



2024 Assistive Products Market Report Webinar

August 27th, 2024

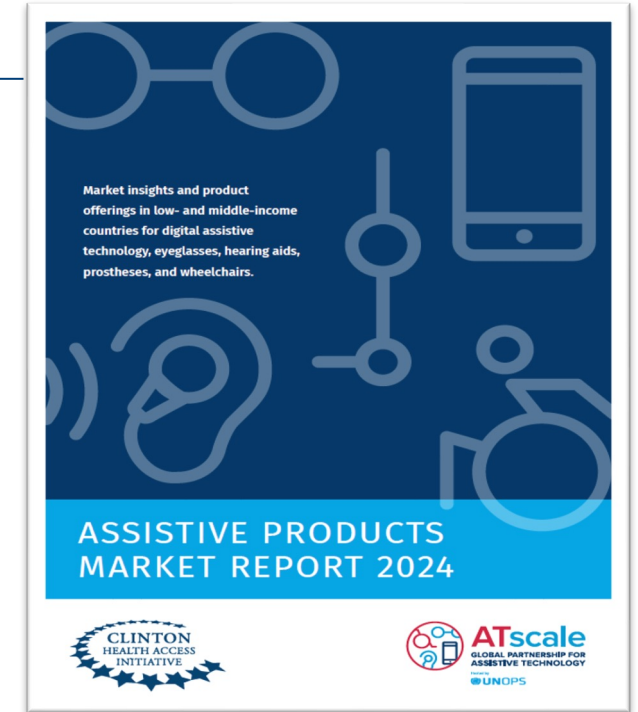
Agenda



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Agenda	Speaker	Time
Welcome and Housekeeping	Satish Mishra Head of Global Programmes, ATscale	5 mins
Opening Remarks	Pascal Jeroen Bijleveld CEO, ATscale	10 mins
Market Report Overview	Ritubhan Gautam Senior Manager, CHAI	10 mins
Country perspective	H.E. Yeap Malyno Director General of Social Policy, MoSVY, Cambodia	5 mins
Development Organization Perspective	Dr. Diego Santana-Hernández Senior Global Advisor for Ear and Hearing Care, CBM	5 mins
Social Enterprise Perspective	Perry Sella Director of Global Supply Chain, VisionSpring	5 mins
Q & A	Satish Mishra Head of Global Programmes, ATscale	10 mins
Closing remarks	Satish Mishra Head of Global Programmes, ATscale	10 mins





Opening Remarks

Pascal Jeroen Bijleveld

Chief Executive Officer - ATscale, the Global Partnership for Assistive Technology



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Market Report Overview

Ritubhan Gautam

Senior Manager, Global Markets - Clinton Health Access Initiative

Why do we need an Assistive Products Market Report?

Access gap

2.5 billion people require one or more assistive products today

3.5 billion people will need assistive products by 2050

Only 1 in 10 have access to these life-saving products across all low- and middle-income countries, and as low as 3% in some countries

Key Challenge: Lack of Market Information



Lack of access to comprehensive and reliable information about product offerings, quality, reference prices - is a critical market failure that governments, procurement agencies, and hospitals, across low- and middle-income countries, face in buying or supplying assistive products.

Intervention: Assistive Products Market Report



Launched by ATscale, the Global Partnership for Assistive Technology, and the Clinton Health Access Initiative, the report aims to be a one-stop guide that provides information on the availability of priority assistive products, including their technical specifications, prices, and key manufacturers

What is in scope?

Domains/products



- Digital assistive devices: augmentative and alternative communication, screen readers, and smartphones
- Eyeglasses
- hearing aids
- Prostheses
- Wheelchairs

Limitations

- To ensure comprehensive care, service provision is vital, but this report's scope is limited to assistive products.
- Supplier listings and product offerings are not exhaustive
- The information is self reported or through publicly available sources

Content



2 complimentary versions are planned

Version 1

Published: 4th June 2024

- Market Overview
- Supplier Landscape
- Product Offerings

Version 2

Publication Target: End of 2024

- Demand Landscape
- Price Markups
- Innovation

Who is the Assistive Products Market Report for?

Audience

How to use the report



1

Buyers of assistive products in low- and middle-income countries, including Governments and procurement agencies

Use the report to inform procurement options



2

Assistive technology donors/funding agencies

Use the market insights to better assess supply landscape and prioritize resource allocation for enhancing supply capacity.



3

Policymakers in the field of assistive technology

Use the report findings to develop partnerships that responds to market's unmet needs

Structure of the Assistive Products Market Report



Main Report

Organized into seven sections. Each section focuses on one assistive product

- **Market overview**
 - Market growth drivers
 - Market segmentation
 - Recommended features for LMICs
 - Supplier landscape
- **Quality**
- **Supplier landscape**
 - Each supplier's product coverage, qualifications and presence in LMICs
- **Pricing overview**
 - Incl. price from public sector procurement
- **Conclusion**

Manufacturer (Headquarters location)	Country presence	Main production sites	Hearing-aid brand	Quality
Intricon (United States)	Primarily ships within United States of America ⁱⁱ	Three facilities in the Asia Pacific and the United States	Hearing Health Express ⁱⁱⁱ	ISO 13485, All Minnesota- and Singapore-based facilities FDA registered ^{iv}
Sonova (Switzerland)	Presence in 100+ countries through subsidiaries in 30+ countries and a network of independent distributors in more than 100 countries through subsidiaries in over 30 countries and a network of independent distributors	China, Switzerland, Viet Nam	Phonak Unitron Hansaton	ISO 13485, FDA, EU MDR, the Medical Device Directive 93/42/EEC
Starkey Hearing Technologies	100+ independent partners and 28 facilities globally	US, China, and Mexico	Starkey Audibel Nuear Microtech	ISO 13485, US FDA, EU MDR, MDD CE, ISO 10993, IED 60601-1, ISO 14971, ANVISA, TGA, INVIMA, COFEPRIS, MHLW
WS Audiology (Denmark and Singapore)	Global office in 45 countries. 45 offices globally Sold in 130 countries through distributors	China, Denmark, Mexico the Philippines, Poland and Singapore	Signia Widex A&M Hearing Coselgi	ISO 13485, FDA, EU MDR

Supplier landscape section for hearing aids

Overall, more than 170 suppliers are featured in the report

Languages English and French

Formats PDF | DAISY | EPUB | HTML

Methodology Desk research, interviews with suppliers, and consultations with industry experts and organizations



Annex: Product Catalogue

Highlights representative companies and products available in low- and middle-income countries

- **Product name**
- **Technical specifications**
 - Material
 - Sizes
 - Accessories
 - Other features
- **International certifications**
- **Indicative price**

Exhibit 8: Prostheses Feet Product Catalogue
(Listed in alphabetical order)

Company	Product	Weight / materials	Components included:	Quality	Indicative price (in United States dollars)
Aosuo [®] (China)	SACH foot and dynamic foot	Weight: Not specified Material: Not specified	Heel height 10mm / Different sizes	ISO, CE	15 – 17 ⁷⁷
Beijing Jingbo [®] (China)	Single and Double Axis Foot	Weight: Not specified Material: Polyurethane		ISO, CE	17
Camfore [®] (China)	SACH foot	Weight: Not specified Material: Not specified	Stronger material cost a bit more	ISO, CE, FDA	12 – 15 ⁸⁰
Circleg (Switzerland)	Dynamic Foot	Weight: 880g-1060g Material: PP GF (foot spring), TPU (cover), steel adapter	Foot component Rubber cover	ISO10328, CE	120 – 250
EXONEO (France)	TINO Foot	Weight: 465g & 700g Material: Molded polymer, fiberglass, stainless steel, aeronautic aluminium	Male pyramid included with the foot. Mobility level : K1, K2 activity level	ISO 10328, CE	170 ⁸¹

Catalogue for prostheses foot

- Over 200 assistive products are featured in the product catalogue with their introductions
- The footprint of the products covers over 50 low- and middle-income countries

Supportive resources for dissemination



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A set of overview documents has been developed to disseminate report findings to a broader audience
These resources are designed to distill key findings and insights into easily digestible formats, making the information more engaging and accessible to various stakeholders while also expanding the report's reach and impact

Report Overview

ASSISTIVE PRODUCTS MARKET REPORT 2024

OVERVIEW
Market failures prevent almost one billion people from accessing the assistive products they need. Information asymmetry – lack of access to reliable information about product offerings, quality, reference prices – is a critical market failure that governments and procurement agencies across low- and middle-income countries face in buying or supplying access to assistive products.

The Assistive Products Market Report 2024, launched by ATscale, the Global Partnership for Assistive Technology, and the Clinton Health Access Initiative (CHAI), aims to address information asymmetry by presenting a one-stop guide that provides information on the availability of assistive products, including their technical specifications, prices, and key manufacturers.

WHAT DOES THE REPORT COVER?
This report focuses on five priority assistive products and offers key market insights and visibility into the supplier landscape and product offerings. Products included are:

- **digital assistive technology:** augmentative and alternative communication, screen readers, and smartphones
- **eyeglasses**
- **hearing aids**
- **prostheses**
- **wheelchairs**

Each product has its dedicated section in the report, providing market context, recommended technical specifications and quality certifications, supplier landscape, and indicative pricing. The Annex features a product catalogue, highlighting active companies and products available in low- and middle-income countries.

WHO IS THE REPORT FOR, AND HOW IS IT TO BE USED?




- **governments and procurement agencies in low- and middle-income countries:** use the report to inform procurement options.
- **assistive technology donors and funding agencies:** use the market insights to better assess need and strategize investment in this space.
- **policy makers in the field of assistive technology:** use the report findings to identify market needs and shape policies to bridge the demand gap.

WHAT TO EXPECT NEXT?

- **An online product catalogue** (to be available online before the end of 2024): a digital platform to enhance accessibility of product catalogue for assistive products.
- **Next edition of the report** (to be published by the end of 2024): offering insights into market demand, innovation, and price markups for assistive products across LMICs.

HOW TO CONNECT WITH US?
We welcome feedback and suggestions for the report. Your contributions will be invaluable for enriching this resource for all stakeholders. We also encourage suppliers and industry experts to share product information available in low- and middle-income countries and market insights that can be highlighted through these reports.
Write to us at assistive@clintonhealthaccess.org

Scan to access the report or click here



Report Infographic

WHO CAN ACCESS ASSISTIVE PRODUCTS TODAY?

DID YOU KNOW?

- **2.5 billion people** require one or more assistive products today, while 3.5 billion people will need assistive products by 2050
- **Only 1 in 10 have access** to these life-saving products across all low- and middle-income countries, and as low as 3% in some countries

EYEGLASSES

- Only 36% of the billions who need eyeglasses have access to a quality pair with the right prescription
- Consumer prices are too high for many
- **Reduce import taxes, logistical costs, and distributor or retail margins to make eyeglasses more accessible.**

HEARING AIDS

- Less than 20% of the millions of people with hearing loss can access hearing aids
- High cost and lack of service provision are major barriers and varies significantly by type/model
- **Adopt WHO recommendations (link) on delivery, specifications and quality, and aggregate procurement to improve access.**

PROSTHESES

- Less than 20% of the estimated 65 million people with limb amputations can access prostheses
- Ambiguity of quality standards hinders the wider use of emerging affordable solutions
- **Increase visibility on quality (link) of emerging affordable solutions.**

SCREEN READERS

- Over 85% of people with visual impairments live in low- and middle-income countries
- Highly fragmented market with significant disparities in functionality, user experience, and device compatibility
- **Adopt digital assistive products such as screen readers as essential assistive products along with accessibility standards to address implementation gaps.**

WHEELCHAIRS


- Less than 35% of the estimated 80 million people who need wheelchairs have them, 65 million of which are in low- and middle-income countries
- High costs and low uptake of suitable designs for low- and middle-income countries limit access
- **Introduce quality standards and ensure provision of appropriate wheelchairs (link) at country level.**

Find out more in the **Assistive Products Market Report**



Video Campaign

atscale_partnership
atscale_partnership · Original audio




If yes, then you might be one of the lucky few.

Liked by chai_globalhealth and 13 others

atscale_partnership ? Did you know that billions of people need eyeglasses, but just 36% can access them?

Our new report, developed with @chai_globalhealth offers actionable insights that will improve access to eyeglasses, hearing aids, prostheses, wheelchairs, digital technology and other #AssistiveTechnology




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Wheelchairs are available for just 5 to 35 percent of the 80 million people who need them globally, report finds


▲ Sarah Sanby · 4th June 2024



Assistive Technology Report Brings More Transparency to Market

Health Systems · 05/05/2024 · Zuzanna Stawiska

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Or visit: <https://atscalepartnership.org/assistive-products-market-report>

What to expect next: Product Catalogue Web Portal



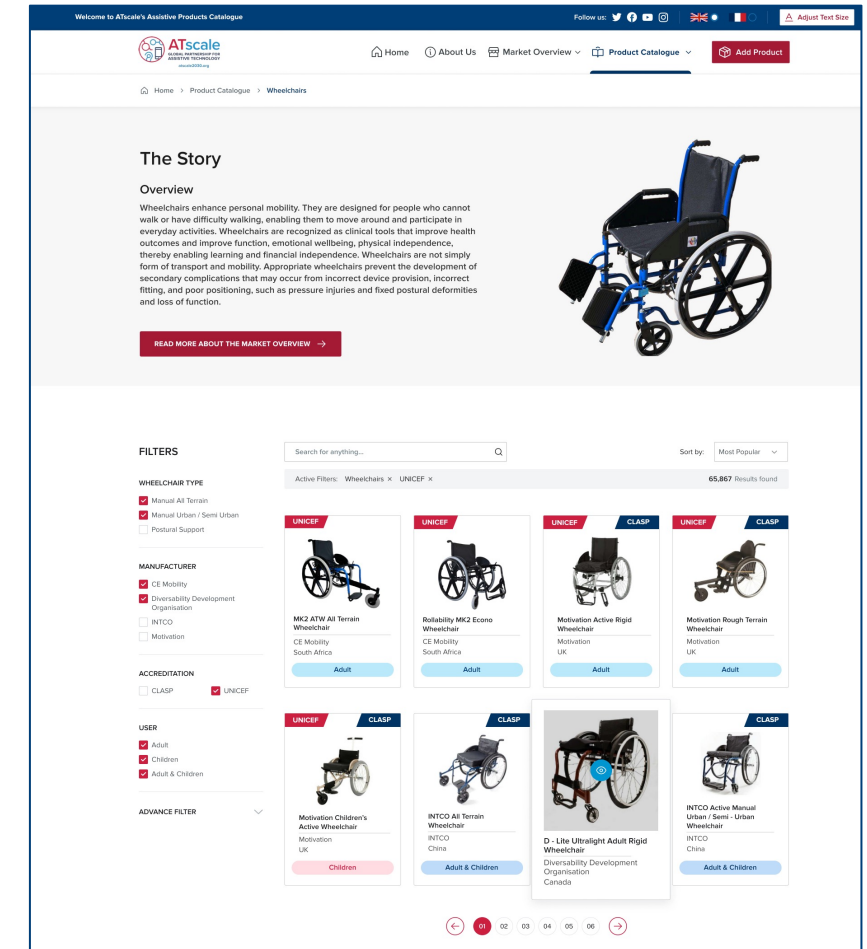
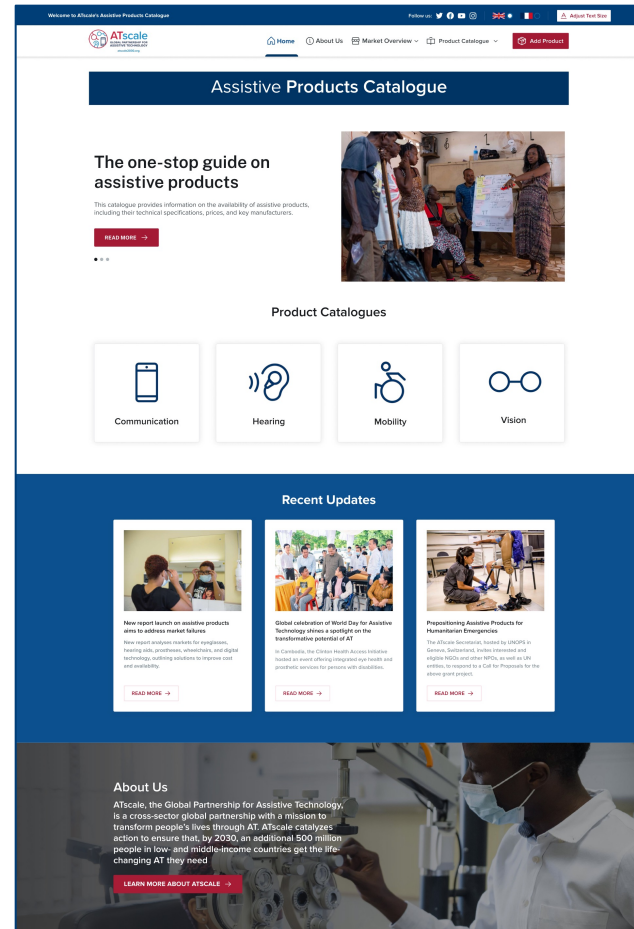
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atscale2030.org



A dynamic platform to showcase assistive products available in LMICs, and provide regular updates and new product listings

Would be available in multiple languages

Would provide for easier consumption of information to user



Public release with limited functionality by Sep 2024, full functionality by Nov 2024

How to connect with us



- We welcome feedback and suggestions for the Assistive Products Market Report . Your contributions will be invaluable for enriching this resource for all stakeholders.
- For the development of the upcoming product catalogue web portal and the next edition of the report, we welcome and encourage your engagement with us, including but not limited to:

Stakeholders	Actions
Suppliers	Share your product information available in low-and middle-income countries
INGO/Donors	Share your insights on market demand, including funding landscape & volume trends
Countries	Share case studies and initiatives in your countries regarding assistive products
Industry experts	Share market insights that could be highlighted in the report



Write to us at atmarketreport@clintonhealthaccess.org



Country Perspective

H.E. Yeap Malyno

Director General of Social Policy - Ministry of Social Affairs, Veterans and Youth Rehabilitation, Cambodia



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Development Organization Perspective

Dr. Diego Santana-Hernández

Senior Global Advisor for Ear and Hearing Care - CBM



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CBM (est. 1908)

- Name based on its founder, Pr. Ernst J. Christoffel (1876-1955)
Christoffel BlindenMission
- International Non-Governmental Organization focused on **Disability and Inclusive Development**
- Working towards the inclusion of persons with disability in the poorest countries of the world for **115 years** (established in 1908)
- Non-State Actor in official relations with the **World Health Organization** (WHO) since 1989

CBM team contributing to AP marker report 2024

CBM reviewing team:

- a. Michael Schwinger
- b. Joyce Koech
- c. Fabian Schindler
- d. Michiel Steenbeek
- e. Diego Santana-Hernández

CBM roles / positions:

- a. **CBID Specialist Technical Advisory lead,**
- b. **Head of Programmes, Inclusive Eye Health**
- c. **Programme Manager Inclusive Eye Health**
- d. **Senior Global Advisor for Physical Rehabilitation**
- e. **Senior Global Advisor for Ear and Hearing Care**



Questions for CBM (1)

As CBM works on the ground with many actors, what **key challenges** you observe in procuring AT, particularly in LMICs?

a. General Community Based Inclusive Development (CBID):

- Lack of availability of AT at community level
- Lack of **reliable funding** to limit financial burden on persons with disabilities
- **Difficulty for LMIC Governments** to include assistive devices in their **budgets**
- Growing relevance of digital AT likely to **aggravate digital divide**

b. Inclusive Eye Health (IEH):

- **Affordability and accessibility** to quality eye care products including spectacles will remain a significant challenge due to **high costs**
- **Supply chain and distribution** of spectacles and eye care products can be challenging in LMICs due to poor infrastructure

Questions for CBM (1): Key challenges (cont.)

c. Physical Rehabilitation (PR):

- Lack of sufficient **Government employment positions** for trained technical Prosthetics and Orthotics (P&O) staff.
- Lack of regional **post-graduate courses** and career opportunities.
- Lack of **investment** in production workshops **infrastructure and equipment**.
- Lack of national/regional **warehousing for AT** (equipment, materials, OTC)
- **Poverty** on the demand side.

d. Ear and Hearing Care (EHC):

- Lack of accessible and affordable **hearing Aids (HA)** & other assistive devices
- **Bureaucracy** and high over-costs of procurement, export/import of products
- Lack of access to **EHC services**: ear surgeons, audiologists and S&L therapists
- **Livelihood & self-sustainability** of new cadres of audiology/HA technicians
- Inefficient or costly technical **follow-up/maintenance & calibration** services

Question 2

What are some diverse **solutions** that you have observed?

a. General (CBID):

Digital AT is replacing increasingly low vision aids etc. in education.

Challenge: inclusion in Social Protection schemes due to personal & leisure use.

b. Inclusive Eye Health (IEH):

Ready readers are a big step to address presbyopia

Ready-to-click spectacles seem practical, users have complained about quality

c. Physical Rehabilitation (PR):

3D printing of prosthetic sockets, some orthoses, insoles. Need time to evaluate.

Direct socket technology for prostheses. Proven in global-north but expensive.

d. Ear and Hearing Care (EHC):

Over-the-Counter (OTCs) Hearing Aids approved by FDA: effect on global market

Not suitable for children, reference audiologist, maintenance, sustainability

Hearing AT for mobile devices. Several Apps for hearing check (ie. hearWHO)

Question 3

How can the market report **help address** these challenges?

a. CBID General:

- Local production/provision where possible
- Reduce mark-ups by suppliers
- Waiver for VAT/customs fees

b. Inclusive Eye Health:

- Bulk orders and centralized in-country spectacles production

c. Physical Rehabilitation:

- Obtain full tax/duties exemption

d. Ear and Hearing Care:

- Manufacturers to take responsibility for procurement chain until end-user
- Governments of LMICs to fund Hearing Aids provision within NHSs.

Question 3 (cont.)

How can the market report **help address** these challenges?

Ask policymakers + **T**ell end-users + **S**how stakeholders



Question 4

Suggested next steps to improve market **transparency & strengthening AT market health** in LMICs?

- Address the challenge to include **Innovation** into practice; e.g. 3D printing in P&O which often looks promising but upon verification is often limited in score.
- **Generate evidence** from own projects, ie: cross-organizational study to capture experiences from international agencies, local professionals and end-users.
- Explore **Digital AT potential**, especially Smartphones' solutions, people discover and apply without help from rehabilitation/health/education professionals.
- Contribute to **changing attitudes** and misconceptions: donors are reluctant to finance mobile devices (phones, tablets, etc.) for individuals, sometimes forced to use outdated AT solutions, such as handheld magnifiers in schools.



Thank you!



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Social Enterprise Perspective

Perry Sella

Director of Global Supply Chain - VisionSpring

Simplify Importing Eyeglasses

- 700+ year-old technology
- Revise the governmental import restrictions
- Maintain quality standards and product labeling requirements



Make Glasses More Affordable

- Connecting the dots between government goals and revenue
- Setting up distinctions for non-profit entities





Thank you to ATscale and CHAI for your tremendous efforts in service of those whose lives can be transformed with assistive technologies – including eyeglasses!



VisionSpringTM
See well. Do well.



Q&A

Satish Mishra

Head of Global Programme - ATscale, the Global Partnership for Assistive Technology



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Closing Remarks

Satish Mishra

Head of Global Programme - ATscale, the Global Partnership for Assistive Technology