

Hospital Markets in South Carolina *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 South Carolina, the percentage of hospitals owned by a system rose from 59% in 2000 to 75% in 2026.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the state's 61 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 (61)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

Market Concentration

South Carolina's hospital markets have become more concentrated since 2000, with average hospital market HHI moving from 5,702 to 6,472, an increase of 770 points. Since 2000, every hospital has had 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 12 to 17. Over the period, 14 hospitals closed and 9 opened, a net loss of 5 hospitals. Twenty-four transactions reshaped ownership. Four of those transactions (17%) 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 | 66 hospitals overall

2026 | 61 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 SC Hospitals

Hospital Markets in South Carolina

October 2026

Key Stats

SYSTEM OWNERSHIP

59% → 75%

39/66 → 46/61 part of system

AVG HHI INCREASE

+770

5,702 → 6,472

RED ZONE TRANSACTIONS

4 of 24

17% in Red Zone

HOSPITALS LOST (NET)

-5

14 closed, 9 opened

Independents Give Way to Systems

The share of South Carolina hospitals owned by a multi-hospital system rose sharply from 59% to 75% between 2000 and 2026, and the number of independent hospitals fell from 27 to 15. The largest operators are MUSC Health (8 hospitals) and Prisma Health Midlands (8), followed by McLeod Health (6).

2000 | 66 hospitals overall

39 in 15 systems 27 independents



2026 | 61 hospitals overall

46 in 11 systems 15 independents

South Carolina's Largest Systems

Eleven systems own 46 of South Carolina's 61 hospitals; the two largest are shown.

SYSTEM	HOSPITALS IN STATE	AVERAGE MARKET HHI	HOSPITALS WITH CONCENTRATION ABOVE 1,800 HHI
MUSC Health	8	6,746	8 of 8
Prisma Health Midlands	8	5,197	8 of 8

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 Leave Remaining Hospitals in Monopoly Markets

Seven South Carolina markets have crossed into monopolies since 2000. Five of these monopolies formed due to the closure of a neighboring hospital, which left the remaining hospital as the only hospital within a 30-minute drive. The two other monopolies formed due to system acquisitions of all hospitals within a 30-minute drive.

MARKET HHI, 2000 → 2026

Now the only hospital in its market



Two or three hospitals in market, one owner



Moderate High Higher Monopoly

An HHI of 10,000 means one owner, not one hospital.