

WINTERGREEN RESEARCH, INC.

**Power Wheelchair Market Shares, Strategies, and
Forecasts, Worldwide, 2009 to 2015**

**Power Wheelchairs Use Microprocessors to Improve
Functionality**



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

POWER WHEELCHAIR MARKET SHARES
Power Wheelchair Market Forecasts
Maneuverable Power Wheelchairs
Rehabilitation Power Wheelchairs
LiFePO4 Battery for Power Wheelchairs
Bariatric Power Wheelchairs
Pediatric Power Wheelchairs
Power Wheelchair Drive Control
Power Wheelchair Electronics
Power Wheelchair Market Segments
Homecare Power Wheel Chair Solutions

Electric Wheelchairs
Lithium Ion Battery
Thin Film Batteries
High Strength, Lightweight Dual Axle Wheelchair
Folding Transport Power Wheelchair

OPPORTUNITY ABOUNDS

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LEXINGTON, Massachusetts (November 11, 2009) – WinterGreen Research announces that it has a new study on power wheelchairs. The 2009 study has 400 pages, 235 tables and figures. Worldwide markets are poised to achieve significant growth as the wheelchairs are used globally. Growth comes as the population ages in every region while the older people seek to maintain a mobile, independent lifestyle.

According to Susan Eustis, the lead author of the study, “the purchase of power wheelchairs is dependent on reimbursement. The use of power wheelchairs is based on providing a chair that has appeal to those who does not have the ability to walk one quarter mile. The inability to walk distances is impossible for some people, yet they resist getting a wheel chair. Custom units, light weight units, stable chairs, comfortable chairs are all an issue in general market as baby boomers reach retirement age and have the desire to maintain an active lifestyle.”

Power wheelchairs impact care delivery, permitting the patient to control mobility for the rehabilitation efforts. Lightweight power wheel chairs give patients the ability to control movement even easier. Rehabilitation depends on patients having a sense of control over their lives and achieving some measure of mobility.

Transport power wheelchairs are used for moving people around a store if their mobility is limited. Patients and family gain more control over the care delivery with the availability of power wheelchairs. Care can be delivered in familiar settings

Homecare wheelchair technology is evolving to give people with disabilities more mobility. 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.

Power wheel chairs provide a primary mode of mobility, frequently fitting onto the rear of a car. Manual wheel chairs are more often used on an interim basis. Many users have both manual and power wheelchairs available.

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The power wheelchair market participants seek to position with chairs that are in growing market segments. Leading vendors offer a wide range of products, services, training, and support. Homecare agencies depend on reimbursement to sell custom units and are frequently able to perform filling out the paperwork for users. . The designs of wheelchairs are making them intuitive to use. Power wheelchairs are evolving electronics and control systems that produce more feature function packages. This represents major market opportunity.

Invacare is among several industry leaders in the market for home medical products. They manufacture and distribute a bundled wheelchair, respiratory, and patient care homecare product offering to home medical equipment providers. Invacare has a very strong distribution network.

Power wheelchair markets in dollars at \$1.4 billion in 2009 are expected to reach \$2.4 billion by 2015. Power wheelchairs are poised to achieve significant growth as batteries become easier to charge from renewable energy, batteries last longer, units weigh less, chairs are more maneuverable, and features support automated process.

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Companies Profiled

Market Leaders

Invacare
Pride Mobility –
Drive Medical –
Handicare
Meyra
Sunrise Medical –

Market Participants

5. Wheelchair Company Profiles

Medline
Merits –
21st Century Scientific Inc
Amigo Mobility
Chiaphua Motors
Convaid
ConvaQuip –
Eagle Sportschairs
Gendron Inc –
Glide Rehabilitation
GF Health Products / Graham Field –
Graham-Field Quality Brands
Gunnell
Hoveround
LEVO AG
Magic Mobility
MED Group
Melrose Kiwi Concept Chairs
Product Design Group –
Otto Bock HealthCare GmbH

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**Permobil –
Piaggio
Pihsiang Machinery Manufacturing Company Limited
RGK –
Shoprider Mobility Products -
Soleus Mobility
Teftec Mobility –
The Scooter Store
Vestil Manufacturing Corporation / Innovation in Motion –
Yamaha Motor Corporation, U.S.A.**

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REPORT METHODOLOGY

THIS IS THE 421 TH 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 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 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 2008. WITH 2008 AND SEVERAL YEARS PRIOR TO THAT AS A BASELINE, MARKET PROJECTIONS WERE DEVELOPED FOR 2009 THROUGH 2015. THESE PROJECTIONS ARE BASED ON A COMBINATION OF A CONSENSUS AMONG THE PRIMARY CONTACTS 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.

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YOU MUST HAVE THIS STUDY

Power Wheelchair Market Shares, Strategies, and Forecasts, 2009 to 2015

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. 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.

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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, 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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