

Discussion Series on Market Shaping in the Assistive Technology Sector: Webinar 2

Insights into the Assistive Products Demand Landscape

Webinar Transcript in English

This document captures the English transcript of the Webinar on AT Market Shaping: Insights into the Assistive Products Demand Landscape held on 2 July 2025, hosted by ATscale and the Clinton Health Access Initiative (CHAI). Please refer to the [report](#), webinar recording, transcript and presentation for full context. This text closely follows the live discussion during the webinar.

>> SATISH MISHRA: Good morning, good afternoon, good evening to all of you who are joining from different parts of the world. My name is Satish, I'm the Head of Programmes for ATscale, which is a Global Partnership for Assistive Technology. A very warm welcome to all of you to this Discussion Series on Market Shaping in the Assistive Technology Sector. This is the second webinar on this topic, and it is co-hosted by ATscale and CHAI, Clinton Health Access Initiative. Today's topic for discussion is "Insights into the Assistive Products Demand Landscape." During today's webinar, we will also launch the Assistive Products Market Report 2025. This Assistive Products Market Report provides an in-depth analysis on the demand landscape and supply chain costs within the assistive technology sector.

As many of you are aware, there was a previous report which was launched in August 2024, and focused on products, suppliers, prices and specifications. This new report which has been launched today adds on with a deeper look on the demand side for assistive products.

Before we begin, some housekeeping notes, which we all know by now, but it's important to remind ourselves. This webinar is for one hour and will end at 1:00 p.m. Central European Time. Please keep your microphone muted. The webinar is translated in Chinese, French and English. Please click on the interpretation button at the bottom of your Zoom screens to access them.

Closed captioning is also available in Chinese, French and English. Please click on the links in the chat to access them separately.

>> We are very thankful to colleagues joining from China. This particular webinar is being live streamed to our colleagues in China by CR Expo through WeChat, and thanks to them for facilitating this live streaming of today's webinar.

The webinar is going to be recorded, and it will be shared publicly after the event. For any questions, please drop them in the chat. We have team members who are monitoring the questions and answers and they will respond in real time in the chat or during the question/answer session which will happen towards the end of the webinar. If we are unable to answer your questions during the webinar, we will follow up individually after the webinar to the person who has asked the questions. Please use chat functions to provide any general comments as you may have and as we progress in the webinar.

In today's webinar, we will have the opening remarks from ATscale. This will be followed by an overview of the Assistive Products Market Report by CHAI, Clinton Health Access Initiative, followed by a panel discussion to present of key insights from this report, presented by government stakeholders, civil society stakeholders, private sector representatives, as well as corporate foundations who are involved in the assistive technology sector and service provision at the country level. Following which, we'll hear from China, on China's role in shaping assistive technology supply.

At the end of this particular webinar, we will have time for question and answers. So, without taking further time, let me invite the Chief Executive Officer of ATscale, Pascal Bijleveld, for his opening remark, and setting the stage on why are we here and how does this work relate to ATscale's strategy for the future. Over to you, Pascal.

>> PASCAL BIJLEVELD: Thank you, Satish, and welcome everyone. It's a real pleasure to have all of you join us today. This is the second session on our Discussion Series on Market Shaping in the Assistive Technology Sector, and the topic for today's webinar is: Insights into the Assistive Products Demand Landscape and we are excited to co-host the discussion with our partner, the Clinton Health Access Initiative.

ATscale launched its latest strategy in December 2024, which emphasises the importance of building sustainable markets of high-quality, affordable products, closer to those who are most in need. Inefficiencies in AT markets are one of the key reasons for limited access to AT in low- and middle-income countries, and for this reason, we are focused on deeply analyzing AT market challenges and driving action towards solutions. In this spirit, our Discussion Series on Market Shaping in the Assistive Technology Sector will focus on demystifying and deep-diving into different facets of AT market barriers, learning from different stakeholders and proposing constructive, forward-looking solutions.

In the first webinar of the Discussion Series, we focused on supply-side questions: How can new suppliers enter the AT market in Africa? What are the steps? What are the challenges?

What can governments, multilateral agencies and the private sector do to navigate these challenges?

In today's webinar, we pivot to demand-side questions. So, today is really a topic that we have long debated in the AT sector. What is the size of the demand for AT in low- and middle-income countries?

While the need for AT is relatively well-known, thanks to important reports like WHO and UNICEF's report on assistive technology back in 2022, there's been limited evidence that quantifies demand, especially what we call funded demand. From the private-sector perspective, there tends to be limited investments in LMICs, precisely because of the lack of concrete evidence of the demand for AT, and this leads, of course, to market failures, which prevents access. And we all know that today, roughly 1 in 10 persons in low-income countries are unable to access the AT that they need.

Today, we're launching the Assistive Products Market Report 2025. As Satish mentioned, this report provides an in-depth analysis of the demand landscape and supply chain costs within the assistive products sector. The report also presents research on the Chinese suppliers landscape, and we're excited to present the findings of this research, as it will now be a new contribution to this field.

Moving from evidence to action, ATscale has also been driving initiatives to build and shape markets in LMICs. One such initiative that is under development is an upcoming partnership with the International Finance Corporation, the private sector lending arm of the World Bank Group, named MOSAIC. It is a multi-sector global initiative that aims to combine blended finance and advisory services to grow AT companies to scale and build enabling ecosystems to positively shape the AT sector in LMICs, and of course, strengthen access to those who need it the most.

ATscale would like to continue supporting such initiatives and build momentum towards transforming the AT market landscape, and we look forward to the support of all partners, many of you who are present today, to make this a reality. We would particularly like to thank our partner CHAI, for their hard work and support in this regard. And of course, we would also like to thank the China Care and Rehabilitation Expo Team that is live streaming the webinar to our friends and colleagues in China. And we would like to thank the speakers from across regions and sectors who are here to present today. We're eager to hear multi-sectoral perspectives, foster dialogue, generate new ideas and start building a community that can really build momentum towards collaborative action.

This Discussion Series -- and this is the second installment -- is expected to run until the end of 2025, with the next session on AT Market Shaping Tools scheduled for September. So, wishing you all a great session today and hope to see the same faces again in the future webinars and discussions. Back to you, Satish. Thanks.

>> SATISH MISHRA: Thank you very much, Pascal, and thanks for highlighting the importance of demand for the assistive technologies sector, its links with market failure and

also some of the challenges which we see in the sector. And also, very exciting news about MOSAIC and the partnership, which is in the process of development and is quite exciting for the sector. Thank you, Pascal.

Now let me invite Ritubhan Gautam, who is the associate director for CHAI, who led the development of the 2025 AP Market Report from CHAI's side. Ritubhan, first of all, thank you very much for all of the hard work you had done on this, and it would be great if you can share with all of us, what is the purpose of this particular market report? How does it build on the 2024 market report? What is the scope? What is the methodology? And if you can share some key findings from the report. Over to you, Ritubhan.

>> RITUBHAN GAUTAM: Thank you, Satish, and thank you to all of you who have joined. So, let me tackle the first question first: Why do we need an Assistive Product Market Report? And I know some of these figures may be familiar to almost all of you, but their significance cannot be overstated. They bear repeating, just to underscore the urgency. So, bear with me while I repeat some of these critical numbers. Today, 2.5 billion people require one or more assistive products globally. This number is expected to increase to 3.5 billion by 2050, driven by aging population and rising prevalence of noncommunicable disease in low- and middle-income countries.

Yet, despite this enormous need, access remains shockingly limited of assistive products. Only 1 in 10, as Pascal highlighted, in low-income countries, have access to the assistive products they need. And in some countries, these numbers drop to as low as 3%. Now, why does this gap persist? Obviously, it's not one reason that leads to this failure, but one of the most pertinent reasons is the absence of transparent, reliable and accessible market information. In CHAI's work with ATscale across countries, what we have observed is that the governments, procurement agencies and even NGOs often struggle to answer the fundamental questions, such as what assistive products are available and fit for purpose? How much do they cost across different markets? What are the major supply chain drivers? And at the same time, in our interaction with manufacturers, we have realized that they also face very similar information gaps, where they struggle to answer, where is the demand and in what volumes. Which procurement processes apply in different countries? What regulatory approvals or certifications are required to access some of these public procurement channels?

This two-way information gap between both the buyers and the suppliers has, in our experience, led to a very fragmented procurement landscape, uncoordinated purchasing and significant cost inefficiencies, all of which directly impacts affordability, quality and ability of assistive products on the ground. And as mentioned by Pascal, to address this, ATscale and CHAI, we jointly developed the Assistive Products Market Report with an intent that this will be a public good, a one-stop, structured, evidence-based reference for anyone working to improve AT access in LMICs.

Now, without wasting much time, let me give you a teaser of several critical insights that you will find in this report. First and foremost, given the limited availability of comprehensive

procurement data across countries, this report draws from procurement volumes reported by major global distribution channels, including major NGOs, corporate foundations, social enterprises, and we also surveyed 12 countries to provide a very targeted snapshot of demand landscape for assistive products.

We all know that 2 out of 3 users rely on out-of-pocket expense to procure assistive products from the private sector. But what about provisions for people who cannot afford out-of-pocket? This is still very heavily donor-dependent, with NGOs, corporate foundations and social enterprises playing a very active role in trying to bridge the gap. But the procurement volume remains modest. It is also fragmented across regions and products.

For instance, if you look at provision of hearing aids through this channel or procurement by NGOs, corporate foundations, et cetera, it is less than 50,000 annually, as reported by these major NGOs and corporate foundations, while more than 80% of people who need hearing aids still don't have access to one. So, in short, there is very strong intent, willingness across the ecosystem to improve access, but much more needs to be done in terms of provisioning to bridge the gap between current provision and unmet need.

Given the very high reliance on out-of-pocket expense, in the report, we also tried to answer the question of what is driving the cost of these products and how best can these be optimized? Three major supply cost drivers were analyzed, which contribute very significantly to the final price of the assistive products. The first one being import taxes and custom duties. While most governments waive these taxes for the humanitarian imports or personal use of assistive products, such waivers in many countries don't apply for any commercial procurement. And even in the cases where these are waived off, the exemption process can be extremely bureaucratic and time-consuming for buyers to take advantage of.

And second and foremost is international shipping. Freight cost, especially ocean freight, as we know, in the current scenarios is very highly volatile. They depend on global fuel prices, shipping lane disruptions and container availability. These costs in our analysis seemed to add between 10% to 25% of the cost.

And third, and I think one of the major contributors of the cost, is the distributor and retail margins. Most of these manufacturers have to rely on intermediaries to access some of these low-income markets, particularly in markets where there are multiple intermediaries involved, we see distributor and retail margins significantly add up. In our analysis, we found that distributor margins range from 5% to 40%, and retailer margins can even exceed 200%, especially in urban settings for spectacles. This increases the product cost by more than 50% to what the product at ex-factory has been.

To further put this in perspective, this is a very illustrative breakdown of how a product that costs \$1 at the factory gate ultimately becomes more than \$6 for the end buyer in one of the low- or middle-income countries. This example is based on a spectacle shipment to Bangladesh, in particular, and it demonstrates how the cost compounds across the supply

chain, often without adding much value to the end user. It also underscores why cost transparency and procurement strategy are so important.

Another example will be from wheelchair supply, which presents an even more complex cost structure. So, let me highlight a few factors. Custom delays have been seen to lead to damage and storage fees for retail supply upwards of \$1,000. Processing of import tax exemptions in cases where there are tariff waivers has often taken suppliers roughly 20 to 80 hours of labor, and may require \$100 to \$1,000 in administrative fees. On top of that, depending on the size and design of wheelchairs, container utilization varies, primarily because of the order sizes, affecting the per unit shipment cost. And as I said previously, supply chain often for wheelchairs we have seen includes multiple layers of sellers, each adding a mark-up and distributor margins can range from 8% to over 200%, especially in the unregulated market for wheelchair supply. These dynamics make wheelchairs one of the most expensive assistive products to deliver affordably and sustainably in LMICs.

In the report, what we have tried to do is to come up with different recommendations on how some of these supply costs can be optimized. To make sure that we are able to reduce the end user cost of assistive products. The first and foremost is to advocate for waiving or reducing of import duties. In many cases, in many countries, we have seen spectacles are still considered luxury goods and not as an essential assistive product. So particularly for products like spectacles.

In countries where import tariffs are already waived off, we are advocating for streamlining of the customs processes. Streamlining the processes for both the suppliers and the buyers to get those exemptions. There is a very important need to support in-country assembly and regional stocking hubs to reduce dependency on overseas shipment and lead times.

We also call for optimization of logistics by pooling procurement orders, using full container loads and planning based on projects demand. Promote direct procurement by public entities from manufacturers to avoid excessive distributor margins.

And finally, engage global manufacturers to demonstrate greater corporate responsibility in pricing and equitable access strategies. Some of the recommendations that we have laid out in the report, hopefully, will help us achieve a lower price and more affordable price for quality assistive products in low- and middle-income countries.

I won't get into details of many other insights that have been covered in the report. I'll leave some of it for us to discuss in the panel discussion and also for the audience to read through the report. But this, hopefully, was a teaser of some critical insights that you can expect in the report.

What I will do is that, before I hand it back to Satish, let me take you through what more you can expect in the report. So, first and foremost, in the report, our scope has been limited to these five priority assistive product categories: hearing aids, prostheses, smartphones used as assistive tech, spectacles and wheelchairs. And while we, CHAI and ATscale, we recognize how critical service provision is, as part of access, our focus to the report, due to

the limitations, have been on products themselves, and we have not covered services. As has been mentioned by Pascal and Satish, that the report has been released in two complimentary versions. The version 1 was launched in 2024, and that provided more of supplier and product landscape. Version 2, which we are launching today, dives into demand landscape, supply cost drivers and also provides supplier landscape in China, which is one of the important hubs of assistive product supply.

The 2025 Assistive Products Market Report is divided into two core sections: our main report, section 1, examines the demand, focusing on key buyers such as NGOs, corporate foundations and social enterprises. Section 2 analyzes supply chain, pricing structures and bottlenecks in the supply of these priority assistive products. In addition, this report has enclosed three annexes: we have China supply landscape, we have procurement profile of major NGOs, social enterprises and corporate foundations, and we have the country-level summaries of demand from the 12 surveyed countries.

Our aim has been that this report is designed for audiences across the ecosystem, for buyers, such as ministries and NGOs, to use their findings to optimize procurement decisions and reduce cost. For donors and funding partners to assess what are the market gaps, underlying resources and demand. For policymakers to identify opportunities to develop partnerships, remove regulatory barriers and shape inclusive policies. And for suppliers to understand the need and demand and inform their products and planning and investments accordingly. We aim this report to be a practical and actionable tool.

And lastly, to support this, the broad uptake of this, we have developed a set of dissemination tools that you will be able to access on ATscale and CHAI's websites. You can also scan the QR code on this slide to access these resources. We encourage you all to share these tools with your teams, partners and networks to help bridge the information gap. We always welcome feedback to further improve the work. Our email address is here. Please, feel free to write to us with any feedback. Thank you. Satish, back to you.

>> SATISH MISHRA: Thank you. Thank you, Ritubhan. And thank you for providing an overview of the report, as well as some of the key teasers of the report. Clearly, six times factory cost for buyers is alarming. And this without even considering the service delivery cost, the travel cost which might be associated in accessing those products. Thank you also for providing some practical solutions to reduce the supply cost. And as you said, very rightly, much more needs to be done in this space. Thank you very much, Ritubhan.

Now we will move to a panel, which will help us further understand the findings of the report. I do invite Widaad Sulaiman-Rykliel, who is the Assistant Director for the Western Cape Department of Health and Wellness in South Africa, Domitille Harb, who is the Director for Hear the World Foundation, Colman Ndetembea, who is the CEO of Kyaro Assistive Tech, and Shitaye Astawes, who is the Director for the African Disability Forum. So, if you can all come and also show your video, so we can see the four panelists. I can see you, Colman, Domitille, Widaad and Shitaye, thank you very much. My first question is for you, Widaad from a government perspective. South Africa has clearly led the assistive

technology needs and set an example for other countries to learn from. Could you please provide an overview of the Western Cape government's effort to meet the need of assistive products?

>> WIDAAD SULAIMAN-RYKLIEF: Hi. We're looking at strengthening the district healthcare system and bringing rehabilitation and assistive technology services closer to the client. It's a key component of the Western Cape's Healthcare 2050 Strategy. The plan emphasizes strengthening community-based services, primary health care and district hospitals, and looking at innovative ways to improve service. So, there is now access to rehabilitation services across all health districts in the Western Cape, basically level assistive technologies are provided across the district healthcare platform, and includes wheelchairs, walking aids, hearing aids, functional aids and low-tech AAC. So, once assessed, clients with more advanced needs will be referred to a higher level of care.

The primary health care system has been further strengthened by the employment of rehabilitation care workers through non-profit organizations. They work under the supervision of rehab personnel in the community and they have played an important role in screening services, such as early identification, as well as providing basic repairs for hearing aids and wheelchairs. The Western Cape is also fortunate to have a specialized rehabilitation center which serves the province. Western Cape Rehabilitation Center, or WCRC, as we know it, is key for providing therapeutic rehabilitation services and assistive technologies to inpatient and outpatient clients, particularly those with more advanced assistive technology needs and those with physical disabilities.

WCRC additionally provides wheelchair seating training as well as wheelchair technician training for personnel across the province. We also have three tertiary hospitals and four regional hospitals which provide comprehensive rehabilitation services. This includes assistive technology to clients, and we've established referral pathways between all levels of care.

Lastly, when looking at procurement, assistive technology services require products to be on tender for easier procurement across all levels of care. The Western Cape therefore worked on both national and provincial tenders to ensure that assistive technology needs for our clients are available for procurement. The Western Cape participates and supports national treasury tenders, however the province also develops its own tenders for items that may not have been included in the national contract.

>> SATISH MISHRA: Thank you, Widaad. And thank you for explaining how you are trying to bring the product and related services at the local level, through a strengthened system, especially through primary health care. Thank you very much.

I will now move to Shitaye and try to have a civil society perspective. Shitaye, if you can help us to understand, in your opinion, what are some of the issues and challenges which you face on promoting the rights of persons with disabilities in the African region? Especially keeping women and girls in mind. Over to you, Shitaye.

>> SHITAYE ASTAWES: Thank you, Satish, and thank you for this opportunity. Yeah, we do have a lot of maybe challenges in accessing assistive devices. We can, like, start from availability, as it's also indicated now in the report. Price is also present. Accessing different sources of support is also a challenge.

When we maybe compare and contrast the African situation with other continents, of course, quality is not also as such very easy to access, as per the need of individuals. I think we don't have any, like you know, unclarity to understand accessing assistive devices is a right for persons with disabilities. But when we unpack that, accessing assistive devices is like a source of empowerment and a key and essential ingredient to independent living. And of course, it's very, very important for also girls and women with disabilities.

But maybe, as I mentioned, in our issues of availability, issues of price and quality, it is also the gap on information. At certain nations and national levels, while you may have the service, you may not have the exact information where to go to get that service and how to go there. So, that's also an issue.

And I know, because I'm also a wheelchair user in my life, and you know, now if you ask me where I should go for a wheelchair, even at my capacity, I might not have the right automatic answer immediately to give you that you should go here and there and you have to pay this and that. But this doesn't mean it's like same thing for all African countries. Maybe the situation in Kenya, particularly for the urban area, could be better as, you know, ISO already, in certain pharmacies, you can see provision of diversified assistive products. And I think this is also better in South Africa and a few other countries. So, the challenge relates with availability, with affordability, as I also already flagged price, and also provision of diversified products with relation to quality. Price might be -- might come at the forefront because for most persons with disabilities, in relation to also working, employment and family situation, to be labeled as, you know, under poverty lines, it affects us as well. So, I think that's what I'd like to say at this level. And thank you for the chance.

>> SATISH MISHRA: Thank you. Thank you, Shitaye. And thank you for also providing that perspective that the understanding of assistive technology as a right is still not there. But the reality that it is a precondition to realize many of the rights is an important perspective which you brought in. Thank you, Shitaye.

I will move now to Domitille. As we also heard from Ritubhan earlier on in the presentation, corporate foundations are playing a key role in terms of assistive technology provision in the countries. Domitille, how do you see the role of the corporate foundations, such as the Hear the World Foundation, in supporting access to hearing care and services in low-resource settings?

>> DOMITILLE HARB: Thank you Satish, and thank you to ATscale and CHAI for hosting this webinar. So as you say, corporate foundations sit really at the unique intersection between private sector innovation and social impact. So at Hear the World, our mission is to improve access to hearing care for children with hearing loss, and we're focused low- and middle-income countries. Globally, as WHO quantified, we're talking about 30 million

children in those low and middle-income countries with hearing loss, with very little access, right, to assistive technology. The need is very big, so what can we do, really?

So, we see our role as being an agile organization, and we try to intervene across four key dimensions. So, first being bridge builders between different sectors, so bringing the resources and the expertise from the private sector and the hearing care industry, so in our case Sonova, bringing that to the needs and the realities of the public health systems in low- and middle-income countries, so we can bring technology, but this goes much beyond that. So, bringing expertise, transfer of knowledge and building up the local workforce, because there is a big shortage in terms of trained professionals.

Second role is about derisking innovation, funding pilots, so corporate foundations can invest, for example, in early-stage interventions. For example, how can we integrate hearing screening in primary care or piloting new service delivery models, which may not be commercially viable at first or attractive to donors.

The third role, which is super important, is about building partnerships, right? So, we facilitate and we foster partnerships across various players, local NGOs, universities, health care providers and governments, of course.

And the last role, which is also very key, is really raising awareness about the importance of hearing health and advocating for policy changes and increased investment in this space, right? So, we do this directly by, you know, engaging in various networks, but also by directly supporting the advocacy efforts of our partners locally across countries so that they are equipped with the right tools, the right data, also to do this advocacy work in their country.

So, to conclude, really, corporate foundations are those agile organizations who can play a complementary role, not replacing government, not replacing the private sector, but helping to connect the dots and help to build those, you know, inclusive systems in low-resource settings.

>> SATISH MISHRA: Thank you, Domitille, and thank you for those four key roles on derisking innovations, partnership building, workforce strengthening, along with the very important role on standing advocacy.

I have a follow-up with you, Domitille. With two-thirds of assistive technology users paying out of pocket, product mark-ups, along with supply chain, remains a significant challenge. Based on your experience, what are some of the impactful interventions that could help reduce the cost and improve affordability?

>> DOMITILLE HARB: Thank you for that question. This is indeed a major barrier and the report that we are launching now has identified a lot of robust recommendations that Ritubhan just highlighted. So, if we reflect on the work of our partners, I'd like to highlight a few concrete activities that really helped them address some of these barriers.

So, first, working, of course, with the appropriate government stakeholders, you know, to receive those tax exemptions, to more broadly -- and this ties back to the advocacy

component I was mentioning – anywhere where there's a government initiative, developing guidelines, procurement opportunities, to get involved as experts, as consultants, to make sure that there are the right procurement policies that are developed. And of course, advocating for funding of hearing aids as part of the public health systems.

We also heard about, you know, the import situation. And so, really the need to develop those good negotiating skills with the customs agents, and also with the storage managers that can help ensure reasonable rates and fees generally.

And also, one key point is fostering those relationships with the local distributors of the assistive technology. This helps also to benefit from training opportunities, support for repairs and maintenance services, and also reducing prices, especially for nonprofit organizations.

But I'd also like to mention that, you know, if we think about affordability, this goes beyond this initial price. So, it's really about the total cost of ownership, right? So, it's also about rethinking how products are delivered, by whom and under what models. And two components that we think are super important to work on that component of affordability is investing in local capacity building, so having the right trained hearing care providers to deliver fitting services after care, because this can also reduce reliance on costly interventions, this can reduce travel and follow-up costs for families. So, we are supporting, you know, search work, for example, in Peru, helping build up this local health worker force so there can be affordable services throughout the country.

And we also are quite optimistic to see that there are new service delivery models that emerge, thanks to technology like teleaudiology. So it's not about the cost of the assistive technology itself, but it's about the cost of the service delivery approach, right? So, these technologies, they are available, and they can also help reduce the cost of services and reduce also travel costs for patients. So, we also support this sort of initiative, for example, in Zimbabwe.

So, we are generally optimistic because we see more people talking about this topic and more appetite also generally to provide these needed services globally. But really, sustainable affordability will really require this systemic change, and that's where this multisector collaboration is so crucial. Thank you.

>> SATISH MISHRA: Thank you Domitille, that was very clear. Investing in local capacity and innovative service delivery models, including use of technologies can certainly help to improve affordability. Thank you.

I will now move to Colman to get in a private service provider perspective. Colman is the CEO for Kyaro Assistive Tech and works at the intersection of local innovation and service delivery. Colman, if you can share with us about your products and pricing strategy. And how do you tailor your products according to the local context need? How do you differentiate your products with other products available in the market? Over to you, Colman.

>> COLMAN NDETEMBEA: Thank you, Satish. And thank you for the opportunity. My name is Colman from Kyaro Assistive Tech. We design and manufacture assistive devices locally, appropriate assistive devices locally. And this is our fifth year in production. So, we had started specifically with wheelchairs, and then over time, our catalog expanded according to the demand. And we now have a catalog of across 26 products.

So, to start answering your questions, one of the things about how do we tailor our products to the local demand, correct? So, I would say, first, that was one of our key focus when we started, which also turned out to be one of our key strengths. So, when we started, the goal was that we needed to be able to make wheelchairs that suited the local environment, and then where customers had issues, they could be repaired locally. So, that's how we started to design our initial wheelchairs. But that customization element also became our strength in terms that we are able to customize the needs of even users who cannot be accommodated by a product that just has many options and features. Depending on the complication, it has become very useful that we are able to interact. Because what we do is we go to the user, we assess them, we make the product and then we go to them during delivery and user training, and we are able to follow up. So, that process enables us to do quite a number of customizations that are only possible to do on the ground.

But also, that has also become very useful as a way of expanding our catalog and creating extra revenue streams, because as I say, we started with wheelchairs, but over time, people came in requesting different rehabilitation products -- standing frame, gauge trainers, tilting tables, you know, rehabilitation room devices – and the more we produced this, we came across more people who needed them. So, this became a secondary revenue model that still, as much as attainable to holistically serve our clients, but it created an extra income, and it enabled us to come across products that can cross markets, products that can be used in rehabilitation and fitness markets, things like weighted vests, you know, et cetera. Which means it provides us with an opportunity to explore sustainability at angles that we would not be able to explore, where we are not able to do this on the ground.

So, customization has been both key and an advantage, and it has also been a competitive advantage over the imported products. So, the majority of the imported products, including those which are appropriate, come with a limited number of functions. And when they incorporated a lot of functions, that increases the product weight, et cetera, et cetera, and the complexity. But since we make it according to the user right on the spot, we only accommodate what is needed. And then, our product then has a much longer lifespan.

So, this is our fifth year, and we have users who have been using our products for five years now without needing to change their product, but simply repair it. But also, it means for children who have outgrown their wheelchairs, because it's our frame, it's our model, and we understand it, we are able to repair it for them or change the wheelchair for them. Where, as previously, former products, you acquire a product, and then once you outgrow it, that's it. You have to acquire, go for the next product, due to various reasons. So, that has been something that has been quite an advantage. And in a way, as I was going through

the report, and even when Ritubhan was giving the highlights, you can see how that tackles some of the things that came up as challenges, with the issues of taxes, shaping and margins, because as we addressed margins as we started, we had to charge low margin at the same time, because we are building up the understanding of people to understand why it's important to do assessments and fittings.

So, across the same price that we are doing, we also do all these service delivery components just to build up that key understanding of why is it important to do this whole service provision. So, it changes the understanding of the market and the awareness, and we are seeing it grow as time goes, and we are even seeing growth in the number of individual private clients that are willing to pay for their devices. This year, so far, at least 20% to 30% of our clientele products went to private clients who are paying out of pocket, and they are willing to. And we are seeing an increasing of that as the awareness keeps increasing.

>> SATISH MISHRA: Right, right. Thank you, Colman. So, customization and ensuring meeting users' need at the local level.

>> COLMAN NDETEMBEA: Yes.

>> SATISH MISHRA: I think those are two key elements which you brought forward. Thank you very much.

>> COLMAN NDETEMBEA: Thank you.

>> SATISH MISHRA: Probably my last question to the panel. And this one, I will go to Shitaye. Shitaye, clearly, you know, despite ongoing efforts, a significant unmet need for assistive products exists across the low- and middle-income countries. In your experience, what should be the critical next step for donors, government and private sector to address and bridge the gap?

>> SHITAYE ASTAWES: Thank you, Satish. Yeah, this is a very critical question or point, as you referred already to the next step. And I think that's what matters for us, to improve lives of persons with disabilities who directly needs these assistive devices and provisions.

So, one of the points here is already flagged by Domitille clearly, and then I can say or I can rename it as the importance of sensitization and awareness to all stakeholders. And then, I think it's important to establish partnership and collaboration between public, private and, of course, civil society as well, with the important contribution or, you know, significant contribution with expert organizations, such as organizations of persons with disabilities. I think we should have in places this collaboration between public, private and organizations of persons with disabilities.

And I think we need also a clear roadmap to where we'd like to go, at least in the coming, like, five years. We're closer to five years already would be tomorrow, and I don't know. But I want to put it in line with the SDG scores, so to make our measurement simple and clear for us. So, yeah, this should be some points for our next steps.

But I want to also make one point here. Particularly on physical aids and appliances. There is a huge concept on accessible infrastructure. We're not yet there. And I'm talking from the perspective or the point of Africans with disabilities. So, some of the issues for the next steps from my side are these. Thank you.

>> SATISH MISHRA: Thank you, Shitaye. Thank you very much. And I really want to thank all the panel. In the interest of time, we will move forward, but this is fascinating conversation. And also resonates a lot with the Assistive Products Market Report findings and some of the recommendations which is coming from that. Thank you.

Now we'll move to China. And as you may have heard, and people who are joining now in the webinar or a bit late, China has been playing a significant role in providing and shaping assistive technology supply globally. It's my pleasure to introduce Zhang Hongtao, who is the Deputy Director-General for China Assistive Devices and Technology Center for Persons with Disabilities. Zhang, thank you very much for joining today's webinar. To facilitate the next ten minutes of the conversation with Zhang, I also invite Yolanda Liang, who is the Senior Associate for CHAI, to facilitate the discussion with Zhang. Over to you, Yolanda.

>> YOLANDA LIANG: Yeah, thank you, Satish. And it's a great honor for CHAI to be able to participate in this important piece of work. And please allow me to first do a quick overview of what is included in this China section and why it's relevant. So, this annex focuses on the landscape of Chinese suppliers. And first, it starts with the overview of Chinese assistive products exports to low- and middle-income countries, including the company size, sales patterns, export destinations, quality certifications and the key challenges and emerging opportunities.

And then, it deep dives into the supplier landscape for each priority product, so including their sales model, the distribution channels and also we try to identify the high-potential suppliers for low- and middle-income countries, based on their product availability, their capacity and also their willingness to engage in this particular market.

And as you can see from the tables that we have highlighted here. So, for each potential supplier, that we try to summarize their introduction, including their capacity and also their low- and middle-income country experience, which country they have actually had experience and distributors, and also their quality certifications.

And in the last, the report goes on to discuss the suppliers' competitive advantages, the challenges and recommendations, and all this focuses solely on the low- and middle-income countries.

So, as my colleague previously mentioned, based on our research, we see Chinese assistive products already widely procured and used in low- and middle-income countries, and both through public and private channels. However, we still find that there are cases where the buyers find difficulties to identify suitable products from China. And we think if we can better link the demand and supply, there is untapped potential to better leverage

China's manufacturing capability, the technical experience and also the innovation for global AT users, and also improve the overall accessibility. And we hope this annex is a foundation for further China and global collaboration, and that's a starting point for people who would like to partner with Chinese manufacturers and products.

So, with that said, I would like to hand the mic to Mr. Hongtao Zhang from CADTC, whose teams has already worked with us through the support of this particular section. And welcome, Mr. Zhang.

>> ZHANG HONGTAO (*in Mandarin Chinese, via interpretation*): Hello everyone. First of all, thank you for your kind invitation and kind introduction. And I also would like to extend a special thanks to ATscale for providing this platform. It's a great opportunity for us to share China's experience and vision in assistive technology with colleagues from around the world.

I'm from CADTC. CADTC is a public institution, under the management of China Disabled Persons Federation -- CDPF -- and it serves as the national center for assistive technology research and resources. Over the years, CADTC has played a proactive and a significant role in policy development, service network building, technical training, project implementation, public awareness and international cooperation in the field of AT in China. CDPF is one of the founding members of ATscale and currently serves on its board. CADTC represents CDPF in the boards where it maintains close contact and practical cooperation with ATscale.

In 2024, CADTC, ATscale and CHAI signed a tripartite memorandum of understanding to jointly support the development of the AP Market Report 2025. And one of the results of this tripartite cooperation is the official release of the report.

Today I would like to extend my congratulations to ATscale and CHAI on this important occasion. We're honored to have contributed to this section on Chinese suppliers, and we hope this report will serve as a starting point for deepening a more effective supply demand alignment between China and the world.

China has 85 million persons with disabilities and over 296 million people aged 60 and above, making the country with the largest and the fastest growing demand for assistive products in the world. This immense domestic need has driven the rapid development of China's AT industry. Today, China is not only one of the world's largest consumers of assistive products, but also a major global manufacturing hub.

This report focuses on priority product categories: hearing aids, wheelchairs, prostheses, eyeglasses and digital assistive technologies. It presents an overview of the current status of Chinese manufacturers in these areas. It identifies high-quality suppliers with both capacity, willingness to engage in low- and middle-income markets, and explores export trends and challenges and opportunities for cooperation. And Shaoyu mentioned that this challenges and cooperation and Chinese suppliers earlier.

Based on literature reviews and field research, we gathered data through questionnaires from 90 suppliers, 56% of whom have experienced exporting to LMICs. Nearly 70% expressed willingness to engage in international cooperation, including through product donations. We also conducted in-depth interviews with more than 20 companies and visited 10 of them for on-site assessments.

Our findings suggest the Chinese suppliers offer significant advantages in product range, pricing, quality and delivery capacity, reflecting China's strong manufacturing capabilities and mature supply chain. At the same time, we recognize the broader context of industrial transformation in China.

Moving forward, improving our product quality and increasing technological sophistication are clear trends. More manufacturers' research institutions and universities are now investing in R&D. We are also aware that our suppliers in China need to better understand the local market needs, enhanced capacity to respond to international tenders, improve alignment with the destination market standards and certification requirements, and we hope the Chinese suppliers to have in-depth cooperation with the rest of the world in the AT sector.

We identified some Chinese suppliers who have international potential for supplying assistive technologies to the rest of the world. We also hope that other countries better understand Chinese suppliers' capability.

In addition, CADTC as a national platform will continue to build bridges between supply and demand, mobilize resources and contribute to improving global AT access. Now I will take the opportunity to promote our annual event, China International Welfare and Rehabilitation Expo. We have actually hosted 17 sessions of Expo from September 12th to 14th this year, The expo will take place in Beijing, hosted by CDPF and organized by CADTC. The expo is expected to feature over 400 exhibitors/participants, and welcome more than 40,000 visitors. I sincerely invite all of you to join us in Beijing. You won't be disappointed. Thank you, everyone. Thank you, moderator.

>> SATISH MISHRA: Thank you. Thank you very much. Let's go to the right channel. Thank you very much. And thank you, Zhang, and thank you, Yolanda, for also presenting on the China landscape. Congratulations on all the work happening in China. Clearly, China is the world's largest domestic market on assistive technology, and also a very important global manufacturing hub for assistive products. And thank you, again, for your support in live streaming this particular webinar back home in China. So, thank you very much.

Now it's time for some quick question and answers. And I'll probably pick one or two questions which has come, which has been repeated. And as I mentioned earlier, we will be responding to each of those questions individually and also we'll be putting that on the public website.

Probably this question is -- I will direct it towards you, Ritubhan, which focuses on, you know, not only the cost component, but how that can be mitigated by local manufacturing of assistive products.

>> RITUBHAN GAUTAM: Thanks, Satish. No definitely, as we also highlight in the report, local manufacturing and encouraging local and regional manufacturing is one of the solutions for mitigating some of the supply cost drivers. Having said that, I think we do need to keep in mind that one size might not fit all the contexts. So, it will really depend on the specific business case, whether this local manufacturing is sustainable and also scalable in that particular context.

Just to give an example. If in certain cases, local manufacturing at scale might be more cost exorbitant as compared to importing a product globally, from some other country. So, we do need to keep in mind. But having said that, we highly see local manufacturing, slash regional manufacturing, I should say, as one of the solutions for scalable and sustainable supply of assistive technologies.

>> SATISH MISHRA: Thank you, Ritubhan. Thank you. I think that was clear. And in the interest of time, we will move forward, but really want to thank everyone for this exciting discussion, and apologies for running over time.

The English report on Assistive Product report of 2025 is available online. My colleagues have shared the link in the chat and we will share it again. The French and the accessible versions will be available shortly. The webinar recording will also be available publicly on the ATscale website and will be shared on the social media.

Colleagues and participants of the webinar, as you may have heard, this is the second Discussion Series, second conversation in the Discussion Series. The next one will be in September and will focus on Market Shaping Toolkits on Assistive Technology. And we look forward to continue the conversation to build assistive technology markets in low- and middle-income countries.

Thank you, everybody, for joining today's webinar. Have a great day or night ahead, depending from wherever you are joining today's webinar. So, thank you very much. Thank you, everybody.