

WinterGreen Research, Inc.

WinterGreen *Impact*

Homecare Medical Equipment Markets

Market Share Analysis: Market Shares, Analysis, and Index, Bundle, Worldwide, 2006 to Current, Quarterly

Mountains of Opportunity



Picture by Susan Eustis

WinterGreen Research, Inc.

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS

BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT

\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES

2016

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

781 853 5078

Analysis to Provide Unique Perspective of Market Sector Revenue

The WinterGreen Impact product is an Excel document that provides ten years of quarterly revenue for the top ten to twenty companies in a market segment. This granular numerical analysis is supported by descriptions of the strengths and weakness of each company. Analysis of the market segments and market driving forces are included.

Company write-ups provide illumination into the strengths and challenges that each company faces in the market segment in a competitive context that is rarely, if ever available. Company write-ups provide details which elucidate the opportunities created by the particular product set of each company, and identify potential acquisition targets. Quarterly updates provide information on the changing nature of the market, companies of particular note, and overall market strength. Both public and private companies are included to allow direct comparison of each company to its direct competitors. This is not using comps that are so typical in the market, but is actually comparing the large companies to the smaller private companies in the same market to allow actual direct comparison.

The numerical analysis presented leads to understanding of the market trends. By presenting actual revenue numbers, further analysis can be performed to gain additional market insight. An index of the growth (or loss) of each company's revenue since 2006 is also included. The graph of the index gives a visual grouping of the performance of the companies in the market segment. This highlights the companies that have had strong or weak growth over a particular period. Strong growth and market share dominance are not necessarily synonymous. When they are, this indicates a truly strong company. Thus, the WinterGreen Impact product provides in-depth perspective, and identification of the winners and losers in this market segment.

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS

BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT

\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES

2016

WinterGreen Impact Homecare Medical Equipment Markets: Market Share Analysis

Ageing Population Drives Growth of Worldwide Homecare Equipment

Homecare Medical Equipment Markets are poised to achieve continuing growth as the aging population needs homecare treatment. The homecare equipment market consists primarily of wheelchairs, scooters, oxygen treatment equipment, accessibility beds, lifts, and toilets. Homecare medical equipment has until recently been sold primarily through distributors. The impact of direct sales through the Internet has brought about some distribution market consolidation, leading to a decrease of in the number of distributors for homecare equipment.

As the population ages, people are more frail and need assistance for mobility. Wheelchair technology is evolving to give people with disabilities more mobility. Mobility depends on a wheelchair that is fit to purpose. Power and manual wheelchairs are bought depending on the needs of the customers. Medical scooters are a growing segment of mobility for the aging population, as they perform better in an outdoor environment. Many issues impact the choice of a wheelchair, including cost and reimbursement availability.

The other major driver of homecare equipment is the large incidence of COPD and other respiratory conditions where oxygen is able to improve the quality of the life in a dramatic manner. Portable devices have become affordable and support a mobile lifestyle even while on oxygen. Stationary oxygen concentrators are needed for night use by patients on portable oxygen concentrators during the day.

Homes must also be outfitted to accommodate the needs of the ageing population, where beds, lifts, and specialty toilets are the major equipment which goes into the home. The equipment distributors work with each customer to outfit the home and car with the required equipment to allow mobility individualized for each case.

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, electronics.ca, and Thompson Financial. WinterGreen Research is positioned to help customers facing challenges that define the modern enterprises. The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. Customers trust wintergreen research to work alongside them to ensure the success of the participation in a particular market segment.

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS

BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT

\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES

2016

WinterGreen Research, Inc.

WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

Key words: Manual Wheelchair, Standard Wheelchair, Lightweight Wheelchair, Power Wheelchair, Indoor Maneuverability, Medical Scooters, Oxygen Concentrator, Stationary Oxygen Concentrators, Medical Oxygen, Portable Oxygen Concentrators, Medical Mobility, Medical Beds, Accessibility Equipment, Medical Lifts, Medical Toilets, Medical Supplies Toilet, Bariatric Rehab Shower, Commode Chair

Companies Profiled Include

AirSep

Invacare

Pride

Chart / Caire / SeQual

Meyra

Sunrise Medical

Drive Medical

Nordic / Handicare / Permobil

Teijin

Graham Field

O2Concepts Oxlife

TiLite

Inogen

Philips Respironics

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS
BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT
\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES

2016

**WinterGreen *Impact* Homecare Medical Equipment Markets
Market Share Analysis: 2006-Current**

Report Methodology

WinterGreen Impact Market Share Trends product is created using a methodology which includes conducting interviews, mining published data, tracking industry trends, and expert analysis. The combination of the different sources of information allow a unique look at each company's quarterly performance inside a given market segment. This analysis provides a view of the total market segment, where direct comparison between large and small companies is facilitated.

Interviews are conducted with vendors, former employees, distributors, users, and industry experts who inform senior staff of ongoing trends and events. Sufficient interviews are performed to insure understanding of the selected market segment.

Published data sources included in market segment analysis are social media comments, blogs, SEC filings, and Internet searches.

WinterGreen Research has a 30 year proven track record of accurately forecasting markets. Now this experience and proprietary data is being used to break out each company's revenues inside a given market sector. The expertise in tracking technology trends is what has allowed accurate forecasting of many diverse markets.

YOU MUST HAVE THIS ANALYSIS

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS
BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT
\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES 2016

WinterGreen Research, Inc.

WinterGreen Impact Homecare Medical Equipment Markets Market Share Analysis 2006-Current

BUNDLE OF FIVE MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT

The analysis provides vendor strengths and weakness descriptions, market forecasts, and numerical market revenue for market participants. The size of the patient populations, the unit shipment analysis, and the price point are also provided.

ABOUT THE COMPANY

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.

WinterGreen Research is positioned to help customers facing challenges that define the modern enterprises. The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. Customers trust wintergreen research to work alongside them to ensure the success of the participation in a particular market segment.

WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS

BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT

\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES

2016

WinterGreen Research, Inc.

ABOUT THE PRINCIPAL AUTHORS

Susie Eustis, Ph. D., Vice President of Development, member of the Board of Directors of WinterGreen Research, provides market assessments to determine size of future markets and best in class technologies. Her Ph. D. was on the optical properties of gold and silver nanoparticles. Previously she was a Research Scientist at Directed Vapor Technologies International (DVTI), specializing in grant writing and grant execution as well as strategic project direction planning. She is a graduate of Georgia Institute of Technology Laser Dynamics Laboratory and Rochester Institute of Technology (RIT). She is the lead author of the WinterGreen Impact Market Segment Analysts reports.

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 in communications, healthcare equipment, 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 Internet, Cloud Computing marketing strategies, Internet equipment, biometrics, a study of Healthcare 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. Ms. Eustis was named Top Woman CEO in 2012 by Who's Who Worldwide. She was named Top Woman Market Research Analyst the same year.

REPORT # E31007WMT: EACH MODULE HAS 14 WORKSHEETS & 1 PRESENTATION WITH TABLES, CHARTS, AND ANALYSIS

BUNDLE OF 5 MODULES: WHEELCHAIRS, SCOOTERS, PORTABLE OXYGEN, STATIONARY OXYGEN, ACCESSIBILITY EQUIPMENT

\$18,000 ANNUAL SUBSCRIPTION WITH QUARTERLY UPDATES

2016