

Ambulatory Services Market Forecasts to 2034 – Global Analysis By Service Type (Primary Care Services, Specialty Care Services, Diagnostic Services, Surgical Services, Therapeutic & Rehabilitation Services, and Preventive & Wellness Services), Facility Type, Clinical Specialty, Ownership, Delivery Mode, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Ambulatory Services Market is accounted for \$4781.6 billion in 2026 and is expected to reach \$8033.2 billion by 2034 growing at a CAGR of 6.7% during the forecast period. Ambulatory services refer to medical care provided on an outpatient basis, including diagnosis, consultation, treatment, and surgery without requiring overnight hospital admission. These services encompass a wide range of facilities such as ambulatory surgical centers, urgent care clinics, and diagnostic imaging centers. The market is expanding rapidly as healthcare systems worldwide shift focus toward cost-effective, convenient, and patient-centered care models that reduce hospital burdens while improving accessibility and outcomes for non-emergency medical needs.

Market Dynamics:

Driver:

Rising healthcare costs and pressure to reduce hospital admissions

Escalating medical expenses are forcing healthcare payers and providers to seek lower-cost alternatives to traditional inpatient care, making ambulatory services increasingly attractive. Ambulatory surgical centers typically charge 45-60% less than hospital outpatient departments for identical procedures, generating substantial savings for insurers and patients. Government programs like Medicare in the US actively promote outpatient care through reimbursement policies favoring ambulatory settings. This cost

differential, combined with clinical evidence showing comparable or better outcomes for many procedures performed in ambulatory facilities, continues to drive rapid market expansion across all developed healthcare systems.

Restraint:

Reimbursement limitations and regulatory barriers

Variations in insurance coverage and regulatory restrictions across regions constrain the full potential of ambulatory services market growth. Many private insurers still maintain restrictive lists of procedures approved for ambulatory settings, while government reimbursement rates sometimes fail to cover the actual costs of care delivery. Licensing requirements for ambulatory surgical centers vary substantially between jurisdictions, creating compliance burdens for multi-facility operators. Additionally, some medical procedures with same-day discharge potential remain categorized as inpatient-only in certain healthcare systems, limiting clinical scope and forcing medically unnecessary overnight stays that increase system costs.

Opportunity:

Technological advancements in minimally invasive surgery

Innovations in surgical techniques and medical devices are enabling increasingly complex procedures to migrate from hospital operating rooms to ambulatory settings. Robot-assisted surgery, advanced laparoscopy, and improved anesthetic protocols allow procedures once requiring multiple hospital days to be performed safely with same-day discharge. Portable diagnostic equipment and telemedicine integration further expand the range of services deliverable in ambulatory clinics. These technological developments create substantial growth opportunities as previously restricted procedure categories become eligible for outpatient treatment, allowing ambulatory providers to capture higher-acuity cases and generate additional revenue streams.

Threat:

Potential for complication management limitations

The absence of overnight observation and intensive care capabilities in many ambulatory facilities raises concerns about managing unexpected post-procedural complications. While serious adverse events are rare, conditions such as bleeding, respiratory depression, or adverse drug reactions may require urgent hospital transfer, creating patient safety risks. Medical malpractice liability concerns may discourage some physicians from performing higher-risk procedures in ambulatory settings. Additionally, negative media coverage of complications occurring in outpatient facilities could undermine patient confidence and prompt regulatory overreach, potentially reversing years of progress toward appropriate procedure migration from hospital settings.

Covid-19 Impact:

The COVID-19 pandemic caused severe disruption followed by accelerated

transformation of ambulatory services globally. During initial outbreak phases, elective procedures were suspended in both hospital and ambulatory settings to preserve resources and reduce infection risk. However, as the pandemic progressed, ambulatory facilities demonstrated superior infection control capabilities due to lower patient volumes and dedicated ventilation systems, attracting both patients and providers. The backlog of delayed surgeries created unprecedented demand for high-volume outpatient capacity. Telehealth adoption during lockdowns permanently expanded the ambulatory care model, with virtual consultations now serving as entry points for many procedural services.

The Ambulatory Surgical Centers (ASCs) segment is expected to be the largest during the forecast period

The Ambulatory Surgical Centers (ASCs) segment is expected to account for the largest market share during the forecast period, driven by their specialized infrastructure, cost efficiency, and procedure volume capabilities. These facilities are specifically designed for same-day surgical procedures, offering dedicated operating rooms, recovery areas, and specialized staffing that optimize throughput. ASCs perform millions of surgeries annually across ophthalmology, gastroenterology, orthopedics, and pain management, with higher patient satisfaction scores compared to hospital settings. Physician ownership models align incentives toward efficiency and quality, while lower overhead costs and avoidance of overnight stays make ASCs the preferred site for payers driving patient volumes toward ambulatory settings.

The Ophthalmology segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Ophthalmology segment is predicted to witness the highest growth rate, reflecting the ideal match between ophthalmic procedures and ambulatory delivery models. Cataract surgery, refractive procedures like LASIK, and intravitreal injections for retinal conditions are performed almost exclusively in ambulatory settings due to their brief duration, minimal anesthesia requirements, and rapid recovery profiles. Aging populations worldwide are driving exponential growth in age-related cataract and macular degeneration cases requiring surgical intervention. Continuous technological advances including femtosecond laser-assisted cataract surgery and premium intraocular lenses increase procedure volumes while attracting patients willing to pay out-of-pocket for enhanced outcomes, further accelerating segment expansion.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by the most mature ambulatory services infrastructure and favorable reimbursement policies. The United States leads in ambulatory surgical center proliferation, with thousands of Medicare-certified facilities performing millions of

procedures annually across all major specialties. Strong private insurance markets actively direct patients toward lower-cost ambulatory settings through tiered networks and financial incentives. Regulatory streamlining through the Centers for Medicare & Medicaid Services has expanded approved procedure lists, while physician ownership remains legally protected. These structural advantages, combined with high healthcare spending per capita, secure North America's dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapidly expanding middle-class populations, increasing chronic disease burdens, and healthcare system modernization. Countries including China, India, and Southeast Asian nations are witnessing unprecedented demand for accessible, affordable surgical care as urbanization accelerates. Government initiatives promoting healthcare infrastructure development include specific targets for ambulatory facility expansion to reduce pressure on overburdened public hospitals. Medical tourism further stimulates growth of high-quality ambulatory surgical centers in Thailand, Malaysia, and Singapore. As Western healthcare models demonstrating cost efficiency gain influence across the region, Asia Pacific emerges as the fastest-growing market for ambulatory services.

Key players in the market

Some of the key players in Ambulatory Services Market include HCA Healthcare Inc., Tenet Healthcare Corporation, Surgery Partners Inc., Envision Healthcare Corporation, Community Health Systems Inc., Universal Health Services Inc., AmSurg Corporation, SCA Health, MEDNAX Inc., UnitedHealth Group Incorporated, Fresenius Medical Care AG, DaVita Inc., Ramsay Health Care Limited, Spire Healthcare Group plc, and Nuffield Health.

Key Developments:

In January 2026, Surgery Partners announced a milestone reaching over 180 managed surgical facilities, noting that its musculoskeletal (MSK) and cardiology volumes increased by double digits in 2025.

In December 2025, Envision announced multi-year in-network agreements with Arizona Blue, ensuring stable patient access to its physician services and ambulatory sites in the Southwest.

In October 2025, Tenet completed the sale of its majority interest in Brookwood Baptist Health in Birmingham, AL, to Orlando Health for approximately \$910 million, further pivoting the company's portfolio away from traditional inpatient acute care toward ambulatory services.

Service Types Covered:

Primary Care Services

Specialty Care Services

Diagnostic Services

Surgical Services

Therapeutic & Rehabilitation Services

Preventive & Wellness Services

Facility Types Covered:

Ambulatory Surgical Centers (ASCs)

Urgent Care Centers

Outpatient Departments (Hospital-based)

Standalone Clinics

Diagnostic & Imaging Centers

Clinical Specialties Covered:

Orthopedics

Ophthalmology

Gastroenterology

Cardiology

Pain Management

Plastic & Cosmetic Surgery

General Surgery

Other Clinical Specialties

Ownership Models Covered:

Hospital-owned Centers

Physician-owned Centers

Chain-based Centers

Independent Centers

Delivery Modes Covered:

In-person Care

Telehealth

Hybrid Care

End Users Covered:

Hospitals

Physician Groups

Independent Clinics

Corporate Healthcare Providers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

Ambulatory Services Market Forecasts to 2034 – Global Analysis By Service Type (Primary Care Services, Special...

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL AMBULATORY SERVICES MARKET, BY SERVICE TYPE

- 5.1 Primary Care Services
- 5.2 Specialty Care Services
- 5.3 Diagnostic Services
- 5.4 Surgical Services
- 5.5 Therapeutic & Rehabilitation Services
- 5.6 Preventive & Wellness Services

6 GLOBAL AMBULATORY SERVICES MARKET, BY FACILITY TYPE

- 6.1 Ambulatory Surgical Centers (ASCs)
- 6.2 Urgent Care Centers
- 6.3 Outpatient Departments (Hospital-based)
- 6.4 Standalone Clinics
- 6.5 Diagnostic & Imaging Centers

7 GLOBAL AMBULATORY SERVICES MARKET, BY CLINICAL SPECIALTY

- 7.1 Orthopedics
- 7.2 Ophthalmology
- 7.3 Gastroenterology
- 7.4 Cardiology
- 7.5 Pain Management
- 7.6 Plastic & Cosmetic Surgery
- 7.7 General Surgery
- 7.8 Other Clinical Specialties

8 GLOBAL AMBULATORY SERVICES MARKET, BY OWNERSHIP MODEL

- 8.1 Hospital-owned Centers
- 8.2 Physician-owned Centers
- 8.3 Chain-based Centers
- 8.4 Independent Centers

9 GLOBAL AMBULATORY SERVICES MARKET, BY DELIVERY MODE

- 9.1 In-person Care
- 9.2 Telehealth
- 9.3 Hybrid Care

10 GLOBAL AMBULATORY SERVICES MARKET, BY END USER

- 10.1 Hospitals
- 10.2 Physician Groups
- 10.3 Independent Clinics
- 10.4 Corporate Healthcare Providers

11 GLOBAL AMBULATORY SERVICES MARKET, BY GEOGRAPHY

- 11.1 North America
 - 11.1.1 United States
 - 11.1.2 Canada
 - 11.1.3 Mexico
- 11.2 Europe
 - 11.2.1 United Kingdom
 - 11.2.2 Germany
 - 11.2.3 France
 - 11.2.4 Italy
 - 11.2.5 Spain
 - 11.2.6 Netherlands
 - 11.2.7 Belgium
 - 11.2.8 Sweden
 - 11.2.9 Switzerland
 - 11.2.10 Poland
 - 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea
 - 11.3.5 Australia
 - 11.3.6 Indonesia
 - 11.3.7 Thailand

- 11.3.8 Malaysia
- 11.3.9 Singapore
- 11.3.10 Vietnam
- 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil
 - 11.4.2 Argentina
 - 11.4.3 Colombia
 - 11.4.4 Chile
 - 11.4.5 Peru
 - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia
 - 11.5.1.2 United Arab Emirates
 - 11.5.1.3 Qatar
 - 11.5.1.4 Israel
 - 11.5.1.5 Rest of Middle East
 - 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments
- 13.5 Other Strategic Initiatives

14 COMPANY PROFILES

- 14.1 HCA Healthcare Inc.
- 14.2 Tenet Healthcare Corporation
- 14.3 Surgery Partners Inc.
- 14.4 Envision Healthcare Corporation
- 14.5 Community Health Systems Inc.
- 14.6 Universal Health Services Inc.
- 14.7 AmSurg Corporation
- 14.8 SCA Health
- 14.9 MEDNAX Inc.
- 14.10 UnitedHealth Group Incorporated
- 14.11 Fresenius Medical Care AG
- 14.12 DaVita Inc.
- 14.13 Ramsay Health Care Limited
- 14.14 Spire Healthcare Group plc
- 14.15 Nuffield Health

List Of Tables

LIST OF TABLES

Table 1 Global Ambulatory Services Market Outlook, By Region (2023–2034) (\$MN)

Table 2 Global Ambulatory Services Market Outlook, By Service Type (2023–2034) (\$MN)

Table 3 Global Ambulatory Services Market Outlook, By Primary Care Services (2023–2034) (\$MN)

Table 4 Global Ambulatory Services Market Outlook, By Specialty Care Services (2023–2034) (\$MN)

Table 5 Global Ambulatory Services Market Outlook, By Diagnostic Services (2023–2034) (\$MN)

Table 6 Global Ambulatory Services Market Outlook, By Surgical Services (2023–2034) (\$MN)

Table 7 Global Ambulatory Services Market Outlook, By Therapeutic & Rehabilitation Services (2023–2034) (\$MN)

Table 8 Global Ambulatory Services Market Outlook, By Preventive & Wellness Services (2023–2034) (\$MN)

Table 9 Global Ambulatory Services Market Outlook, By Facility Type (2023–2034) (\$MN)

Table 10 Global Ambulatory Services Market Outlook, By Ambulatory Surgical Centers (ASCs) (2023–2034) (\$MN)

Table 11 Global Ambulatory Services Market Outlook, By Urgent Care Centers (2023–2034) (\$MN)

Table 12 Global Ambulatory Services Market Outlook, By Outpatient Departments (Hospital-based) (2023–2034) (\$MN)

Table 13 Global Ambulatory Services Market Outlook, By Standalone Clinics (2023–2034) (\$MN)

Table 14 Global Ambulatory Services Market Outlook, By Diagnostic & Imaging Centers (2023–2034) (\$MN)

Table 15 Global Ambulatory Services Market Outlook, By Clinical Specialty (2023–2034) (\$MN)

Table 16 Global Ambulatory Services Market Outlook, By Orthopedics (2023–2034) (\$MN)

Table 17 Global Ambulatory Services Market Outlook, By Ophthalmology (2023–2034) (\$MN)

Table 18 Global Ambulatory Services Market Outlook, By Gastroenterology (2023–2034) (\$MN)

Table 19 Global Ambulatory Services Market Outlook, By Cardiology (2023–2034) (\$MN)

Table 20 Global Ambulatory Services Market Outlook, By Pain Management (2023–2034) (\$MN)

Table 21 Global Ambulatory Services Market Outlook, By Plastic & Cosmetic Surgery (2023–2034) (\$MN)

Table 22 Global Ambulatory Services Market Outlook, By General Surgery (2023–2034) (\$MN)

Table 23 Global Ambulatory Services Market Outlook, By Other Clinical Specialties (2023–2034) (\$MN)

Table 24 Global Ambulatory Services Market Outlook, By Ownership Model (2023–2034) (\$MN)

Table 25 Global Ambulatory Services Market Outlook, By Hospital-owned Centers (2023–2034) (\$MN)

Table 26 Global Ambulatory Services Market Outlook, By Physician-owned Centers (2023–2034) (\$MN)

Table 27 Global Ambulatory Services Market Outlook, By Chain-based Centers (2023–2034) (\$MN)

Table 28 Global Ambulatory Services Market Outlook, By Independent Centers (2023–2034) (\$MN)

Table 29 Global Ambulatory Services Market Outlook, By Delivery Mode (2023–2034) (\$MN)

Table 30 Global Ambulatory Services Market Outlook, By In-person Care (2023–2034) (\$MN)

Table 31 Global Ambulatory Services Market Outlook, By Telehealth (2023–2034) (\$MN)

Table 32 Global Ambulatory Services Market Outlook, By Hybrid Care (2023–2034) (\$MN)

Table 33 Global Ambulatory Services Market Outlook, By End User (2023–2034) (\$MN)

Table 34 Global Ambulatory Services Market Outlook, By Hospitals (2023–2034) (\$MN)

Table 35 Global Ambulatory Services Market Outlook, By Physician Groups (2023–2034) (\$MN)

Table 36 Global Ambulatory Services Market Outlook, By Independent Clinics (2023–2034) (\$MN)

Table 37 Global Ambulatory Services Market Outlook, By Corporate Healthcare Providers (2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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