

Ambulance Services Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 130 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The ambulance services market is expected to register a CAGR of around 8.01% during the forecast period.

The COVID-19 outbreak had a significant impact on the ambulance services market owing to the high demand for ambulance services to provide emergency care services to COVID-19 patients during the epidemic. For instance, according to an article published in the BMJ Journal, due to extreme pressures and a significant number of staff absences, hospitals, and ambulance services in England led to declare critical incidents and issue warnings about 12-hour patient wait times in emergency rooms for around 10,000 patients in November 2021. The Queen Alexandra Hospital in Portsmouth and South Central Ambulance Service both declared critical incidents, and the hospital issued a warning that its emergency room and beds were both full of patients only critical patients needed to be admitted. The ambulance service noted increased challenges in releasing some of the ambulances from busy acute hospitals and a large volume of calls being received throughout the day and into the night. As a result, there was a higher demand for ambulance services during COVID-19, but the supply side's difficulties had a profound impact on the market under investigation. Owing to the high prevalence of chronic diseases and emergency cases patients globally, the market is expected to grow during the forecast period.

The ambulance services market is likely to show a sharp rise due to the new ambulance service providers globally, the increasing number of accidents, and the introduction of the latest ambulances.

An article published in British Paramedic Journal in December 2021 stated that people with diabetes frequently contact the ambulance service about acute problems. Also, as per IDF, the number of adults (20-79 years) with diabetes globally was 536.6 million in 2021 and it is predicted to reach 783.2 million by 2045. The prevalence of diabetes worldwide was 10.5% in 2021 and is projected to be 12.2% in 2045. The high burden of diabetes worldwide is projected to boost the market growth during the analysis

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

period.

Furthermore, road accidents are found to be the leading cause of death from injuries and are also the tenth leading cause of death worldwide as they now form a surprisingly significant fragment of the burden on the sick world. As per the Road Accidents in India report, number of traffic accidents in the country have increased to 4,22,659 in 2021, an increase of around 13% compared to the previous year. Also, as per EC, on average, 44 road deaths per million inhabitants in 2021, representing a 5% increase compared to 2020 was reported in European Union. The high burden of road accidents and increasing injury and trauma worldwide that require urgent medical attention is increasing the market share for ambulance services.

In response to the COVID-19 pandemic, several market players have devised a number of business strategies, such as strategic agreements, technological advances, launches, and partnerships, to survive in the market. For example, in May 2021, United States-based helicopter transport services provider Blade's Indian subsidiary launched air ambulance services amid an increase in demand. The growing popularity of air ambulance services is expected to improve this market in the coming years.

Therefore, owing to the aforementioned factors the studied market is anticipated to witness growth over the analysis period. However, the high cost of air ambulances and stringent regulations by the federal aviation administration (FAA) are likely to impede the market growth.

Ambulance Services Market Trends

The Air Ambulance Segment is Expected to Register a Significant Share Over The Forecast Period

Air ambulances are ambulance services that are vital for transportation in case of medical emergencies. Air ambulances are armed with medical equipment and medical staff that offer medical care in flight, while non-medically equipped and staffed aircraft assist in transporting patients and organs. These services provide various benefits, such as convenience, flexibility, and safety.

The increasing burden of chronic diseases like cardiac arrests and other emergencies is boosting segment growth. For instance, an article published in BMJ in August 2021 stated that the incidence of out-of-hospital cardiac arrest (OHCA) ranges from 28.3 per 100,000 in Asia to 54.6 per 100,000 population in North America. Since, air ambulance provides the fastest service, the high incidence of cardiac arrests is projected to boost the segment growth.

The rising demand for air ambulances creates the need to formulate policies for the smooth and safe deployment of such services globally. For instance, in September 2021, the Department of Health and Human Services (HHS), the Department of Labor (DOL), and the Department of the Treasury (Treasury), along with the Office of Personnel Management (OPM), released a notice of proposed rulemaking (NPRM), regarding air ambulance services. Such regulations are estimated to boost the segment's growth during the forecast period.

Furthermore, governments worldwide are engaged in launching air ambulance services, thereby boosting the segment's growth. For instance, In December 2021, the Chief Minister of Odisha (India) launched the air ambulance Service (Mukhyamantri Vayu Swasthya Seva) in Bhubaneswar in order to provide health services to residents of rural and underdeveloped areas of the State. Such strategic initiatives adopted by government is estimated to boost the demand for air ambulances, thereby propelling the segment's growth during forecast period.

North America is Expected to Hold a Significant Market Share Over The Forecast Period

North America holds a significant market share owing to the rising emergency cases in the region, the high prevalence of chronic

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

diseases, the presence of several key market players in this region, the growing demand for quality healthcare services, and the well-established healthcare infrastructure.

As per the IDF report, the number of adults (20-79 years) with diabetes was 32.2 million in 2021 and it is predicted to reach 36.3 million by 2045 in the United States. America is predicted to be in 4th position among the top 10 countries or territories with diabetes in 2021 and 2045. As per the same report, the number of adults with diabetes in Mexico was 14.1 million in 2021 and is predicted to reach 21.2 million by 2045. The high prevalence of diabetes in the region is estimated to create a high opportunity for ambulance services chronic diabetes patients many times face Hypoglycaemia which is a serious condition and require emergency ambulance services, thereby boosting the market growth in the region.

Additionally, as per NIH, the emergency care spending in the United States was USD 164 million in 2021, and is estimated to be USD 173 million in 2022 and USD 175 million in 2023. The emergency care services also include ambulances services. Hence, the high spending of the nation on emergency care is estimated to boost the market growth during the forecast period.

Moreover, the strategic initiatives like launches, technological advancements, partnerships by key market players in the region is projected to boost the market growth. For instance,

According to the AHA's facts on US Hospitals, 2022 report, the number of active hospitals in the United States increased to 6093 in 2022, a growth of 10% compared to the past few years. A growing number of hospitals providing proper air ambulance facilities, and improving medical facilities across various regions of the country is projected to boost the market growth during the forecast period.

Ambulance Services Market Competitor Analysis

The ambulance services market is fragmented in nature due to the presence of a few companies operating globally as well as regionally. The competitive landscape includes an analysis of a few international as well as local companies which hold market shares and are well known. Some market players are Envision Healthcare Corporation, Falck Holding AS, Acadian Ambulance Service Inc., Ziqitza Health Care Limited, and Medivic Aviation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Entrance of New Ambulance Service Providers Globally

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.2.2 Increasing Number of Accidents
- 4.2.3 Introduction of New Ambulances
- 4.3 Market Restraints
 - 4.3.1 High Cost of Air Ambulances
 - 4.3.2 Stringent Regulations by the Federal Aviation Administration (FAA)
- 4.4 Porter's Five Forces Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

- 5.1 By Mode of Transport
 - 5.1.1 Air Ambulance
 - 5.1.2 Water Ambulance
 - 5.1.3 Ground Ambulance
- 5.2 By Equipment
 - 5.2.1 Basic Life Support (BLS) Ambulance Services
 - 5.2.2 Advanced Life Support (ALS) Ambulance Services
- 5.3 By Type of Service
 - 5.3.1 Emergency Services
 - 5.3.2 Non-emergency Services
- 5.4 Geography
 - 5.4.1 North America
 - 5.4.1.1 United States
 - 5.4.1.2 Canada
 - 5.4.1.3 Mexico
 - 5.4.2 Europe
 - 5.4.2.1 Germany
 - 5.4.2.2 United Kingdom
 - 5.4.2.3 France
 - 5.4.2.4 Italy
 - 5.4.2.5 Spain
 - 5.4.2.6 Rest of Europe
 - 5.4.3 Asia-Pacific
 - 5.4.3.1 China
 - 5.4.3.2 Japan
 - 5.4.3.3 India
 - 5.4.3.4 Australia
 - 5.4.3.5 South Korea
 - 5.4.3.6 Rest of Asia-Pacific
 - 5.4.4 Middle-East
 - 5.4.4.1 GCC
 - 5.4.4.2 South Africa
 - 5.4.4.3 Rest of Middle-East
 - 5.4.5 South America

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.5.1 Brazil
- 5.4.5.2 Argentina
- 5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Envision Healthcare Corporation
 - 6.1.2 Scandinavian AirAmbulance
 - 6.1.3 Acadian Ambulance Service Inc.
 - 6.1.4 BVG India Ltd
 - 6.1.5 America Ambulance Services Inc.
 - 6.1.6 Falck Holding AS
 - 6.1.7 Air Methods Corporation
 - 6.1.8 Ziqitza Health Care Limited
 - 6.1.9 Medivic Aviation
 - 6.1.10 Dutch Health BV
 - 6.1.11 Livonta Global Pvt. Ltd

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

8 IMPACT OF COVID-19 ON THE MARKET

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Ambulance Services Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 130 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-25"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

