

# Standard and Specialty Medical Beds and Therapeutic Surfaces Worldwide

## Report Highlights

February 2008

# Report Benefits

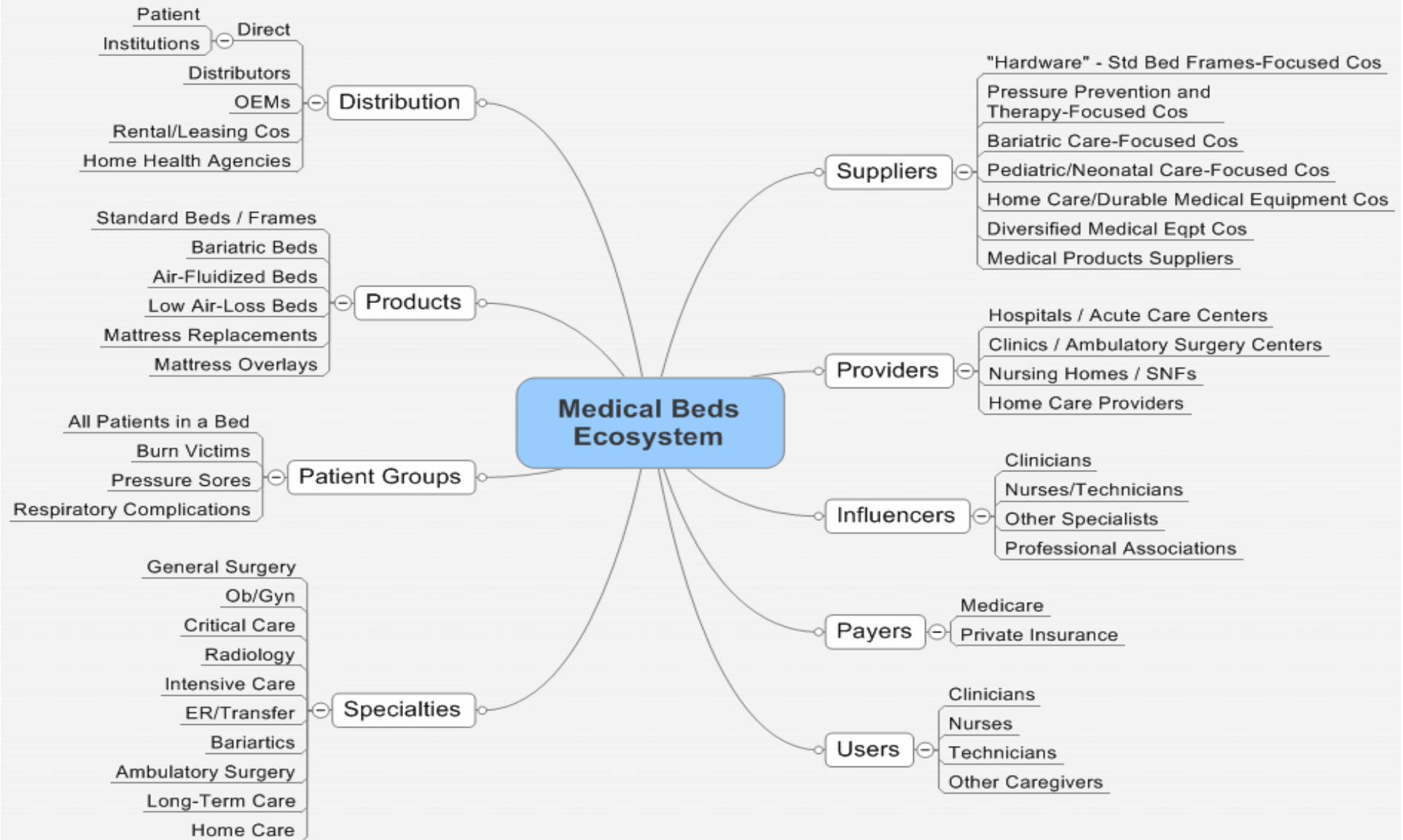
This report can help in:

- Assessing the market for Standard and Specialty Medical Beds and Therapeutic Surfaces, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

# Key Takeaways

- The world market for specialty medical beds & support surfaces for pressure prevention and treatment is expected to reach \$3.0 billion by the end of 2008, growing at a rate of 4.3 percent per year during the 2005-2014 period.
- Focus of product innovation is on interoperability, enhancing patient outcomes, and enhancing caregiver outcomes.
- Key trends: a) Trend toward equipment purchases, away from rentals; and b) Declining demand for mattress overlays in advanced countries.
- Chinese manufacturers have expanded the breadth and depth of their medical bed offerings, leading to increased price pressure on the low- to mid-range frames segment

# Medical Beds & Surfaces Market Ecosystem



# Key Market Drivers

- Aging population and resulting increased incidence of age-related health conditions such as cardiovascular and neurological diseases that lead to immobility and acute care admission as well as long-term care admission.
- Greater emphasis on prevention coupled with availability of less expensive, multifunctional models of pressure relief and reduction products.
- Group purchasing options in the US that enable hospitals and long-term care facilities to purchase specialty beds and mattresses will sustain the growing trend towards purchasing rather than renting products.
- Partnerships and ulcer management programs between medical beds and surfaces manufacturers and hospital systems both in the US and internationally will boost sales.

# Sample Market Table

## World - Acute Care Market for Specialty Medical Bed Systems and Therapeutic Surfaces By Country/Region (\$ Million, 2005-2014)

Country/Region	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
United States										
Rest of the Americas (ROA)										
Japan										
Rest of APAC (ROAPAC)										
Europe										
Middle East & Africa										
<b>Total World Market</b>										
Revenues (\$ Million)										
Revenue Growth										

### Notes

1. Includes Air Fluidized and Low Air-Loss and combination Bed Systems, Bariatric Specialty Beds and Therapeutic Surfaces, Mattress Replacement Systems, and Mattress Overlays
2. Acute Care settings include OR, ICU/CCU, MedSurg, Labor & Delivery, ER/Transfer, Ambulatory Care, etc
3. Rest of the Americas (ROA) includes Canada, Mexico, Central, and South America
4. Rest of Asia-Pacific (ROAPAC) includes all of Asia and Pacific Rim countries such as Australia and New Zealand

Source: Marketstrat™

<b>Regions Covered</b>	<b>USA, Rest of the Americas (ROA), Japan, Europe, Rest of Asia-Pacific (ROAPAC), Middle East &amp; Africa</b>
<b>Product/Market Segments</b>	<p><b>Standard Medical/Surgical Beds:</b> Birthing Beds; ICU Beds; Pediatric Beds; All Other</p> <p><b>Specialty Medical Beds and Therapeutic Support Surfaces:</b> Integrated Bed Systems (Air Fluidized, Low Air-Loss); Bariatric Bed Systems and Support Surfaces; Mattress Replacements; Mattress Overlays</p> <p><b>Care Locations:</b> Acute Care; Long Term Care; Home Care</p> <p><b>Revenue Type:</b> Rental/Leasing; Capital/Sales; Parts &amp; Accessories; Maintenance Services</p>
<b>Companies Profiled</b>	64 key players, 125 company briefs worldwide
<b>Market Estimates/ Forecasts</b>	In US dollars for the years 2005-2014
<b>Marketstrat® Analytical Framework</b>	Drivers and Restraints; Key Market Parameters (KeyMAP Grid), Market Share Ranking, Competitive Position Map, Competitive Segmentation, Market Segment Summaries
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