

**Worldwide Power Wheelchair, Scooter, and All Terrain  
Vehicle Market Opportunities, Strategies, and Forecasts,  
2006 to 2012**

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**Power Wheelchair, Scooter, and All Terrain Vehicle**

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*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

**WinterGreen Research, Inc.  
Lexington, Massachusetts**

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**CHECK OUT THESE KEY TOPICS**

***POWER WHEELCHAIR, SCOOTER, AND ALL TERRAIN MARKET FORECASTS***  
***Power Wheelchair, Scooter, and All Terrain Market Shares***  
***Market Driving Forces***

***Healthcare Cost Containment Trends***

***Reimbursement Drives Healthcare Equipment Industry***  
***Hospital and Home Care Services Billing Issues***

***NUMBER OF PEOPLE IN WHEELCHAIRS***

***WHEELCHAIR PRICES***

***MEDICAL EQUIPMENT GOVERNMENT REGULATIONS***

***ULTRALIFE BATTERIES***

***SCIENCE AND MEDICAL TECHNOLOGY***

***THIN FILM BATTERY TECHNOLOGICAL TRENDS***

***WHEELCHAIR TECHNOLOGICAL TRENDS***

***WHEELCHAIR DISTRIBUTION CHANNELS***

***MARKET DRIVERS FOR HEALTHCARE COST CONTAINMENT***

***HEALTHCARE EQUIPMENT INDUSTRY***

***OPPORTUNITY ABOUNDS***

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## **Worldwide Power Wheelchair And Scooter All Terrain And Regular Personal Vehicle Market Opportunities, Market Forecasts, and Market Strategies, 2006-2012**

Worldwide power wheelchair and scooter all terrain and regular personal vehicle markets have shifted dramatically in the last year. Vehicles are useful as personal vehicles in controlled settings, going beyond medical necessity to personal transport. Most vehicles are paid for by Medicare or private insurance as users are usually not as mobile as they wished.

There is a small proportion of the market that is not paid for by public or private insurance. Scooter and power wheelchair vehicles are used in shopping settings, airports, in gated communities, and for local transport. Scooters and power wheelchairs are evolving a market presence that goes beyond handicapped transport to personal transport.

Forecasts for 2006-2012 indicate the start of fuel cell personal vehicles and electric vehicles with longer lasting travel capability. There is a measurable sub segment of the market that addresses all terrain vehicles.

Power wheelchair and scooter markets are expected to grow as the baby boomers age. The aging of the population is expected to change markets. Older people need more support for continued mobility through disability. Rehabilitation becomes more prevalent.

Power wheelchair, scooter, and all terrain market forecasts indicate strong growth based on new technology and demand from people wanting a vehicle in between a heavy expensive to drive car and a manual wheelchair.

Wheelchair and scooter markets at \$1.7 billion in 2005 are expected to grow to \$5.3 billion by 2012. Power wheelchairs and scooters provide mobility and move the healthcare delivery system toward the lower cost homecare.

## Companies Profiled

### Market Leaders

Invacare  
Suzuki

### Market Participants

Amigo Mobility	Convaid
Convaquip	Drive Medical
Eagle Sportschairs	Gendron Inc.
Glide Rehabilitation Products	Graham-Field
Gunnell	Hoveround
Vestil Manufacturing/Innovation In Motion	Magic Mobility
Melrose Kiwi Concept Chairs	Merits
Product Design Group	Permobil
Piaggio	Pride Mobility
RGK	Shoprider Mobility Products
Soleus Mobility	Sunrise Medical
Yamaha Motor	Wheelcare Power Mobilizers

## **Power Wheelchair, Scooter, and All Terrain Vehicle Strategies and Forecasts, 2006-2012**

### **REPORT METHODOLOGY**

THIS IS THE 288TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

**YOU MUST HAVE THIS STUDY**

# Power Wheelchair, Scooter, and All Terrain Vehicle Market Opportunities, Strategies, and Forecasts, 2006 to 2012

## Table of Contents

### WORLDWIDE POWER WHEELCHAIR AND SCOOTER EXECUTIVE SUMMARY

<b>WORLDWIDE POWER WHEELCHAIR AND SCOOTER EXECUTIVE SUMMARY</b>	<b>ES-1</b>
Worldwide Power Wheelchair And Scooter All Terrain And Regular Personal Vehicle Market Shifts	ES-1
Power Wheelchair, Scooter, and All Terrain Market Driving Forces	ES-2
Power Wheelchair, Scooter, and All Terrain Market Shares	ES-4
Power Wheelchair, Scooter, and All Terrain Market Forecasts	ES-6
Power Wheelchair Market Forecasts	ES-8

### POWER WHEELCHAIR, SCOOTER, AND PERSONAL VEHICLE MARKET DYNAMICS AND MARKET DESCRIPTION

<b>1. POWER WHEELCHAIR, SCOOTER, AND PERSONAL VEHICLE MARKET DYNAMICS AND MARKET DESCRIPTION</b>	<b>1-1</b>
1.1 Power Wheelchairs, Scooters, Power All Terrain Medical Vehicles, and Electric Wheel Chairs	1-1
1.1.1 Range Of Rear, Center, And Front Wheel Drive Chairs	1-2
1.1.2 Power Wheelchair Returns	1-3
1.2 Health Care Cost Containment Trends	1-3
1.2.1 Home Health Care And Home Medical Equipment	1-4
1.2.2 Changing Home Health Care Market Distribution Channels	1-5
1.2.3 Mainstreaming Of People With Disabilities	1-5
1.2.4 Recovery And Active Lifestyles Of Disabled Portion of the Population	1-6
1.3 Healthcare Equipment Industry	1-10
1.4 Reimbursement Drives Healthcare Equipment Industry	1-10
1.4.1 Prospective Payment System (PPS)	1-11
1.4.2 Market-Driven Reforms	1-12
1.4.3 Home Medical Equipment Industry Segments	1-13
1.5 Marketing Globally	1-15
1.5.1 U.S. Healthcare Delivery Industry	1-17
1.5.2 Competition Forms Basis Of U.S. Medical Care Services Delivery	1-18
1.5.3 European Homecare Market Trends	1-19
1.6 Hospital and Home Care Services Billing Issues	1-20
1.6.1 Managed Care Requirements	1-22
1.7 Market Drivers For Healthcare Cost Containment	1-25
1.7.1 Managed Care Organization Impact	1-26
1.7.2 Reasons Home Health Care Has Gained Wide-Spread Acceptance	1-26
1.7.3 Managed Care Change In The Healthcare Industry	1-27
1.7.4 Homecare For People With Long Term Disabilities	1-27
1.7.5 Health Care Cost Containment Trends	1-28
1.8 Wheel Chair Distribution Channels	1-29

## POWER WHEELCHAIR, MEDICAL SCOOTER, AND PERSONAL VEHICLE MARKET SHARES AND MARKET FORECASTS

<b>2. POWER WHEELCHAIR, MEDICAL SCOOTER, AND PERSONAL VEHICLE MARKET SHARES AND MARKET FORECASTS</b>	<b>2-1</b>
2.1 Power Wheelchair, Medical Scooter, and Personal Vehicle Market Driving Forces	2-1
2.1.1 Baby Boomers That Need To Utilize Wheelchairs	2-5
2.1.2 Lifestyle Demands	2-7
2.1.3 Power Wheelchair Usage	2-8
2.1.4 Race And Ethnicity	2-9
2.1.5 Socioeconomic Status	2-9
2.1.6 Employment	2-10
2.1.7 Conditions Causing Disability	2-11
2.1.8 Active Patients	2-11
2.1.9 Customized and Lightweight Power Wheelchairs and Scooters Transform Market	2-13
2.1.10 Power Wheelchair and Scooter Market Issues	2-13
2.1.11 Wheelchair Insurance Reimbursement	2-15
2.2 Power Wheelchair and Scooter Market Shares	2-16
2.2.1 Invacare Positioning	2-21
2.2.2 Suzuki Motors Fuel Cell-Powered Wheelchair	2-25
2.2.3 Sunrise Medical Positioning	2-26
2.3 Number of People in Wheelchairs	2-27
2.3.1 Transportation Significant Barrier To Employment And Full Community Participation	2-29
2.3.2 Public Transportation	2-30
2.3.3 Medicare Wheelchair Spending	2-30
2.4 Wheelchair Segments	2-31
2.5 Power Wheelchair and Scooter Market Forecasts	2-34
2.5.1 Power Wheelchair, Scooter, and All Terrain Market Forecasts	2-34
2.5.2 Power Wheelchair Market Forecasts	2-38
2.5.3 3 Wheel Scooter Market Forecasts	2-42
2.5.4 4 Wheel Scooter Market Forecasts	2-44
2.5.5 Wheelchair Market Forecasts	2-48
2.5.6 All Terrain Power Wheelchair Market Driving Forces	2-49
2.5.7 All Terrain Power Wheelchair Market Forecasts	2-51
2.5.8 Power Wheelchairs	2-53
2.6 Wheelchair Prices	2-54
2.6.1 Invacare Ultra Lightweight Frame Type:	2-55
2.6.2 Zip'r Mobility Prices	2-57
2.6.3 Sunrise Guardian Four Wheel Scooter Prices	2-58
2.6.4 Guardian Prices	2-58
2.6.5 Drive Medical Travel Power Wheelchair	2-60
2.7 Power Wheelchair and Scooter Regional Market Analysis	2-61

## MEDICAL SCOOTER AND POWER WHEELCHAIR PRODUCT DESCRIPTION

<b>3. MEDICAL SCOOTER AND POWER WHEELCHAIR PRODUCT DESCRIPTION</b>	<b>3-1</b>
3.1 Scooters and Power Wheelchairs	3-1
3.1.1 Invacare Lynx L-3 Red 3-Wheel Micro-Portable Scooter	3-1
3.1.2 Invacare At'm Power Wheelchair	3-4
3.1.3 Invacare Pronto Electric Wheelchairs	3-5
3.2 Sunrise	3-9
3.2.1 Sunrise Guardian Scooters	3-9
3.2.2 Sunrise Wheelcare Breeze III	3-9

3.2.3	Sunrise Guardian MicroLite Ruby Travel Power Wheelchair	3-12
3.3	Wheelcare	3-13
3.3.1	The Wheelcare Sportster	3-13
3.3.2	Wheelcare Porter	3-13
3.3.3	Wheelcare Caddy	3-13
3.3.4	Wheelcare Super Light 3	3-14
3.3.5	Wheelcare Stand-N-Ride Too	3-14
3.3.6	Wheelcare Wind	3-14
3.3.7	Wheelcare Power Bike	3-15
3.4	Pride	3-16
3.4.1	Pride Mobility Scooters	3-16
3.4.2	Pride Go-Go Ultra X 3-Wheel Electric Scooter	3-18
3.4.3	Pride Mobility Products Corp.	3-19
3.5	Suzuki Motors Fuel Cell-Powered Wheelchair	3-24
3.6	All Terrain Powered Wheelchair	3-25
3.6.1	Innovation In Motion	3-25
3.7	AllWebScooters	3-27
3.8	Zip'r Mobility	3-29
3.9	Drive Medical	3-30
3.9.1	Drive Medical Scooters	3-30
3.9.2	Drive Medical Travel Power Wheelchair	3-33
3.10	Amigo	3-34
3.10.1	Amigo FD	3-34
3.10.2	Amigo Classic	3-34
3.10.3	Amigo MC	3-34
3.10.4	Amigo RD	3-35
3.10.5	Amigo RT Express	3-35
3.10.6	Amigo RT Express Junior	3-35
3.10.7	Amigo EXT350	3-35
3.10.8	Amigo Escort	3-35
3.11	Hoveround	3-36
3.11.1	Hoveround Transporter LX	3-36
3.11.2	Hoveround Transporter GL	3-36
3.11.3	Hoveround ForerunnerTM	3-36
3.12	Golden Technologies	3-37
3.13	Pacesaver	3-38
3.14	Independence Technology @ iBOT	3-40
3.15	Merits Health Products	3-41
3.15.1	Merits Power Pioneer	3-45
3.15.2	Merits Power Pioneer 10 S347 Bariatric 4 Wheeled Outdoor Scooter	3-46
3.15.3	Merits Power Pioneer 2DLX S246 Twin Front Wheel Compact Scooter	3-46
3.15.4	Pioneer Cruiser Q	3-47
3.16	Shop Rider	3-51
3.17	Lifts and Ramps	3-55
3.18	Harmar Mobility	3-55
3.18.1	Harmar Mobility	3-55

**POWER WHEELCHAIR AND SCOOTER TECHNOLOGY**

<b>4. POWER WHEELCHAIR AND SCOOTER TECHNOLOGY</b>	<b>4-1</b>
4.1	Ultralife Batteries 4-1
4.1.1	Lithium Technology Corporation Technology Overview 4-4
4.2	Lithium Technology Corporation (LTC) 4-8

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4.3	BYD	4-9
4.4	Cymbet™ Corporation	4-9
4.4.1	Cymbet Application Specific Solid Energy Technology	4-13
4.5	Teledyne	4-16
4.5.1	Teledyne Thin Film Battery Cycle life	4-19
4.6	Government Regulation	4-20
4.6.1	Competitive Bidding	4-24
4.7	Technological Trends	4-25
4.7.1	Thin Film Lithium And Lithium Ion Batteries	4-25
4.7.2	Thin Film Battery Market Driving Forces	4-27
4.8	Thin Film Solid-State Battery Construction	4-27
4.9	Science And Medical Technology	4-29
4.9.1	Physical Therapy	4-30
4.9.2	Treatment Trends	4-30
4.10	Wheel Chair Technological Trends	4-32
4.10.1	Power Wheelchairs	4-32
4.10.2	Sport Wheelchairs	4-32
4.10.3	Lightweight Wheelchairs	4-33
4.10.4	Transport Wheelchairs (Folding)	4-33
4.11	Medical Equipment Government Regulation	4-35
4.11.1	U.S. Medical Equipment Government Regulation	4-35
4.11.2	Safe Medical Devices Act of 1990 and Medical Device Amendments of 1976	4-36
4.11.3	Companies Gain Market Credibility For Adhering To High Standards Of Quality And Safety	4-37
4.11.4	U.S. Legislation Related To Providing Prescription Drug Coverage For The Elderly -- November 2003	4-37

**PERSONAL VEHICLE WHEELCHAIR AND SCOOTER COMPANY PROFILES**

<b>5. PERSONAL VEHICLE WHEELCHAIR AND SCOOTER COMPANY PROFILES</b>	<b>5-1</b>	
5.1	Wheelchair Companies	5-1
5.2	Amigo Mobility	5-4
5.3	Convaid	5-5
5.4	Convaquip	5-5
5.5	Drive Medical	5-7
5.6	Eagle Sportschairs	5-8
5.7	Gendron Inc.	5-8
5.8	Glide Rehabilitation Products	5-9
5.9	Graham-Field	5-10
5.9.1	Everest & Jennings	5-12
5.9.2	Graham-Field Launches Everest Power Wheelchair Line	5-12
5.9.3	Graham Field Health Products Third Quarter Revenues	5-13
5.9.4	CEO of Graham-Field Health Products	5-13
5.10	Gunnell	5-14
5.11	Hoveround	5-15
5.11.1	Products	5-16
5.12	Vestil Manufacturing / Innovation In Motion	5-17
5.13	Invacare	5-18
5.13.1	Invacare Manufacturing And Suppliers	5-19
5.13.2	Invacare North America	5-21
5.13.3	Invacare Asia/Pacific	5-21
5.13.4	Invacare Europe	5-21
5.13.5	Invacare Acquisitions	5-22

5.13.6	Invacare Strategy	5-23
5.13.7	Invacare Products	5-25
5.13.8	Financial Data	5-26
5.13.9	Invacare Intersegment Revenues	5-30
5.14	Magic Mobility	5-31
5.15	Melrose Kiwi Concept Chairs	5-31
5.16	Merits	5-31
5.17	Product Design Group	5-32
5.18	Permobil	5-32
5.19	Piaggio	5-32
5.20	Pride Mobility	5-33
5.21	RGK	5-37
5.22	Shoprider Mobility Products	5-37
5.23	Soleus Mobility	5-38
5.24	Sunrise Medical	5-38
5.24.1	Products	5-39
5.24.2	Sunrise Acquires Adaptive Equipment Systems, RehabiliTech and Whitmyer Biomechanix.	5-39
5.25	Yamaha Motor	5-40
5.26	Wheelcare Power Mobilizers	5-44

### **DME PROVIDERS POWER WHEELCHAIR, SCOOTER, AND PERSONAL VEHICLE MARKET DISTRIBUTION AND MARKET PARTICIPATION**

<b>6. DME PROVIDERS POWER WHEELCHAIR, SCOOTER, AND PERSONAL VEHICLE MARKET DISTRIBUTION AND MARKET PARTICIPATION</b>	<b>6-1</b>
6.1 Power Wheelchairs, Scooters, Power All Terrain Medical Vehicles, and Electric Wheel Chairs	6-1
6.1.1 DME / Wheelchair Companies	6-1
6.2 Invacare	6-6
6.3 Permobil	6-7
6.4 Invacare Marketing and Distribution	6-10
6.4.1 North America and Asia/Pacific	6-10
6.4.2 Europe	6-11
6.5 Sunrise Medical	6-12
6.6 List of Wheelchair and Scooter Personal Vehicle Distributors 221 pages of distributor information	6-12

**List of Tables and Figures****WORLDWIDE POWER WHEELCHAIR AND SCOOTER EXECUTIVE SUMMARY**

Table ES-1 Scooter and Power Wheelchair Market Driving Forces	ES-3
Table ES-2 Worldwide Power Wheelchair and Scooter Shipments Market Shares, Dollars, First Three Quarters 2006	ES-5
Figure ES-3 Worldwide Power Wheelchair, Scooter, and All Terrain Shipments Market Forecasts and Segments, Dollars, 2006 -2012	ES-7
Table ES-4 Worldwide Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	ES-9

**POWER WHEELCHAIR, SCOOTER, AND PERSONAL VEHICLE MARKET DYNAMICS AND MARKET DESCRIPTION**

Table 1-1 Wheelchair Target Markets	1-7
Table 1-2 Wheelchair Target Market Positioning	1-8
Table 1-3 Wheelchair Market Positioning Functions	1-9
Table 1-4 Home Medical Equipment Market Segments	1-13
Table 1-5 Marketing Globally	1-16
Table 1-6 Home Care Services Billing Issues	1-21
Table 1-7 Home Care Services Billing Changes Needed	1-22
Table 1-8 JCAHO ORYX Requirements	1-23

**POWER WHEELCHAIR, MEDICAL SCOOTER, AND PERSONAL VEHICLE MARKET SHARES AND MARKET FORECASTS**

Table 2-1 Scooter and Power Wheelchair Market Driving Forces	2-2
Table 2-2 Scooter and Power Wheelchair Market Home Health Care Treatment Trends	2-3
Table 2-3 Scooter and Power Wheelchair Market Aspects	2-4
Table 2-4 Power Wheelchair and Scooter Market Issues	2-14
Table 2-5 Worldwide Power Wheelchair and Scooter Shipments Market Shares, Dollars, First Three Quarters 2006	2-17
Table 2-6 Worldwide Power Wheelchair and Scooter Shipments Market Shares, Dollars, First Three Quarters 2006	2-18
Figure 2-7 Worldwide Power Wheelchair and Scooter Shipments Market Shares, Dollars, 2005	2-19

Table 2-8	2-20
Worldwide Power Wheelchair and Scooter Shipments Market Shares, Dollars, 2005	
Table 2-9	2-22
Invacare Positioning Suzuki Fuel Cell Power Wheelchair	
Figure 2-10	2-32
Worldwide Wheelchair Shipments Market Segments, Dollars, 2005	
Figure 2-11	2-33
Worldwide Wheelchair Shipments Market Segments, Dollars, 2012	
Table 2-12	2-35
Worldwide Power Wheelchair and Scooter Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-13	2-36
Worldwide Power Wheelchair and Scooter Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-14	2-37
Worldwide Wheelchair and Scooter Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-15	2-39
Worldwide Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-16	2-40
Worldwide Custom Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-17	2-41
Worldwide Non Custom Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-18	2-42
Worldwide Custom and Non Custom Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Figure 2-19	2-43
Worldwide Custom and Non Custom Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-20	2-44
Worldwide Custom and Non Custom Power Wheelchair Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-21	2-45
Worldwide 4 Wheel Scooter Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Table 2-22	2-46
Worldwide 4 Wheel Scooter Shipments Market Forecasts and Segments, Dollars, 2006 -2012	
Figure 2-23	2-47
Worldwide Wheelchair and Scooter Shipments Market Forecasts, Dollars, 2005 -2012	
Figure 2-24	2-48
Worldwide Wheelchair Shipments Market Forecasts, Dollars, 2005 -2012	
Table 2-25	2-50
All Terrain Scooter and Power Wheelchair Market Driving Forces	
Table 2-26	2-52
Worldwide All Terrain Medical Power Wheelchair Market Forecasts, 2006-2012	
Table 2-27	2-53
Worldwide All Terrain Medical Power Wheelchair Market Forecasts, 2006-2012	
Table 2-28	2-56
Invacare Custom Wheelchairs Front Frame	
Figure 2-29	2-62
Worldwide Wheelchair Regional Shipments, Dollars, First Half 2006	
Table 2-30	2-63
Worldwide Wheelchair Regional Shipments, Dollars, First Half 2006	

**MEDICAL SCOOTER AND POWER WHEELCHAIR PRODUCT DESCRIPTION**

Table 3-1	3-2
Invacare Lynx L-3 Scooter Features	
Figure 3-2	3-3
Invacare Lynx L-3 Red 3-Wheel Micro-Portable Scooter	
Table 3-3	3-4
Invacare Power Wheelchair	
Table 3-4	3-5
Invacare At'm Power Wheelchair Features	
Table 3-5	3-6
Invacare Pronto Electric Wheelchairs Features	
Table 3-6	3-7
Invacare Pronto Electric Wheelchairs Specifications	
Figure 3-7	3-8
Invacare Pronto Electric Wheelchair	
Table 3-8	3-10
Sunrise Wheelcare Breeze III Features	
Figure 3-9	3-11
Sunrise Guardian Three Wheel Scooter	
Figure 3-10	3-11
Sunrise Guardian Four Wheel Scooter	
Figure 3-11	3-12
Sunrise Guardian MicroLite Ruby Travel Power Wheelchair	
Figure 3-12	3-15
Wheelcare Wind	
Table 3-13	3-18
Pride Go-Go Ultra X 3-Wheel Electric Scooter	
Figure 3-14	3-19
Pride Full-Sized Power Wheelchairs And Travel-Sized Scooters	
Table 3-15	3-20
Jazzy® Power Chairs	
Table 3-16	3-21
Pride Lift Chairs	
Table 3-17	3-21
Pride Go-Go® Travel Mobility Products	
Table 3-18	3-22
Pride Scooters	
Table 3-19	3-23
Pride Personal Mobility Vehicles	
Figure 3-20	3-24
Suzuki Fuel Cell Power Wheelchair	
Table 3-21	3-26
Innovation In Motion All Terrain Functions	
Figure 3-22	3-27
Innovation In Motion X4-Extreme	
Figure 3-23	3-28
AllWebScooters	
Table 3-24	3-28
AllWebScooters	
Figure 3-25	3-29
Zip'r Mobility	

Figure 3-26	3-30
Zip'r Mobility Three Wheel	
Table 3-27	3-31
Drive Medical	
Table 3-28	3-31
Drive Medical 3-Wheel Scooter Functions	
Table 3-29	3-32
Drive Medical 3-Wheel Scooter Features	
Table 3-30	3-32
Drive Medical Daytona 3-Wheel Electric Scooter	
Table 3-31	3-33
Drive Medical Geo Travel Power Wheelchair	
Table 3-32	3-37
Features of the Hoveround Forerunner™	
Table 3-33	3-38
Golden Technologies Buzz Around 3-Wheel Electric Scooter	
Figure 3-34	3-39
Pacesaver Scooters	
Figure 3-35	3-41
Independence Technology iBOT® Stair Function	
Table 3-36	3-42
Merits Health Products P313 Technical Specs	
Table 3-37	3-43
Merits Health Products P313 Features	
Figure 3-38	3-45
Merits Power Wheelchair	
Table 3-39	3-47
Selected Merits Pioneer Power Wheel Chair Line	
Figure 3-40	3-52
Shop Rider Power Chairs	
Figure 3-41	3-53
Shoprider XtraLite Jiffy	
Figure 3-42	3-54
Selected Shoprider Scooters	
Figure 3-43	3-55
Shoprider XtraLite 3 Scooter	
Figure 3-44	3-56
Harmar Mobility Ramp	
Figure 3-45	3-57
Harmar Mobility Lift	
Figure 3-46	3-58
Harmar Mobility Power Lift	
Figure 3-47	3-59
Harmar Mobility Tri-Powered Lift	

**POWER WHEELCHAIR AND SCOOTER TECHNOLOGY**

Table 4-1	4-2
Selected Lithium Technology Corporation Customers	
Table 4-2	4-11
Cymbet™ Thin-Film Battery System Key Features	

Table 4-3	4-12
Cymbet™ Thin-Film Battery System Smart Card Applications	
Table 4-4	4-14
Cymbet Application Specific Solid Energy Technology	
Table 4-5	4-15
Cymbet Application Specific Solid Energy Technology Recharge Characteristics	
Figure 4-6	4-17
Teledyne NanoEnergy™ Powering A Blue LED	
Table 4-7	4-18
Teledyne Typical Charging Curve Of A 0.9 mAh Batter	
Figure 4-8	4-19
Teledyne NanoEnergy™ discharge rates and discharge characteristics	
Figure 4-9	4-20
Teledyne Thin Film Battery Capacity and Charging rate Cycles	
Figure 4-10	4-28
Typical Structure Of A Thin Film Solid State Battery	
Table 4-11	4-31
Factors Relating To Value Of Home Health Care Over Institutional Care	
Table 4-12	4-34
Transport Wheelchair Features	

**PERSONAL VEHICLE WHEELCHAIR AND SCOOTER COMPANY PROFILES**

Table 5-1	5-1
Selected Wheelchair Companies	
Table 5-2	5-4
Amigo Scooters	
Table 5-3	5-6
Convaquip Equipment Offerings	
Table 5-4	5-9
Glide Rehabilitation Product Areas	
Table 5-5	5-11
Graham Field Product Lines	
Table 5-6	5-12
Graham Field Everest Wheelchair New Features	
Table 5-7	5-15
Gunnell Product Categories	
Table 5-8	5-16
Hoveround Adult Power Wheelchair Lines	
Table 5-9	5-17
Hoveround Scooter	
Table 5-10	5-24
Invacare's Strategy	
Table 5-11	5-28
Invacare Quarterly Revenue	
Table 5-12	5-29
Invacare Annual Revenue	
Table 5-13	5-34
Pride Mobility Subsidiaries:	
Table 5-14	5-43
Yamaha Motor Profile of the IM Company	

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**ELLEN T. CURTISS**, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

**SUSAN EUSTIS**, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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