

WINTERGREEN RESEARCH, INC.

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

Wheelchairs More Reliable and Functional



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

WHEELCHAIR MARKET SHARES

Wheelchair Market Forecasts

Ultra Lightweight Wheelchairs

Lightweight Wheelchairs

Sports Wheelchairs

Bariatric Wheelchairs

Pediatric Wheelchairs

Racing Wheelchairs

Power Wheelchairs

Wheelchair Market Segments

Homecare Wheel Chair Solutions

New Materials for Wheelchairs

Ultralight Aluminum Wheelchair

High Strength, Lightweight Dual Axle Wheelchair

Folding Transport Wheelchair

OPPORTUNITY ABOUNDS

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Wheelchair Market Shares, Strategy, and Forecasts, Worldwide, 2009-2015

LEXINGTON, Massachusetts (October 20, 2009) – WinterGreen Research announces that it has a new study on Wheelchairs. The 2009 study has 484 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.

According to Susan Eustis, the lead author of the study, “the use of wheelchairs is based on providing a chair for everyone who does not have the ability to walk one quarter mile. The ability to walk longer distances is impossible for some people and then they need a wheel chair. Custom units, light weight units, stable chairs, comfortable chairs are all an issue in general market seating and are moving to be adopted in the wheel chair market.”

Hospital and homecare wheelchair technology is evolving to give people with disabilities more mobility. Markets are poised to create the ability for people with disabilities to get more exercise and have more mobility. Impact on the healthcare delivery industry is positive because it is encouraging mobility of people who were previously bed ridden.

Wheelchairs impact care delivery, permitting the patient to control mobility for the rehabilitation efforts. Lightweight wheel chairs give patients the ability to control movement. Transport wheelchairs are used for moving patients from the bed to another place. Patients and family gain more control over the care delivery with the availability of transport wheelchairs. Care can be delivered in familiar home settings. Wheelchair market driving forces include the fact that baby boomers are starting to hit age 65 resulting in growth in the population over age 65. As overall life expectancy increases, more wheelchairs are needed.

The home medical equipment market includes home health care products, physical rehabilitation products and other non-disposable products used for the recovery and long-term care of patients. The demand for domestic home medical equipment products continues to grow. Growth during the next decade and beyond is a result of several factors:

Wheelchair 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.

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The ability to get reimbursement has been a significant market factor. As baby boomers age and need wheelchairs, they will be willing to pay directly for mobility and comfort as they do for homes and cars now. This trend will assure market growth worldwide.

Wheelchair and scooter markets at \$3.9 billion in 2009 are expected to grow to \$7.9 billion by 2015. Wheelchairs and scooters provide improved lifestyle for disabled people by enabling mobility and move the healthcare delivery system toward the lower cost homecare.

Companies Profiled

Market Leaders

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

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Market Participants

5. Wheelchair Company Profiles

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
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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Wheelchair Shares, Strategies, and Forecasts, 2009-2015

REPORT METHODOLOGY

THIS IS THE 419 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.

YOU MUST HAVE THIS STUDY

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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.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. 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.

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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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