



REHABILITATION SECTOR IN UKRAINE

THE ASSISTIVE TECHNOLOGY (AT) PRODUCTS MARKET

AT A GLANCE: MARKET SNAPSHOT



Ukraine's **AT Products Market** focuses on the development, distribution, and provision of **devices & equipment** (mobility aids, prosthetics, orthotics, communication devices, home rehabilitation kits, and digital health applications). It serves both **institutional buyers** (hospitals & clinics) and **individual consumers**.



The market is shaped by a **multi-layered competitive environment** where domestic producers, international suppliers, and donor-supported projects interact under the evolving trade and regulatory regime. This environment has been influenced by war-related demand for prosthetics, orthotics and rehabilitation, and by **rapid technological innovation**.



AT products are delivered through the **Prozorro public procurement system**, offering selection of orthopedic support devices, orthopedic implants, orthopedic prostheses, coronary endoprotheses, wheelchairs, and invalid carriages.



For suppliers, success depends on registering products as medical devices, complying with pricing and quality requirements, and often partnering with local distributors experienced in Prozorro procurement system. **For investors**, the system offers growing predictability and alignment with EU practice.



For private companies and investors, donor involvement lowers market-entry risk. Co-financed procurement programs, transparent tendering requirements, and internationally supervised quality controls create a predictable environment for supplying ATs.



Importers & distributors are a key link between **foreign manufacturers** and **end users** (rehabilitation centers, hospitals, patients) and manage all stages of market entry, starting with customs clearance and certification under Ukraine's technical regulations.



Government Stakeholders: Key national policymakers in AT products include Parliament, Cabinet of Ministers, the Ministries of Economy; Social Policy; Health; Veteran's Affairs, and the NHSU. These bodies set the legislative & regulatory framework for the production, import, certification, and provision of ATs. **Regional authorities** plan and finance AT provision across their regions, and **community authorities** manage the day-to-day delivery of ATs.

AT Products By The Numbers

\$98M+

In Ministry of Health
Procurements (2023)

700+

Hospitals Using
Prozorro Market (2023)

550+

Medicines and
Medical Items
Contracted (2023)

24%

Average Savings for
Hospitals via Prozorro
Market (2023)

MARKET TRENDS & OPPORTUNITIES

The AT products market is shifting from state-driven supply to a diverse, innovation-focused marketplace. Demand for prosthetics, orthoses, and mobility aids is surging due to war injuries and chronic health conditions. Buyers increasingly value technology, clinical results, and service reliability.

- **Local Production:** Ukraine is rapidly advancing in AT products (prosthetics, bionics, rehabilitation devices). U.S. companies can set up local manufacturing to meet demand, lower logistics costs, and tap into Ukraine's innovation (3D printing, AI).
- **Joint Ventures/Partnerships:** U.S. companies can enter Ukraine through joint ventures, partnerships (including Public-Private Partnerships), licensing, or fully owned subsidiaries—gaining local knowledge, sharing risk, and easing market integration.
- **Technology Transfer & Training:** U.S. firms can partner with Ukrainian companies to share expertise, introduce manufacturing advances, and support workforce skill development.
- **Leveraging EU Integration:** As Ukraine adopts EU medical device standards, U.S. companies can collaborate with EU partners in Ukraine to ease regulatory adaptation and expand their market reach.