

Ambulance Services Market Assessment, By Mode of Transportation [Ground Ambulance, Air Ambulance, Water Ambulance], By Equipment [Basic Life Support Ambulance Services, Advanced Life Support Ambulance Services], By Type of Service [Emergency Services, Non-Emergency Services], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global ambulance services market is projected to witness a CAGR of 9.71% during the forecast period 2024-2031, growing from USD 48.72 billion in 2023 to USD 102.21 billion in 2031. The ambulance service industry is experiencing growth due to several reasons. One of them is the aging population, which is more susceptible to chronic diseases like obesity, diabetes, and heart disease. Another contributing factor is the shortage of primary care providers and clinics, which results in an increased reliance on emergency services. Furthermore, there is a rise in chronic diseases, traumatic accidents, and the geriatric population, which further increases the demand for ambulance services. In some cases, people with underlying chronic illnesses, recent bereavement, or following discharge from the hospital tend to make high use of the emergency ambulance service. Additionally, policies like the Affordable Care Act (ACA) have imposed financial penalties on hospitals for patient readmissions, which incentivizes hospitals to rely on ambulance services for non-urgent transportation and reduce readmissions, further enhancing growth in the market.

However, regulatory guidelines for vehicles, supplies, and services provided may pose challenges to expanding the market. Particularly in the United States market, the certificate of necessity is one such example of regulatory obligations. Increasing inter-facility travel between specialty healthcare facilities is another significant challenge for the market. Contractual limitation between service providers and healthcare facilities also limits the expansion for local players.

In November 2023, The Queen Creek Fire and Medical Department in the United States revealed their plans to expand their ambulance service, with a budget of USD 4.6 million. This will involve purchasing five new ambulances at a cost of USD 1.9

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million, as well as ongoing operating expenses of USD 2.7 million. Previously, Queen Creek had relied mainly on a private ambulance company, American Medical Response, which also serves other nearby communities.

Technological Advancements in Ambulances

Technological advancements in ambulances have significantly transformed the ambulance services market. These advancements include the use of RFID, 5G connectivity, high-resolution video calling, remote healthcare solutions, and integrated healthcare systems. The integration of these technologies has improved the efficacy, efficiency, and safety of ambulance services, leading to better patient care and outcomes. Additionally, remote healthcare solutions and integrated healthcare systems have enabled faster and more effective delivery of care. Furthermore, disinfection technologies, such as ultraviolet light disinfection systems, have become crucial for ensuring the cleanliness and safety of ambulance equipment. Overall, these technological advancements have played a vital role in the evolution of ambulance services, ultimately benefiting both the public and healthcare providers. In October 2023, 5G-connected ambulances were launched, which are developed under collaboration between Chunghwa Telecom and Ericsson 5G for St. Paul's Hospital, Canada. These ambulances are enabled by network slicing technology on 5G standalone architecture. Isolated network slices and radio resource partitioning guarantee seamless transmission of patients' real-time data and 4K videos from ambulances to hospitals. This collaboration is a significant step towards enhancing emergency medical care with 5G technology.

Growing Number of Trauma Cases

The growing number of trauma cases increases the demand for ambulance services due to the need for timely and specialized medical care for critically injured patients. Traumatic injuries are a leading cause of death, and the timely transport of patients to trauma hospitals is crucial for their survival. Research has shown that an increase in trauma cases leads to a higher demand for emergency ambulance services, impacting the quality of care, healthcare costs, and the number of admissions in emergency departments. In addition to physical trauma, mental health emergencies also contribute to the demand for ambulance services. The COVID-19 pandemic and related lockdowns have impacted the demand for ambulance services, with changes in the number and types of emergency cases being observed.

According to the Global Status Report on Road Safety 2023 published by WHO estimates that around 1.19 million road traffic deaths occurred in 2021 corresponding to a rate of 15 road traffic deaths per 100,000 population.

Dominance of Ground Ambulance Segment While Fast Growth for Air Ambulances

The ground ambulance segment has a dominant position in the ambulance services market. This is primarily because they are widely preferred during emergency services due to various factors such as heavy traffic, expanding metropolitan population, and increasing demand for pre-hospital emergency services on the ground. Ground ambulances are the most used type of ambulance, offering a range of services from basic to advanced life support. They play a crucial role in ensuring timely and efficient transportation of patients to medical facilities, especially in areas where air transportation is impractical, such as inside residential areas. While ground ambulances dominate the market, the growing incidence of accidents in remote places or inaccessible terrains is expected to bolster the adoption of air ambulance services.

For instance, in April 2023, RED.Health, a medical emergency response platform in Hyderabad, launched 'Red Air Guardian,' a new air ambulance service. The service is available in over 550 cities in India and includes a fleet of eight specialized aircraft. The ambulances are equipped with advanced medical technology and staffed by highly qualified critical care professionals.

Emergency Ambulance Services to Dominate the Market

The emergency ambulance services are expected to dominate the market due to factors such as the high incidence of traumatic accidents and the presence of a large population aged over 60 years, which is prone to various medical conditions. During the COVID-19 pandemic, the high number of cases of COVID-19 led to a significantly high demand for emergency ambulance services. Emergency ambulance services play an indispensable role in addressing urgent medical needs and ensuring swift responses during accidents, emergencies, and crises. Service providers are also expanding the scope of this segment by incorporating technology-driven solutions in ambulance vehicles. Government and stakeholders' attempt to address medical emergencies are also boosting the growth of this segment.

For instance, in March 2023, The East of England Ambulance Service NHS Trust started piloting Hybrid Connex, a new technology that provides strong connectivity for ambulance crews and vehicles in areas where cellular connectivity is not available. The EUR 5.7 million initiative is co-funded by the European Space Agency and the United Kingdom Space Agency to create the prototype

for an always-connected and cloud-based digital ambulance. Hybrid Connex combines software, hardware, and cellular and satellite services into one package. The initiative is led by UK emergency services connectivity specialists Excelerate Technology and includes NHS Arden and Greater East Midlands Commissioning Support Unit, Livewire, the Satellite Applications Catapult, and Vodafone.

North America to be the Dominating Region

North America is the leading market for ambulance services due to several factors. The region hosts major players in the industry such as Air Methods, Acadian Ambulance Service, and American Air Ambulance. Additionally, North America has a well-established healthcare infrastructure, favorable policies regarding reimbursement, and a growing demand for high-quality healthcare services. The presence of a large population, particularly the elderly who are prone to chronic diseases and accidents, has led to an increased demand for ambulance services in the region. North America's dominance in the ambulance services market is further supported by strong collaborations with healthcare systems, compelling integrated care models, and community reshaping of ambulance services in the United States.

Future Market Scenario (2024 – 2031F)

□ Electric ambulances are anticipated to become more popular over the coming years, as they are environmentally friendly, reduce emissions, operate quietly, and have lower costs. They improve pre-hospital medical care and response times, making them a sustainable and efficient option for healthcare providers and governments.

□ Integration of 5G technology in ambulances to enhance connectivity and improve patient monitoring during the transit from the site of incidence to the healthcare facility is driving the innovation in ambulance services.

□ Paradigm shift towards shell ambulance and mobile treatment options for better out-of-hospital healthcare is anticipated to change the landscape of ambulance services in the upcoming future.

For instance, in February 2023, Falck launched its first electric ambulance in Denmark, marking a significant milestone in the electric ambulance business. This launch is seen as Falck's attempt at a green transformation of patient transport as it aims for a 50% reduction of direct CO2 emissions before 2030, under its commitment to the Science Based Targets initiative in 2022.

Key Players Landscape and Outlook

The key players in the ambulance services market include both international and local companies. Some of the major players in the global ambulance services market are Falck Holding A/S, Acadian Ambulance Service, Inc., Ziqitza Health Care Limited, and Air Methods. Many companies are working on developing new products and expanding their business through collaborations, partnerships, mergers, and strategic alliances. The market value of these players is driven by the successful implementation of these strategies. Additionally, the dominance of local and privately owned organizations is still a challenge for organizing this industry.

In January 2024, Occupli acquired Elite Private Ambulance Service (Cork) Limited. Occupli is Ireland's leading provider of health and safety training, food safety, recruitment, consultancy, and environmental solutions. This acquisition is second in line of team expansion efforts made by Occupli.

In May 2023, Empress EMS has recently acquired Mobile Life Support Services (MLSS), which will unite two of the largest EMS ambulance service providers. The acquisition took place as a solution to the financial setbacks that Mobile Life Support Services faced following a settlement in 2022 with New York State Attorney General Tish James over illegal billing practices.

Table of Contents:

- 1. □ Research Methodology
- 2. □ Project Scope & Definitions
- 3. □ Executive Summary
- 4. □ Global Ambulance Services Market Outlook, 2017-2031F
 - 4.1. □ Market Size & Forecast
 - 4.1.1. □ By Value
 - 4.1.2. □ By Volume
 - 4.2. □ By Mode of Transportation
 - 4.2.1. □ Ground Ambulance

- 4.2.2.□Air Ambulance
- 4.2.3.□Water Ambulance
- 4.3.□By Equipment
- 4.3.1.□Basic Life Support Ambulance Services
- 4.3.2.□Advanced Life Support Ambulance Services
- 4.4.□By Type of Service
- 4.4.1.□Emergency Services
- 4.4.2.□Non-Emergency Services
- 4.5.□By Region
- 4.5.1.□North America
- 4.5.2.□Europe
- 4.5.3.□Asia-Pacific
- 4.5.4.□South America
- 4.5.5.□Middle East and Africa
- 4.6.□By Company Market Share (%), 2023
- 5.□Global Ambulance Services Market Outlook, By Region, 2017-2031F
- 5.1.□North America*
- 5.1.1.□Market Size & Forecast
- 5.1.1.1.□By Value
- 5.1.1.2.□By Volume
- 5.1.2.□By Mode of Transportation
- 5.1.2.1.□Ground Ambulance
- 5.1.2.2.□Air Ambulance
- 5.1.2.3.□Water Ambulance
- 5.1.3.□By Equipment
- 5.1.3.1.□Basic Life Support Ambulance Services
- 5.1.3.2.□Advanced Life Support Ambulance Services
- 5.1.4.□By Type of Service
- 5.1.4.1.□Emergency Services
- 5.1.4.2.□Non-Emergency Services
- 5.1.5.□United States*
- 5.1.5.1.□Market Size & Forecast
- 5.1.5.1.1.□By Value
- 5.1.5.1.2.□By Volume
- 5.1.5.2.□By Mode of Transportation
- 5.1.5.2.1.□Ground Ambulance
- 5.1.5.2.2.□Air Ambulance
- 5.1.5.2.3.□Water Ambulance
- 5.1.5.3.□By Equipment
- 5.1.5.3.1.□Basic Life Support Ambulance Services
- 5.1.5.3.2.□Advanced Life Support Ambulance Services
- 5.1.5.4.□By Type of Service
- 5.1.5.4.1.□Emergency Services
- 5.1.5.4.2.□Non-Emergency Services
- 5.1.6.□Canada
- 5.1.7.□Mexico

*All segments will be provided for all regions and countries covered

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- 5.2. Europe
 - 5.2.1. Germany
 - 5.2.2. France
 - 5.2.3. Italy
 - 5.2.4. United Kingdom
 - 5.2.5. Russia
 - 5.2.6. Netherlands
 - 5.2.7. Spain
 - 5.2.8. Turkey
 - 5.2.9. Poland
- 5.3. Asia-Pacific
 - 5.3.1. India
 - 5.3.2. China
 - 5.3.3. Japan
 - 5.3.4. Australia
 - 5.3.5. Vietnam
 - 5.3.6. South Korea
 - 5.3.7. Indonesia
 - 5.3.8. Philippines
- 5.4. South America
 - 5.4.1. Brazil
 - 5.4.2. Argentina
- 5.5. Middle East & Africa
 - 5.5.1. Saudi Arabia
 - 5.5.2. UAE
 - 5.5.3. South Africa
- 6. Market Mapping, 2023
 - 6.1. By Mode of Transportation
 - 6.2. By Equipment
 - 6.3. By Type of Services
 - 6.4. By Region
- 7. Macro Environment and Industry Structure
 - 7.1. Demand Supply Analysis
 - 7.2. Import Export Analysis
 - 7.3. Value Chain Analysis
 - 7.4. PESTEL Analysis
 - 7.4.1. Political Factors
 - 7.4.2. Economic System
 - 7.4.3. Social Implications
 - 7.4.4. Technological Advancements
 - 7.4.5. Environmental Impacts
 - 7.4.6. Legal Compliances and Regulatory Policies (Statutory Bodies Included)
 - 7.5. Porter's Five Forces Analysis
 - 7.5.1. Supplier Power
 - 7.5.2. Buyer Power
 - 7.5.3. Substitution Threat
 - 7.5.4. Threat from New Entrant

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- 7.5.5. Competitive Rivalry
 - 8. Market Dynamics
 - 8.1. Growth Drivers
 - 8.2. Growth Inhibitors (Challenges and Restraints)
 - 9. Regulatory Framework and Innovation
 - 9.1. Clinical Trials
 - 9.2. Patent Landscape
 - 9.3. Regulatory Approvals
 - 9.4. Innovations/Emerging Technologies
 - 10. Key Players Landscape
 - 10.1. Competition Matrix of Top Five Market Leaders
 - 10.2. Market Revenue Analysis of Top Five Market Leaders (in %, 2023)
 - 10.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
 - 10.4. SWOT Analysis (For Five Market Players)
 - 11. Pricing Analysis
 - 12. Case Studies
 - 13. Key Players Outlook
 - 13.1. Babcock International Group PLC
 - 13.1.1. Company Details
 - 13.1.2. Key Management Personnel
 - 13.1.3. Products & Services
 - 13.1.4. Financials (As reported)
 - 13.1.5. Key Market Focus & Geographical Presence
 - 13.1.6. Recent Developments
 - 13.2. Falck A/S
 - 13.3. London Ambulance Service NHS Trust
 - 13.4. Acadian Ambulance Service
 - 13.5. American Ambulance Service Inc.
 - 13.6. Medivic Pharmaceutical Pvt Ltd
 - 13.7. Global Medical Response
 - 13.8. Air Methods Corporation
 - 13.9. Ziqitza Healthcare Limited
 - 13.10. BVG
- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
- 14. Strategic Recommendations
 - 15. About Us & Disclaimer

Ambulance Services Market Assessment, By Mode of Transportation [Ground Ambulance, Air Ambulance, Water Ambulance], By Equipment [Basic Life Support Ambulance Services, Advanced Life Support Ambulance Services], By Type of Service [Emergency Services, Non-Emergency Services], By Region, Opportunities and Forecast, 2017-2031F

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