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Home Medical Equipment

US Industry Study with Forecasts for **2012 & 2017**

Study #2447 | January 2009 | \$4600 | 271 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

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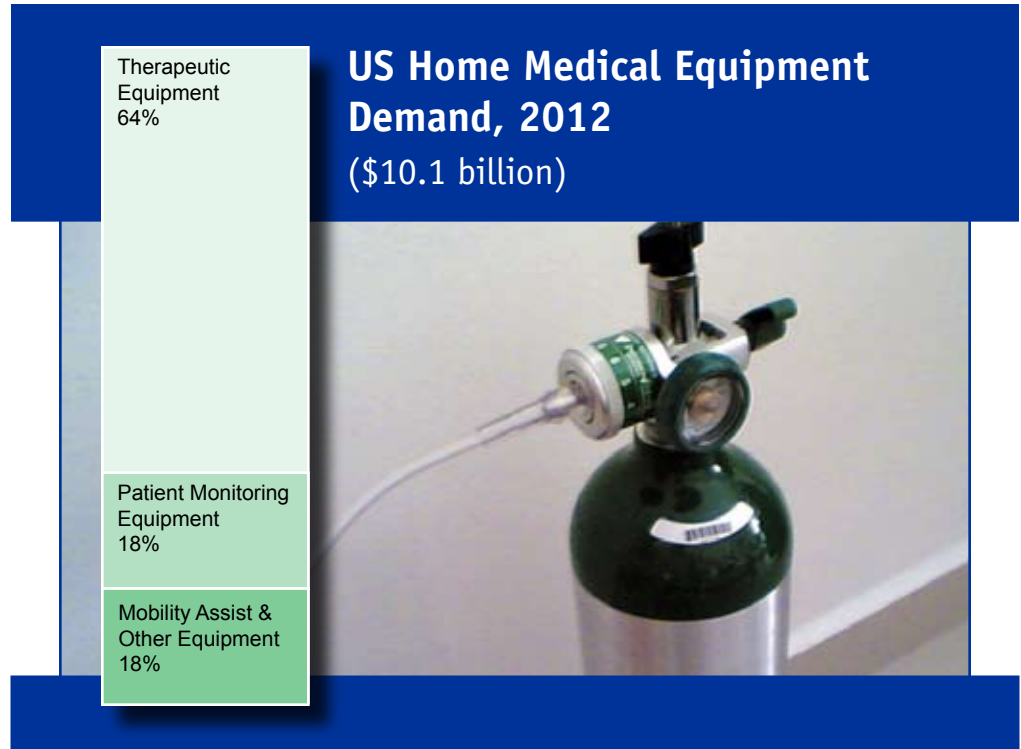
Cost-saving products that reduce the need to treat or monitor chronically ill patients in hospitals, skilled nursing facilities and specialized clinics will command strong growth opportunities.

US demand to grow 5.5% annually through 2012

US demand for home medical equipment is forecast to increase 5.5 percent annually to over \$10 billion in 2012. Cost-saving products that reduce the need to treat or monitor chronically ill patients in hospitals, skilled nursing facilities and specialized clinics will command strong growth opportunities. Included in this group are CPAP machines and accessories, peritoneal dialysis equipment, IV pumps, ventilators and accessories, and blood pressure monitors. Mobility devices, medical furniture and home safety equipment that enable elderly and disabled persons to live independently without extensive caregiver support will continue to form sizeable markets.

Respiratory, kidney, cancer therapy products to drive therapeutic segment

An increasing prevalence of chronic conditions, especially respiratory disorders, kidney failure and cancer, will boost demand for home therapeutic equipment 6.2 percent annually to 2012. Portable oxygen concentrators for treating chronic obstructive pulmonary disease (COPD), CPAP products for managing obstructive sleep apnea, and ventilators and accessories for alleviating severe breathing impairments will provide the best growth opportunities for home respiratory therapy equipment. Advances in the ease of use and convenience features of dialysate machines,



coupled with a rising number of patients with end-stage kidney failure, will create fast rising demand for home dialysis products. The home IV equipment market will gain strong upward momentum as an increasing number of cancer and other chronic care patients receive parenteral nutritional therapies.

BP, heart rate products to pace monitoring equipment

Demand for home patient monitoring equipment will increase 5.6 percent annually to 2012. This product segment will see mixed growth opportunities as markets for products such as electronic thermometers and Holter monitors are approaching the saturation stage. Monitors for blood pressure, coagulation,

heart rate, sleep apnea and general physiological parameters, along with home alert systems, will fare better in the marketplace based on trends promoting the expansion of preventive medicine activities.

A significant share of the demand posted by home medical equipment will remain in mobility assist devices. Strong growth in the elderly population will create opportunities for both personal and household products that help orthopedically impaired individuals maintain independent lifestyles. As a result, bathroom safety products, home medical furniture, powered scooters, rollators, and canes will build up attractive niches in the home health care marketplace.

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Sample Text, Table & Chart

HOME THERAPEUTIC EQUIPMENT

Oxygen Concentrators -- Oxygen concentrators hold the best growth potential among home oxygen therapy equipment. They generate oxygen internally from the air and do not require refilling. Based on this advantage and the increasing availability of models adaptable to away-from-home use, demand for oxygen concentrators in the home health care market is projected to expand annually to \$1.5 billion by 2017. Demand for these units will also benefit from the increasing availability of Medicare reimbursement, which is expected to be expanded under the new Medicare reimbursement scheme, which will cover the cost of the devices.

Oxygen concentrators are electrically or battery powered units that remove nitrogen from air thereby producing oxygen. Until the recent introduction of portable models, available oxygen concentrators consisted of non-transportable, stationary units used exclusively by patients at home. Newer portable configurations have greatly expanded the market potential of this product group.

Among the top-selling portable oxygen concentrators on the market is Respiroics' EVERGO, which weighs less than ten pounds and is easily transportable in a black case with a non-medical design. The EVERGO features an eight-hour battery life, an oxygen capacity of 1,050 milliliters per minute and an easy to use, control touch screen. The device delivers oxygen on a pulse basis, which conserves power and extends battery life.

Another high value-added portable oxygen concentrator is sold by SeQual Technologies under the ECLIPSE 2 label. The ECLIPSE 2 provides for both pulse and continuous oxygen delivery and incorporates an automatically recharging cassette. The concentrator is about the size

TABLE V-1

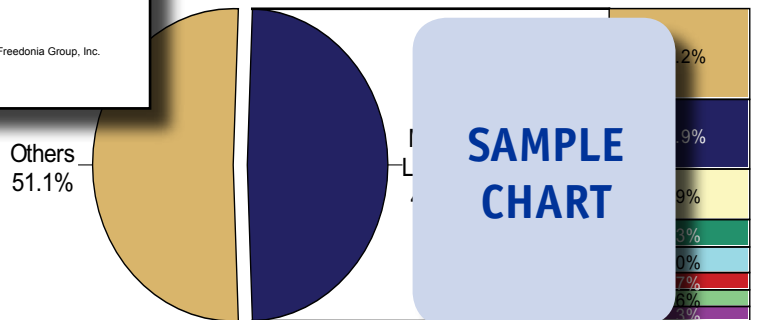
HOME PATIENT MONITORING EQUIPMENT DEMAND BY PRODUCT GROUP (million dollars)

Item	1997	2002	2007	2012	2017
Chronic Conditions (mil)					
\$ monitors/000 conditions					
Home Patient Monitoring Equipment					
Blood Glucose Monitors					
Blood Pressure Monitors					
Holter Monitors					
Heart Rate Meters					
Apnea & Sleep Monitors					
Multi-Parameter Monitors					
Other Home Patient Monitors					
% patient monitoring equipment					
Home Medical Equipment Demand					

SAMPLE TABLE

CHART VII-1

GLOBAL EQUIPMENT MARKET SHARE BY COMPANY, 2007 (\$7.7 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-2
WHEELCHAIRS & RELATED APPLIANCE DEMAND

Item	1997	2002	2007	2012	2017
Population 65 Years & Older (mil)	34.4	35.6	37.9	42.6	49.8
wheelchairs & rel/000 capita 65+	2	2	2	2	1.9
Wheelchairs & Related (000)					90
\$/unit					50
Wheelchairs & Related (mil \$)					10
Wheelchairs:					90
Manual Wheelchairs					90
Powered Wheelchairs					10
Powered Scooters					20
Stair Lifts					90
% wheelchairs & related appliances	73.8	73.6	71.7	69.4	67.7
Mobility Assist & Other Equip (mil \$)	1009	1320	1575	1860	2230

**SAMPLE
TABLE**

COMPANY PROFILES

DeVilbiss Healthcare Incorporated

100 DeVilbiss Drive
 Somerset, PA 15501
 814-442-4881
<http://www.devilbiss.com>

Annual Sales:
 Employment:

Key Products
 humidifiers, nebulizers,
 CPAP systems, oxygen concentrators, portable oxygen filling stations

**SAMPLE
PROFILE**

DeVilbiss Healthcare is a designer, manufacturer and marketer of home care and extended care products, including respiratory medical and sleep therapy equipment. The privately held company also provides a range of financial and educational services related to its products. DeVilbiss Healthcare manufactures products in the US, Europe and the Asia/Pacific region, and distributes products in more than 100 countries worldwide. In July 2007, the Company was spun off from Sunrise Medical Incorporated (Longmont, Colorado).

DeVilbiss Healthcare is active in the US home medical equipment industry through the manufacture of sleep apnea and respiratory therapy products. Among the Company's sleep apnea therapy products are continuous positive airway pressure (CPAP) systems, which are offered in standard, bilevel and automatic adjust types. For example, DeVilbiss Healthcare makes the DEVILBISS INTELLIPAP standard CPAP unit with an attached heated humidification system. This device features large, slip-resistant pads on the bottom of the unit to minimize movement on tables during the night; a delay pressure ramp designed

"Powered Wheelchairs -- Weakened by intensifying supplier competition and tighter controls on Medicare and other health insurance coverage and reimbursement, home demand for powered wheelchairs will expand slowly, rising 1.6 percent annually to \$470 million in 2012. Ongoing advances in the performance and convenience features of manual wheelchairs will also hinder gains. Lastly, ..."

--Section VI, pg. 132-3

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OTHER STUDIES

Disposable Medical Supplies

This study analyzes the US disposable medical supply industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product group (e.g., drug delivery, catheterization and related; wound management; nonwoven medical disposables), market (e.g., hospitals, home health care, outpatient facilities, physicians' offices) and raw material. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2476 04/2009..... \$4800

In Vitro Diagnostics

This study analyzes the US IVD industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., reagents and consumables, clinical chemistry, immunoassay, blood testing, nucleic acid testing, microbiology, cellular analysis, anatomical pathology, effusion and visual inspection, cytology), application (e.g., endocrine conditions, infectious diseases, cancer, drug testing, heart disease testing) and market. The study also evaluates company market share and profiles industry players.

#2455 02/2009..... \$4800

Dental Products in China

This study analyzes the Chinese market for dental care products. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by material, product (e.g., crowns and bridges, dentures, implants, fillings, orthodontic appliances, veneers, whiteners, adhesives and cements, sealants, fluoride treatments, toothpaste, mouthwash/dental rinse, floss), end use (professional, consumer), and region. The study also considers market environment factors, evaluates company market share and profile industry players.

#2421 01/2009..... \$5100

Patient Monitoring Systems

US demand for patient monitoring systems will grow 5.9% annually through 2012. Accessories will be the fastest growing segment, driven by blood glucose testing strips. Growth in the equipment sector will be based on strength in remote monitors that transmit data via the Internet or telephone, and in home use devices. This study analyzes the \$9 billion US patient monitoring system industry, with forecasts for 2012 and 2017 by product and market. It also details company market share and profiles major players.

#2323 04/2008..... \$4600

Drug Delivery Systems

US demand for drug delivery systems will grow 10% annually through 2012. Oral types will remain the largest drug delivery category while parenteral, inhalation and implantable systems grow the fastest. Parenteral formulations will eventually surpass oral dosages as the largest product group. This study analyzes the \$80.2 billion US drug delivery system industry, with forecasts for 2012 and 2017 by material, type and application. It also evaluates company market share and profiles leading industry players.

#2294 03/2008..... \$4500

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