

Hospital Markets in Ohio *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 Ohio, the percentage of hospitals owned by a system rose from 55% in 2000 to 78% in 2026.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the state's 158 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 (158)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

Market Concentration

Ohio's hospital markets have become more concentrated since 2000, with average hospital market HHI rising from 3,877 to 4,792 in 2026, an increase of 915 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 10 to 13. Over the period, 31 hospitals closed and 24 opened, leading to a net loss of 7 hospitals. Fifty-nine transactions reshaped ownership. Thirty of those transactions (51%) 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 | 165 hospitals overall



2026 | 158 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 OH Hospitals

Hospital Markets in Ohio

October 2026

Key Stats

SYSTEM OWNERSHIP

55% → 78%

91/165 → 124/158 part of system

RED ZONE TRANSACTIONS

30 of 59

51% in Red Zone

AVG HHI INCREASE

+915

3,877 → 4,792

HOSPITALS LOST (NET)

-7

31 closed, 24 opened

Rising Share of System Ownership

The share of Ohio hospitals owned by a multi-hospital system rose sharply from 55% to 78% between 2000 and 2026, and the number of independent hospitals fell from 74 to 34. The largest systems are Bon Secours Mercy Health (20 hospitals) and OhioHealth (15), followed by University Hospitals (14).

2000 | 165 hospitals overall

91 in 24 systems 74 independents

55%

45%

2026 | 158 hospitals overall

124 in 25 systems 34 independents

78%

22%

Ohio's Largest Systems

Twenty-five systems own 124 of Ohio's 158 hospitals; Bon Secours Mercy Health and OhioHealth lead.

SYSTEM	HOSPITALS IN STATE	AVERAGE MARKET HHI	HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI
Bon Secours Mercy Health	20	3,722	18 of 20
OhioHealth	15	5,650	15 of 15
University Hospitals	14	4,505	14 of 14
Cleveland Clinic Health System	13	3,679	13 of 13

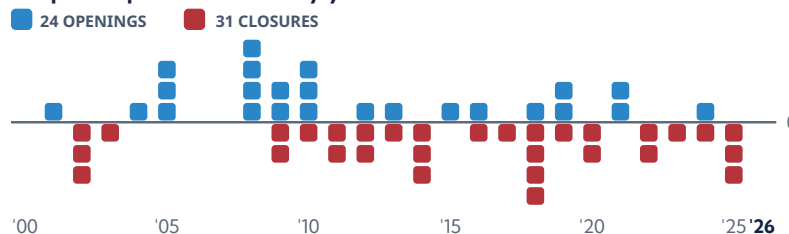
Average market HHI reflects the mean HHI across each system's hospitals within the state. HHI is calculated within a 30-minute travel radius of each facility. National hospital data typically lags by one to two years for new openings and recent ownership changes, so figures for 2024–2026 are preliminary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

Turnover and Consolidation

Ohio lost hospitals on net: 24 opened and 31 closed since 2000, a net loss of 7 hospitals. Openings and closures occurred at a similar pace across the period.

Alongside this turnover, the state recorded 59 transactions since 2000, with transaction activity peaking in 2010. More than half of them (51%) qualified as Red Zone mergers.

Hospitals opened & closed by year



Transactions by year

