

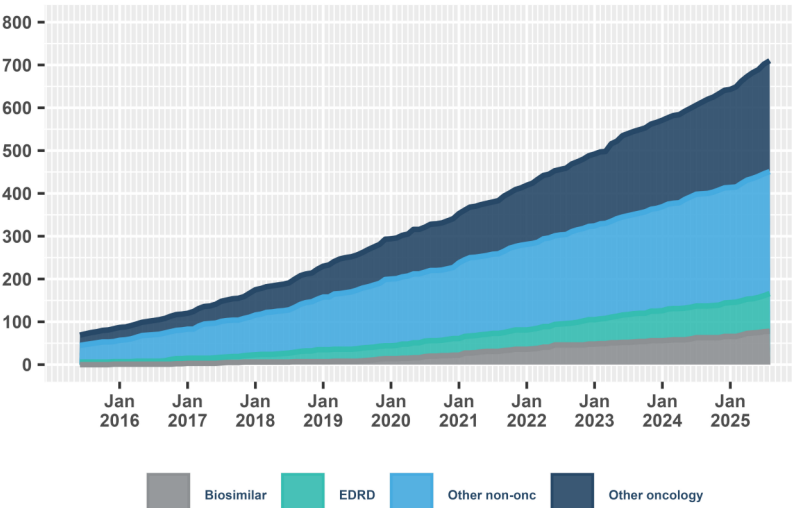
October 2025 Dashboard

Letters of intent

Increase access, improve consistency and reduce duplication

Since the pCPA's inception, **710** negotiations have reached a letter of intent (LOI), including:

- **259** for oncology drugs
- **78** for biosimilars
- **88** for expensive drugs for rare diseases (EDRD)



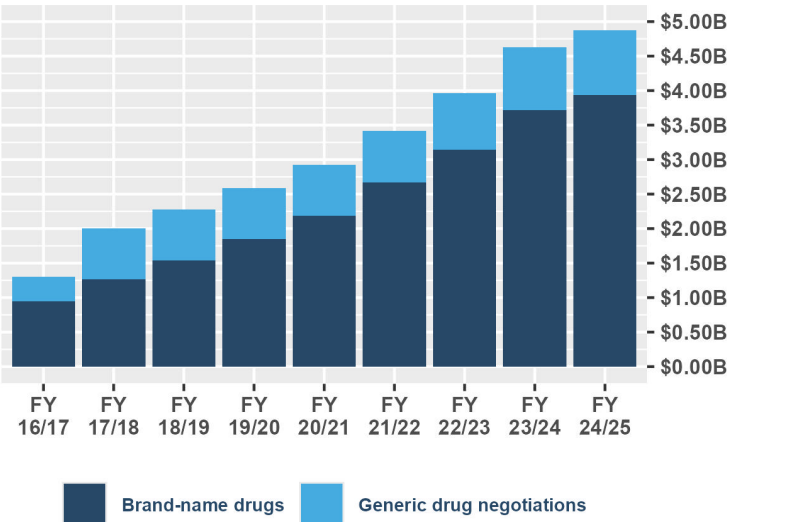
Savings

Lower drug costs

pCPA activities saved jurisdictions an estimated **\$4.87B** in 2024-25:

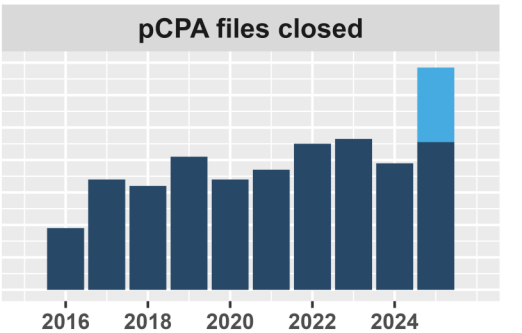
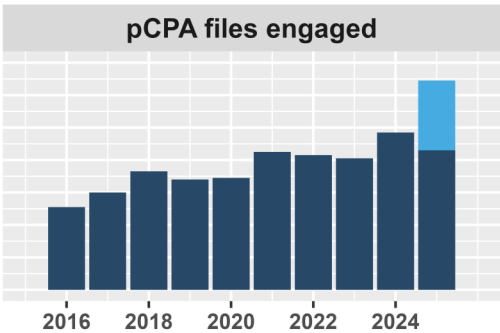
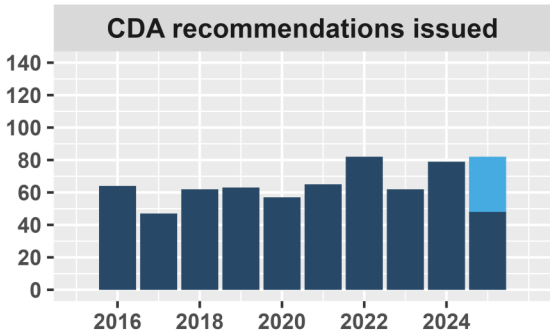
- **\$3.94B** from brand-name drugs
- **\$935M** from generic drugs

Since 2010, cumulative savings are estimated to be **\$28.8B**



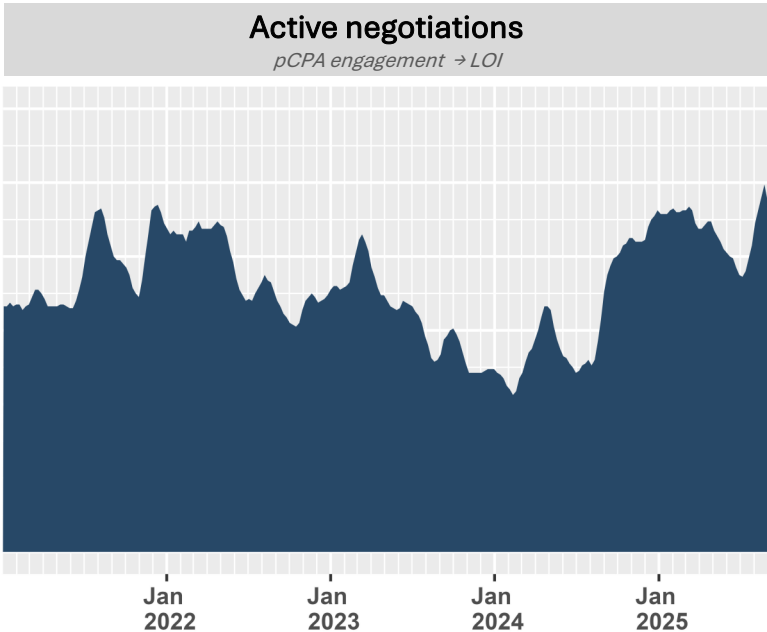
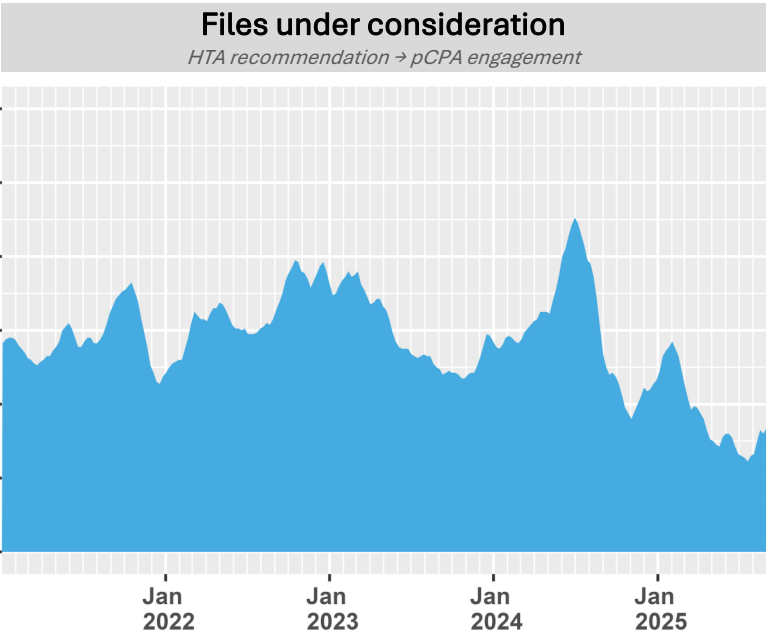
HTA and pCPA volumes

- There has been very high activity in the first 8 months of 2025, and the pCPA is projecting high volumes of health technology assessment (HTA) recommendations, and record volumes of negotiations engaged, and negotiations closed.



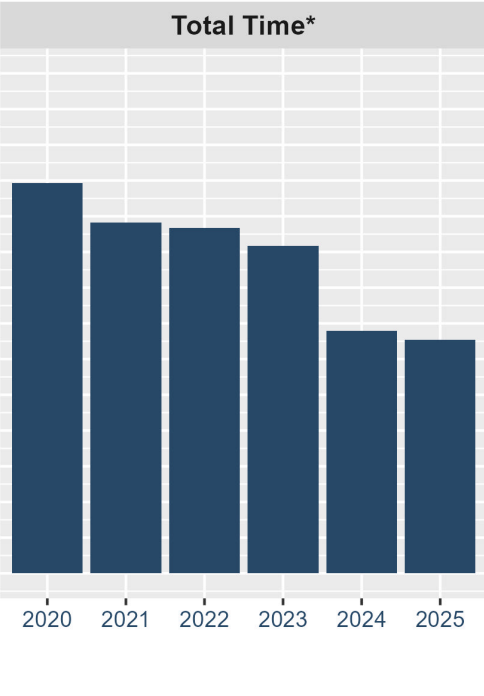
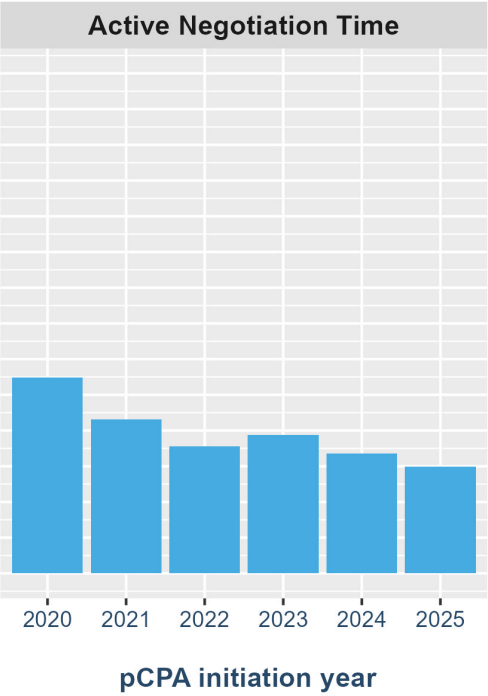
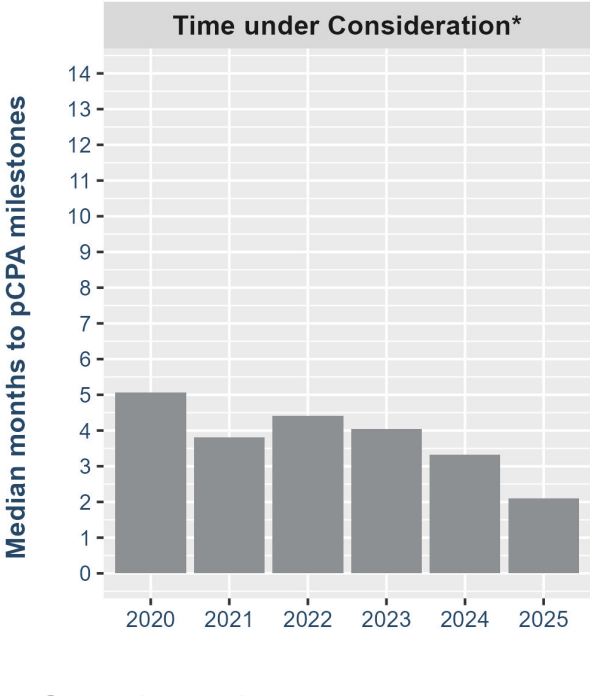
pCPA activity

- The number of files in consideration **was under 20 files** for the first time in the post-COVID era.
- The pCPA is committed to further decreasing the in-consideration timeline.
- The number of active negotiations has significantly increased. In August, 2025, the pCPA negotiated a **record 49 files**.



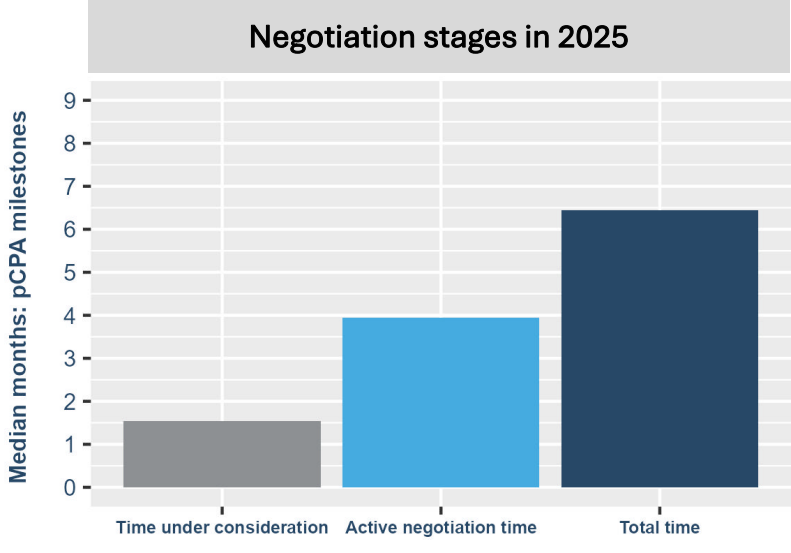
pCPA timelines

- All pCPA timeline metrics have **improved between 2020 and 2025**.
- The typical months under consideration phase improved from **5.1 months** to **2.1 months**, a **59 % decrease**, and active negotiation timelines improved from **5.5 months** to **3 months**, a **46 % decrease**.
- Between 2020 and 2025, the total timeline improved from **11 months** to **6.5 months**, a **41 % decrease**.



Oncology drugs

- The pCPA's negotiation times for oncology drugs have decreased over time, **shortened from 9 months** for HTA reviews in 2020, **to 6.4 months** in 2025 (1.5 months to engagement and 3.9 months for active negotiation).



* Time under consideration and total timelines are only assessed for files arising from HTA recommendations, and excludes files that do not undergo negotiations.
pCPA targets outlined in the brand process guidelines are approximately 2 months for file engagement, 4 months for active negotiations and 6 months combined.