Access to Medicine Index 2026

10th Edition



Charting the evolution of pharma company action on access to medicine

EXECUTIVE SUMMARY

access to medicine FOUNDATION

Executive Summary

Healthcare innovations only matter if they reach the people who need them. But today, billions of people across the globe cannot access even the most essential medicines. Populations in low- and middle-income countries (LMICs) are especially affected, and as new health threats emerge and disease burdens evolve, they are at risk of being left even further behind.

As the developers and producers of life-saving products, pharmaceutical companies have a critical bearing on whether these are available and affordable. Since its first edition in 2008, the Access to Medicine Index has assessed the efforts of the world's leading pharmaceutical companies in expanding access to medicines and other essential healthcare products in LMICs. This iteration marks a 20-year milestone of tracking progress and driving change, highlighting the Index's unique role in bringing a clearer understanding of how companies are addressing priority access-to-medicine topics across three Technical Areas: Governance of Access, Research & Development (R&D) and Product Delivery. Drawing on this analysis, the Index identifies Best Practices and highlights tailored opportunities for companies to enhance their efforts.

For its tenth edition, the Access to Medicine Index charts how companies' approaches to access have shifted over the last two decades. Access has become more central to companies' operations: they are increasingly incorporating access considerations earlier in the product lifecycle, integrating them into R&D, establishing dedicated business models to improve access and measuring the outcomes of these efforts. Despite this progress, companies' access efforts remain concentrated in relatively few countries, with both commercial and non-commercial approaches reaching people at scale for only a limited number of products.

Building on this analysis, the 2026 Index examines what companies are achieving in practice, particularly in terms of reaching patients and the sustainability of their access efforts, while spotlighting areas where gaps are especially pervasive. It finds that companies are taking important steps to expand access, from advancing promising innovations to securing important product approvals and building stronger local partnerships. However, the overall picture is uneven, and approaches that could improve access are still not being implemented or scaled consistently.

Although the proportion of pipeline products with access plans has more than tripled since 2018, many plans still address only part of the access challenge. For non-communicable disease (NCD) products, for example, 43% of plans focus solely on registration, without tackling other barriers that can determine whether a product ultimately reaches patients. Geographic coverage also remains limited, with lower-resource settings and underserved populations too often left outside companies' plans.

At the same time, companies' pipelines hold significant potential, including promising candidates in development targeting diseases such as malaria, HIV and Group B Streptococcus (GBS). Realising this potential will depend on companies planning early and comprehensively for how these products will reach the people who need them. The need to pair innovation with access is also evident in diabetes: despite continued innovation in the field, life-saving insulin – discovered more than a century ago – remains out of reach for many people in LMICs.

More companies are taking steps to reach underserved populations through commercial models, with several establishing inclusive business models. Key drivers of these models include stronger local partnerships, more sustainable approaches and, in some cases, progress in reaching patients. However, reporting on patient reach remains inconsistent, making it difficult to assess whether these models are translating into meaningful improvements in access.

Over two decades, the Index has provided evidence of how the industry is progressing, what works to improve access, where progress has been concentrated and where future priorities lie, both for individual companies and the industry as a whole. This body of evidence provides a springboard for companies to build on progress, address persistent gaps and expand access to medicines at scale for people living in LMICs.

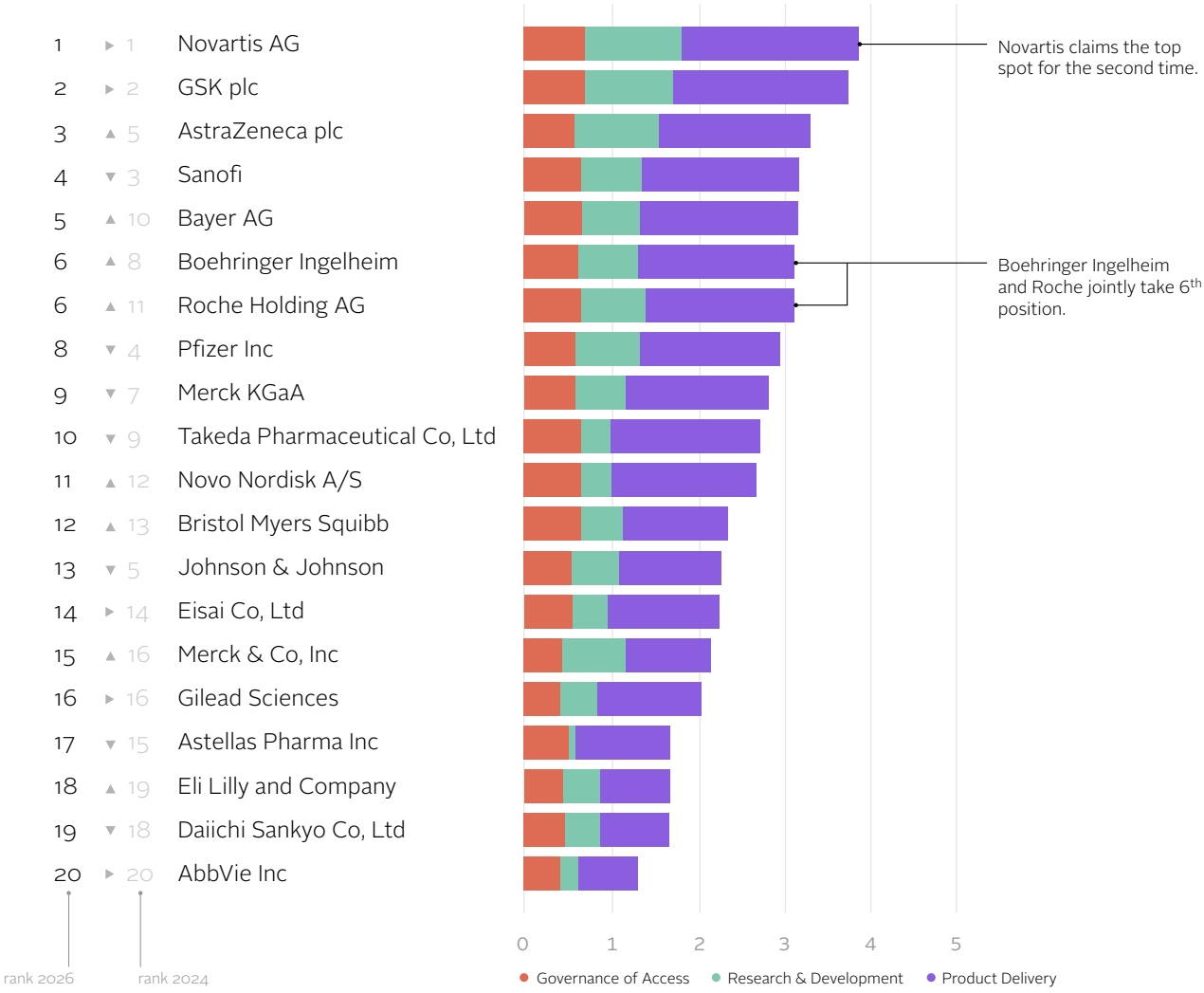
3 KEY FINDINGS

1. Companies step up access planning for pipeline products, but progress lags for non-communicable diseases
2. Promising pockets of progress emerge in cancer access, but the overall picture remains uneven
3. Inclusive business models: Momentum in expanding reach and strengthening long-term foundations, yet visibility into impact remains limited

READ MORE ON P.19-P.31 OF THE 2026 INDEX

2026 Index ranking

In the tenth iteration of the Index, Novartis takes the lead for a second time, with GSK a close runner-up. A clear gap separates these top two companies from the wider field. Despite these companies' strong performance across all three Technical Areas, alongside pockets of strength among other companies, overall industry performance has plateaued since the 2026 Index. There remains considerable scope for companies to strengthen their approaches to access, particularly those at the lower end of the ranking. Overall, the industry performs most strongly in the Governance of Access Technical Area, but lags in the other Technical Areas of R&D and Product Delivery.



TOP PERFORMERS

Novartis (1st) and **GSK** (2nd) stand out for their performance, holding the same positions across all three Technical Areas.

SIX HIGH PERFORMERS

All six companies perform above average across all Technical Areas:

- **AstraZeneca** (3rd)
- **Sanofi** (4th)
- **Bayer** (5th)
- **Boehringer Ingelheim** and **Roche** (tied for 6th)
- **Pfizer** (8th)

EIGHT MIDDLE PERFORMERS

These companies highlight mixed performance across all Technical Areas:

- **Merck KGaA** (9th)
- **Takeda** (10th)
- **Novo Nordisk** (11th)
- **Bristol Myers Squibb** (12th)
- **Johnson & Johnson** (13th)
- **Eisai** (14th)
- **MSD** (15th)
- **Gilead** (16th)

FOUR LOW PERFORMERS

These companies make up the bottom of the ranking, with minimal reporting and transparency across all Technical Areas:

- **Astellas** (17th)
- **Eli Lilly and Company** (18th)
- **Daiichi Sankyo** (19th)
- **AbbVie** (20th)

2026 Index at a Glance

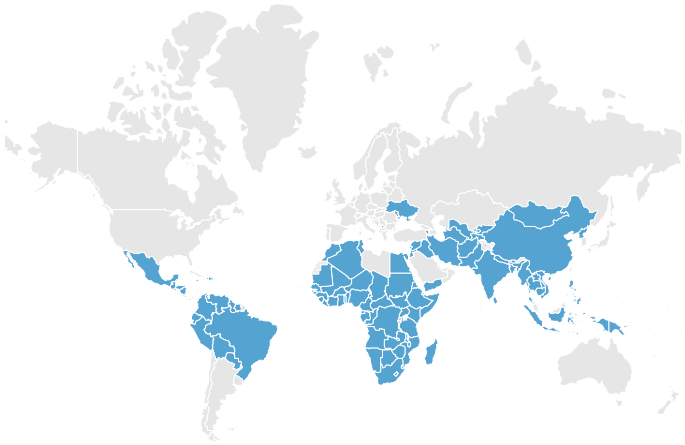
Scope of Assessment

20 LARGE INNOVATIVE PHARMACEUTICAL COMPANIES

- AbbVie Inc
- Astellas Pharma Inc
- AstraZeneca plc
- Bayer AG
- Boehringer Ingelheim
- Bristol Myers Squibb
- Daiichi Sankyo Co., Ltd
- Eisai Co., Ltd
- Eli Lilly and Company
- Gilead Sciences
- GSK plc
- Johnson & Johnson
- Merck & Co., Inc
- Merck KGaA
- Novartis AG
- Novo Nordisk A/S
- Pfizer Inc
- Roche Holding AG
- Sanofi
- Takeda Pharmaceutical Co., Ltd

113 LOW- AND MIDDLE-INCOME COUNTRIES

The geographic scope of the 2026 Index covers 113 low- and middle-income countries.



8 PRODUCT TYPES

- Medicines
- Microbicides
- Preventative vaccines
- Therapeutic vaccines
- Vector control products
- Platform technologies
- Diagnostics
- Contraceptive methods and devices

84 DISEASES, CONDITIONS AND PATHOGENS

- 24 communicable diseases, including HIV/AIDs, Mpox (monkeypox) and tuberculosis.
- 16 non-communicable diseases, including cancers, cardiovascular diseases and diabetes.
- 21 neglected tropical diseases, including dengue fever, Noma disease and rabies.
- 10 reproductive, maternal and newborn health conditions, including preterm birth complications, neonatal sepsis and infections, and maternal haemorrhage.
- 13 priority pathogens, as included on the World Health Organization's priority pathogen list (2024).

Highlights from the report

20 YEARS OF THE INDEX

Across ten editions, the Access to Medicine Index has tracked how the world's leading pharmaceutical companies are working to improve access to essential health products in low- and middle-income countries (LMICs). To mark this milestone, the 2026 Index looks back at two decades of progress, tracing how industry approaches have evolved across all three Technical Areas, alongside the evolution of the Index itself.

Read more on p.15-p.18 of the 2026 Index

5 BEST PRACTICES

Best Practices are approaches that can be accepted as being the most effective way of achieving a desired end, relative to what the industry is currently doing in that area and what stakeholder expectations are. Some of these focus on a single company, while others draw on examples from several companies.

Read more on p.71-p.81 of the 2026 Index

20 COMPANY REPORT CARDS

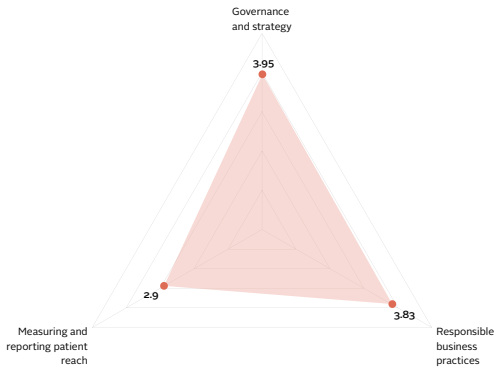
Each company has a report card providing a detailed overview of its performance in the 2026 Index, including a summary of its strengths and weaknesses, drivers behind changes in its ranking, as well as tailored opportunities to improve and maximise its access-to-medicine efforts.

Read more on p.83-p.166 of the 2026 Index

Industry Trends

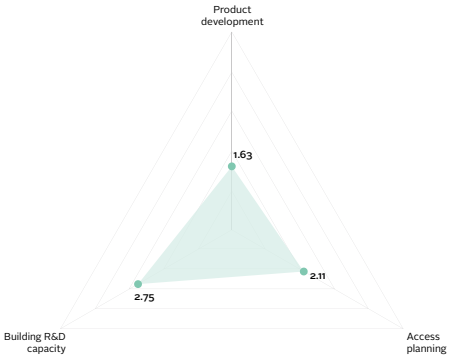
GOVERNANCE OF ACCESS

Governance of Access remains the strongest-performing Technical Area, with strengthened expectations for measuring and reporting patient reach affecting performance in this area. Read more on p.13.



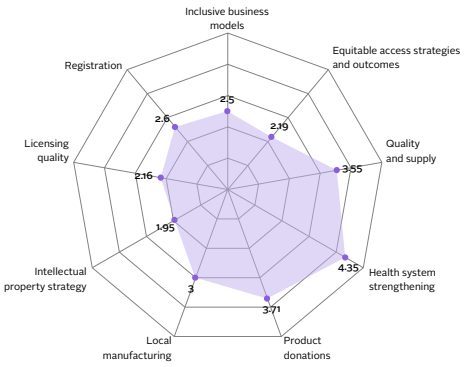
RESEARCH & DEVELOPMENT

Performance in Research & Development is weakest, with declining engagement in priority R&D, persistent gaps in access planning and limited progress in expanding the geographic reach of access plans. Read more on p.13.



PRODUCT DELIVERY

Product Delivery demonstrates varied performance, with strong results in capacity building but low product registration in high-burden countries, narrow geographic reach of access strategies and weaker performance in intellectual property strategies. Read more on p.14.



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