

Hospital Markets in New York *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 New York, the percentage of hospitals owned by a system rose from 55% in 2000 to 81% in 2026.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the state's 182 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 (182)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

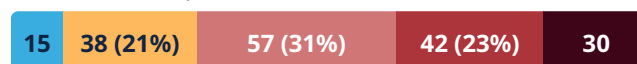
Market Concentration

New York's hospital markets have become more concentrated since 2000, with average hospital market HHI rising from 3,398 to 4,426 in 2026, an increase of 1,028 points. Most hospitals now have 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 24 in 2000 to 30 in 2026. Over the period, 45 hospitals closed and 2 opened, leading to a net loss of 43 hospitals. Sixty-seven transactions reshaped ownership. Twenty of those transactions (30%) 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 | 225 hospitals overall



2026 | 182 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 NY Hospitals

Hospital Markets in New York

October 2026

Key Stats

HOSPITALS LOST (NET)

-43

45 closed, 2 opened

SYSTEM OWNERSHIP

55% → 81%

124/225 → 147/182 part of system

AVG HHI INCREASE

+1,028

3,398 → 4,426

RED ZONE TRANSACTIONS

20 of 67

30% in Red Zone

Independents Give Way to Systems

The share of New York hospitals owned by a multi-hospital system rose sharply from 55% to 81% between 2000 and 2026, and the number of independent hospitals fell from 101 to 35. The largest systems are Northwell Health (19 hospitals) and NYC Health + Hospitals (11), followed by WMCHHealth (9).

2000 | 225 hospitals overall

124 in 38 systems 101 independents

55%

45%

2026 | 182 hospitals overall

147 in 35 systems 35 independents

81%

19%

New York's Largest Systems

Thirty-five systems own 147 of New York's 182 hospitals; Northwell Health and NYC Health + Hospitals lead.

SYSTEM	HOSPITALS IN STATE	AVERAGE MARKET HHI	HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI
Northwell Health	19	3,699	16 of 19
NYC Health + Hospitals	11	1,148	0 of 11
WMCHHealth	9	5,047	8 of 9
New York Presbyterian	9	1,547	1 of 9

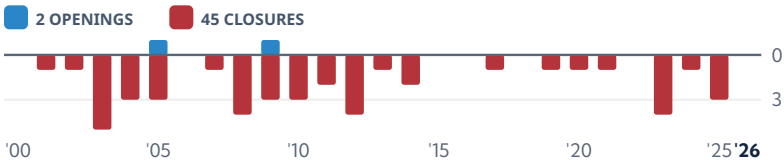
Average market HHI reflects the mean HHI across each system's hospitals within the state. HHI is calculated within a 30-minute travel radius of each facility. National hospital data typically lags by one to two years for new openings and recent ownership changes, so figures for 2024–2026 are preliminary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

Closures and Consolidation

From 2000 to 2026, only 2 hospitals in New York opened while 45 closed, leading to a net loss of 43 hospitals. Closures occurred throughout the period, with annual closures peaking at five in 2003.

Alongside these closures, the state recorded 67 transactions since 2000, with transaction activity peaking in 2015. Twenty of them (30%) qualified as Red Zone mergers.

Hospitals opened & closed by year



Transactions by year

