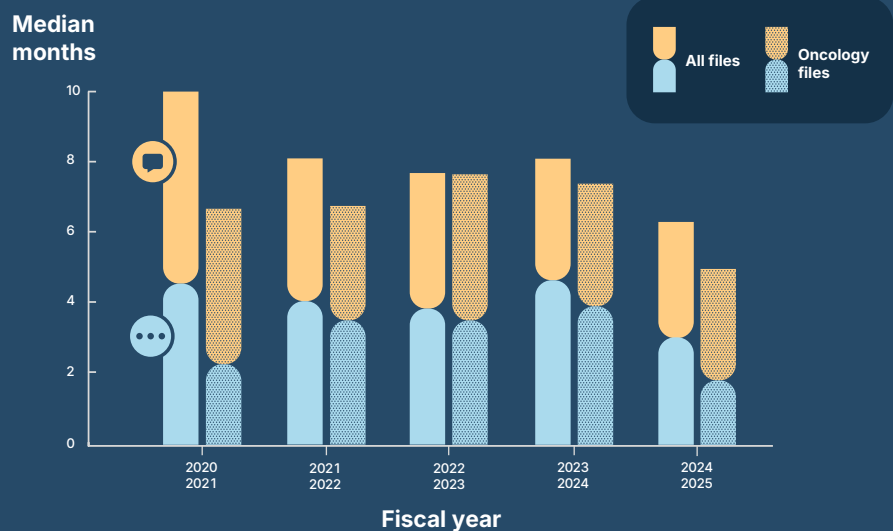
These improvements are partly due to organizational growth, along with new initiatives to anticipate reimbursement recommendations following health technology assessments (HTAs) and improved processes for negotiations.

... In consideration

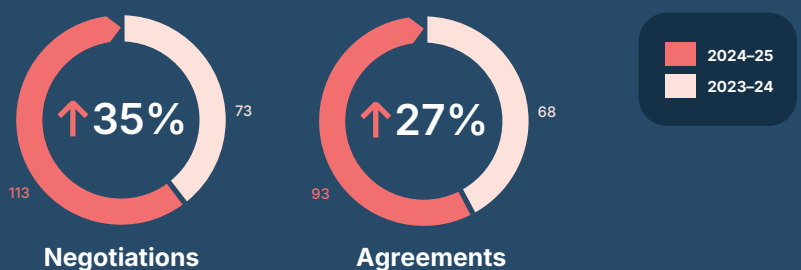
In consideration refers to the phase when the pCPA considers whether it will enter into a negotiation for a drug. During this period, the pCPA may seek to gather additional information or clarification as required.

🗨 In active negotiation

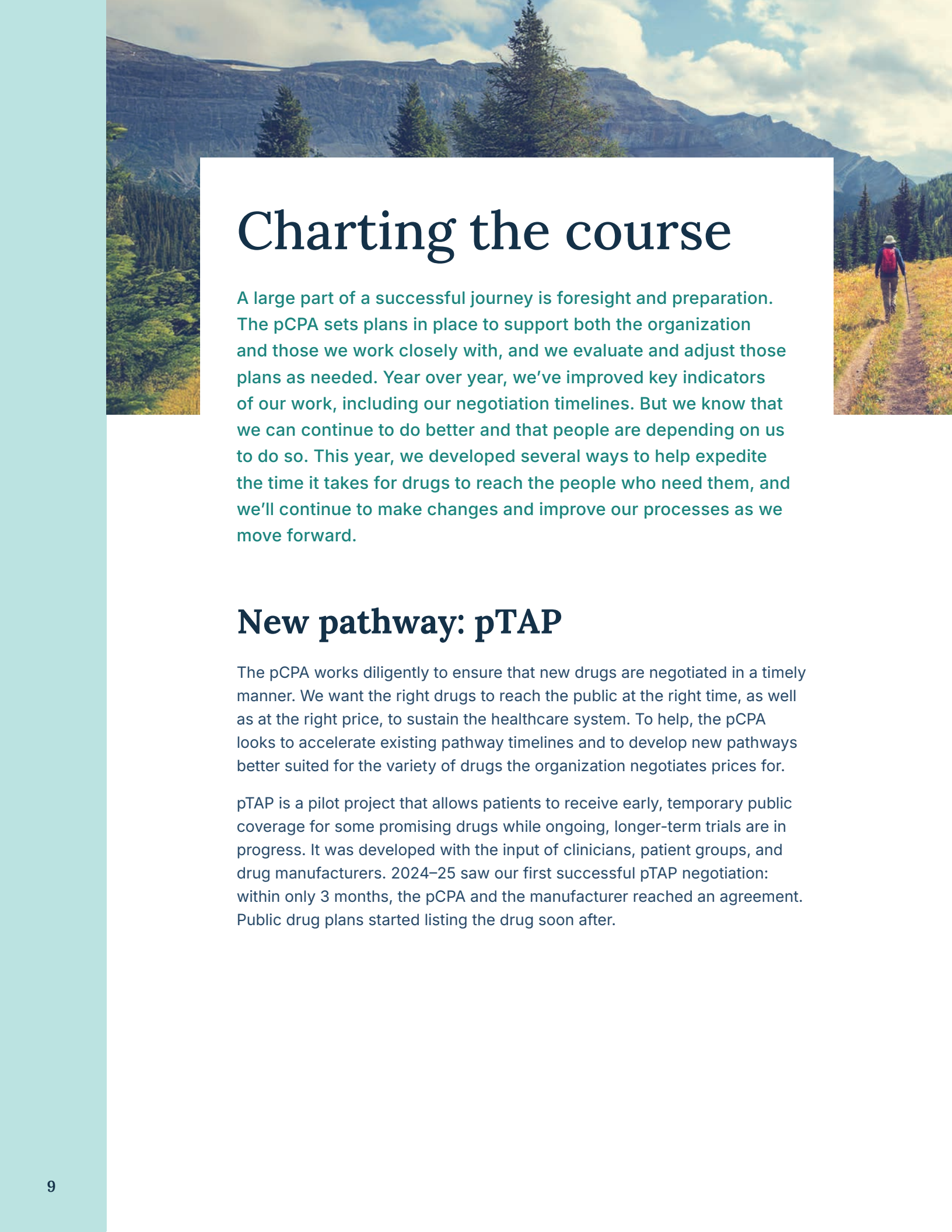
In active negotiation refers to files where the pCPA and the manufacturer are currently engaged in a negotiation for the price of a new drug.



The timelines during which files were in consideration and in active negotiation were shortened compared to last year, with “in consideration” at 3 months for this fiscal year and “in active negotiation” for 3.2 months. Timelines for oncology files were the shortest, with in consideration at 1.8 months and in active negotiation for 3.2 months. The 2024–25 period is a record year for our active negotiation time.



We’ve continued to negotiate for more medicines every year. Negotiations increased by **35%** over the last fiscal year. At the same time, we’ve increased the number of agreements by **27%**.

A scenic landscape featuring a mountain range under a blue sky with white clouds. In the foreground, there are green evergreen trees. A hiker with a red backpack is walking on a dirt path that leads into the distance. The overall scene is bright and natural.

Charting the course

A large part of a successful journey is foresight and preparation. The pCPA sets plans in place to support both the organization and those we work closely with, and we evaluate and adjust those plans as needed. Year over year, we've improved key indicators of our work, including our negotiation timelines. But we know that we can continue to do better and that people are depending on us to do so. This year, we developed several ways to help expedite the time it takes for drugs to reach the people who need them, and we'll continue to make changes and improve our processes as we move forward.

New pathway: pTAP

The pCPA works diligently to ensure that new drugs are negotiated in a timely manner. We want the right drugs to reach the public at the right time, as well as at the right price, to sustain the healthcare system. To help, the pCPA looks to accelerate existing pathway timelines and to develop new pathways better suited for the variety of drugs the organization negotiates prices for.

pTAP is a pilot project that allows patients to receive early, temporary public coverage for some promising drugs while ongoing, longer-term trials are in progress. It was developed with the input of clinicians, patient groups, and drug manufacturers. 2024–25 saw our first successful pTAP negotiation: within only 3 months, the pCPA and the manufacturer reached an agreement. Public drug plans started listing the drug soon after.

New navigation tools

Centralized price change process

This year, the pCPA's generic drugs team introduced the **centralized price change process**, which aims to be a faster and easier way for generic drug manufacturers to submit annual price change requests. In this new system, manufacturers submit a single request directly to the pCPA, instead of to each individual drug plan.

The project includes improved facilitation of pricing requests and better sharing of information with jurisdictions.

HTA recommendation forecasting

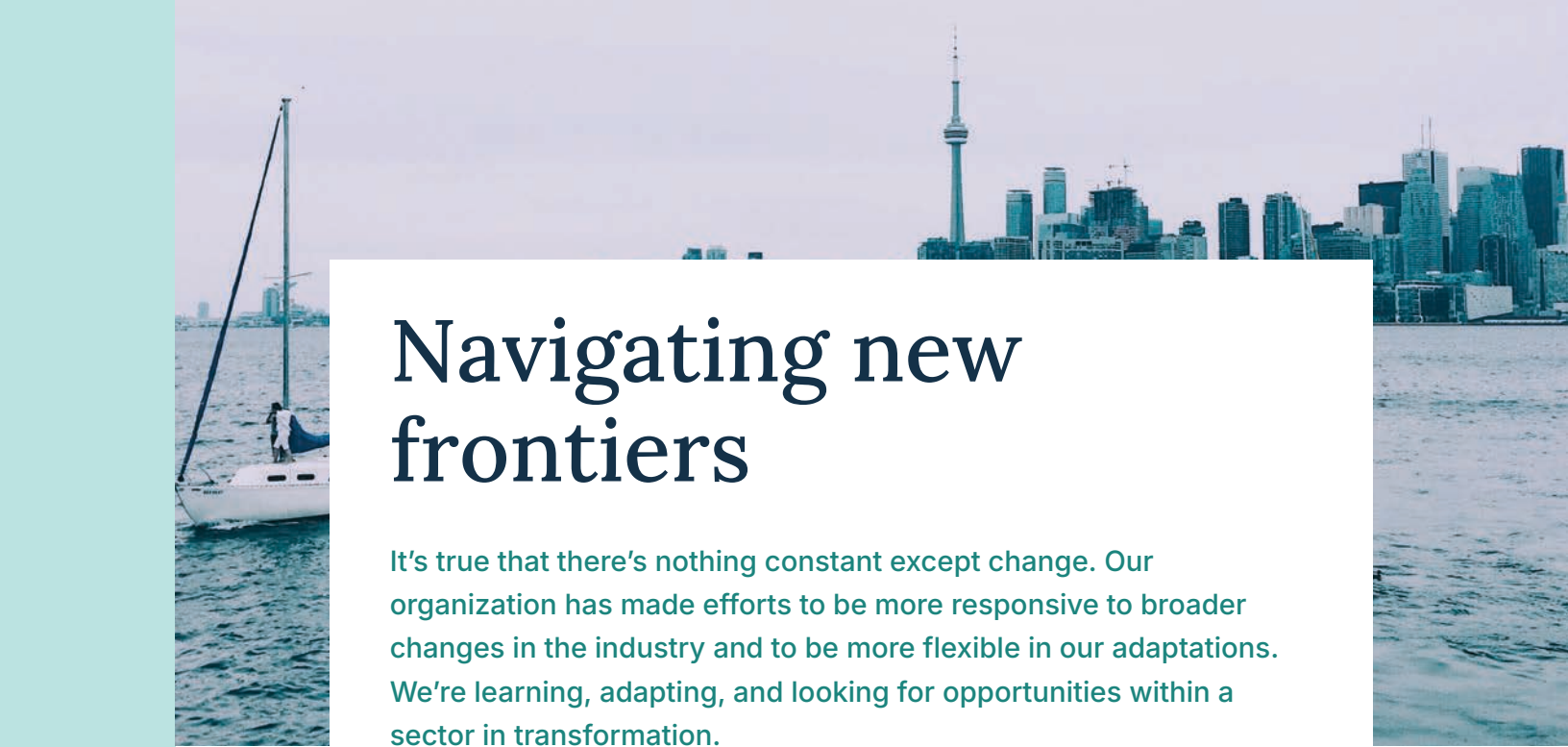
The pCPA has developed a system to help anticipate the number of upcoming HTA reimbursement recommendations coming to the pCPA. The tool forecasts HTAs to better plan negotiation activities each month, including preparing for resource-intensive periods.

Tools for manufacturers

Our team has developed a new tool to support manufacturers, designed to help standardize discussions at the first negotiation meeting and ensure the process is clear for everyone involved.

This year we also implemented an email inbox for brand-name drug inquiries, to help improve communication with manufacturers. Manufacturers can now email the brand-name drug team directly to send in forms, ask questions, and share documents.

The tools, pathways, and initiatives that have been designed and adopted are pieces of the overall planning we're taking to ensure we keep moving forward. They mark where we've been and chart where we're going, showing the best route to improve processes for our organization and for our partners.



Navigating new frontiers

It's true that there's nothing constant except change. Our organization has made efforts to be more responsive to broader changes in the industry and to be more flexible in our adaptations. We're learning, adapting, and looking for opportunities within a sector in transformation.

National pharmacare

The rapidly changing pharmaceutical landscape has meant not only navigating new frontiers, but helping to shape them, too.

In fall 2024 our then-acting CEO, Dominic Tan, spoke at the Standing Senate Committee on Social Affairs, Science and Technology hearing on national pharmacare, before the Pharmacare Act received royal assent. He presented on the importance of drug price negotiations to ensure the public system remains sustainable, and how the pCPA will need to play a critical role in the implementation of national pharmacare.

As Dominic explained, we have “the expertise and the experience to negotiate drug prices for all Canadians through national pharmacare. This would be an expansion of our already successful system. What we do works.”

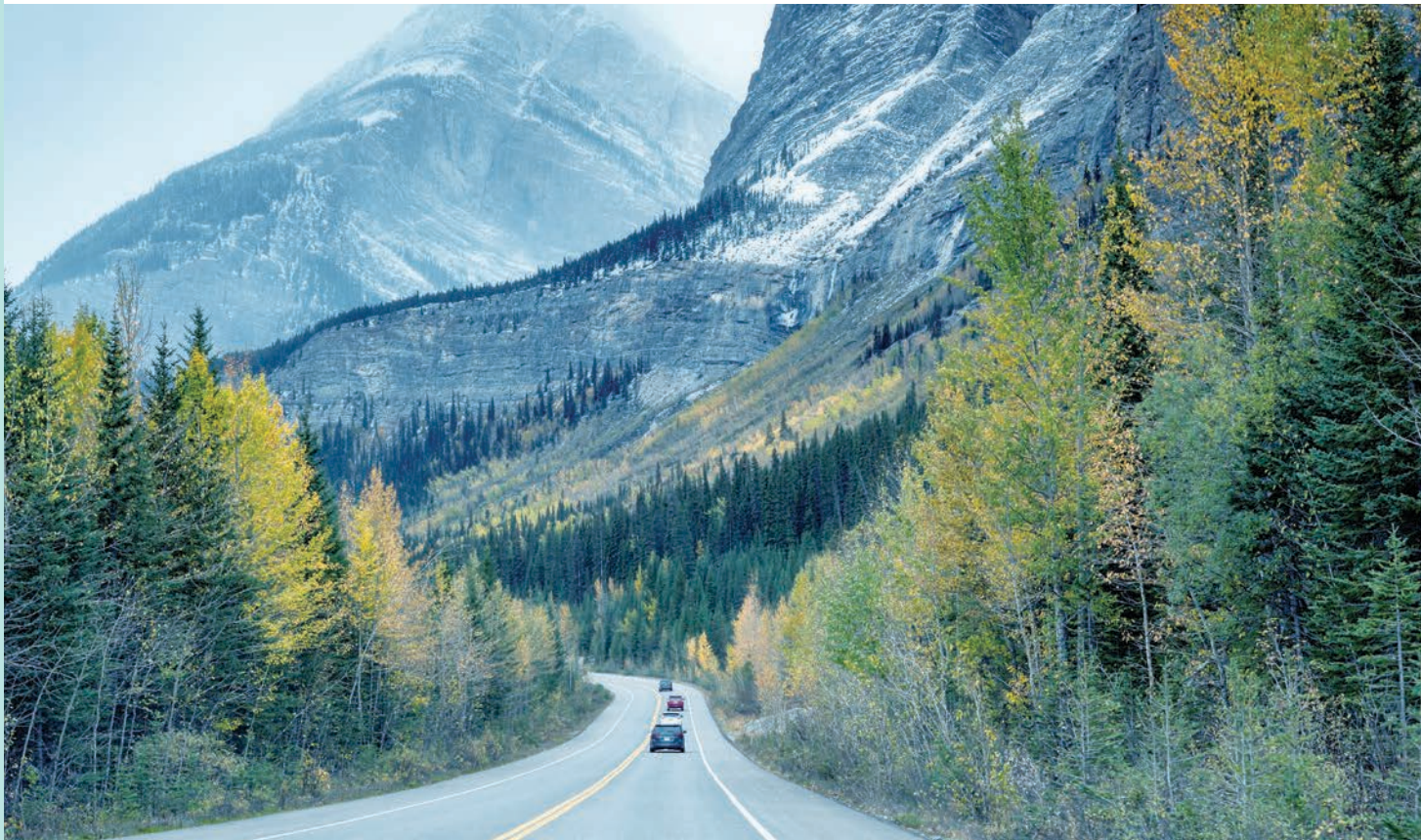
Since the Pharmacare Act received royal assent in late 2024, the pCPA has been working closely with partners to help develop a bulk purchasing strategy and a list of essential medicines. We also collaborated with groups such as the National Pharmacare Committee of Experts, which is responsible for advising the government on the implementation of the operation and financing of a national, universal, single payer pharmacare program in Canada.

National Strategy for Drugs for Rare Diseases

In 2023, the Government of Canada announced the launch of the first phase of the National Strategy for Drugs for Rare Diseases, designed to help increase access to effective drugs for rare diseases and make them more affordable for patients across Canada. The pCPA successfully negotiated all medicines included on Health Canada's common list of drugs for rare diseases.

In 2024–25, we successfully negotiated:

- Epkinly (epcoritamab) for relapsed or refractory diffuse large B-cell lymphoma
- Koselugo (selumetinib) for neurofibromatosis type 1
- Oxlumo (lumasiran) for primary hyperoxaluria type 1
- Welireg (belzutifan) for Von Hippel-Lindau disease
- Yescarta (axicabtagene ciloleucel) for follicular lymphoma and second-line treatment of diffuse large B-cell lymphoma or high-grade large B-cell lymphoma





Strengthening partnerships

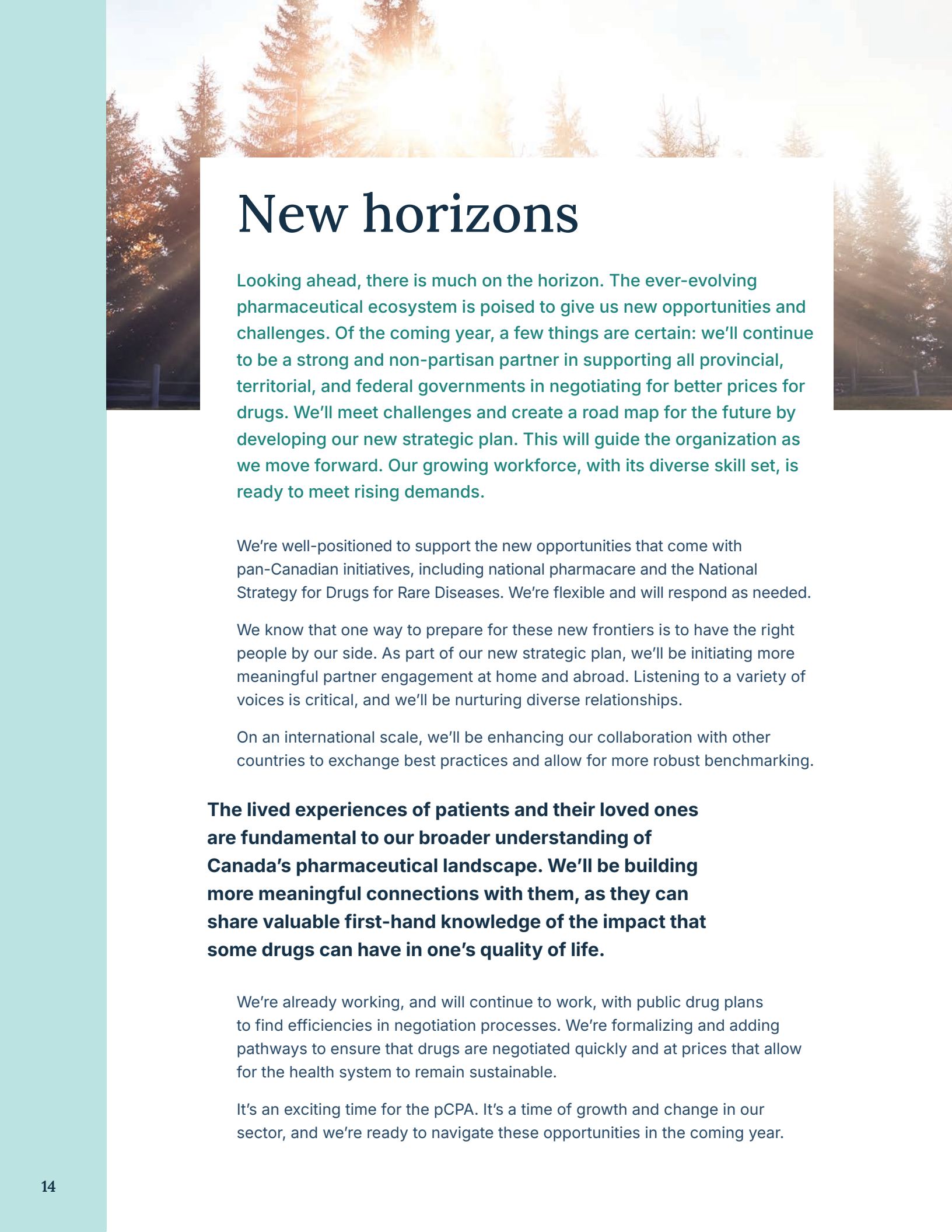
Our journey includes learning from others as much as it does from our own experiences. Our partners in the pharmaceutical ecosystem are on parallel paths with similar goals, and we have much to learn from one another. With that in mind, the pCPA has been strengthening and building partnerships with the goal of sharing our knowledge and having the opportunity to grow from the experiences of others.

In 2024–25, we welcomed the opportunity to meet and engage with various partners from Canada and abroad, both one-on-one and during events. We presented at various conferences and symposiums to share more about initiatives such as pTAP, the evolution of the pCPA, and our negotiation processes.

As we continue to watch global economic policies shape our industry and sector, we're working to learn from our international partners and share our knowledge. We are stronger together.



In 2024–25, we engaged with various partners from Canada and abroad.



New horizons

Looking ahead, there is much on the horizon. The ever-evolving pharmaceutical ecosystem is poised to give us new opportunities and challenges. Of the coming year, a few things are certain: we'll continue to be a strong and non-partisan partner in supporting all provincial, territorial, and federal governments in negotiating for better prices for drugs. We'll meet challenges and create a road map for the future by developing our new strategic plan. This will guide the organization as we move forward. Our growing workforce, with its diverse skill set, is ready to meet rising demands.

We're well-positioned to support the new opportunities that come with pan-Canadian initiatives, including national pharmacare and the National Strategy for Drugs for Rare Diseases. We're flexible and will respond as needed.

We know that one way to prepare for these new frontiers is to have the right people by our side. As part of our new strategic plan, we'll be initiating more meaningful partner engagement at home and abroad. Listening to a variety of voices is critical, and we'll be nurturing diverse relationships.

On an international scale, we'll be enhancing our collaboration with other countries to exchange best practices and allow for more robust benchmarking.

The lived experiences of patients and their loved ones are fundamental to our broader understanding of Canada's pharmaceutical landscape. We'll be building more meaningful connections with them, as they can share valuable first-hand knowledge of the impact that some drugs can have in one's quality of life.

We're already working, and will continue to work, with public drug plans to find efficiencies in negotiation processes. We're formalizing and adding pathways to ensure that drugs are negotiated quickly and at prices that allow for the health system to remain sustainable.

It's an exciting time for the pCPA. It's a time of growth and change in our sector, and we're ready to navigate these opportunities in the coming year.

Governance

Members

pCPA members include public drug plans from Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, the Northwest Territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Québec, Saskatchewan, Yukon, and the Government of Canada (Non-Insured Health Benefits, Correctional Service Canada, Department of National Defence, and Veterans Affairs Canada).



Leadership

* As of March 31, 2025

Chief Executive Officer

Mauro Chies

Deputy Chief Executive Officer

Dominic Tan

Executive Director, Communications

Genevieve C. Gagnon

Executive Director, Corporate Services

Gavrielle Tran

Board of Directors

* As of March 31, 2025

Alberta	Leann Wagner, Assistant Deputy Minister Primary and Preventative Health Services
British Columbia	Ian Rongve, Assistant Deputy Minister Pharmaceutical, Laboratory, and Blood Services Division
Manitoba	Robert Shaffer (Chair), Assistant Deputy Minister Insurance Division, Manitoba Health
New Brunswick	Éric Levesque, Associate Deputy Minister Francophone Affairs, Pharmaceutical, Physician and Community Services
Newfoundland and Labrador	Pam Barnes (Vice-chair), Director Drug Programs and Services
Northwest Territories	Luke Spooner, Senior Project Manager Pharmaceutical Management
Nova Scotia	Sheila MacLeod, Senior Executive Director Benefits Programs and Eligibility
Nunavut	Carmine Nieuwstraten, Executive Pharmacy Lead Department of Health
Ontario	Patrick Dicerni, Assistant Deputy Minister Health Programs and Delivery Division
Prince Edward Island	Trevor J. Paynter, Director Pharmaceutical Services, Department of Health and Wellness
Québec	Dominic Bélanger, Director Pharmaceutical Affairs and Drugs Directorate
Saskatchewan	Chad Ryan, Assistant Deputy Minister Deputy Minister's Office, Ministry of Health
Yukon	Cathy McNeil, Assistant Deputy Minister Innovation, Quality and Performance Division
Federal	Scott Doidge, Director General Non-Insured Health Benefits

Financials

Audited financial statements will be available on the pCPA website following approval by our members at the annual general meeting in fall 2025.

An aerial photograph of three kayakers on a river. The kayakers are in yellow and red kayaks, paddling through a dense field of green lily pads. The water is dark blue. The image is positioned on the left side of the page, partially overlapping a white rectangular area that contains the main text.

Special acknowledgements

We thank everyone who contributed to the pCPA's achievements this past fiscal year. The insights, contributions, and perspectives of a diverse array of partners and supporters allow us to fulfill our important mandate.

Together, we have a lot to celebrate.

We'd like to thank our Board members, whose vision and support steer our ship in all weather. We're grateful for their contributions.

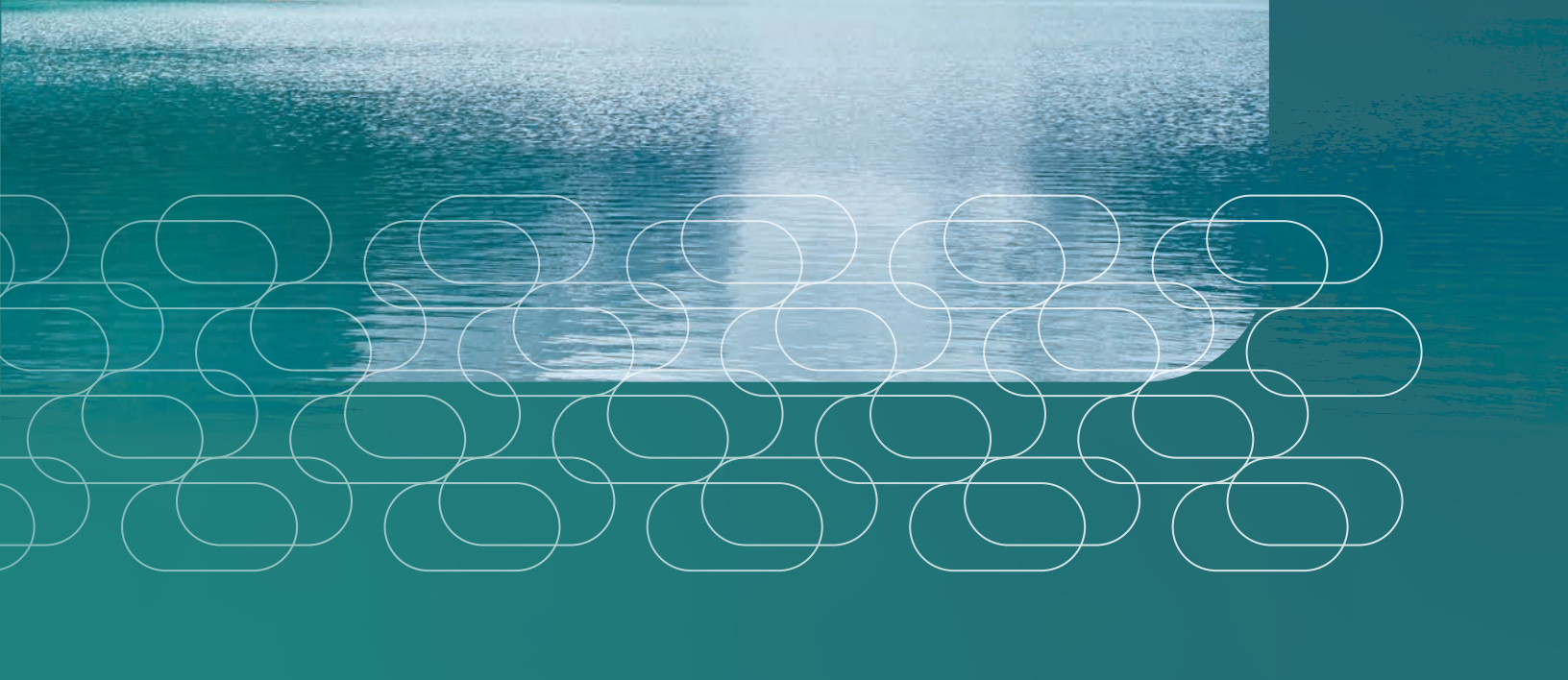
We want to recognize Dominic Tan, who served as acting CEO for part of the year and whose direction has helped the organization reach and explore new shores.

Our journey has had fair sailing because of our amazing people — from our staff to drug plan leads, to our jurisdictional members. They are insightful, passionate, and dedicated to achieving great results while meeting the needs of all public drug plans in Canada. As we continue to grow together, we look forward to seeing more of these incredible accomplishments.

The pCPA is one part of a greater Canadian drug reimbursement process. We want to thank Health Canada, the Patented Medicine Prices Review Board, Canada's Drug Agency, and the Institut national d'excellence en santé et en services sociaux for their support. Together, we continue to develop strong relationships that allow us to fulfill our respective missions.

We also want to acknowledge the commitment and passion of our various partners, both as individuals and collectives — from drug manufacturers to patients and clinicians. As we move forward, we hope to strengthen our relationships and find new ways to collaborate and work more closely together toward our common goals.

We're so fortunate to have an incredible group of people to work with, at all levels and partnerships. We know that as we meet new challenges and opportunities, we'll meet them together.



pan-Canadian Pharmaceutical Alliance

 pcpacanada.ca

 info@pcpacorp.ca

 [linkedin.com/company/pan-canadian-pharmaceutical-alliance](https://www.linkedin.com/company/pan-canadian-pharmaceutical-alliance)

This report includes forward-looking statements. These statements reflect current expectations and assumptions regarding the future of the pCPA and that of the pharmaceutical environment. They should not be interpreted as assurance of future focus or work, as our rapidly evolving landscape might lead to new circumstances or priorities for the pCPA.