



DEVELOPING DATA

Retail Clinics Shrink By 33%

■ Alan A. Ayers, MBA, MAcc

RETAIL CLINIC ROOFTOPS BY HOST

Rank	Retail Host	Clinics	% of Total	Hospital-Affiliated
1	CVS Health (MinuteClinic)	805	69.0%	0
2	Kroger Co. (The Little Clinic)	170	14.6%	0
3	Walgreen Co.	100	8.6%	100
4	Target Corp.	35	3.0%	35
5	Hy-Vee, Inc.	18	1.5%	13
6	Meijer, Inc.	8	0.7%	7
7	Walmart Inc.	5	0.4%	5
8	Fruth Pharmacy	4	0.3%	2
9	Publix Super Markets	3	0.3%	3
Unclassified				
	Regional grocery chains	4	0.3%	4
	Independent pharmacies	14	1.2%	2
	Total	1,166	100.0%	171

Data as of June 19, 2026. Sources: National UC Realty and retailer websites. Hospital-affiliated data includes clinics operated by or clinically linked to a hospital or health system. Percentages may not total 100% due to rounding.

Between May 2023 and June 2026, the number of health clinics hosted in retail settings in the United States fell from 1,750 to 1,166. This represents a 33% overall decline from the 2023 peak.¹

The contraction began when CVS, Walgreens, and Walmart announced closures and has continued with no offsetting growth. MinuteClinic's 805 rooftops (down from 875) and The Little Clinic's 170 rooftops (down from 220) represent notable declines over the period among the 2 largest self-operated chains.

Consolidation has intensified even as the field has contracted. The top 5 hosts now account for 96.7% of all in-store clinics, up from 95% just 18 months ago. CVS alone operates 69% of the national total, and CVS and Kroger together hold 83.6% of the retail clinic rooftops. By comparison, independent pharmacies and regional supermarket

chains represent just 1.5% of clinics.

CVS and Kroger have maintained a stronghold on the self-operated model, and for players outside the top 2, the format has transitioned into a health-system outpatient channel. All 35 Target Clinics—which operate exclusively in California—are run by Kaiser Permanente, and Walgreens' 100 sites are spread across 11 different health-system partners. Meanwhile, Walmart's 5 surviving clinics are each operated by a different system. Every Meijer, Publix, and Target retail clinic carries a health-system affiliation. In all, 171 of 1,166 rooftops (14.7%) are health-system-affiliated, spanning more than 30 distinct systems.

Much like the broader consumerization of healthcare, where success requires highly specialized, lean operations to maintain throughput, only the largest retail giants have the scale to operate independently.² For the rest of the market, the retail clinic is no longer a retail venture at all, but rather a leased physical touchpoint for traditional hospital systems. ■



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References

1. Ayers AA. Retail Clinic Rooftops Retreat from 2023 Peak. *J Urgent Care Med.* 2025;19(5):57.
2. Ayers AA. 'Big retail' pivots are a retreat from 'on demand' care. *J Urgent Care Med.* 2023;17(9):30-35.