

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOAL AND OBJECTIVES .....	1
REASONS FOR DOING THE STUDY .....	1
INTENDED AUDIENCE.....	1
SCOPE OF REPORT .....	1
METHODOLOGY .....	2
INFORMATION SOURCES.....	2
AUTHOR’S CREDENTIALS .....	2
RELATED BCC PUBLICATIONS .....	2
BCC ONLINE SERVICES.....	3
DISCLAIMER .....	3
 CHAPTER TWO: SUMMARY.....	 4
DECISIVE CHANGES IN LIVES .....	4
WHAT DOES THE FUTURE HOLD? .....	5
PROJECTIONS FOR FUTURE NEEDS .....	5
<i>SUMMARY TABLE PROJECTED NEEDS OF THE U.S. ELDERLY,</i> <i>THROUGH 2014 (\$ MILLIONS).....</i>	 6
<i>SUMMARY FIGURE PROJECTED NEEDS OF THE U.S. ELDERLY, BY</i> <i>MARKET SEGMENT, 2008-2014 (\$ MILLIONS).....</i>	 6
<i>SOURCE: BCC RESEARCH .....</i>	 6
 CHAPTER 3: DEMOGRAPHICS OF THE ELDERCARE MARKET .....	 7
DEFINITIONS .....	7
GLOBAL SOCIAL ENVIRONMENT.....	7
INTERGENERATIONAL LIVING ISSUES IN DEVELOPING	
COUNTRIES .....	8
INTERGENERATIONAL-LIVING ISSUES IN DEVELOPED	
COUNTRIES .....	8
GLOBAL ECONOMIC ENVIRONMENT.....	8
DEMOGRAPHICS IN THE UNITED STATES.....	9
SHIFTING DEMOGRAPHICS IN THE U.S.....	9
<i>TABLE 1 ESTIMATES FOR OVER-65 POPULATIONS BY U.S.</i> <i>REGION, 2007 .....</i>	 9
RACIAL AND ETHNIC CHANGES.....	10
<i>FIGURE 1 DISTRIBUTION OF OVER-65 U.S POPULATION BY</i> <i>RACE/ETHNICITY 2007 AND 2015 (%).....</i>	 11
HEALTH OF THE ELDERLY IN THE U.S. ....	12
DISCREPANCIES IN MINORITY HEALTH STATUS .....	12
LIVING WITH LIMITATIONS .....	12
<i>FIGURE 2 PREVALANCE OF CHRONIC CONDITIONS AMONG</i> <i>ADULTS IN THE U.S. OVER 65 YEARS OF AGE, BY RACE AND</i> <i>ETHNICITY (%).....</i>	 13

<i>FIGURE 3 CHRONIC CONDITIONS IN U.S. POPULATION OVER 65, 2005 (%)</i> .....	14
LONG-TERM CARE SPENDING .....	14
<i>FIGURE 4 U.S. NATIONAL SPENDING ON LONG-TERM CARE, BY PAYER, 2005 (%)</i> .....	15
U.S. HEALTH TRENDS .....	15
<i>TABLE 2 MOST COMMON CHRONIC CONDITIONS BY AGE, GENDER, AND RACE IN U.S., 2005</i> .....	16
MORTALITY AND U.S. SENIORS .....	17
<i>FIGURE 5 LEADING CAUSES OF U.S. DEATHS IN THOSE OVER 65, 2007 (%)</i> .....	18
INDIVIDUAL BEHAVIORS AND MORTALITY .....	18
ECONOMIC TRENDS FOR U.S. SENIORS .....	19
HOUSING TRENDS FOR U.S. SENIORS .....	19
Housing Options .....	20
LIFESTYLE TRENDS FOR SENIORS IN THE U.S. ....	21
INTERNATIONAL DEMOGRAPHICS .....	21
HEALTH OF THE ELDERLY AROUND THE GLOBE .....	22
ECONOMIC TRENDS OUTSIDE THE U.S. ....	22
HOUSING TRENDS OUTSIDE THE U.S. ....	23
GLOBAL LIFESTYLE TRENDS OF THE ELDERLY .....	23
 CHAPTER FOUR: OVERVIEW OF HEALTHCARE FUNDING	
POSSIBILITIES .....	24
U. S. AND INTERNATIONAL HEALTHCARE COSTS.....	24
<i>TABLE 3 COMPARISON OF ESTIMATED GOVERNMENT HEALTHCARE SPENDING AS PERCENT OF GDP, 2007 (%/\$ MILLIONS)</i> .....	24
<i>TABLE 3 (CONTINUED)</i> .....	25
<i>FIGURE 6 PROJECTED U.S. POPULATION OVER 65, 2000-2050 (%)</i> .....	25
U.S. RETIREMENT FUNDING .....	26
Individual Retirement Savings .....	26
Social Security .....	27
<i>FIGURE 7 RECIPIENTS OF SOCIAL SECURITY BENEFITS, 2006 (%)</i> .....	27
Social Security Beneficiaries .....	28
Social Security Solvency .....	28
Company-sponsored Pension Plans .....	28
GLOBAL RETIREMENT FUNDING.....	29
Individual Retirement Savings .....	29
<i>TABLE 4 SELECTED PUBLIC AND PRIVATE PENSION EXPENDITURES, 2006 (\$ MILLIONS)</i> .....	29
Social Security .....	29
TYPES OF HEALTHCARE FUNDING IN THE U.S.....	30
Private Insurance .....	30
Long Term Care Insurance .....	31

Medicare.....	31
Medicare Part A.....	32
Medicare Part B.....	32
Medicare Part C.....	33
Medicare Part D.....	33
Medicaid.....	33
Medicaid Spending and Community-based Services.....	34
<i>TABLE 5 CURRENT MEDICARE/MEDICAID PAYMENTS FOR SERVICES, 2009</i> .....	34
<i>TABLE 5 (CONTINUED)</i> .....	35
Medicare and Private Health Insurance	
Reimbursement Issues.....	35
Medicare Policies on Reimbursement for Powered Wheelchairs.....	35
 CHAPTER 5: U.S. GOVERNMENT PROGRAMS AND LEGISLATION FOR THE ELDERLY.....	36
THE AMERICANS WITH DISABILITIES ACT.....	36
LITIGATION ON BEHALF OF THE ELDERLY.....	36
ADDITIONAL LEGISLATION.....	37
SAFETY AND QUALITY REGULATIONS.....	38
CLASS I AND II DEVICES.....	38
NUTRITION PROGRAMS.....	38
INFRASTRUCTURE CONSIDERATIONS.....	39
 CHAPTER 6: INDUSTRY TRENDS BY SECTOR—HEALTHCARE.....	40
INDUSTRY TRENDS BY SECTOR—HEALTHCARE.....	40
<i>TABLE 6 PROJECTED U.S. MARKET FOR ELDERCARE HEALTHCARE PRODUCTS AND SERVICES, THROUGH 2014 (\$ MILLIONS)</i> .....	41
ARTHRITIS.....	41
<i>TABLE 7 INCIDENCE OF DIAGNOSED ARTHRITIS CASES AND CHRONIC JOINT SYMPTOMS IN THE U.S. BY AGE GROUP, 2006 (MILLION PERSONS)</i> .....	42
Current Treatments.....	42
Medications.....	42
• Rheumatoid Arthritis.....	43
• Anticytokine Agents.....	43
<i>TABLE 8 NEWER ANTICYTOKINE AGENTS FOR THE TREATMENT OF RHEUMATOID ARTHRITIS</i> .....	44
Nutritional Supplements.....	44
Future Arthritis Burden in the U.S.....	44
<i>FIGURE 8 FUTURE BURDEN OF ARTHRITIS FOR THOSE OVER 65 IN THE U.S., BY GENDER, 2010-2030 (MILLIONS)</i> .....	45
Market for Treatments for Arthritis for the Elderly.....	45

<i>TABLE 9 PROJECTED U.S. MARKET FOR PHARMACEUTICAL ARTHRITIS MEDICATIONS FOR INDIVIDUALS OVER 65, AT MANUFACTURER'S COST, THROUGH 2014 (\$ MILLIONS)</i> .....	46
Opportunities for Growth Related to Arthritis .....	46
<i>CARDIOVASCULAR DISEASES</i> .....	46
Cardiovascular Disease in the U.S. ....	47
Cardiovascular Disease Internationally .....	47
Risk Factors .....	47
Treatments .....	48
Lifestyle Changes.....	48
Medications .....	48
<i>TABLE 10 SELECTED HEART DISEASE MEDICATIONS</i> .....	49
<i>TABLE 10 (CONTINUED)</i> .....	50
<i>TABLE 11 GLOBAL MARKET FOR CARDIOVASCULAR DISEASE MEDICATIONS, THROUGH 2014 (\$ MILLIONS)</i> .....	51
<i>TABLE 12 U.S. MARKET FOR CARDIOVASCULAR DISEASE MEDICATIONS FOR THE ELDERLY, THROUGH 2014 (\$ MILLIONS)</i> .....	51
Surgery .....	51
<i>TABLE 13 U.S. MARKET FOR CARDIOVASCULAR SURGICAL PROCEDURES FOR THE ELDERLY, THROUGH 2014 (\$ MILLIONS)</i> .....	52
<i>NEUROLOGICAL DYSFUNCTIONS</i> .....	53
Related Dementias and Alzheimer's Disease .....	53
<i>FIGURE 9 CAUSES OF DEMENTIA IN PEOPLE OVER 65 (%)</i> .....	54
Current Treatments for Alzheimer's.....	55
<i>TABLE 14 COMMON PRESCRIPTION MEDICATIONS TO TREAT ALZHEIMER'S DISEASE</i> .....	56
<i>DEPRESSION</i> .....	56
Origins of the Disease.....	57
Genetic Factors .....	57
Biological Factors.....	57
Sociological Factors.....	57
Psychological Factors.....	58
Risk Factors for Depression .....	58
Gender .....	58
Age .....	58
Marital status .....	58
Family History .....	59
Social Support .....	59
Family Type .....	59
Medical Status .....	59
<i>TABLE 15 PERCENTAGE OF PATIENTS WHO REPORT BEING DEPRESSED, BY CHRONIC CONDITION (%)</i> .....	60
Types of Depression.....	60

Prevalence of the Disorder .....	60
Diagnosing Depression .....	60
Treatment for Depression .....	61
<i>TABLE 16 GLOBAL DIRECT AND INDIRECT COST OF DEPRESSION, THROUGH 2014 (\$ MILLIONS)</i> .....	61
Therapy .....	62
Antidepressant Medications.....	62
<i>TABLE 17 SELECTED ANTIDEPRESSANT MEDICATIONS</i> .....	62
<i>TABLE 17 (CONTINUED)</i> .....	63
• Market for Neurological Medications.....	63
<i>TABLE 18 PROJECTED U.S. MARKET FOR DEMENTIA AND DEPRESSION MEDICATIONS FOR THE ELDERLY, THROUGH 2014 (\$ MILLIONS)</i> .....	63
CANCER.....	64
Types of Cancer .....	64
<i>FIGURE 10 ESTIMATED NEW CASES OF CANCER IN THE U.S., 2008 (%)</i> .....	65
Costs for Cancer.....	65
<i>TABLE 19 PROJECTED GLOBAL COSTS FOR CANCER TREATMENTS, THROUGH 2014 (\$ MILLIONS)</i> .....	66
Treatment for Seniors .....	66
<i>TABLE 20 PROJECTED U.S. MARKET FOR ALL TYPES OF CANCER TREATMENTS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$MILLIONS)</i> .....	66
DIABETES .....	67
Diabetes in the U.S.....	67
International Prevalence.....	67
Origins of the Disease.....	68
Type 2 Diabetes .....	68
Complications of Diabetes .....	69
Barriers to Care in the U.S. ....	69
Diagnosing Diabetes.....	69
Prediabetes.....	70
Treatment for Type 2 Diabetes .....	70
Prescription Trends in Diabetes Care.....	71
Medications for Type 2 Diabetes .....	71
<i>TABLE 21 SELECTED DIABETIC ORAL AGENTS, BY TYPE, TRADE NAME AND MANUFACTURER</i> .....	72
<i>TABLE 21 (CONTINUED)</i> .....	73
<i>TABLE 22 GLOBAL MARKET FOR DIABETIC ORAL AGENTS, THROUGH 2014 (\$ MILLIONS)</i> .....	73
The Elder Market for Diabetic Oral Agents.....	74
<i>TABLE 23 U.S. MARKET FOR DIABETIC ORAL AGENTS FOR ADULTS OLDER THAN 65, THROUGH 2014 (\$ MILLIONS)</i> .....	74

Types of Insulin .....	74
Long-acting Insulins .....	75
Rapid Insulins .....	75
Intermediate-acting Insulin .....	75
Short-acting Insulin .....	75
<i>TABLE 24 INSULIN MARKET IN U.S. FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	76
Blood Glucose Monitoring .....	76
<i>TABLE 25 SELECTED LIST OF COMPANIES MARKETING GLUCOSE MONITORING TESTS</i> .....	77
<i>TABLE 26 GLOBAL MARKET FOR BLOOD GLUCOSE MONITORING DEVICES, THROUGH 2014 (\$ MILLIONS)</i> .....	78
<i>TABLE 27 U.S. BLOOD GLUCOSE MONITORING MARKET THROUGH 2014 (\$ MILLIONS)</i> .....	78
<i>TABLE 28 GLOBAL BLOOD GLUCOSE MONITORING MARKET FOR INDIVIDUALS OLDER THAN 65, THROUGH 2014 (\$ MILLIONS)</i> .....	79
<i>TABLE 29 U.S. BLOOD GLUCOSE MONITORING MARKET FOR INDIVIDUALS OLDER THAN 65, THROUGH 2014 (\$ MILLIONS)</i> .....	79
Rationale for the Use of Blood Glucose Monitors.....	79
Nutrition and Exercise .....	80
COMMUNICATION DISORDERS.....	81
Speech Impairments.....	81
Writing Difficulties.....	81
Sensory Disabilities.....	81
Vision Loss .....	81
<i>TABLE 30 PREVALENCE OF AGE-RELATED EYE DISEASES, 2004 (%)</i> .....	82
<i>TABLE 30 (CONTINUED)</i> .....	83
Eyeglass Market .....	83
<i>FIGURE 11 U.S. MARKET FOR EYEGLASSES AND CONTACTS IN 2007 (%)</i> .....	84
Market for Vision Loss Products .....	84
<i>TABLE 31 PROJECTED U.S. EYEWEAR SALES, THROUGH 2014 (\$ MILLIONS)</i> .....	85
Market for Eyewear Products for Seniors.....	85
<i>TABLE 32 PROJECTED U.S. EYEWEAR SALES FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	85
Cataracts .....	86
<i>TABLE 33 PROJECTED COST OF CATARACT SURGERY FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	86
Hearing Loss .....	86
<i>TABLE 34 SELECTED HEARING AID MANUFACTURERS</i> .....	87
<i>TABLE 35 REPORTED INCIDENCE OF HEARING PROBLEMS AMONG U.S. ADULTS BY SEX/AGE GROUP, 2006 (%)</i> .....	88
Projected Senior Market for Hearing Aids .....	88

<i>TABLE 36 PROJECTED U.S. MARKET FOR HEARING AIDS FOR INDIVIDUALS OVER 65, AT RETAIL PRICING, THROUGH 2014 (\$ MILLIONS)*</i> .....	88
Cochlear Implants.....	89
Communication Aids .....	89
Speech Recognition .....	89
Vocal Output Technology.....	89
Developments in Communication Technology.....	90
Mobile Location Technology .....	90
Sensor Technology .....	90
Visual and Reading Aids .....	91
<i>TABLE 37 2007 VISION AND READING AIDS SALES</i> .....	91
Newer adaptive technologies.....	91
MEMS-based Hearing Aids .....	92
Telephony Accessories .....	92
Vision and Reading Aids.....	92
Video Magnifiers .....	92
ORTHOPEDIC IMPAIRMENTS .....	93
<i>TABLE 38 PROJECTED TRENDS IN NUMBER OF U.S. TOTAL HIP AND KNEE REPLACEMENTS, THROUGH 2014 (THOUSANDS OF PROCEDURES)</i> .....	94
<i>TABLE 39 U.S. ORTHOPEDIC IMPLANT MARKET BY NUMBER AND TYPE OF PROCEDURE, THROUGH 2014</i> .....	94
Orthopedic Implant Market for Elders.....	94
<i>TABLE 40 PROJECTED U.S. AND REST OF THE WORLD ORTHOPEDIC IMPLANT MARKET GROWTH, THROUGH 2014 (\$ MILLIONS)</i> .....	95
<i>TABLE 41 PROJECTED U.S. COSTS OF ORTHOPEDIC SURGERY FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	95
Orthobiologic Market.....	96
<i>TABLE 42 GLOBAL ORTHOBIOLOGICS MARKET, BY PRODUCT, THROUGH 2014 (\$ MILLIONS)</i> .....	96
Orthobiologics and Implications for Falls and the Elderly .....	96
RESPIRATORY CONDITIONS.....	97
Allergies and Asthma .....	97
ASTHMA.....	97
Origins of the Disease.....	98
Treatments.....	98
<i>TABLE 43 SELECTED LIST OF COMMON ALLERGY/ASTHMA MEDICATIONS</i> .....	99
<i>TABLE 44 SELECTED LISTING OF INHALED CORTICOSTEROIDS</i> .....	100
Costs for Asthma Medications .....	100

<i>TABLE 45 GLOBAL COSTS FOR ASTHMA MEDICATIONS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	100
<i>TABLE 46 U.S. COSTS FOR ASTHMA MEDICATIONS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	101
CHRONIC OBSTRUCTIVE PULMONARY DISEASE (COPD) .....	101
Costs of COPD in the U.S.,.....	101
Home Use of Oxygen and Respiratory Supplies.....	102
Costs of Respiratory Care.....	102
<i>TABLE 47 PROJECTED COSTS OF HOME OXYGEN AND RESPIRATORY SUPPLIES FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	102
OTHER CHRONIC CONDITIONS .....	103
Dental Health .....	103
Osteoporosis .....	103
Age-related Loss of Strength/Balance/Coordination .....	104
UROLOGICAL PROBLEMS.....	104
Incontinence Medications.....	105
<i>TABLE 48 PROJECTED MARKET FOR INCONTINENCE MEDICATIONS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	105
Benign Prostatic Hyperplasia (BPH).....	105
<i>TABLE 49 SELECTED MEDICATIONS FOR BPH</i> .....	106
<i>TABLE 50 PROJECTED U.S. MARKET FOR BPH MEDICATIONS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	106
OBESITY .....	106
<i>TABLE 51 GLOBAL MARKET FOR PRESCRIPTION WEIGHT LOSS PRODUCTS THROUGH 2014 (\$ MILLIONS)</i> .....	107
<b>CHAPTER 7: INDUSTRY TRENDS BY SECTOR—HOUSING/PERSONAL CARE</b> .....	108
<i>TABLE 52 PROJECTED HOUSING MARKETS FOR SENIORS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	108
OPTIONS FOR HOUSING.....	109
REMODELING TO REMAIN AT HOME .....	109
<i>TABLE 53 PROJECTED SPENDING ON HOME RENOVATION PROJECTS BY INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	109
COSTS OF AT-HOME SENIOR SERVICES CARE.....	110
<i>TABLE 54 AVERAGE ANNUAL COST OF HOME CARE SERVICES, 2008 (\$)</i> .....	111
<i>TABLE 55 PROJECTED MARKET FOR HOME CARE SERVICES, THROUGH 2014 (\$ MILLIONS)</i> .....	111
ADULT DAY CENTERS .....	111
ALTERNATIVE COMMUNITIES.....	112
Independent Living Communities .....	112



Recreationally Based Retirement Communities .....	113
Assisted Living .....	113
Costs for Assisted Living .....	114
<b>TABLE 56 PROJECTED GROWTH OF ASSISTED-LIVING COSTS IN THE U.S. FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</b> .....	115
Nursing Care .....	115
Paying for Skilled Nursing Services .....	115
<b>TABLE 57 PROJECTED MARKET FOR SKILLED NURSING FACILITIES FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</b> .....	116
Alzheimer's Care.....	116
Costs of Alzheimer's Care.....	116
UNPAID CAREGIVERS .....	117
PAID CAREGIVERS .....	117
Toll on Caregivers.....	118
LONG-TERM CARE .....	118
<b>FIGURE 12 PROJECTED LIFETIME LONG-TERM CARE NEEDS FOR INDIVIDUALS OVER 65 (%)</b> .....	119
<b>END-OF-LIFE CONSIDERATIONS</b> .....	119
Legal Matters.....	119
Hospice and Alzheimer's .....	120
Hospice Costs and Alzheimer's Disease.....	120
<b>MARKET OPPORTUNITIES IN ELDERCARE HOME SERVICES AND HOUSING OPTIONS</b> .....	120
Market Opportunities in ...(Continued) .....	121
<b>CHAPTER EIGHT: INDUSTRY TRENDS BY SECTOR—ASSISTIVE TECHNOLOGY</b> .....	122
<b>TABLE 58 PROJECTED U.S. ASSISTIVE TECHNOLOGY SALES FOR THE ELDERCARE MARKET, THROUGH 2014 (\$ MILLIONS)</b> .....	122
HOME SAFETY PRODUCTS/SERVICES.....	123
ACTIVITY LOCATION/PERSONAL MONITORING AIDS .....	123
Activity/Emergency Location Monitors .....	123
Remote Medical Monitors.....	123
<b>TABLE 59 SELECTED MEDICAL/PERSONAL MONITORING AID MANUFACTURERS</b> .....	124
MARKET GROWTH .....	124
<b>TABLE 60 PROJECTED U.S. SALES OF MEDICAL/PERSONAL MONITORING AIDS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</b> .....	124
MARKET DRIVERS.....	125
Market Fragmentation .....	125
DAILY LIVING AIDS .....	125
<b>TABLE 61 SELECTED DAILY LIVING AIDS MANUFACTURERS</b> .....	126

<i>FIGURE 13 DAILY LIVING MARKET, BY SEGMENT AND TOTAL PERCENT OF SALES, 2007 (%)</i> .....	126
<i>FIGURE 14 PERCENT OF TOTAL SALES FOR OTHER DAILY LIVING AIDS, 2007 (%)</i> .....	127
The Market for Daily Living Aids.....	127
<i>TABLE 62 PROJECTED U.S. SALES OF DAILY LIVING AIDS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	128
Market Share by Company .....	128
<i>TABLE 63 DAILY LIVING AIDS MANUFACTURERS, SALES AND PERCENT OF MARKET, 2007 (\$ MILLIONS/PERCENT)</i> .....	128
Incontinence Product Market.....	129
<i>TABLE 64 PROJECTED U.S. SALES OF INCONTINENCE AND OSTOMY PRODUCTS, THROUGH 2014 (\$ MILLIONS)</i> .....	129
BATHING AIDS.....	129
Commode and Shower Chairs .....	129
<i>TABLE 65 PROJECTED U.S. SALES OF COMMODE AND SHOWER CHAIRS TO INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	130
MOBILITY AIDS .....	130
<i>TABLE 66 REPORTED INCIDENCE OF IMPAIRED MOBILITY AND DEXTERITY IN THE U.S. BY SEX/AGE GROUP, 2006 (%)</i> .....	131
<i>TABLE 67 PROJECTED U.S. MARKET FOR MOBILITY PRODUCTS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	131
AMBULATORY AIDS .....	132
<i>TABLE 68 SELECTED AMBULATORY AID MANUFACTURERS</i> .....	132
Ambulatory Aids Usage and Demographics.....	132
<i>TABLE 69 PROJECTED U.S. SALES OF AMBULATORY AIDS FOR INDIVIDUALS OVER 65, THROUGH 2014 (\$ MILLIONS)</i> .....	133
WHEELCHAIR/SCOOTER USE.....	133
Medicare Reimbursement for Powered Wheelchairs .....	134
MARKET SHARE LEADERS.....	134
<i>TABLE 70 SELECTED LIST OF WHEELCHAIR AND SCOOTER MANUFACTURERS</i> .....	134
<i>TABLE 70 (CONTINUED)</i> .....	135
<i>TABLE 71 WHEELCHAIR TYPES AND PERCENT OF MARKET, 2007 (%)</i> .....	135
MARKET DRIVERS.....	135
<i>TABLE 72 PROJECTED U.S. MARKET FOR WHEELCHAIR/SCOOTER MOBILITY PRODUCTS FOR THE ELDERLY, THROUGH 2014 (\$ MILLIONS)</i> .....	136
Special Purpose Wheelchairs .....	136
MOTOR VEHICLE CONVERSIONS .....	136
NAVIGATION AIDS .....	137
Ultrasound Guidance Systems.....	137

GPS Systems.....	138
<i>TABLE 73 SELECTED NAVIGATION AIDS MANUFACTURERS.....</i>	<i>138</i>
ACCESS AIDS.....	138
MARKET FOR ACCESS AIDS.....	139
<i>TABLE 74 PROJECTED U.S. SALES OF ACCESS AID PRODUCTS BY</i>	
<i>SEGMENT, THROUGH 2014 (\$ MILLIONS) .....</i>	<i>139</i>
<i>TABLE 75 PROJECTED U.S. SALES OF ACCESS AID PRODUCTS</i>	
<i>FOR INDIVIDUALS OVER 65, BY SEGMENT, THROUGH 2014 (\$</i>	
<i>MILLIONS).....</i>	<i>139</i>
HOME ELEVATORS .....	140
WHEELCHAIR LIFTS.....	140
STAIR CLIMBERS.....	140
ACCESSIBLE BATHS AND SHOWERS.....	140
SPECIAL COMMODES .....	140
BATH AND POOL LIFTS.....	141
TRANSFER LIFTS.....	141
DOOR OPENERS.....	141
<i>TABLE 76 SELECTED ACCESS AID MANUFACTURERS .....</i>	<i>141</i>
OTHER AIDS .....	142
<i>TABLE 77 SELECTED MANUFACTURERS OF BED, SEATING, AND</i>	
<i>ERGONOMIC AIDS FOR THE ELDERLY.....</i>	<i>142</i>
<i>TABLE 78 PROJECTED MARKET FOR BEDS, SEATING SYSTEMS,</i>	
<i>AND ERGONOMIC AIDS FOR INDIVIDUALS OVER 65, THROUGH</i>	
<i>2014 (\$ MILLIONS).....</i>	<i>143</i>
Beds, Seating .....	143
Bariatric Beds .....	144
Seating and Positioning Systems.....	144
Ergonomic Aids.....	144
<i>TABLE 79 EXAMPLES HAVE ERGONOMIC AIDS FOR THE ELDERLY ...</i>	<i>145</i>
Computer Access Aids .....	145
Input Devices .....	145
Output Devices.....	145
Computer Software .....	146
<i>TABLE 80 SELECTED COMPUTER AID MANUFACTURERS.....</i>	<i>146</i>
ENVIRONMENTAL AIDS.....	146
<i>TABLE 81 SELECTED ENVIRONMENTAL AID MANUFACTURERS.....</i>	<i>147</i>
ASSISTIVE TECHNOLOGIES UNDER DEVELOPMENT .....	147
ELECTRONICS.....	148
Mobile Location Technology .....	148
Sensor Technology .....	148
Artificial Intelligence.....	148
ENERGY SOURCES.....	149
MINIATURIZATION .....	149
 CHAPTER NINE: COMPANY DIRECTORY .....	 150

ABBOTT LABORATORIES.....	150
BUSINESS OVERVIEW.....	150
FINANCIALS .....	150
PRODUCTS.....	150
ASTRAZENECA PLC .....	151
BUSINESS OVERVIEW.....	151
FINANCIALS .....	151
PRODUCTS.....	151
BAY ADVANCED TECHNOLOGIES, LTD. ....	151
BUSINESS OVERVIEW.....	152
FINANCIALS .....	152
PRODUCTS .....	152
BAYER AG (MILES-BAYER).....	152
BUSINESS OVERVIEW.....	152
FINANCIALS .....	152
PRODUCTS.....	153
BRISTOL-MYERS SQUIBB.....	153
BUSINESS OVERVIEW.....	153
FINANCIALS .....	153
PRODUCTS .....	153
BROOKDALE SENIOR LIVING .....	153
BUSINESS OVERVIEW.....	154
FINANCIALS .....	154
PRODUCTS.....	154
CENTOCOR.....	154
BUSINESS OVERVIEW.....	154
FINANCIALS .....	154
PRODUCTS.....	155
COVIDIEN .....	155
BUSINESS OVERVIEW.....	155
FINANCIALS .....	155
PRODUCTS .....	155
ELI LILLY.....	155
BUSINESS OVERVIEW.....	156
FINANCIALS .....	156
PRODUCTS.....	156
FOREST PHARMACEUTICALS .....	156
BUSINESS OVERVIEW.....	156
FINANCIALS .....	157
PRODUCTS .....	157
GENENTECH, INC. ....	157
BUSINESS OVERVIEW.....	157
FINANCIALS .....	157
PRODUCTS .....	157

GLAXOSMITHKLINE PLC .....	158
BUSINESS OVERVIEW .....	158
FINANCIALS .....	158
PRODUCTS .....	158
GRAHAM-FIELD HEALTH PRODUCTS .....	158
BUSINESS OVERVIEW .....	159
FINANCIALS .....	159
PRODUCTS .....	159
HONEYWELL HOMMED, LLC.....	159
BUSINESS OVERVIEW .....	159
FINANCIALS .....	159
PRODUCTS .....	159
HUMANWARE .....	160
FINANCIALS .....	160
PRODUCTS .....	160
INVACARE CORP. ....	160
BUSINESS OVERVIEW .....	160
FINANCIALS .....	160
PRODUCTS .....	161
JOHNSON & JOHNSON .....	161
BUSINESS OVERVIEW .....	161
FINANCIAL INFORMATION .....	161
PRODUCTS .....	161
KIMBERLY CLARK .....	162
BUSINESS OVERVIEW .....	162
FINANCIALS .....	162
PRODUCTS .....	162
KINDRED HEALTHCARE .....	162
BUSINESS OVERVIEW .....	162
FINANCIALS .....	162
PRODUCTS .....	163
LIFE ALERT EMERGENCY RESPONSE .....	163
BUSINESS OVERVIEW .....	163
FINANCIALS .....	163
PRODUCTS .....	163
LIFE CARE CENTERS OF AMERICA.....	163
BUSINESS OVERVIEW .....	164
FINANCIALS .....	164
PRODUCTS .....	164
LIFE GUARDIAN LLC.....	164
BUSINESS OVERVIEW .....	164
FINANCIALS .....	164
PRODUCTS .....	165
LIVHOME, INC. ....	165

BUSINESS OVERVIEW .....	165
FINANCIALS .....	165
PRODUCTS .....	165
HCR MANOR CARE.....	165
BUSINESS OVERVIEW .....	166
FINANCIALS .....	166
PRODUCTS .....	166
MAXHEALTH CORPORATON.....	166
BUSINESS OVERVIEW .....	166
FINANCIALS .....	166
PRODUCTS .....	166
MEDLINE INDUSTRIES, INC.....	167
BUSINESS OVERVIEW .....	167
FINANCIALS .....	167
PRODUCTS .....	167
MERCK & CO INC .....	167
BUSINESS OVERVIEW .....	167
FINANCIAL INFORMATION.....	168
PRODUCTS .....	168
NOVARTIS AG.....	168
BUSINESS OVERVIEW .....	168
FINANCIALS .....	168
PRODUCTS .....	169
NOVO NORDISK.....	169
BUSINESS OVERVIEW .....	169
FINANCIALS .....	169
PRODUCTS .....	169
OPTELEC.....	170
BUSINESS OVERVIEW .....	170
FINANCIALS .....	170
PRODUCTS .....	170
ORTHO-MCNEIL .....	170
BUSINESS OVERVIEW .....	170
FINANCIALS .....	171
PRODUCTS .....	171
PFIZER.....	171
BUSINESS OVERVIEW .....	171
FINANCIALS .....	171
PRODUCTS .....	172
PHILIPS LIFELINE SYSTEMS, INC. ....	172
BUSINESS OVERVIEW .....	172
FINANCIALS .....	172
PRODUCTS .....	172
PHONAK AG.....	172

BUSINESS OVERVIEW .....	173
FINANCIALS .....	173
PRODUCTS .....	173
PRIDE MOBILITY PRODUCTS CORP.....	173
BUSINESS OVERVIEW .....	173
FINANCIALS .....	173
PRODUCTS .....	173
ROCHE PHARMACEUTICALS.....	174
BUSINESS OVERVIEW .....	174
FINANCIALS .....	174
PRODUCTS .....	174
SANOFI-AVENTIS .....	174
BUSINESS OVERVIEW .....	175
FINANCIALS .....	175
PRODUCTS .....	175
SAVARIA CONCORD LIFTS, INC. ....	175
BUSINESS OVERVIEW .....	175
FINANCIALS .....	175
PRODUCTS .....	176
SCA (SVENSKA CELLULOSA AKTIEBOLAGET) .....	176
BUSINESS OVERVIEW .....	176
FINANCIALS .....	176
PRODUCTS .....	176
SCHERING-PLOUGH.....	176
BUSINESS OVERVIEW .....	177
FINANCIALS .....	177
PRODUCTS .....	177
SIEMENS HEARING INSTRUMENTS, INC. ....	177
BUSINESS OVERVIEW .....	177
FINANCIALS .....	177
PRODUCTS .....	178
STARKEY LABORATORIES .....	178
BUSINESS OVERVIEW .....	178
FINANCIALS .....	178
PRODUCTS .....	178
SUNRISE MEDICAL, INC.....	178
BUSINESS OVERVIEW .....	179
FINANCIALS .....	179
PRODUCTS .....	179
SUNRISE SENIOR LIVING .....	179
BUSINESS OVERVIEW .....	179
FINANCIALS .....	179
PRODUCTS .....	180
TAKEDA PHARMACUETICALS.....	180

BUSINESS OVERVIEW.....	180
FINANCIALS .....	180
PRODUCTS .....	180
THORNDIKE PRESS .....	180
BUSINESS OVERVIEW.....	181
FINANCIALS .....	181
PRODUCTS .....	181
THYSSENKRUPP ACCESS.....	181
BUSINESS OVERVIEW.....	181
FINANCIALS .....	181
PRODUCTS .....	181
TYCO INTERNATIONAL .....	182
BUSINESS OVERVIEW.....	182
FINANCIALS .....	182
PRODUCTS .....	182
WIDEX.....	182
BUSINESS OVERVIEW.....	182
FINANCIALS .....	183
PRODUCTS .....	183
WYETH .....	183
BUSINESS OVERVIEW.....	183
FINANCIALS .....	183
PRODUCTS .....	184
APPENDIX.....	185
DEFINITIONS .....	185
ACTIVITIES OF DAILY LIVING (ADLS) .....	185
ALZHEIMER'S DISEASE.....	185
ARTHRITIS .....	185
ASSISTIVE TECHNOLOGY .....	185
ASSISTED LIVING.....	186
BABY BOOMER.....	186
CAREGIVERS .....	186
CARDIOVASCULAR DISEASE (CVD).....	186
CONGESTIVE OBSTRUCTIVE PULMONARY DISEASE (COPD) .....	186
DEMENTIA .....	186
DIABETES .....	187
DURABLE MEDICAL EQUIPMENT .....	187
ELDER/SENIOR .....	187
GERONTOLOGY .....	187
HOSPICE CARE .....	187
INSTRUMENTAL ACTIVITIES OF DAILY LIVING (IADL) .....	187
LONG-TERM CARE .....	188
PROSTHETICS AND ORTHOTICS.....	188



