

Executive Summary

This study by the Health Regulatory Authority (ERS) analyses the evolution and structure of the non-public hospital sector in mainland Portugal, with a particular focus on its competitive dimension.

The private hospital sector has experienced significant growth over the past decade, accounting for 11% of current health expenditure in 2023 – an increase of approximately 1.05 billion EUR since 2015.

The financing of private hospitals relies mainly on direct household payments and health insurance schemes, which together represented around 33% of the current health expenditure in 2024.

Between September 2015 and September 2025, ERS issued 33 competition assessment opinions at the request of the Portuguese Competition Authority, 17 of which concerned private hospital operators.

The sector shows a high level of concentration, with 59% of the population living in municipalities classified as highly concentrated markets (Herfindahl-Hirschman Index – HHI > 2,000). Monopoly situations were identified in certain areas where only one operator provides non-public hospital services.

A comparative analysis with the 2024 results reveals an overall upward trend in market concentration, particularly in the NUTS II regions of Oeste e Vale do Tejo and Greater Lisbon.

The study concludes that, although no immediate negative competitive impacts are necessarily observed, the situation in some regions may affect the negotiation of public service agreements and reduce the diversity of options available to patients. Continuous monitoring of competition is therefore essential to ensure efficient markets, prevent restrictive practices, and promote accessibility and quality in the provision of healthcare services.