2000-2009 Survey Results

Pharmacy Benefit Trends & Data

Costs, Benefit Design, Utilization, PBM Market Share

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PBM Market Share by Total Annual Prescription Volume, as of 2Q2009

Company	Number Rx/Year	Market Share
CVS/Caremark Rx, Inc.	594,999,120	15.36%
Medco Health Solutions, Inc.	586,000,000	15.13%
Argus Health Systems, Inc.	578,000,000	14.92%
Express Scripts/CuraScript	420,400,000	10.85%
WellPoint NextRx	267,651,000	6.91%
Prescription Solutions	254,091,612	6.56%
ACS, Inc.	250,000,000	6.45%
First Health Services Corporation	148,500,000	3.83%
MedImpact Healthcare Systems, Inc.	119,843,571	3.09%
Prime Therapeutics LLC	115,000,000	2.97%
HealthTrans	100,000,000	2.58%
Aetna Pharmacy Management (APM)	89,709,989	2.32%
Walgreens Health Services Division	84,105,927	2.17%
CIGNA Pharmacy Management	54,600,000	1.41%
Catalyst Rx	52,529,756	1.36%
SXC Health Solutions, Inc./informedRx	39,362,980	1.02%
RESTAT, LLC	24,000,000	0.62%
ScriptSave	17,000,000	0.44%
FutureScripts	15,503,019	0.40%
PerformRx	9,771,216	0.25%
National Pharmaceutical Services	8,500,000	0.22%
Navitus Health Solutions, LLC	8,000,000	0.21%
BioScrip	7,735,710	0.20%
RegenceRx	5,237,234	0.14%
NovoLogix	4,800,000	0.12%
Kroger Managed Prescription Drug Plan	3,600,000	0.09%
Partners Rx Management, LLC (PRx)	2,300,000	0.06%
Northwest Pharmacy Services (NWPS)	1,800,000	0.05%
Maxor National Pharmacy Services Corporation	1,734,000	0.04%
IdealScripts	1,100,000	0.03%
Allion Healthcare, Inc., dba MOMS Pharmacy	1,082,004	0.03%
AmeriPharm, Inc.	1,000,000	0.03%
HealthSmart RX	860,453	0.02%
4D Pharmacy Management Systems, Inc.	853,248	0.02%
Axium Healthcare Pharmacy, Inc.	700,000	0.02%
United Drugs, Inc.	604,527	0.02%
Cypress Care, Inc.	500,000	0.01%
Pequot Pharmaceutical Network (PRxN)	410,000	0.01%
AmerisourceBergen Specialty Group	250,000	0.01%
Commcare Pharmacies	215,000	0.01%
Coram Healthcare	210,000	0.01%
ivpcare, a Walgreens Specialty Company	180,000	0.00%

PBM Market Share by Total Annual Prescription Volume, as of 2Q2009

Company	Number Rx/Year	Market Share
ICORE Healthcare, Inc.	110,000	0.00%
Assured Pharmacy	108,442	0.00%
ScripNet, Inc.	87,000	0.00%
Burman's Specialty Pharmacy, LLC	70,000	0.00%
Hyde Rx	70,000	0.00%
Advanced Pharmacy Solutions	50,000	0.00%
Advanced Care Scripts, Inc.	36,000	0.00%
BioPlus Specialty Pharmacy Services	30,000	0.00%
WorkScripts	25,000	0.00%
Biologics, Inc.	22,000	0.00%
Acro Pharmaceutical Services	20,000	0.00%
Factor Support Network Pharmacy	18,000	0.00%
Vital Care, Inc.	12,000	0.00%
HCI Specialty Pharmacy	1,600	0.00%
Total	**3,873,400,408**	

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Chapter 4

PBM Membership and Market Share

This chapter presents the number of covered lives, or members, reported by companies in the survey. Depending on how their client contracts are structured and what services are offered, the "covered lives" metric may not be used for all business models represented in the database. The majority of companies surveyed use the covered lives metric, which indicates the number of members, or patients, a PBM may potentially serve — i.e., the number of members per each group health plan that contracts with the PBM.

It is important to clarify that the term "covered lives" in the PBM industry does not refer to fully insured — or "covered" — members on a one-to-one basis. "Covered lives" refers to the number of potential members that may possibly be served by any of the PBM's existing contracts. An individual member may be covered under multiple contracts, depending on how the services are structured for each client. Therefore, the total number of covered lives represented by the industry is vastly greater than the total U.S. population.

See Chapter 6 for further discussion of this phenomenon and for more analysis of market share via covered lives.

PBM Market Share by Number of Covered Lives, as of 2Q2009		
Company	**Total Covered Lives**	**Market Share**
CVS/Caremark Rx, Inc.	82,000,000	11.85%
Walgreens-OptionCare	75,000,000	10.84%
ICORE Healthcare, Inc.	60,000,000	8.67%
Medco Health Solutions, Inc.	60,000,000	8.67%
Express Scripts/CuraScript	55,000,000	7.95%
NovoLogix	40,000,000	5.78%
WellPoint NextRx	35,049,000	5.07%
MedImpact Healthcare Systems, Inc.	32,000,000	4.63%
Argus Health Systems, Inc.	28,600,000	4.13%
HealthTrans	15,300,000	2.21%
Prime Therapeutics LLC	14,800,000	2.14%
ACS, Inc.	14,000,000	2.02%
Provider Synergies, LLC	14,000,000	2.02%
Health Information Designs, Inc.	14,000,000	2.02%
ScriptSave	12,000,000	1.73%
RxStrategies, Inc.	12,000,000	1.73%
Prescription Solutions	11,754,249	1.70%
Aetna Pharmacy Management (APM)	11,000,000	1.59%
First Health Services Corporation	10,000,000	1.45%
Walgreens Health Services Division	9,700,000	1.40%
Acro Pharmaceutical Services	7,000,000	1.01%
CIGNA Pharmacy Management	6,200,000	0.90%
Catalyst Rx	6,028,140	0.87%
Axium Healthcare Pharmacy, Inc.	6,000,000	0.87%
RESTAT, LLC	6,000,000	0.87%
Sanovia Corporation	5,000,000	0.72%
SXC Health Solutions, Inc./informedRx	4,900,330	0.71%
BioScrip	4,656,614	0.67%
CSI Specialty Infusion Services	3,625,000	0.52%
Scriptrax	3,400,000	0.49%
ScripNet, Inc.	3,000,000	0.43%
WellDyne RxWEST	3,000,000	0.43%
RegenceRx	3,000,000	0.43%
NationsHealth	3,000,000	0.43%
National Pharmaceutical Services	2,500,000	0.36%
PerformRx	2,100,000	0.30%
FLRx	1,960,000	0.28%
US Script, Inc.	1,500,000	0.22%
WMS Prescription Drug Plans	1,500,000	0.22%
4D Pharmacy Management Systems, Inc.	1,497,000	0.22%
MemberHealth, Inc. (MHI)	1,276,000	0.18%
PRAM Insurance Services, Inc.	1,200,000	0.17%

PBM Market Share by Number of Covered Lives, as of 2Q2009		
Company	**Total Covered Lives**	**Market Share**
FutureScripts	1,152,782	0.17%
Navitus Health Solutions, LLC	850,000	0.12%
Northwest Pharmacy Services (NWPS)	700,000	0.10%
Envision Pharmaceutical Services, Inc.	500,000	0.07%
Pharmacy Provider Services Corporation	500,000	0.07%
Maxor National Pharmacy Services Corporation	450,000	0.07%
PBM Plus, Inc. An OmniCare Company	425,000	0.06%
Kroger Managed Prescription Drug Plan	412,000	0.06%
SunRx, Inc.	400,000	0.06%
Partners Rx Management, LLC (PRx)	400,000	0.06%
American Health Care	300,000	0.04%
Avia Partners, Inc.	250,000	0.04%
BeneCard Services, Inc.	250,000	0.04%
HealthSmart RX	160,372	0.02%
United Drugs, Inc.	100,000	0.01%
PBA Health	100,000	0.01%
Pequot Pharmaceutical Network (PRxN)	100,000	0.01%
IdealScripts	85,000	0.01%
Hyde Rx	10,000	0.00%
WorkScripts	1,500	0.00%
Total	**691,692,987**	

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