

Mobility Aids & Accessories Worldwide

A Market Strategy Report

Report Highlights

June 2006

Report Benefits

This report can help executives in:

- Assessing the market for Mobility Aids and Accessories, growth segments, and growth regions.
- Understanding market drivers and restraints.
- Business planning, strategic decision making and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- The power operated vehicles (wheelchair and scooter) market is expected to grow about 3.0 percent during the 2004-2012 period.
- The Internet and blogs have emerged as a major channel for consumers and manufacturers in finding and disseminating information regarding products.
- There are hundreds of companies in this space, from makers of high-tech wheelchairs and scooters to makers of walking aids such as canes and crutches.
- Successful wheelchair companies must demonstrate ability to “mass customize” – i.e. achieve scale in production yet retain flexibility to customize product for individual needs.

Key Takeaways...cont'd.

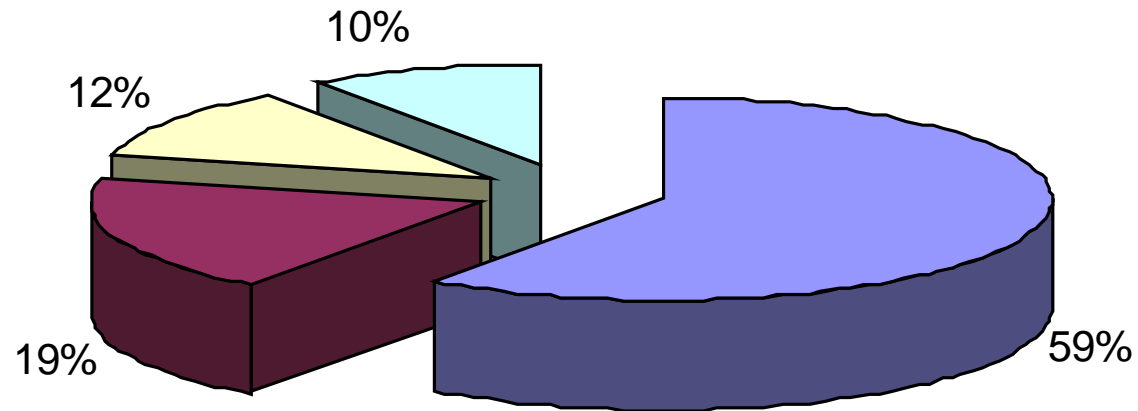
- Despite price pressures, the sweet spot is the sport/ultralight weight segment, which is largely consumer-driven and less medicare-dependent.
- The Patient Lifts market is growing the fastest. Healthcare worker safety, increasing obesity, aging population, and trend toward home care – are key growth drivers. Arjo leads the global patient lift market.
- The Mobility Aids market is characterized by 2-3 companies dominating each product segment, followed by extreme fragmentation in tiers two and three.
- Entry barriers relatively low, but scaling up is a challenge.

Growth Drivers

- Aging population and increasing disability rates.
- Technological advances in the design and construction of aids and appliances for elderly and disabled people.
- Rapid increase in the number “morbidly” obese patients worldwide driving demand for specialized wheelchairs and patient handling equipment in hospitals.
- Increasingly active lifestyles among all age groups.
- Increasing awareness about disability and efforts to integrate them into the workforce and society.
- Healthcare worker injuries and safety issues – resulting in significant workers compensation costs to hospitals, driving demand for patient lifts.

UK – Specialty Manual Wheelchairs

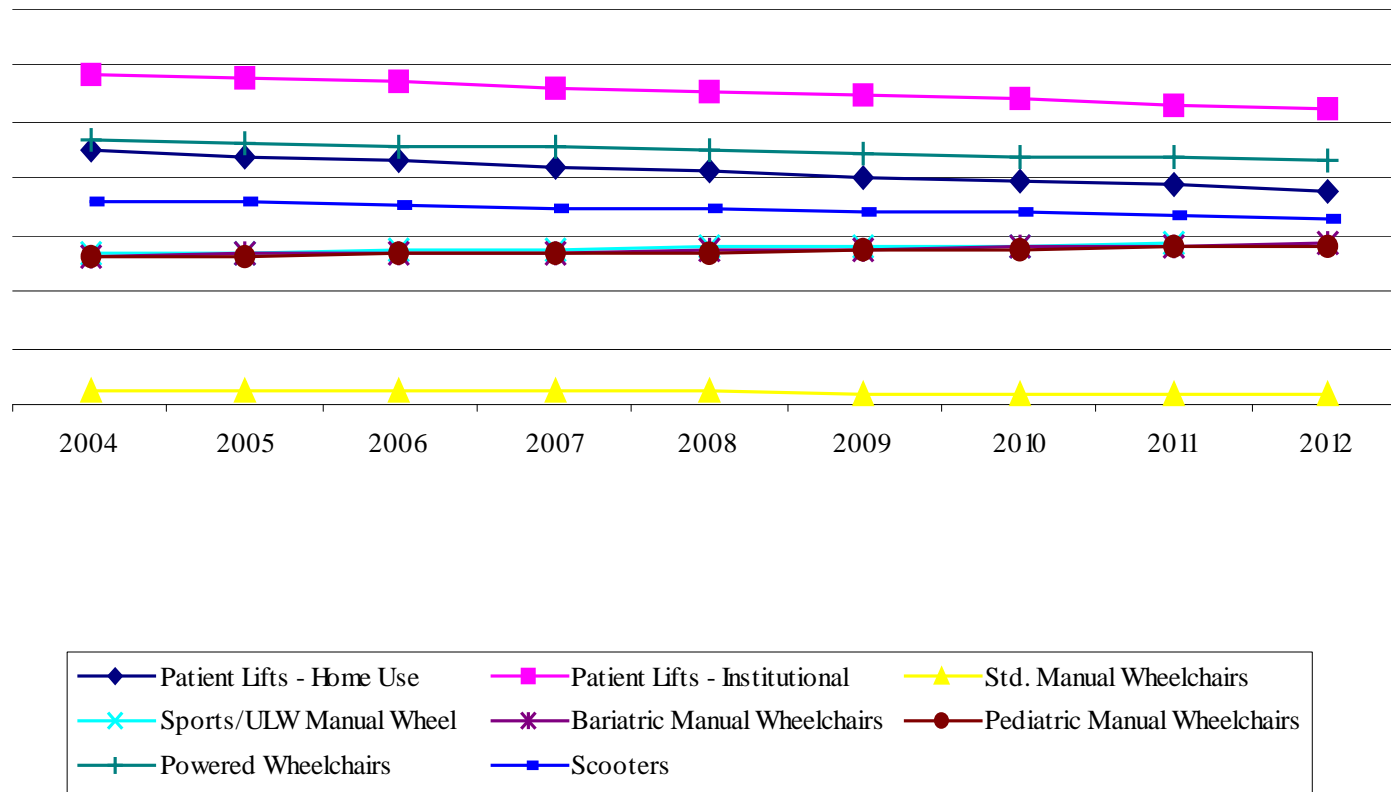
Specialty Wheelchairs Revenue Distribution: UK - 2006



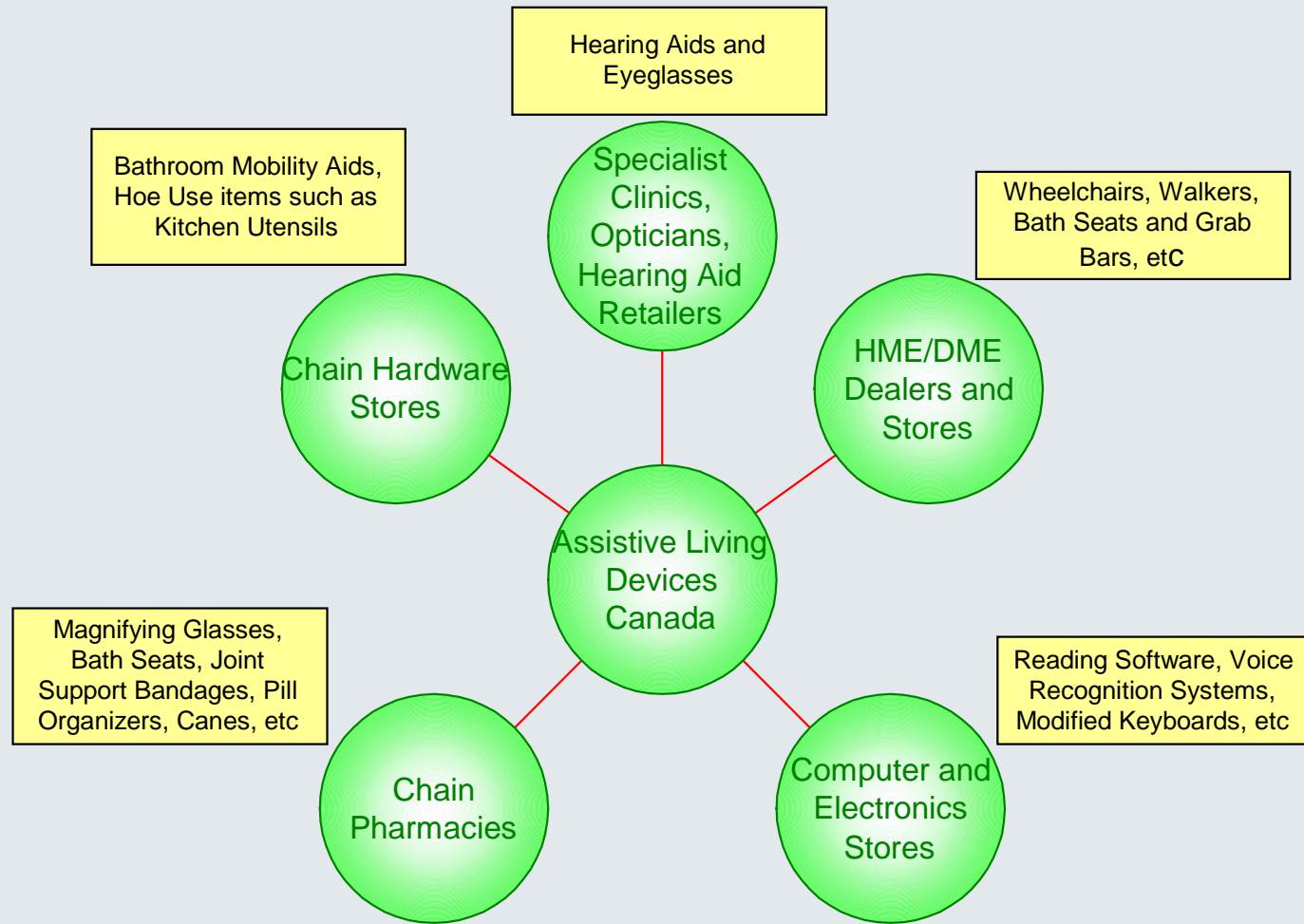
■ Sports/Lightweight Manual
 ■ Bariatric Manual
 ■ Pediatric Manual
 ■ Parts & Accessories

Pricing Trends Worldwide

Mobility Aids Pricing Trends - Worldwide



Distribution Structure - Canada



Sample Data Table

Manual Wheelchairs Market - Germany (2004 - 2012)

Segment	2004	2005	2006	2007	2008	2009	2010	2011	2012	CAGR
Standard Manual										
Unit Sales										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Sports/Lightweight Manual										
Unit Sales										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Bariatric Manual										
Unit Sales										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Pediatric Manual										
Unit Sales										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Parts & Accessories										
Revenues (\$ Million)										
Revenue Growth										
Total Market										
Revenues (\$ Million)										
Units										
Revenue Growth										

Source: Marketstrat®

Regions Covered	<p>The Americas (USA, Canada, Rest of the Americas – ROA)</p> <p>Asia-Pacific (China, India, Japan, Rest of Asia-Pacific – ROAPAC)</p> <p>Europe (France, Germany, Italy, UK, Rest of Europe – ROEU)</p> <p>Rest of the World (ROW)</p>
Product/Market Segments	<p>Manual Wheelchairs (Standard, Lightweight/Sport, Bariatric, Pediatric); Powered Mobility Aids (Wheelchairs, Scooters); Parts & Accessories (Manual Wheelchair, Powered Mobility); Other Mobility Aids (Patient Transfer Aids, Walking Aids)</p>
Companies Profiled	750+ worldwide
Market Estimates/ Forecasts	Estimates/Forecasts for 2004-2012 in Units & US dollars, separately by Device Type and by Region.
MARKETSTRAT Analytical Framework	Drivers and Restraints; KPPI Grid (Key Product Performance Indicators); Competitive Framework; SRCE Framework; Key Market Parameters (KeyMAP Grid)
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