

Vertical Business Relationships Among Insurers, PBMs, Specialty Pharmacies, Retail Pharmacies, Mail-Order Pharmacies and Providers, 2024



	BlueCross BlueShield	CENTENE Corporation	THE CIGNA GROUP	CVS Health	Elevance Health	Humana	UNITEDHEALTH GROUP
INSURERS	BlueCross BlueShield	Medicaid wellcare ambetter	cigna healthcare	aetna	Anthem	Humana	United Healthcare
PBMs (GPO)	PRIME THERAPEUTICS	envolve Pharmacy Solutions	EXPRESS SCRIPTS Ascent Health Services	CVS caremark Zinc	carelon Rx	Humana Pharmacy Solutions	OPTUMRx EMISAR
SPECIALTY PHARMACIES	allianceRx Walgreens Pharmacy accredo	AcariaHealth Specialty Pharmacy	accredo FREEDOM FERTILITY PHARMACY	CVS specialty	CVS specialty BioPlus Specialty Pharmacy Kroger specialty pharmacy	CenterWell Specialty Pharmacy	OPTUM Specialty Pharmacy
PREFERRED RETAIL PHARMACIES			Walgreens RITE AID	CVS pharmacy		Walmart	
MAIL-ORDER PHARMACIES	EXPRESS SCRIPTS		EXPRESS SCRIPTS	CVS caremark	ingenioRx	CenterWell Pharmacy	OPTUMRx
LONG-TERM CARE PHARMACIES				Omnicare a CVS Health company			amedisys
PROVIDER SERVICES	USMM U.S. Medical Management Community Medical Group		EVERNORTH HEALTH SERVICES alegis care MDLIVE VillageMD	CVS Health minute clinic Oak St. Health signifyhealth	CareMore HEALTH Aspire Health	CONVIVA Care Center CenterWell Senior Primary Care CenterWell Home Health	OPTUMCare

¹ Since 2021, Prime's Blue Cross and Blue Shield plans have had the option to use Express Scripts or AllianceRx Walgreens Pharmacy for mail/specialty pharmacy services. In Dec, 2021, Walgreens purchased Prime Therapeutics' 45% ownership interest, so this business had no PBM ownership in 2022. Effective June 2022, the company was rebranded as AllianceRx Walgreens Pharmacy.
² Centene has announced that it would outsource its PBM operations to Express Scripts in 2024. In 2023, Centene rebranded its pharmacy benefit subsidiary as Centene Pharmacy Services.
³ In 2021, Centene sold a majority stake in its U.S. Medical Management to a group of private equity firms.

⁴ Since 2020, Prime has sourced formulary rebates via Ascent Health Services for its commercial plans.
⁵ Previously known as Evernorth Care Group and Cigna Medical Group.
⁶ In 2021, Cigna's Evernorth business acquired MDLive.
⁷ In 2022, Cigna invested \$2.7 billion for an estimated 14% ownership stake in VillageMD. Walgreens owns a majority of Village MD.
⁸ In September 2022, CVS Health announced its acquisition of Signify Health. In February 2023, CVS announced its acquisition of Oak Street Health. Both transactions closed in 2023.
⁹ Previously known as IngenioRx.

¹⁰ In 2021, Partners in Primary Care and Family Physicians Group businesses were rebranded as CenterWell Senior Primary Care.
¹¹ In 2022, Kindred at Home was rebranded as CenterWell Home Health. Humana announced an agreement to divest its majority interest in Kindred at Home's Hospice and Personal Care Divisions to Clayton, Dubiller & Rice. Humana also announced plans to close a majority of its SeniorBridge home care locations.
¹² In 2024 grocer Kroger, said it had entered a definitive agreement for the sale of its specialty pharmacy business to CarelonRx, a unit of U.S. health insurer Elevance Health.
 • CVS Pharmacy is owned by CVS/Caremark.