

Non-Emergency Medical Transportation Market Forecasts to 2032 – Global Analysis By Service Type (Ambulatory Patient Transport, Wheelchair-bound Patient Transport, Stretcher-bound Patient Transport, Bariatric Patient Transport, Behavioral & Pediatric Transport and Chronic Care Transport), Transport Mode, Payment Type, Vehicle Type, End User and By Geography

<https://marketpublishers.com/r/N3C95A8AF21FEN.html>

Date: September 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: N3C95A8AF21FEN

Abstracts

According to Statistics MRC, the Global Non-Emergency Medical Transportation Market is accounted for \$11.80 billion in 2025 and is expected to reach \$22.71 billion by 2032 growing at a CAGR of 9.81% during the forecast period. Non-Emergency Medical Transportation (NEMT) is an essential service designed to help people reach healthcare providers when emergency care is not required. It is particularly valuable for seniors, individuals with disabilities, and those lacking access to private vehicles who often struggle to attend regular medical checkups, therapy, or pharmacy visits. NEMT offers dependable, cost-effective, and secure transport that ensures timely access to medical care. By reducing missed appointments and supporting consistent treatment, these services improve overall patient well-being. Moreover, NEMT helps cut healthcare expenses by decreasing avoidable emergency room usage. In essence, it strengthens community healthcare by promoting accessibility.

According to the Medical Transportation Access Coalition (MTAC), NEMT services provide over 59 million rides annually to Medicaid beneficiaries who otherwise might not have access to healthcare. MTAC emphasizes that these services are critical for patients needing dialysis, chemotherapy, and other recurring treatments, especially in

rural and underserved areas.

Market Dynamics:

Driver:

Growing elderly population

The rising number of senior citizens strongly influences the Non-Emergency Medical Transportation (NEMT) market. Elderly individuals frequently experience mobility limitations, chronic health problems, or disabilities that hinder their ability to reach clinics and hospitals independently. With global life expectancy on the rise, there is increasing demand for dependable transport to medical appointments, dialysis centers, pharmacies, and therapy sessions. NEMT provides accessible and secure travel solutions that directly address these needs. By reducing transportation barriers, these services promote regular medical visits, enhance treatment compliance, and support healthier lifestyles among older adults. Consequently, this demographic shift significantly contributes to sustained NEMT market growth.

Restraint:

High operational costs

The Non-Emergency Medical Transportation (NEMT) sector faces considerable challenges due to high operating expenses. Service providers must manage vehicle upkeep, regulatory compliance, driver training, and mandatory insurance, all of which increase costs substantially. Rising fuel prices, regular servicing, and administrative overheads make operations even more expensive. Smaller providers, in particular, find it difficult to achieve profitability, especially when reimbursement rates from insurers or government health programs are inadequate or delayed. These cost burdens often restrict investments in expanding fleets, adopting technology, or improving service quality. As a result, operational expenses remain a significant restraint limiting the overall scalability of NEMT services.

Opportunity:

Expansion in rural healthcare access

Improving healthcare accessibility in rural regions creates strong potential for the Non-

Emergency Medical Transportation (NEMT) market. Many rural residents struggle to reach hospitals or clinics because of long distances, inadequate public transit, or the absence of personal vehicles. NEMT can help overcome these challenges by providing cost-effective and reliable transportation, ensuring patients can attend routine visits, preventive care, and post-treatment checkups. These services reduce health disparities, lower hospitalization rates, and support better long-term outcomes for underserved communities. With governments and healthcare organizations increasingly focusing on rural health, NEMT providers have a growing opportunity to expand services and strengthen their market presence.

Threat:

Competition from ride-sharing services

Ride-sharing platforms such as Uber and Lyft represent a growing threat to the Non-Emergency Medical Transportation (NEMT) sector. By offering affordable pricing, quick bookings, and broad availability, these companies are expanding into healthcare transport. Although they generally lack the specialized vehicles and trained staff required for medical transport, their cost-effectiveness and convenience appeal to both patients and medical institutions. This rising competition forces NEMT providers to adopt advanced technologies, streamline operations, and remain price-competitive. If ride-sharing firms continue forming strong collaborations with healthcare systems, they may secure a greater share of the market, thereby restricting the expansion of traditional NEMT operators.

Covid-19 Impact:

The outbreak of COVID-19 brought both challenges and opportunities to the Non-Emergency Medical Transportation (NEMT) industry. In the early stages, service demand dropped significantly due to lockdown restrictions, infection concerns, and widespread cancellation of non-urgent medical visits. This decline created revenue losses for many operators. Over time, however, NEMT services became vital for ensuring access to vaccination programs, COVID-19 testing, and critical treatments such as dialysis. Providers enhanced safety measures by implementing sanitization practices and adopting contactless booking systems. As restrictions eased, healthcare appointments surged back, fueling recovery in the sector. The pandemic ultimately reinforced NEMT's essential role in healthcare accessibility.

The ambulatory patient transport segment is expected to be the largest during the

forecast period

The ambulatory patient transport segment is expected to account for the largest market share during the forecast period because it serves the broadest patient group. These services are designed for individuals capable of walking independently or with minimal support but still requiring dependable transportation for healthcare access. The segment is frequently used for medical checkups, diagnostic imaging, rehabilitation, and regular follow-up care. Its widespread adoption is driven by the increasing need for consistent medical visits among patients who do not require specialized vehicles. Offering affordability, convenience, and broad availability, ambulatory transport remains the most prominent NEMT service segment and plays a key role in driving industry growth.

The privately insured transport segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the privately insured transport segment is predicted to witness the highest growth rate. With healthcare expenses rising and chronic illnesses becoming more prevalent, private insurers are broadening their coverage of non-emergency medical trips to promote better health outcomes while reducing costly emergency visits. Collaborations between insurance companies and NEMT operators improve efficiency, speed up reimbursements, and deliver higher-quality services. This segment also appeals to patients outside government-funded programs due to the flexibility of private coverage. Increasing awareness of the importance of timely medical visits and preventive care strongly supports the segment's accelerated growth trajectory in the NEMT industry.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by robust healthcare systems and favorable government programs. Medicaid and Medicare are central to covering transportation costs, enabling broad patient access to essential medical visits. Rising numbers of elderly individuals and patients with chronic illnesses continue to drive the need for dependable NEMT services. Furthermore, widespread use of digital innovations such as GPS-enabled monitoring, mobile scheduling, and automation has improved overall service delivery. Combined with strong participation from insurance providers and extensive availability of services, these factors make North America the leading market for NEMT.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, supported by expanding healthcare systems and greater focus on patient accessibility. Rising numbers of elderly citizens and increasing cases of chronic illnesses, including heart disease, cancer, and diabetes, is driving steady demand for transport services. Regional governments are implementing reforms to strengthen medical infrastructure, broaden insurance coverage, and attract private investments. At the same time, rapid urbanization and the integration of digital solutions such as GPS navigation and app-based booking are enhancing efficiency. Together, these factors establish Asia-Pacific as the fastest-growing NEMT market worldwide.

Key players in the market

Some of the key players in Non-Emergency Medical Transportation Market include ModivCare, EgyCross, Lyft, Inc., Express Medical Transporters, MTM, Inc., Veyo, Southeastrans, Inc., ERS Medical (ERS Transition Ltd.), Falck, FirstGroup PLC, Global Medical Response Inc, Acadian Ambulance Service, Coastal Medical Transportation Systems, Transdev Group SA and Ride Health.

Key Developments:

In August 2025, Modivcare Enters into Comprehensive Restructuring Agreement to Strengthen its Future, Reduce Debt and Inject Capital. Modivcare Inc. announced that it has taken necessary and decisive action intended to strengthen its financial foundation while continuing to provide access to care, reduce costs, and improve outcomes for clients and members nationwide.

In April 2025, Lyft, Inc. announced it has entered into a definitive agreement to acquire FREENOW, a leading European multi-mobility app with a taxi offering at its core, from BMW Group and Mercedes-Benz Mobility for approximately €175 million or \$197 million* in cash.

In August 2024, MTM is pleased to announce it has signed an agreement with Global Medical Response to acquire Access2Care, LLC. This strategic acquisition, expected to close this fall, will enhance MTM's market presence and increase total annual revenue by approximately 25%, marking a milestone in the company's growth trajectory.

Service Types Covered:

Ambulatory Patient Transport

Wheelchair-bound Patient Transport

Stretcher-bound Patient Transport

Bariatric Patient Transport

Behavioral & Pediatric Transport

Chronic Care Transport

Transport Modes Covered:

Land-based Medical Transport

Airborne Medical Transport

Payment Types Covered:

Medicaid-funded Transport

Medicare-supported Transport

Privately Insured Transport

Direct-pay (Self-funded) Transport

Vehicle Types Covered:

Wheelchair-accessible Vans

Ambulatory Passenger Vans

Stretcher-equipped Vans

Zero-emission Medical Vehicles

End Users Covered:

Acute Care Hospitals

Dialysis & Infusion Centers

Behavioral Health Facilities

Long-term Care Homes

Physical Rehabilitation Clinics

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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:

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

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 End User Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL NON-EMERGENCY MEDICAL TRANSPORTATION MARKET, BY

Non-Emergency Medical Transportation Market Forecasts to 2032 – Global Analysis By Service Type (Ambulatory Pa...

SERVICE TYPE

- 5.1 Introduction
- 5.2 Ambulatory Patient Transport
- 5.3 Wheelchair-bound Patient Transport
- 5.4 Stretcher-bound Patient Transport
- 5.5 Bariatric Patient Transport
- 5.6 Behavioral & Pediatric Transport
- 5.7 Chronic Care Transport

6 GLOBAL NON-EMERGENCY MEDICAL TRANSPORTATION MARKET, BY TRANSPORT MODE

- 6.1 Introduction
- 6.2 Land-based Medical Transport
- 6.3 Airborne Medical Transport

7 GLOBAL NON-EMERGENCY MEDICAL TRANSPORTATION MARKET, BY PAYMENT TYPE

- 7.1 Introduction
- 7.2 Medicaid-funded Transport
- 7.3 Medicare-supported Transport
- 7.4 Privately Insured Transport
- 7.5 Direct-pay (Self-funded) Transport

8 GLOBAL NON-EMERGENCY MEDICAL TRANSPORTATION MARKET, BY VEHICLE TYPE

- 8.1 Introduction
- 8.2 Wheelchair-accessible Vans
- 8.3 Ambulatory Passenger Vans
- 8.4 Stretcher-equipped Vans
- 8.5 Zero-emission Medical Vehicles

9 GLOBAL NON-EMERGENCY MEDICAL TRANSPORTATION MARKET, BY END USER

- 9.1 Introduction

- 9.2 Acute Care Hospitals
- 9.3 Dialysis & Infusion Centers
- 9.4 Behavioral Health Facilities
- 9.5 Long-term Care Homes
- 9.6 Physical Rehabilitation Clinics

10 GLOBAL NON-EMERGENCY MEDICAL TRANSPORTATION MARKET, BY GEOGRAPHY

- 10.1 Introduction
- 10.2 North America
 - 10.2.1 US
 - 10.2.2 Canada
 - 10.2.3 Mexico
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.2 UK
 - 10.3.3 Italy
 - 10.3.4 France
 - 10.3.5 Spain
 - 10.3.6 Rest of Europe
- 10.4 Asia Pacific
 - 10.4.1 Japan
 - 10.4.2 China
 - 10.4.3 India
 - 10.4.4 Australia
 - 10.4.5 New Zealand
 - 10.4.6 South Korea
 - 10.4.7 Rest of Asia Pacific
- 10.5 South America
 - 10.5.1 Argentina
 - 10.5.2 Brazil
 - 10.5.3 Chile
 - 10.5.4 Rest of South America
- 10.6 Middle East & Africa
 - 10.6.1 Saudi Arabia
 - 10.6.2 UAE
 - 10.6.3 Qatar
 - 10.6.4 South Africa

10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures

11.2 Acquisitions & Mergers

11.3 New Product Launch

11.4 Expansions

11.5 Other Key Strategies

12 COMPANY PROFILING

12.1 ModivCare

12.2 EgyCross

12.3 Lyft, Inc.

12.4 Express Medical Transporters

12.5 MTM, Inc.

12.6 Veyo

12.7 Southeastrans, Inc.

12.8 ERS Medical (ERS Transition Ltd.)

12.9 Falck

12.10 FirstGroup PLC

12.11 Global Medical Response Inc

12.12 Acadian Ambulance Service

12.13 Coastal Medical Transportation Systems

12.14 Transdev Group SA

12.15 Ride Health

List Of Tables

LIST OF TABLES

Table 1 Global Non-Emergency Medical Transportation Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Non-Emergency Medical Transportation Market Outlook, By Service Type (2024-2032) (\$MN)

Table 3 Global Non-Emergency Medical Transportation Market Outlook, By Ambulatory Patient Transport (2024-2032) (\$MN)

Table 4 Global Non-Emergency Medical Transportation Market Outlook, By Wheelchair-bound Patient Transport (2024-2032) (\$MN)

Table 5 Global Non-Emergency Medical Transportation Market Outlook, By Stretcher-bound Patient Transport (2024-2032) (\$MN)

Table 6 Global Non-Emergency Medical Transportation Market Outlook, By Bariatric Patient Transport (2024-2032) (\$MN)

Table 7 Global Non-Emergency Medical Transportation Market Outlook, By Behavioral & Pediatric Transport (2024-2032) (\$MN)

Table 8 Global Non-Emergency Medical Transportation Market Outlook, By Chronic Care Transport (2024-2032) (\$MN)

Table 9 Global Non-Emergency Medical Transportation Market Outlook, By Transport Mode (2024-2032) (\$MN)

Table 10 Global Non-Emergency Medical Transportation Market Outlook, By Land-based Medical Transport (2024-2032) (\$MN)

Table 11 Global Non-Emergency Medical Transportation Market Outlook, By Airborne Medical Transport (2024-2032) (\$MN)

Table 12 Global Non-Emergency Medical Transportation Market Outlook, By Payment Type (2024-2032) (\$MN)

Table 13 Global Non-Emergency Medical Transportation Market Outlook, By Medicaid-funded Transport (2024-2032) (\$MN)

Table 14 Global Non-Emergency Medical Transportation Market Outlook, By Medicare-supported Transport (2024-2032) (\$MN)

Table 15 Global Non-Emergency Medical Transportation Market Outlook, By Privately Insured Transport (2024-2032) (\$MN)

Table 16 Global Non-Emergency Medical Transportation Market Outlook, By Direct-pay (Self-funded) Transport (2024-2032) (\$MN)

Table 17 Global Non-Emergency Medical Transportation Market Outlook, By Vehicle Type (2024-2032) (\$MN)

Table 18 Global Non-Emergency Medical Transportation Market Outlook, By

Wheelchair-accessible Vans (2024-2032) (\$MN)

Table 19 Global Non-Emergency Medical Transportation Market Outlook, By Ambulatory Passenger Vans (2024-2032) (\$MN)

Table 20 Global Non-Emergency Medical Transportation Market Outlook, By Stretcher-equipped Vans (2024-2032) (\$MN)

Table 21 Global Non-Emergency Medical Transportation Market Outlook, By Zero-emission Medical Vehicles (2024-2032) (\$MN)

Table 22 Global Non-Emergency Medical Transportation Market Outlook, By End User (2024-2032) (\$MN)

Table 23 Global Non-Emergency Medical Transportation Market Outlook, By Acute Care Hospitals (2024-2032) (\$MN)

Table 24 Global Non-Emergency Medical Transportation Market Outlook, By Dialysis & Infusion Centers (2024-2032) (\$MN)

Table 25 Global Non-Emergency Medical Transportation Market Outlook, By Behavioral Health Facilities (2024-2032) (\$MN)

Table 26 Global Non-Emergency Medical Transportation Market Outlook, By Long-term Care Homes (2024-2032) (\$MN)

Table 27 Global Non-Emergency Medical Transportation Market Outlook, By Physical Rehabilitation Clinics (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

I would like to order

Product name: Non-Emergency Medical Transportation Market Forecasts to 2032 – Global Analysis By Service Type (Ambulatory Patient Transport, Wheelchair-bound Patient Transport, Stretcher-bound Patient Transport, Bariatric Patient Transport, Behavioral & Pediatric Transport and Chronic Care Transport), Transport Mode, Payment Type, Vehicle Type, End User and By Geography

Product link: <https://marketpublishers.com/r/N3C95A8AF21FEN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/N3C95A8AF21FEN.html>