

India Ambulance Services Market By Transport Vehicle (Ground and Air), By Services (Emergency and Non-Emergency), By Service Operators (Hospital Based Service, Private Ambulance Service, Government Ambulance Service, Others (Third Party Ambulance, Others), By Equipment Type (Advanced Life Support and Basic Life Support), By Region, Competition, Forecast & Opportunities, 2020-2030F

Market Report | 2024-06-28 | 80 pages | TechSci Research

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Report description:

India Ambulance Services Market was valued at USD 1672.74 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.75% through 2030. The India Ambulance Services Market is primarily driven by factors such as increasing healthcare awareness, rising demand for emergency medical services, and improving healthcare infrastructure. With the growing prevalence of accidents, medical emergencies, and chronic diseases, there is a heightened need for timely and efficient ambulance services to transport patients to healthcare facilities swiftly. Government initiatives aimed at strengthening emergency medical services, training paramedics, and enhancing ambulance fleet infrastructure contribute to market growth. Advancements in technology, such as GPS tracking systems, telemedicine integration, and ambulance dispatch optimization, enhance service efficiency and patient care. The emergence of private ambulance operators, partnerships with healthcare providers, and investments in mobile healthcare solutions further propel market expansion, ensuring broader accessibility and improved healthcare outcomes for individuals across India.

Key Market Drivers

Rising Prevalence of Chronic Diseases

The prevalence in number of chronic diseases like cardiovascular diseases, surgeries, trauma, and injuries etc. require urgent emergency services for the care and treatment of patient. In India, non-communicable diseases accounts for 53% of all deaths and 44 % of disability-adjusted life-years, lost. India is considered a home to more than a sixth of the world's population and has been witnessing rapid epidemiological transition i.e, a shift towards chronic non-communicable diseases along with

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socio-economic development. According to Department of Biotechnology, Government of India, India has the highest number of people with Diabetes in the world at around 77 million, which is a data expected to have a projection of 134 million by 2045, as per International Diabetes Federation. India experiences premature death as a result of cardiovascular disease, which causes one-fourth of all fatalities. The increasing prevalence of diseases and accidents have significantly increased the number of people requiring immediate treatment and transportation to hospitals, thereby supporting the market growth for ambulances in India.

Increase in the Number of Road Accidents

Generally, the increase in number of road accidents leads to many injuries and deaths. For instance, according to the Times of India, two wheelers accounted for maximum fatal road accidents (69,240 deaths), contributing 44.5% of total road accidental deaths, followed by cars and trucks/lorries in 2021. The rise in the adoption of commercial and personal vehicles has led to an increase in the number of road accidents incidence in the country, resulting in creating the requirement for emergency hospital admissions for urgent medical care and assistance. According to the data from the National Crime Records Bureau (NCRB), a total of 4,03,116 road accident cases were reported in 2021, which is an increase from 3,54,796, in 2020. This, in turn, is anticipated to positively influence the market growth in the coming years.

Increase Technological Advancement

Rapid advancements in research and development (R&D) activities are propelling the growth of the market. The new technology-based programmes are developed that provides specific medical services and care in emergency. Major companies are developing advanced technologies and launching new services to stay competitive in the market. For instance, in 2021, JCBL developed with reliability and advantages, which is fully equipped with all the facilities that a basic mobile medical unit may need, including a PA system, oxygen cylinders, emergency stretchers, and an operating table, complete with all necessary medical supplies.

In 2020, Ziqitza Healthcare Ltd (ZHL), Asia's largest emergency medical service provider company and one of the fastest-growing holistic healthcare solution platforms in India, introduced Ambulance Subscription services for corporates and large business units under the Corporate Wellness product extension, recently in India. In September 2020, Karnataka, India, launched the country's first integrated air ambulance service, a collaboration between the International Critical Air Transfer Team (ICATT) and the Kyathi.

Rising Development in Hospital Facilities & Infrastructure

The improving healthcare infrastructure across India will increase the number of hospital establishments across the country, which in turn will increase the demand for ambulance services. Every hospital has either their own ambulance or ambulance services in collaboration with any service provider. The Indian government is continuously investing in upgrading the existing hospitals' infrastructure and establishing new hospitals in the country. For instance, in 2019, the NITI Aayog announced that India will have 2,500 new hospitals in the next five years. Similarly, on March 26th, 2022, the Delhi government announced that it would be upgrading 15 hospitals and building 4 new hospital facilities in Delhi. Also, in August 2022, the Delhi State Health Department announced that Delhi will soon have 11 new hospitals adding more than 10,000 beds to the health infrastructure of the city. Hence, these factors show the growth of the market at an impressive rate in the coming years.

Rise in Medical Tourism in India

India is one of the potential countries for medical tourism, on account of affordable treatment costs, availability of skilled healthcare professionals, lesser wait times, etc. The increasing medical tourism has further created significant demands for air ambulance services also. According to the Minister of State for Civil Aviation, India has only 49 air ambulance operated by 19 operators. Out of these 49, Delhi has 39 air ambulances, followed by Maharashtra with 5. However, this number is set to increase in the coming years due to growth in medical tourism, thereby creating new prospects for the market growth. The increase in medical tourism has also led to the emergence of various new players in the market offering ambulance services and has also made the existing ones improve their services and cost offerings. This, in turn, is expected to create lucrative opportunities for the growth of ambulance services market in the coming years, within India.

Key Market Challenges

Quality of Services and Training Shortages

The quality of ambulance services and shortages of trained personnel pose significant challenges to the India Ambulance Services Market. While the availability of ambulances has increased in recent years, disparities in service quality, equipment standards, and paramedic training persist across different regions and service providers. Ambulances may lack essential medical equipment,

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diagnostic tools, and life-saving medications, compromising the delivery of timely and effective pre-hospital care. Shortages of qualified paramedics, emergency medical technicians (EMTs), and medical responders limit the availability of skilled personnel capable of providing advanced life support (ALS) interventions and critical care en route to healthcare facilities. Addressing these challenges requires investments in paramedic training programs, standardized protocols, and accreditation systems to ensure uniformity, quality assurance, and competency in ambulance services nationwide.

Regulatory and Legal Frameworks

Regulatory and legal challenges pose obstacles to the India Ambulance Services Market, impacting service standards, operational efficiency, and liability issues. Ambulance services are subject to a complex regulatory landscape encompassing various central and state-level regulations, guidelines, and licensing requirements, leading to inconsistencies, bureaucratic hurdles, and compliance challenges for operators. Ambulance operators must navigate licensing procedures, vehicle registration requirements, equipment standards, and emergency response protocols, often facing delays and regulatory ambiguities. Legal liabilities, insurance coverage, and medico-legal issues surrounding ambulance operations, patient care, and transport further complicate service delivery and risk management. Streamlining regulatory processes, harmonizing standards, and establishing clear guidelines for ambulance operations, training, and accountability are essential to address regulatory challenges and improve the efficiency and effectiveness of ambulance services in India.

Key Market Trends

Rising Disposable Income and Healthcare Expenditure

The increasing disposable income and healthcare expenditure of the Indian population drive demand for premium ambulance services and value-added medical transportation solutions. As disposable incomes rise and living standards improve, individuals and families are willing to invest in quality healthcare services, including ambulance transportation, for themselves and their loved ones. The growing prevalence of health insurance coverage and employer-sponsored healthcare benefits incentivizes individuals to opt for private ambulance services with enhanced amenities, such as advanced life support (ALS) capabilities, specialized medical personnel, and luxury ambulance fleets. This trend towards premiumization and customization of ambulance services creates opportunities for market players to differentiate their offerings and cater to diverse consumer preferences and needs.

Urbanization and Traffic Congestion

Urbanization and traffic congestion in major metropolitan areas drive the demand for ambulance services by exacerbating transportation challenges and increasing the incidence of accidents and medical emergencies. As cities expand and populations concentrate in urban centers, traffic congestion worsens, leading to delays in emergency response times and access to healthcare facilities. Ambulances equipped with navigation systems, traffic management tools, and alternate route planning capabilities help mitigate the impact of traffic congestion and ensure timely arrival at the scene of emergencies. The deployment of motorcycle ambulances, bicycle ambulances, and rapid response units in densely populated urban areas improves accessibility and maneuverability, enabling paramedics to reach patients in congested or hard-to-reach locations more efficiently.

Segmental Insights

Transport Vehicle Insights

Based on the Transport Vehicle, in the India Ambulance Services Market, ground ambulance services dominate over air ambulance services due to several factors. Ground ambulances are more accessible and cost-effective compared to air ambulances, making them the preferred choice for medical transportation in most scenarios. Ground ambulances are equipped to navigate diverse terrain, including urban, suburban, and rural areas, providing timely response and transportation to patients in need. They offer versatility in terms of vehicle types, such as basic life support (BLS) ambulances for non-critical patients and advanced life support (ALS) ambulances equipped with advanced medical equipment and trained personnel for critical care. Ground ambulances are better suited for short-distance transfers, inter-facility transports, and community-based emergency response, catering to a wide range of medical emergencies and patient needs. While air ambulances offer rapid transportation over long distances and remote areas, their limited availability, high operational costs, and regulatory constraints restrict their widespread adoption in the Indian context. Ground ambulances play a crucial role in facilitating door-to-door transportation, patient triage, and on-scene medical interventions, ensuring comprehensive pre-hospital care and seamless integration with the broader healthcare system. Despite the advantages of air ambulances in certain scenarios, such as mass casualty incidents, natural disasters, and organ transplants, ground ambulances remain the backbone of the India Ambulance Services Market,

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providing essential medical transportation services to millions of patients across the country.

Services Insights

Based on Services, In the India Ambulance Services Market, emergency ambulance services dominate over non-emergency ambulance services due to the critical role they play in addressing life-threatening medical situations and providing urgent medical care to patients in need. Emergency ambulance services are equipped to respond promptly to medical emergencies, such as accidents, trauma cases, heart attacks, strokes, and other acute illnesses, where timely intervention is crucial for patient survival and recovery. These ambulances are staffed with trained paramedics, equipped with advanced life support (ALS) equipment and medications, and operate on a 24/7 basis to ensure rapid response and transportation to healthcare facilities. Emergency ambulance services prioritize patient triage, stabilization, and on-scene medical interventions, facilitating seamless coordination with hospitals and emergency departments for timely definitive care. While non-emergency ambulance services cater to patients requiring scheduled medical transportation, such as hospital transfers, routine medical appointments, and non-urgent transfers between healthcare facilities, they constitute a smaller segment of the market. The dominance of emergency ambulance services reflects the critical need for timely emergency response and pre-hospital care in addressing life-threatening emergencies and ensuring optimal patient outcomes in the India Ambulance Services Market.

Regional Insights

The Western region of India emerges as a dominant region in the India Ambulance Services Market, comprising states such as Maharashtra, Gujarat, Rajasthan, and Goa. Several factors contribute to the Western region's prominence in the Ambulance Services Market. Maharashtra, with its bustling metropolis of Mumbai, serves as a hub for healthcare services, emergency response, and medical infrastructure. Mumbai, known as the financial capital of India, boasts a comprehensive network of ambulance services, including both public and private providers, catering to the city's dense population and high demand for emergency medical care. The presence of premier medical institutions, such as Tata Memorial Hospital, Lilavati Hospital, and Bombay Hospital, underscores the critical need for reliable ambulance services to facilitate timely access to specialized treatments and trauma care.

Gujarat, with its industrial cities like Ahmedabad and Vadodara, is a major contributor to the Ambulance Services Market in the Western region. Ahmedabad, in particular, is home to a robust healthcare ecosystem, comprising hospitals, medical colleges, and emergency medical services (EMS) providers. The city's strategic location, well-developed infrastructure, and proactive approach to emergency preparedness make it a key player in ambulance services, catering to urban and rural populations across Gujarat and neighboring states.

Key Market Players

- Ziqitza Health Care Limited
- Stanplus Technologies Private Limited
- Medulance Healthcare Private Limited
- Air Rescuers Worldwide Private Limited
- Panchmukhi Air & Train Ambulance Services Pvt. Ltd.
- EMSOS Medical Pvt. Ltd.
- AmbiPalm Health Private Limited
- BVG India Limited
- Falcon Emergency
- EMRI Green Health Services

Report Scope:

In this report, the India Ambulance Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□ India Ambulance Services Market, By Transport Vehicle:

- o Ground
- o Air

□□ India Ambulance Services Market, By Services:

- o Emergency

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- o Non-Emergency
- ☐ India Ambulance Services Market, By Service Operators:
 - o Hospital Based Service
 - o Private Ambulance Service
 - o Government Ambulance Service
 - o Others
- ☐ India Ambulance Services Market, By Equipment Type:
 - o Advanced Life Support
 - o Basic Life Support
- ☐ India Ambulance Services Market, By Region:
 - o North
 - o South
 - o West
 - o East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Ambulance Services Market.

Available Customizations:

India Ambulance Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- ☐ Detailed analysis and profiling of additional market players (up to five).

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