

Hospital Markets in Connecticut *at a glance*

A snapshot of hospital market structure, concentration, and ownership across the state — and how they've changed since 2000. This analysis reflects data available through May 2026.

In Connecticut, two hospital systems own more than half of all hospitals.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the state's 32 general short-term acute care (GSAC) hospitals — the facilities where most privately insured, Medicare, and Medicaid patients receive inpatient care, and where market concentration most directly affects the prices employers and workers pay. Each hospital's market is defined via a 30-minute travel radius around that facility. Within it, we measure concentration using the Herfindahl-Hirschman Index (HHI) — a standard antitrust metric calculated as the sum of the squared market shares of the owners in a market. HHI ranges from 0 (many small hospitals, low concentration) to 10,000 (a monopoly market, which has a single owner). Our hospital-centric HHI is a consistent analytical proxy for market concentration, not a legally defined antitrust market.

● **GSAC Hospitals (32)**

● VA / Military

● Psychiatric / Behavioral

● Rehabilitation

● Children's Specialty

Market Concentration

In 2000, five hospitals in Connecticut were in low- and moderate-concentration markets. By 2026, all 32 hospitals were operating in markets with an HHI above 1,800, the threshold the Federal Trade Commission (FTC) and Department of Justice (DOJ) consider “highly concentrated.” The average hospital market HHI had risen by 53% to 4,834. No hospitals closed. Over the same period, 25 transactions reshaped hospital ownership, and 9 of those mergers were considered “Red Zone” mergers. A Red Zone merger raises at least one merging hospital's market HHI by over 100 points to above 1,800, which DOJ and FTC guidelines presume is likely to raise prices. The market concentration levels of 31 of the state's 32 hospitals increased between 2000 and 2026; Sharon Hospital remained a monopoly with a maximum HHI of 10,000.

2000 | 32 hospitals overall



2026 | 32 hospitals overall



CONCENTRATION SCALE (IN HHI)

● **Low** (<1,000 HHI) ● **Moderate** (1,000 to <1,800) ● **High** (1,800 to <5,000) ● **Higher** (5,000 to <10,000) ● **Monopoly** (10,000 HHI)

Explore the data yourself

Our tool has three components. **The Market Explorer** tracks how hospital market concentration has evolved from 2000 to May 2026, drawing on ownership data from the AHA's Annual Survey, validated against state health department filings, SEC disclosures, and public reporting. **The Closures Explorer** tracks hospital closures and openings nationwide, each year since 2000. **The Forecast Lab** uses that same data to model how a proposed merger, closure, or opening would reshape a hospital market as it stood in 2026 — it models the scenarios you specify and does not identify potential mergers.

Note on the data: The tool uses a first-of-its-kind database that we built from scratch. We have done our best to gather and validate the data; however, if you notice an error (e.g., a hospital's name, a merger year) or if you have questions about our methodology, please notify us at HealthCareAffordabilityLab@yale.edu.

Health Care
Affordability Lab
at Yale

Explore Market Concentration at
Markets.HealthCareAffordabilityLab.org



QR code to CT Hospitals

Hospital Markets in Connecticut

October 2026

Key Stats

2 LARGEST SYSTEMS

18 of **32**

56% · Hartford HealthCare + Yale New Haven

HOSPITALS CLOSED

0

Zero closures since 2000

RED ZONE TRANSACTIONS

9 of **25**

36% in Red Zone

AVERAGE HHI INCREASE

+1,666

3,168 → 4,834

Two Systems Now Own More Than Half of Connecticut's Hospitals

In 2000, nearly 70% of Connecticut's 32 hospitals were independent. In 2026, five hospitals (16%) are independent. Two systems now control more than half the state: Hartford Healthcare grew from 3 hospitals to 12, and Yale New Haven Health grew from 3 hospitals to 6. Together they own 18 of 32 hospitals. A third system, Nuvance Health, was created in 2019 by merging two existing networks, which now operates four hospitals. Nuvance merged with Northwell Health in 2025.

2000 | 32 hospitals overall

10 in 4 systems 22 independents

31%

69%

2026 | 32 hospitals overall

27 in 5 systems 5 independents

84%

16%

Connecticut's Largest Systems

Together, five systems control 27 of 32 hospitals — up from 10 in 2000.

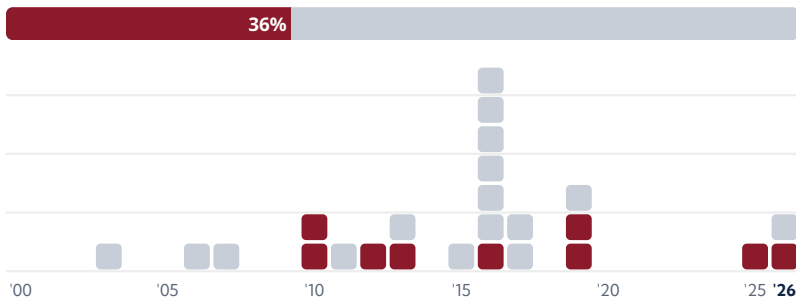
SYSTEM	HOSPITALS IN STATE	AVERAGE MARKET HHI	HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI
Hartford Healthcare	12	4,507	12 of 12
Yale New Haven Health	6	5,564	6 of 6

Average market HHI reflects the mean HHI across each system's hospitals within the state. HHI is calculated within a 30-minute travel radius of each facility. National hospital data typically lags by one to two years for new openings and recent ownership changes, so figures for 2024–2026 are preliminary and may not yet reflect all recent activity.

25 Transactions Reshaped Connecticut Hospital Markets

Since 2000, 25 transactions, including 9 Red Zone mergers, have increased hospital market concentration levels. In one instance, Western Connecticut Healthcare in Danbury became a monopoly when it merged with Nuvance Health (now Northwell Health).

9 RED ZONE MERGERS 16 OTHER TRANSACTIONS



Yale New Haven Health's acquisition of Milford Hospital and Hartford Healthcare's acquisition of St. Vincent's raised hospital HHI levels from "high" to "higher" (duopoly).