

Hospital Markets in Washington, D.C. *at a glance*

A snapshot of hospital market structure, concentration, and ownership across the District — and how they've changed since 2000. This analysis reflects data available through May 2026.

Overall, Washington, D.C.'s hospital markets are moderately concentrated. Only one D.C. hospital market is considered highly concentrated according to regulatory guidelines.

WHAT THIS ANALYSIS COVERS

This analysis focuses on the District's 5 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 (5)** ● VA / Military ● Psychiatric / Behavioral ● Rehabilitation ● Children's Specialty

Market Concentration

The average concentration level of hospital markets in Washington, D.C. has risen by 30% since 2000. In 2000, all seven of the District's hospitals operated in moderately concentrated markets, with HHIs between 1,000 and 1,800, below the threshold the Federal Trade Commission (FTC) and Department of Justice (DOJ) consider “highly concentrated.” By 2026, the average hospital market HHI had increased to 1,750. This change was driven by the closure of two hospitals (Providence Hospital in 2019 and United Medical Center in 2023) and Johns Hopkins' acquisition of Sibley Memorial Hospital in 2010. Currently, only one D.C. hospital, MedStar Georgetown University Hospital, has an HHI level above the moderately concentrated range (HHI 2,278).

2000 | 7 hospitals overall

2026 | 5 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 DC Hospitals

Hospital Markets in Washington, D.C.

October 2026

What's Changed?

AVG HHI CHANGE SINCE 2000

+399

1,351 → 1,750

HOSPITALS CLOSED

2

Providence (2019) · United Medical Center (2023)

NUMBER OF TRANSACTIONS

1

Sibley → Johns Hopkins

The average concentration (HHI) level of hospitals in Washington, D.C. has increased by 30% since 2000. However, in 2026, all but one hospital is in a moderately concentrated market. One hospital is in a “highly concentrated” market with an HHI level of 2,278, which does not approach the level of a duopoly or monopoly.

HOSPITAL NAME	OWNER (2026)	GSAC BEDS	HHI 2026	CHANGE FROM 2000	NOTES
MedStar Georgetown University Hospital	MedStar Health 9-hospital system, 2 in DC	442	● 2,278	+555	Only DC hospital above the 1,800 “highly concentrated” line.
George Washington University Hospital	Universal Health Services 28-hospital system, 1 in DC	395	● 1,707	+498	
Howard University Hospital	Independent	282	● 1,672	+601	Largest HHI increase among active DC hospitals.
Sibley Memorial Hospital	Johns Hopkins Health System 5-hospital system, 1 in DC	297	● 1,635	+268	Transaction — Was independent. Joined Johns Hopkins in 2010.
MedStar Washington Hospital Center	MedStar Health 9-hospital system, 2 in DC	779	● 1,460	+297	District's largest hospital by beds; lowest-HHI (most rivals within 30 min).
United Medical Center (closed 2023)	Greater Southeast Healthcare	354	—	—	Closed in 2023. East-of-the-river public hospital; replaced by Cedar Hill Regional (opened 2025, not yet in national data).
Providence Hospital (closed 2019)	Ascension Healthcare	447	—	—	Closed in 2019.

Data from the Health Care Affordability Lab's Hospital Markets tool. HHI (Herfindahl-Hirschman Index) measures market concentration on a scale of 0–10,000. Hospital counts reflect general short-term acute care (GSAC) classification and may differ from state licensure totals. 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.

How Ownership has Shifted

Between 2000 and 2026, the proportion of Washington, D.C. hospitals owned by systems has increased from 71% to 80%. MedStar Health operates two D.C. hospitals: MedStar Washington Hospital Center and MedStar Georgetown University Hospital. In 2026, one of D.C.'s five hospitals is independently operated: Howard University Hospital. The remaining two hospitals are operated by health systems with other facilities outside the District: Sibley Memorial Hospital (acquired by Johns Hopkins Health System in 2010), George Washington University Hospital (Universal Health Services). Providence Hospital (Ascension) closed in 2019, and United Medical Center (Greater Southeast Healthcare) closed in 2023.

2000 | 7 hospitals overall

■ 5 in 4 systems □ 2 independents

71%

29%



2026 | 5 hospitals overall

■ 4 in 3 systems □ 1 independent

80%

20%