

# Hospital Markets in Nebraska *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 Nebraska, two in three hospitals remain independent, one of the highest shares in the country.*

## WHAT THIS ANALYSIS COVERS

**This analysis focuses on the state's 87 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 (87)

● VA / Military

● Psychiatric / Behavioral

● Rehabilitation

● Children's Specialty

## Market Concentration

Nebraska's average hospital market HHI remained relatively unchanged, moving from 5,490 in 2000 to 5,453 in 2026. Every hospital has 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 rose slightly from 15 in 2000 to 17 in 2026, while 5 hospitals closed and 5 opened, leaving no net change. Over the past 26 years, 11 transactions reshaped ownership, 2 of which (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** | 86 hospitals overall

**2026** | 87 hospitals overall (1 closed in 2026)



## 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 NE Hospitals

# Hospital Markets in Nebraska

October 2026

## Key Stats

### INDEPENDENT HOSPITALS

**58** of **87**

67% remain independent

### SYSTEM OWNERSHIP

**30%** → **33%**

26/86 → 29/87 part of system

### RED ZONE TRANSACTIONS

**2** of **11**

18% in Red Zone

### AVG HHI CHANGE

**-37**

5,490 → 5,453

## High Share of Independent Hospitals

Nebraska has one of the highest shares of independent hospitals in the country. In 2026, 58 of its 87 hospitals (67%) were independent, falling only slightly from 60 (70%) in 2000. The share owned by a system rose modestly, from 30% to 33%, as three more hospitals became system-owned. The largest operators are CommonSpirit Health (11 hospitals), Bryan Health (6), and Faith Regional Health Services (3).

### 2000 | 86 hospitals overall

■ 26 in 13 systems ■ 60 independents

30%

70%

### 2026 | 87 hospitals overall (1 closed in 2026)

■ 29 in 10 systems ■ 58 independents

33%

67%

## Nebraska's Largest Systems

Ten systems own 29 of Nebraska's 87 hospitals; most hospitals are independent.

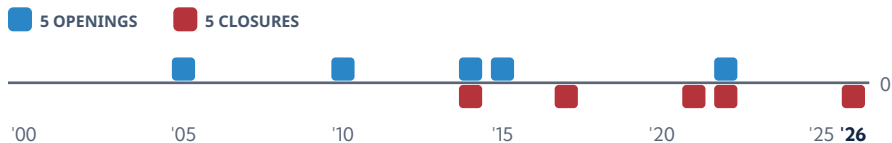
| SYSTEM                         | HOSPITALS IN STATE | AVERAGE MARKET HHI | HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI |
|--------------------------------|--------------------|--------------------|----------------------------------------------|
| CommonSpirit Health            | 11                 | 3,716              | 11 of 11                                     |
| Bryan Health                   | 6                  | 5,679              | 6 of 6                                       |
| Faith Regional Health Services | 3                  | 7,716              | 3 of 3                                       |

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.

## Equal Number of Openings and Closures

Nebraska saw steady turnover, with five hospitals opening and five closing since 2000 leading to no net change. Two of the 11 transactions in Nebraska were Red Zone mergers. Two in three hospitals remain independent, with the state's high concentration reflecting in part its rural geography and long travel distances between hospitals.

### Hospitals opened & closed by year



### Transactions by year

