

Emergency And Disaster Response - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Emergency And Disaster Response Market size is estimated at USD 166.73 billion in 2024, and is expected to reach USD 229.30 billion by 2029, growing at a CAGR of 6.58% during the forecast period (2024-2029).

The emergency and disaster response market plays a key role in mitigating and managing unforeseen incidents. Primary drivers in this market are technological advancements and the increasing frequency of natural disasters. The integration of innovative technologies, such as AI and IoT, enhances response capabilities, while the rising incidence of natural disasters globally fuels the demand for effective response solutions. The evolving global threat landscape, including pandemics, cyberattacks, and terrorism, propels the need for adaptable and comprehensive emergency response solutions.

In an ever-changing world marked by the constant threat of natural calamities, technological accidents, and pandemics, the ability to respond swiftly and effectively to emergencies and disasters has become a paramount concern for governments and organizations. The focus on preparedness and resilience has intensified, driving investment in research and development of innovative solutions to tackle future emergencies effectively.

However, the market faces challenges, including budget constraints for public agencies and governments. Limited financial resources may hinder the adoption of advanced response technologies. Regulatory challenges and interoperability issues among different response systems pose obstacles, slowing down the seamless coordination required during emergencies.

Increasing incidents of natural and anthropogenic hazards globally have led to a rise in the procurement of necessary equipment and response vehicles by the concerned government agencies. As emergencies become more complex and diverse, traditional approaches may prove insufficient, necessitating continuous adaptation and innovation. This uncertainty can make it difficult for stakeholders to anticipate and prepare for all potential scenarios, further damaging the market's ability to respond effectively.

Emergency and Disaster Response Market Trends

Land Segment to Register the Highest CAGR during the Forecast Period

Increasing procurement of land vehicles by various public and private organizations is acting as the main driver for the market.

Land vehicles can be locally stationed and easily and promptly deployed for emergency damage alleviation. To increase the availability of land-based emergency response vehicles, local disaster management and emergency response teams keep these vehicles at their disposal. Thus, their procurement volumes are higher than that of aerial vehicles, whose overall fleet is smaller, as they are stationed only in bigger cities with the necessary infrastructure to maintain the aircraft.

However, with the growing number of large-scale disasters, the deployment of aerial vehicles for purposes like firefighting and disaster relief logistics is increasing. For instance, in May 2022, American Medical Response was awarded a new USD 1.2 billion five-year contract to provide medical transport and support in response to national disasters and emergencies. AMR is the biggest provider of ground medical transportation in the United States and FEMA's prime EMS provider.

North America to Dominate Market Share during the Forecast Period

North America dominates the market share due to high spending from the government, in addition to the continual procurement of related equipment and vehicles by various public and private disaster rescue teams.

Severe hurricanes and floods have hit the United States in the recent past, and the country, along with Canada, has seen several forest fires in the past five years. In

response to all these occurrences, the procurement of disaster response equipment and vehicles has increased in the region. These factors are expected to drive the market in the region during the forecast period.

For instance, in January 2023, ICF was awarded a three-year USD 51 million contract by the Puerto Rico Department of Housing (PRDOH) to support the commonwealth's single-family disaster recovery and mitigation programs. Under the terms of the contract, the ICF will expand its implementation support of PRDOH's Community Development Block Grant for Disaster Recovery (CDBG-DR) and Community Development Block Grant for Mitigation (CDBG-MIT) grant programs to repair and rebuild homes damaged by hurricanes Irma and Maria, as well as build resilience against future natural disasters.

Emergency and Disaster Response Industry Overview

The market is fragmented, with various players supplying their products to various applications that fall under the overall emergency and disaster response market. Rosenbauer International AG, Darley, Textron Inc., 3M, and Leonardo SpA are some of the major players in the market. The presence of many local players with varying product portfolios in each country also enhances market fragmentation.

The competition for the players is restricted to the product portfolios they offer, and there are no cross-industry competitors for the players. In such cases, players compete with a relatively lower direct-competitor pool than facing a larger set of multi-industry players having different product offerings.

Established players in the market gain the flexibility to expand their product reach by entering other related industries either by partnerships or acquisitions. For instance, Rosenbauer is very successful in Germany with its ET series these days. Currently, the group firefighting vehicles for disaster relief (LF 20 KatS) are being delivered, which the Federal Ministry of the Interior ordered at the end of 2021 on behalf of the Federal Office of Civil Protection and Disaster Assistance.

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