

Hospital Markets in Delaware *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 Delaware, hospital markets grew more concentrated, with one transaction and one closure occurring since 2000.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the state's 7 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 (7)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

Market Concentration

In 2000, all eight of Delaware's 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.” By 2026, one hospital, operated by ChristianaCare, had closed and the average hospital market HHI had risen by 33% to 6,803. One transaction occurred: Catholic Health East (which owned St. Francis Hospital) was acquired by Trinity Health in 2013, though the transaction itself did not change local market concentration. Concentration levels rose across Delaware's remaining hospital markets over the same period.

2000 | 8 hospitals overall

2026 | 7 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 DE Hospitals

Hospital Markets in Delaware

October 2026

What's Changed?

AVG HHI CHANGE SINCE 2000

+1,703

5,100 → 6,803

HOSPITALS CLOSED

1

Riverside Hospital (2003)

NUMBER OF TRANSACTIONS

1

Catholic Health East → Trinity Health

Delaware is one of a small number of states with very few hospital transactions since 2000. Yet Delaware's hospital market concentration increased over the period. Hospital closures can affect competition by changing the structure of local hospital markets.

HOSPITAL NAME	OWNER (2026)	GSAC BEDS	HHI 2026	CHANGE FROM 2000	NOTES
Kent General Hospital	Bayhealth Hospital 2-hospital system	256	● 10,000	0	
ChristianaCare Hospital	ChristianaCare 3-hospital system, 2 in DE	1,244	● 7,665	+3,202	Delaware's only Level I trauma center.
Wilmington Hospital	ChristianaCare 3-hospital system, 2 in DE	302	● 6,489	+2,704	ChristianaCare's Wilmington campus.
St. Francis Hospital	Trinity Health 80-hospital system, 1 in DE	127	● 6,489	+2,681	Transaction — Owner was Catholic Health East (27 hosp., 8 states) in 2000. Now Trinity Health (80 hosp., 17 states).
TidalHealth Nanticoke	Independent	99	● 6,147	+846	Renamed — Was Nanticoke Memorial Hospital. Rebuilt 2019.
Bayhealth Medical Center	Bayhealth Hospital 2-hospital system	172	● 5,587	+334	
Beebe Healthcare	Independent	155	● 5,048	-200	
Riverside Hospital	Christiana Health Care System	149	—	—	Closed in 2003

Data from the Health Care Affordability Lab's Hospital Markets tool. HHI (Herfindahl-Hirschman Index) measures market concentration on a scale of 0–10,000. Hospital counts reflect general short-term acute care (GSAC) classification and may differ from state licensure totals. 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.

Note on the data: The Hospital Markets tool currently lists ChristianaCare's Wilmington campus twice for 2000–2014, so the tool shows nine Delaware hospitals in 2000; the figures here count it once. The tool's data will be corrected at the next data update.

How Ownership has Shifted

Delaware's hospital markets have become more concentrated since 2000. ChristianaCare operated three hospitals in the state in 2000, closed one hospital in 2003, and operates the remaining two in 2026. Catholic Health East, a 27-hospital regional system, was absorbed into Trinity Health, now one of the largest health systems in the country with 80 hospitals across 17 states. Bayhealth Hospital operates two facilities in central Delaware. Two hospitals remain independent: TidalHealth Nanticoke and Beebe Healthcare.

2000 | 8 hospitals overall

■ 6 in 3 systems □ 2 independents

75%

25%



2026 | 7 hospitals overall

■ 5 in 3 systems □ 2 independents

71%

29%