

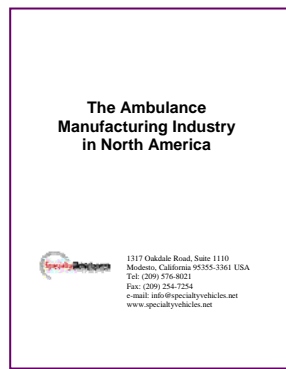
# The Ambulance Manufacturing Industry in North America

*Size, segmentation, trends, growth, channels, competitive shares and industry structure underlying the manufacture of ambulances in North America*

**Comprehensive information developed through rigorous analysis on a complex industry involving Type I, Type II and Type III ambulances**

## Analysis

- Production estimates in units and dollars
- Competitive review
- Key trends & developments
- Demand drivers
- Key external environmental and regulatory influences
- Export data
- Outlook and forecast



**The only independently-researched report of its kind that evaluates the business of ambulance manufacturing in North America by reference to each type of ambulance:**

- **Type I Ambulances**
- **Type II Ambulances**
- **Type III Ambulances**

## Strategic Profiles of Manufacturers

- Competitive industry picture on identified manufacturers in the United States and Canada, with:
  - Market shares
  - Key proprietary and technical advantages
  - Description of operations
  - ISO and other qualifications
  - Channels
  - Facilities and employees
  - Company description/niches
  - Strategies/strengths/weaknesses

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# The Ambulance Manufacturing Industry in North America

## ABOUT THIS REPORT

The upfit manufacture of ambulances in North America is a challenging and differentiated endeavor, due to the need to incorporate numerous medical and complex life support components. These components must be fitted into a limited space on a light- or medium-duty van truck/body, and in turn meet all necessary safety requirements.

The majority of ambulance manufacturers offer a wide product range covering multiple configurations. In all, around twenty-four players have been identified in this report, with a total sales output for body and fabrication of around \$360 million.

With high regulatory barriers to entry, there are unlikely to be new entrants into this market. A handful of national companies compete with smaller regional fabricators that focus on their own geographic areas. Consolidations are likely as competitive factors and capacity force manufacturers to seek economies of scale.

Going forward, the primary market driver will be the need to make vehicles more fuel efficient, even while incorporating additional medical equipment that adds weight and decreases mileage. The punishment of daily use and relatively rough handling, due to the rigors of the aggressive driving style required, metes out punishment to the vehicles so that their average life span is about seven to ten years, on average.

These and other issues analyzed in this report provide a perspective on the business for this specialized vocational truck/body segment.

The study breaks out production estimates in units and dollars for each manufacturer, to arrive at the total production in North America. Information is presented to highlight vehicle and building trends, and manufacturer profiles further shed light on the overall structure and dynamics of this niche segment of the vehicle body-building industry.

SpecialtyVehicles.net (SVN) is a market research company focusing on vocational and specialized trucks. It is often not understood that after the production of a truck from the handful of well-known vehicle manufacturers, there is a huge downstream industry that readies the vehicle for specific customer applications, by fabricating a dedicated body and installing the components for final delivery to the customer. Our reports fill a crucial information gap between OE chassis and body/upfit areas.

This is the only report of its kind on this subject, prepared by a publishing/ consulting firm whose principals have 25+ years of industry knowledge and experience. SVN's studies have been put to use throughout the industry for market and sales planning, competitive analysis, bank debt/equity submissions, strategic acquisitions targeting, and private equity M & A.

## METHODOLOGY

- Perusal of all relevant trade publications.
- Financial information searches from national and local sources, including several specialized directories.
- Extensive utilization of Internet research tools.
- Analysis of product literature and technical data from individual manufacturers and from general industry sources.
- Interactive contact(s) with industry participants.

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*SVN has developed unique expertise and skills in developing information on these industries and markets that require a pioneering effort in research and analysis. Our reports are used throughout the vehicular industries for sales and market planning, strategy development, acquisitions, investment presentations, financing submissions and numerous other uses.*

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American Emergency Vehicles	Malley Industries, Inc.
Braun Northwest, Inc.	Marque, Inc.
Crestline Coach Ltd.	McCoy Miller, LLC
CRS Emergency Vehicles	Medix Specialty Vehicles, Inc.
Demers Ambulances	Medtec Ambulance Corporation
Excellance, Inc.	Miller Coach Company, Inc.
Foster Rescue Products	Osage Industries, Inc.
Frazer, Inc.	PL Custom Emergency Vehicles
Horton Emergency Vehicles, Inc.	Road Rescue, Inc.
Leader Industries	Taylor Made Ambulances
Les Plastiques Flexibulb Inc.	Tri-Star Industries Ltd.
Lifeline Emergency Vehicles	Wheeled Coach Industries

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## HOW THIS REPORT IS ORGANIZED

### The Ambulance Manufacturing Industry in North America

*Size, segmentation, trends, growth, channels, competitive shares and industry structure underlying the manufacture of ambulances in North America*

**A. SCOPE & METHODOLOGY** defines the coverage of the report and outlines the **methodology, assumptions** and **sources** used in compiling the research.

**B. PRODUCT OVERVIEW** describes the various types of ambulances, with details such as **pricing, weight** and **size** parameters.

**C. MARKET ANALYSIS** provides **estimated production** and **competitive shares** in units and dollars for the entire North American ambulance market. This section addresses the **regional nature** of these products, with locations, production numbers and values for each region. Data is provided on **chassis usage** by manufacturer.

**D. ESTIMATED PRODUCTION & COMPETITIVE SHARES BY PRODUCT TYPE** provides individual analysis of each of the three product categories, in terms of **unit volumes, estimated sales values,** and **identification of top producers.**

**E. COMPETITIVE REVIEW** briefly describes the **challenges** facing **major manufacturers** in this market segment.

**F. MARKET SCENARIO** describes relevant aspects of the marketplace for each type of unit, including **recent developments and trends, key demand drivers, applications, customers,** and **distribution channels.**

**G. OUTLOOK & FORECAST** offers **SVN's predictions** for the immediate future of the ambulance industry, with projected North American unit production through 2011.

**H. INDUSTRY STRUCTURE & MANUFACTURER DATA** is a **tabulation** that correlates **employment, plant size** and **sales** at each company, to arrive at a bird's eye view of the underlying industry structure. **Web addresses of manufacturers** are provided as a convenience to users wishing to access additional information on each company.

**I. COMPANY PROFILES**, based on a mix of interviews and/or other information, seek to describe company operations in a way that adds immeasurably to the overall understanding of this industry. All identified players in the United States and Canada are featured as a profile, with the larger, more important companies carrying a higher degree of detail.

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