

Pharmacy Aggregation Groups Annual Report

2025





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Senior Vice President
Pharmacy Aggregation Group Program

Welcome to the 2025 Vizient Pharmacy Aggregation Groups Annual Report

As health systems navigate unprecedented financial pressure, persistent drug supply volatility and accelerating clinical innovation, pharmacy's role has never been more central to enterprise performance. In 2025, pharmacy leaders weren't only stewards of medication access and safety, but they were also strategic drivers of affordability, resilience and value.

This year's annual report reflects the Vizient commitment to advancing that role through aggregation, collaboration and data-driven insights. Together, we strengthened strategies to optimize total drug spend, improve efficiency through innovation and stabilize drug supply—all while keeping patient care at the forefront.

The teams leveraged the collective scale of membership to secure competitive pricing, improve contract transparency and expand access to critical medications, including high-cost specialty and emerging therapies. Just as importantly, we deepened partnerships with manufacturers and distributors to drive greater predictability, accountability and long-term sustainability.

This past year also sharpened the focus on what matters most to health systems: aligning drug cost management with clinical outcomes, reimbursement strategy and operational efficiency. By integrating pharmacy more closely with enterprise-wide priorities, health systems are better positioned to manage margin pressure while continuing to innovate in care delivery.

None of this progress is possible without the leadership, engagement and collaboration of pharmacy leaders and their teams who implemented the initiatives. Their willingness to share insights, challenge assumptions and work collectively continues to shape the future of pharmacy aggregation and strengthen our ability to advocate.

Looking ahead, Vizient remains focused on helping pharmacy leaders anticipate market disruption, adapt to policy and reimbursement change and maximize the value of aggregation in a rapidly evolving drug landscape. We're proud to stand alongside you as trusted partners in advancing pharmacy's impact across the health system.

Sincerely,

A handwritten signature in cursive script that reads "Ginger Ertel".

Ginger Ertel, PharmD, MBA
Senior Vice President
Pharmacy Aggregation Group Program

Executive overview

A year in focus

The Pharmacy Aggregation Groups strive to deliver differentiated, measurable value to pharmacy leaders through analytics, sourcing and clinical expertise. In 2025, that value was reinforced through disciplined, member-driven decision making in a market defined by sustained supply disruption and rising complexity.

Guided by direct member input, initiatives focused on the areas that matter most to health system leadership: access, reliability and financial stewardship. From continued progress in automation to the expansion of ambulatory and non-acute contracting strategies, efforts reflected a deep understanding of how pharmacy performance supports broader organizational goals.

A defining priority in 2025 was helping members navigate persistent drug shortages. Through deliberate sourcing strategies, strengthened manufacturer engagement and coordinated use of Vizient programs, such as Novaplus Enhanced Supply Reserve, the team supported continuity of care while improving supply resilience.

By grounding every decision in data and aligning actions to member priorities, the pharmacy aggregation groups delivered meaningful value across diverse care settings. Together, these results outlined in Figure 1 reflect a collective, member-led approach that enables health systems to achieve greater stability, influence and value than any organization could realize independently.

Figure 1. Pharmacy Aggregation Groups: 2025 by the numbers

From metric to meaning



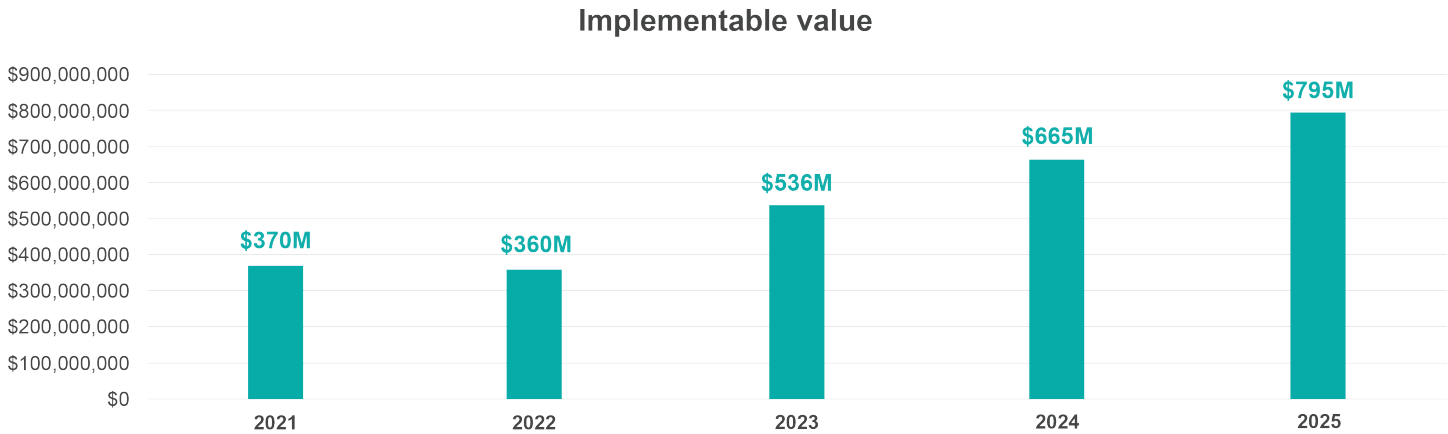
Driving strategic value

Where numbers meet real-world value

Over the past five years, the Pharmacy Aggregation Groups have delivered **consistent implementable value at an increasing rate (Figure 2)**, reflecting both disciplined execution and increased member engagement. This underscores the effectiveness of a collective, data-driven approach to sourcing and category strategy.

This sustained upward trajectory isn't only driven by market conditions but also reflects deliberate prioritization and accountability across pharmacy aggregation group teams as well as the active participation of members who align shared strategies and execution. This past year represents a meaningful step forward in translating collective scale into tangible, implementable outcomes.

Figure 2. Implementable value from Pharmacy Aggregation Groups, 2021-2025



Building on this growth, 2025 value delivery was powered by a **concentrated set of high-impact initiatives**. Table 1 shows categories where member alignment, clinical insight and sourcing strategy converged to drive meaningful results. Categories included but weren't limited to plasma-derived products, antineoplastic agents, vaccines, immunologic agents and pharmacy distribution.

Table 1. Top 10 initiatives in 2025

Initiative	Total implementable value
Plasma-derived products	\$224M
Antineoplastic agents	\$115M
Vaccines	\$106M
Immunologic agents	\$45M
Pharmacy distribution	\$43M
Coagulation modifiers	\$25M
Diagnostic imaging agents	\$23M
Viscoelastic agents	\$23M
Hematopoietic agents	\$19M
Neuromuscular blocking agents	\$14M

Rather than pursuing volume only, the groups focused on categories with significant spend, supply complexity and opportunity for differentiation. Each initiative reflects a balance of clinical appropriateness, supply resilience, market dynamics and financial stewardship—ensuring that value was both achievable and implementable at the member level. Additionally, the team focused on successfully completing utilization and standardization initiatives for drug categories of antidotes, pain therapeutics and anti-infective agents—**delivering more than \$8 million in value**.

Together, the sustained growth in implementable value and the performance of targeted initiatives illustrate how a member-led model translates scale into real-world results—delivering value that’s both measurable and meaningful.

Innovation highlights

Accelerating performance through scale, technology and adaptability

High-performance member advancement

High-performance member advancement is driven by a disciplined focus on speed to value, enabled by automation, advanced analytics and emerging AI-supported tools. These capabilities strengthen internal operations while delivering actionable insights that simplify decision making, accelerate implementation and reduce administrative burden. Over the past year, the team implemented automated member management processes powered by enterprise data sources, significantly reducing manual intervention and improving data integrity. By integrating authoritative enterprise systems into our workflows, we established a centralized framework for member eligibility, attribution and status tracking.

Adapting to evolving sites of care through class-of-trade expansion

As healthcare delivery continues to shift across multiple sites of care, the Pharmacy Aggregation Groups have intentionally expanded contracting strategies across classes of trade to better meet member needs. In 2025, this included a focused emphasis on ambulatory care, where growth, migration and operational variability require tailored sourcing solutions.

As a result of this focus, the team **delivered contracts in eight new ambulatory care contract categories**, enabling members to access more competitive pricing while maintaining compliance and operational flexibility. This multi-class-of-trade approach supports lower acquisition costs, greater sourcing consistency and alignment with how and where care is increasingly delivered.

Automation of distribution value tracking

The team also deployed automated distribution value tracking to standardize how savings and program value are calculated and reported. As a result, **pharmacy medication distribution value reporting is now more consistent, defensible and scalable**. The automation framework ensures that value tracking aligns with enterprise standards while reducing dependency on manual analysis.

Real-time value demonstration through prospective member analysis and performance opportunity automation

This year, we automated key components of our prospective member analysis and missed opportunity processes to **provide near real-time visibility into program performance and value realization**. Stakeholders now have immediate access to actionable insights, allowing for faster course correction and stronger storytelling.

Strengthening supply resilience amid persistent drug shortages

Persistent drug shortages in 2025 drove the Pharmacy Aggregation Groups to take a proactive, accountable approach to supply resilience. Participation in the Vizient Novaplus Enhanced Supply Reserve Program resulted in member access to **319 individual medications, providing 980,000 units to support direct patient care needs at 886 sites**. This increased access to a dedicated inventory of essential medications and emergency syringes delivered diversified sourcing strategies, strengthening collective supply assurance and continuity of care.



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