

# Hospital Markets in Maine *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 Maine, the percentage of hospitals owned by a system rose from 50% in 2000 to 73% in 2026. Two of the 11 transactions in Maine were Red Zone mergers.*

## WHAT THIS ANALYSIS COVERS

**This analysis focuses on the state's 37 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 (37)

● VA / Military

● Psychiatric / Behavioral

● Rehabilitation

● Children's Specialty

## Market Concentration

Maine's hospital markets have become more concentrated since 2000, with average hospital market HHI rising from 7,316 to 8,297, an increase of 981 points. Every hospital still operates in a market with an HHI above 1,800, the threshold the Federal Trade Commission (FTC) and Department of Justice (DOJ) consider “highly concentrated.” The number of monopoly hospitals increased from 16 to 21. Over the period, three hospitals closed and none opened, leading to a net loss of three hospitals. Eleven transactions reshaped ownership. Two of those transactions (18%) qualified as “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.

2000 | 40 hospitals overall



2026 | 37 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](mailto:HealthCareAffordabilityLab@yale.edu).

Health Care  
Affordability Lab  
at Yale

Explore Market Concentration at  
[Markets.HealthCareAffordabilityLab.org](https://Markets.HealthCareAffordabilityLab.org)



QR code to ME Hospitals

# Hospital Markets in Maine

October 2026

## Key Stats

2 LARGEST SYSTEMS

**20** of **37**

54% · MaineHealth + Northern Light

HOSPITALS CLOSED

**3**

Goodall, Parkview, Northern Light Inland

RED ZONE TRANSACTIONS

**2** of **11**

18% in Red Zone

AVG HHI INCREASE

**+981**

7,316 → 8,297

## Independents Give Way to Systems

The share of Maine hospitals owned by a multi-hospital system rose sharply from 50% to 73% between 2000 and 2026, and the number of independent hospitals fell from 20 to 10. The largest systems are MaineHealth (10 hospitals) and Northern Light Health (10), followed by Prime Healthcare Services (3).

2000 | 40 hospitals overall

20 in 6 systems 20 independents

50%

50%

2026 | 37 hospitals overall

27 in 5 systems 10 independents

73%

27%

## Maine's Largest Systems

Five systems own 27 of Maine's 37 hospitals; MaineHealth and Northern Light Health lead.

| SYSTEM                | HOSPITALS IN STATE | AVERAGE MARKET HHI | HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI |
|-----------------------|--------------------|--------------------|----------------------------------------------|
| MaineHealth           | 10                 | 8,875              | 10 of 10                                     |
| Northern Light Health | 10                 | 8,258              | 10 of 10                                     |

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.

## Rising System Ownership Leads to Monopolies

The number of monopoly hospitals in Maine rose from 16 to 21 between 2000 and 2026. In four of the new monopoly markets, one system acquired all the hospitals within a 30-minute drive of each other. Meanwhile, the number of hospitals in monopoly markets with no other hospitals within a 30-minute drive remained relatively steady, at 15 in 2000 and 16 in 2026.

Each dot is one of Maine's 37 hospitals, placed by its 2026 market HHI

● SYSTEM-OWNED

● INDEPENDENT

