

WinterGreen Research, INC.

**Oxygen Concentrator Market Shares, Strategies, and Forecasts,
Worldwide, 2012 to 2018**

**Oxygen Concentrator: Aging of the Population, Baby Boomers Reach Age 65,
More Demand for Improved Lifestyle**



Torrie The Cat in the Tulips Picture by Susan Eustis

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

REPORT # SH24942312

524 PAGES

191 TABLES AND FIGURES

2012

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CHECK OUT THESE KEY TOPICS

Oxygen Concentrator
Portable Oxygen
Concentrators
Homecare
Home Oxygen
Home Medical Equipment
Oxygen Therapy

Managed Care
Non-Acute Health Care
Unified Supply Network
Portable Pulsed Delivery
Oxygen
Portable Continuous
Pressure Oxygen

Portable Pulsed Oxygen
Patients on Oxygen
Home Oxygen
Reimbursement
Homefill Oxygen
Concentrator

Oxygen Concentrator Market Growth Strategy

**Oxygen Concentrator: Market Shares, Strategies, and Forecasts, Worldwide,
2012-2018**

LEXINGTON, Massachusetts (February 7, 2012) – WinterGreen Research announces that it has a new study on Oxygen Concentrator Market Shares and Forecasts, Worldwide, 2012-2018. The 2012 study has 524 pages, 191 tables and figures.

Reimbursement drives oxygen concentrator markets. People pay for medical insurance and medical insurance pays for oxygen concentrators. The Oxygen Concentrator market is moving inexorably toward portable devices that are more supportive of a lifestyle than the stationary devices.

The TCO is considerably lower with the portable Oxygen Concentrators because the need for deliveries of bottle oxygen is eliminated. The portable devices seem much preferable to the stationary devices that support refilling of oxygen containers. The refilling process is onerous.

There has been a quantum improvement in the oxygen concentrator technology. The huge jump in technology started with the introduction of AirSep's LifeStyle, which was the first less-than-10-pound battery-operated concentrator that could be worn. AirSep has re-engineered the unit down to a 2 pound device.

This portable oxygen concentrator technology has been instantiated many times over, but in a most compelling manner by Inogen as the Inogen oxygen concentrator which represents a technological breakthrough. The Inogen One is a complete departure from current mainstream technologies. It represents a shift away from standard large, bulky, stationary concentrator systems and inefficient and impractical portable devices.

As the old style distribution network disappears, with expensive truck rolls, it is being replaced with a homecare services model for making oxygen concentrators available. Inogen in the US, and Teijin In Japan illustrate vendors positioning to leverage this new sales model.

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Homecare services address a situation where market transformation presents a new opportunity for vendors of PSA oxygen equipment. Economies of scale and a new distribution modality leveraging homecare services are set to change the medical oxygen industry.

Innovative products drive a significant homecare service business. Inogen is a manufacturer and Accredited Homecare Provider dedicated to oxygen therapy. Inogen products tailored to oxygen therapy users provide the base for a services business catering to users in their homes.

Inogen is a technology leader in the oxygen concentrator business. It combines the offering of a portable oxygen concentrator in demand by patients with a home care services organization. It has contracts with veterans all over the US. Inogen has expanded its home oxygen therapy service area to include the state of Florida.

Inogen is an innovator in oxygen therapy products and services. Inogen has restored freedom and independence to thousands of oxygen therapy users throughout the US. It is able to offer access to the residents of Florida. The State of Florida has the largest percentage of senior citizens of any U.S. state as retirees are drawn to the pleasant climate that allows them to remain active. To complement their active lifestyle, oxygen therapy users need an oxygen solution that works.

In Japan the Teijin Group is a leader in the field of oxygen concentrators for home oxygen therapy (HOT). Home oxygen therapy is used by patients with chronic respiratory distress such as pulmonary emphysema. A team of various specialist staff provides a 24-hour, 365-day nationwide patient support network with over 90 bases throughout the country, enabling patients to stay in the comfort of their own homes without concern.

The Teijin Group provides unique and revolutionary solutions. These are in the fields of pharmaceuticals and home health care. With a focus on three key therapeutic areas: a bone and joint, respiratory, and cardiovascular and metabolic disease, Teijin is an example of a well-positioned company.

The government provides people over age 65 with medical insurance in the US. New initiatives provide for universal healthcare coverage. In many parts of the developed world, there is complete medical coverage provided by the government, though working people tend to supplement government coverage with medical insurance.

As the population ages, people are more frail and need assistance for supplemental oxygen if they have respiratory disease, COPD or emphysema. Technology is evolving to give people with disabilities more mobility as batteries weigh less and devices are smaller. Mobility depends on an oxygen concentrator that is fit to purpose.

Markets are poised to create the ability for people to get more exercise and impact the healthcare delivery industry by encouraging mobility of people who were previously bed ridden. Oxygen concentrators impact care delivery, permitting the patient to control mobility for the rehabilitation efforts.

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Invacare is an industry leader in the market for oxygen concentrators and home medical products. It is a quality company. Its leadership position is bolstered by the ability to offer quality products and an enviable distribution network. Invacare is very happy to take care of its distribution network, not competing with it by selling directly. Invacare is very good about supporting the dealers in every way, including helping with financing.

Oxygen concentrator markets at \$521 million in 2011 are expected to reach \$3.2 billion by 2018. Growth is expected to be worldwide and a result of vendor achievement of marked improvements in the technology that provide patients with better oxygen delivery, permitting patients to live longer.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, Bloomberg, and Thompson Financial.

Companies Profiled

Market Leaders

Invacare
Drive Medical
Chart Industries / SeQual
Drive Medical
Longfian Scitech Co.,Ltd.
Nidek
Philips / Respironics

Sunrise Medical
Graham Field / John Bunn
AirSep
Inogen
DeVilbiss Healthcare
Oxus
Teijin

Market Participants

Chart / CAIRE / Sequal
Drive / CHAD Therapeutics
Gardner Denver / Thomas

Graham Field
GeckoSystems International
IDEX / Gast

Longfian Scitech Co.,Ltd.
Medline
Merits

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Oxygen Concentrator Depot
Oxygen Concentrator Inc.
Terumo

UltraNebs
Vitality Medical
Weinmann

Oxygen Concentrator: Market Shares, Strategies, and Forecasts, Worldwide, 2012 to 2018

Report Methodology

This is the 494th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are a priority in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. They are supported by a team, each person with specific research tasks and proprietary automated process database analytics. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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 participant 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

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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 is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2011. With 2011 and several years prior to that as a baseline, market projections were developed for 2012 through 2018. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

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We cannot publish everything we know, the studies get too long, so let us know if you have questions after you read the study.

YOU MUST HAVE THIS STUDY

Oxygen Concentrator: Market Shares, Strategies, and Forecasts, Worldwide, 2012-2018

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ABOUT THE COMPANY

WinterGreen Research, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and thinking about market trends is a high priority at WinterGreen Research. As with all research, the value proposition for competitive analysis comes from intellectual input.

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, Software, Internet, Energy Generation, Energy Storage, Renewable energy, and advanced computer technology. Industry reports focus on opportunities that expand existing markets or develop major new markets. The reports access new product and service positioning strategies, new and evolving technologies, and technological impact on products, services, and markets. Innovation that drives markets is explored. Market shares are provided. Leading market participants are profiled, and their marketing strategies, acquisitions, and strategic alliances are discussed. The principals of WinterGreen Research have been involved in analysis and forecasting of international business opportunities in telecommunications and advanced computer technology markets for over 30 years.

The studies provide primary analytical insight about the market participants. By publishing material relevant to the positioning of each company, readers can look at the basis for analysis. By providing descriptions of each major participant in the market, the reader is not dependent on analyst assumptions, the information backing the assumptions is provided, permitting readers to examine the basis for the conclusions.

ABOUT THE PRINCIPAL AUTHORS

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, IS A SENIOR ANALYST. SHE HAS DONE RESEARCH AND WRITING IN COMMUNICATIONS, HEALTHCARE, ENERGY, 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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