

Hospital Markets in Oregon *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 Oregon, the percentage of hospitals owned by a system rose from 59% in 2000 to 71% in 2026. Six of its 17 transactions were Red Zone mergers.

WHAT THIS ANALYSIS COVERS

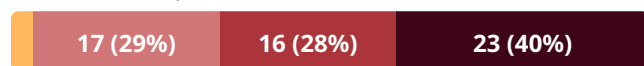
This analysis focuses on the state's 59 general short-term acute care (GSAC) hospitals — the facilities where most privately insured, Medicare, and Medicaid patients receive inpatient care, and where market concentration most directly affects the prices employers and workers pay. Each hospital's market 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 (59)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

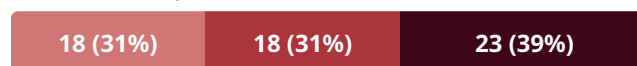
Market Concentration

Oregon's hospital markets have become modestly more concentrated since 2000, with average hospital market HHI rising from 6,617 to 6,766, an increase of 149 points. Every hospital now 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 stayed constant at 23. Over the period, three hospitals closed and four opened, a net gain of one hospital. Seventeen transactions reshaped ownership. Six of those transactions (35%) were “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 | 58 hospitals overall



2026 | 59 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 OR Hospitals

Hospital Markets in Oregon

October 2026

Key Stats

STRUCTURAL MONOPOLY

23 of 59

39% in monopoly markets

NET HOSPITALS GAINED

+1

3 closed, 4 opened

RED ZONE TRANSACTIONS

6 of 17

35% in Red Zone

AVG HHI CHANGE

+149

6,617 → 6,766

Ownership Shifts

The share of Oregon hospitals owned by a multi-hospital system rose from 59% to 71% between 2000 and 2026, and the number of independent hospitals fell from 24 to 17. The largest operators are Providence (8 hospitals) and Samaritan Health Services (5), followed by Legacy Health (5).

2000 | 58 hospitals overall

34 in 13 systems 24 independents

59%

41%

2026 | 59 hospitals overall

42 in 14 systems 17 independents

71%

29%

Oregon's Largest Systems

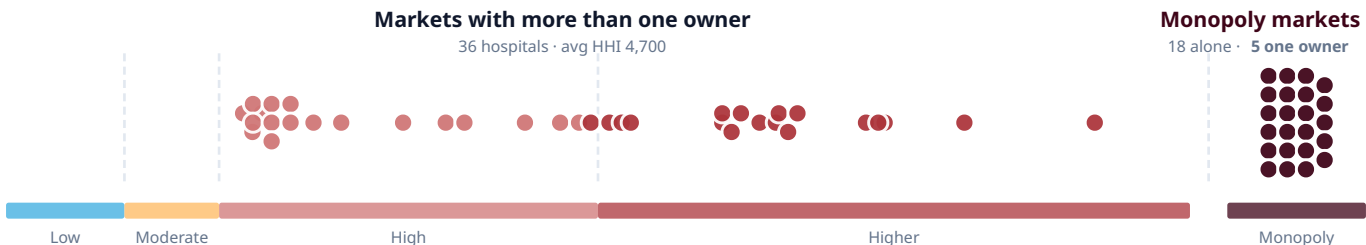
Fourteen systems own 42 of Oregon's 59 hospitals; Providence and Samaritan Health Services lead.

SYSTEM	HOSPITALS IN STATE	AVERAGE MARKET HHI	HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI
Providence	8	3,489	8 of 8
Samaritan Health Services	5	10,000	5 of 5
Legacy Health	5	3,306	5 of 5

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.

Transactions Reshape System Ownership

Oregon has had 23 monopoly markets from 2000 to 2026. In 18 of the monopolies, there is no other hospital within a 30-minute drive. In the five other monopolies, two or three hospitals within a 30-minute drive of each other share the same owner. Despite a steady number of monopoly markets, transactions have still changed hospital ownership in Oregon. In Oregon, 17 transactions occurred, 6 of which were Red Zone mergers, leading system ownership to rise from 59% to 71% while average market HHI increased by 149 points.



Each dot is one of Oregon's 59 hospitals, placed by its 2026 market HHI. Five of Oregon's monopoly markets hold more than one hospital: Samaritan Health Services owns all three in the Albany–Corvallis–Lebanon market, and St. Charles and Salem Health each own both hospitals in theirs.