

*2000-2009 Survey Results*

**Pharmacy Benefit Trends & Data  
Costs, Benefit Design, Utilization,  
PBM Market Share**

**Erin Trompeter, Editor**

**Susan Namovicz-Peat, Managing Editor**

Atlantic Information Services, Inc.

1100 17th Street, NW, Suite 300 • Washington, DC 20036 • 202-775-9008 • [www.AISHealth.com](http://www.AISHealth.com)

| <b>PBM Market Share by Total Annual Prescription Volume, as of 2Q2009</b> |                       |                     |
|---|-----------------------|---------------------|
| <b>Company</b>  | <b>Number Rx/Year</b> | <b>Market Share</b> |
| 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%               |

| <b>PBM Market Share by Total Annual Prescription Volume, as of 2Q2009</b>                                    |                       |                     |
|--|-----------------------|---------------------|
| <b>Company</b>   | <b>Number Rx/Year</b> | <b>Market Share</b> |
| 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%               |
| <b>Total</b>   | <b>3,873,400,408</b>  |                     |
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# 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.

| <b>PBM Market Share by Number of Covered Lives, as of 2Q2009</b> |                            |                     |
|--|----------------------------|---------------------|
| <b>Company</b>   | <b>Total Covered Lives</b> | <b>Market Share</b> |
| 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%               |

| <b>PBM Market Share by Number of Covered Lives, as of 2Q2009</b>  |                            |                     |
|---|----------------------------|---------------------|
| <b>Company</b>  | <b>Total Covered Lives</b> | <b>Market Share</b> |
| 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%               |
| <b>Total</b>  | <b>691,692,987</b>         |                     |
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