

Global Ophthalmic Drug Delivery Devices Market: Focus on Product, Formulation, Sales Channel, End User, and 21 Countries - Analysis and Forecast, 2021-2030

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Abstracts

Market Report Coverage - Ophthalmic Drug Delivery Devices

Market Segmentation

Product- Pre-filled syringes, multidose eyedroppers, squeeze dispensers, mist sprayers, add-on devices, contact lenses, and others (tubes, ocular inserts, etc.)

Formulation- eye drops, liquid sprays, ointments, gels, and others (emulsions, suspensions, etc.)

Sales channel- Direct sales and indirect sales

End User- Hospitals, clinics, homecare settings, and others (standalone and specialty centers)

Regional Segmentation

North America – U.S., and Canada

Europe – Germany, U.K, France, Italy, Spain, Nordic Countries, and Rest-of-Europe

Asia-Pacific – Japan, China, India, South Korea, Australia and New Zealand, Singapore, and Rest-of-Asia-Pacific

Latin America – Brazil, Mexico, Argentina, Colombia, and Rest-of-Latin-America

Middle East and Africa – K.S.A., Israel, South Africa, and Rest-of-Middle East and Africa

Market Growth Drivers

Rising Prevalence of Ocular Disorders

Development of Novel Drug Dispensers

Integration of Digital Solutions in Ophthalmic Drug Delivery Devices

Regular Funding Cycles for Emerging Companies

Market Challenges

High Upfront Cost of Advanced Ophthalmic Drug Delivery Devices

Prolonged Regulatory Approval Process

Market Opportunities

Entry of Regional Companies in Global Ophthalmic Drug Delivery Devices Market

Partnerships Between Companies and Ophthalmic Clinics

Inclusion of Nanotechnology in Ophthalmic Drugs Formulation

Key Companies Profiled

Aero Pump GmbH, AptarGroup, Inc., Bausch Health Companies Inc., Becton, Dickinson and Company, EyePoint Pharmaceuticals, Inc., Gaplast GmbH, Gerresheimer AG, Jotteq Inc., Nemera, Nipro Corporation, Ocular Therapeutix, Inc., Owen Mumford, Silgan Holdings Inc., Terumo Corporation, West Pharmaceutical Services, Inc., Kedalion Therapeutics, Inc., Re-Vana Therapeutics, Mati Therapeutics, Inc., Biocorp, Ocumedic, Inc.

How This Report Can Add Value

Who should buy this report?

Technology/non-healthcare companies planning to enter the ophthalmic drug delivery devices market through a platform, mobile application, or smart device

Ophthalmic drug delivery device manufacturers

Companies manufacturing contact lenses

Key questions answered in the Global Ophthalmic Drug Delivery Devices Market Report

What has been the impact of COVID-19 on the global ophthalmic drug delivery devices market?

What are the key technological trends influencing the global ophthalmic drug delivery devices market, and what is their potential in short-, mid-, and long-term duration?

What are the key regulations impacting the global ophthalmic drug delivery devices market?

Who are the key players in the global ophthalmic drug delivery devices market?

Which key strategy was most extensively used in the global ophthalmic drug delivery devices market?

What are the key factors influencing the growth of the global ophthalmic drug delivery devices market? What are the major opportunity areas for the companies operating in the market?

Which product sub-category is projected to witness accelerated growth in the global ophthalmic drug delivery devices market during the forecast period 2021-2030?

Which formulation type is projected to hold the largest share in the global ophthalmic drug delivery devices market during the forecast period 2021-2030?

What are the major sales channels in the global ophthalmic drug delivery devices market, and what is their growth potential during the forecast period 2021-2030?

Who are the key end users, and what is their respective share in the global ophthalmic drug delivery devices market?

What are the major key findings for the global ophthalmic drug delivery devices market across various regions?

Global Ophthalmic Drug Delivery Devices Market Overview

The scope of the global ophthalmic drug delivery devices market involves various drug delivery devices used in ophthalmic drug delivery. The considered devices include pre-filled syringes, multidose eyedroppers, drug-eluting contact lenses, technology-enabled add-on devices, mist sprayers, squeeze dispensers, and other devices such as tubes and ocular inserts.

The global ophthalmic drug delivery devices market comprises various key medical device companies and emerging companies. The major medical device companies operating in the market include Becton, Dickinson and Company, Nipro Corporation, Teruo Corporation, and West Pharmaceutical Services, Inc.

Furthermore, various ophthalmic drug delivery device manufacturers such as Aero Pump GmbH, AptarGroup, Inc., Bausch Health Companies Inc., EyePoint Pharmaceuticals, Inc., Gaplast GmbH, Gerresheimer AG, Jotteq Inc., Namera, Ocular Therapeutix, Inc., Owen Mumford, and Silgan Holdings Inc. also operate in the market.

Additionally, owing to the rising technology integration, various emerging companies such as Kedalion Therapeutics, Inc., Re-Vana Therapeutics, Inc., Biocorp, and

Ocumedic, Inc. are also present in the market and are developing advanced ophthalmic drug delivery devices.

The factors driving growth include increasing prevalence of ocular disorders, development of novel drug dispensers, integration of digital solutions in ophthalmic drug delivery devices, and regular funding cycles for emerging companies. The restraints for the global ophthalmic drug delivery devices market include high upfront cost of the advanced ophthalmic drug delivery devices and prolonged regulatory approval process. Furthermore, there are various opportunities in the market that hold considerable growth potential. Entry of regional companies in the global ophthalmic drug delivery devices market, partnerships between companies and ophthalmic clinics, and inclusion of nanotechnology in ophthalmic drugs formulation are the key opportunity areas in the global ophthalmic drug delivery devices market.

Key technology trends such as the sustained drug delivery, connected devices for medication adherence, small molecules for drug delivery, and liquid sprays are anticipated to influence the global ophthalmic drug delivery devices market.

The global ophthalmic drug delivery devices market is in early stages of technology integration. A limited number of patents have been filed in the global market between January 2016-July 2021. According to World Intellectual Property Organisation (WIPO), there were only 148 patents filed pertaining to the global market, with the highest being filed in 2017 (46).

During January 2018-June 2021, the global ophthalmic drug delivery devices market witnessed 54 key developments. Regulatory and legal activities were the most actively employed strategies, followed by mergers and acquisitions. The key companies that received regulatory approvals between January 2018-June 2021 included Ocular Therapeutix, Inc., AptarGroup, Inc., EyePoint Pharmaceuticals, Inc., Nemera, Johnson, and Johnson Medical Devices Companies, Bausch and Lomb Incorporated, Ocumedic, Inc, and Terumo Corporation. Similarly, several partnerships took place between January 2018-June 2021. The aim of strategic partnerships includes new product development and business expansion.

New product launches are one of the primary strategies adopted by new companies to enter the global ophthalmic drug delivery devices market. Companies have also been working on upgrades for their existing products. Between January 2018-June 2021, several new products were launched in the global ophthalmic drug delivery devices market. Companies such as Gerresheimer AG, Hoffman Neopac AG, Ocular

Therapeutix, Inc., and Silgna Holdings, Inc. launched their products in the mentioned period. Furthermore, funding activities are critical for the entry and operation of start-ups in the global ophthalmic drug delivery devices market. Re-Vana Therapeutics, Credence MedSystems, Inc., and Kedalion Therapeutics, Inc. are the prominent companies in the global ophthalmic drug delivery devices market that have received funding for their product development and R&D efforts.

Two business models, namely, business-to-customer (B2C) and business-to-business (B2B), are operational in the global ophthalmic drug delivery devices market. The device manufacturers often employ both the business models for ensuring a prominent local and global presence. Moreover, owing to the emergence of add-on devices, the adoption of B2C business model is projected to increase in the market.

The global ophthalmic drug delivery devices market report highlights that the market was valued at \$295.4 million in 2020 and is expected to reach \$537.8 million by the end of 2030. The market is expected to grow at a CAGR of 6.17% during the forecast period from 2021 to 2030.

Global Ophthalmic Drug Delivery Devices Market Drivers

The factors driving growth include increasing prevalence of ocular disorders, development of novel drug dispensers, integration of digital solutions in ophthalmic drug delivery devices, and regular funding cycles for emerging companies. The rising prevalence of ocular disorders has also increased the global prevalence of blindness. For instance, according to a study published in Lancet, in December 2020, titled 'Causes of Blindness and Vision Impairment In 2020 and Trends Over 30 Years, and Prevalence of Avoidable Blindness in Relation to VISION 2020: The Right to Sight: An Analysis for the Global Burden of Disease Study,' cataract was the major cause of blindness. Furthermore, other ocular disorders such as glaucoma, uncorrected refractive error, age-related macular degeneration, and diabetic retinopathy are also the causes of blindness.

To overcome the shortcomings of conventional eye droppers, various companies operating in the market have developed either novel dispensing systems or advanced eyedroppers. For instance, companies such as AptarGroup, Inc. and Owen Mumford have developed squeeze dispensers for ophthalmic drug delivery. Furthermore, companies such as Namera, Aero Pump GmbH, and Berry Healthcare have developed advanced eye droppers with a focus on preservative-free formulation and ease of usage.

Furthermore, owing to the rising digitization in the global healthcare system, advancements in drug delivery systems, rising focus on medication adherence, and high cost of drug non-adherence, the ophthalmic drug delivery devices have witnessed digital solutions integration. Companies such as Namera have developed digital devices for ensuring medication adherence and compliance with the prescribed therapy by the patient. Furthermore, Aptar Group, Inc., in association with Kali Care, has developed connected solutions for ensuring optimum eye care.

Furthermore, emerging companies such as Kedalion Therapeutics, Inc., Re-Vana Therapeutics, and Ocumedic, Inc also operate in the global ophthalmic drug delivery devices market. These companies have a strong product pipeline of advanced drug delivery devices with a focus on minimal drug wastage. Moreover, the companies receive regular fundings that ensure constant product development and research and development (R&D) activities.

Global Ophthalmic Drug Delivery Devices Market Challenges

The restraints for the global ophthalmic drug delivery devices market include high upfront cost of the advanced ophthalmic drug delivery devices and prolonged regulatory approval process.

The high upfront cost of the advanced ophthalmic drug delivery devices plays a pivotal role in their limited adoption. For instance, the average price of an ocular insert is approximately \$10 per unit, whereas the average price of a pre-filled syringe varies between \$0.02-\$0.60 per unit. Similarly, the price of a multidose eyedropper varies between \$0.03-\$0.12. The high price of the advanced ophthalmic drug delivery devices makes their purchase dependent on the reimbursable amount and eligibility criteria. Furthermore, the sales of such devices are considerably low in countries with only private insurance systems.

Furthermore, owing to the long duration of regulatory process and additional requirements, the cost of the process increases that further limits the new product launches. Furthermore, the product undergoes the regulatory process in each geography prior to its launch.

Global Ophthalmic Drug Delivery Devices Market Opportunities

Entry of regional companies in the global ophthalmic drug delivery devices market,

partnerships between companies and ophthalmic clinics, and inclusion of nanotechnology in ophthalmic drugs formulation are the key opportunity areas in the global ophthalmic drug delivery devices market.

The global ophthalmic drug delivery devices market is dominated by global companies such as Nemera, Aptar Group, Inc., Becton, Dickinson and Company, and West Pharmaceutical Services, Inc. However, the market holds significant growth potential for regional companies as well. For instance, Chinese companies are one of the major global suppliers for pre-filled syringes and multidose eyedroppers.

Moreover, companies can partner with chain or standalone clinics as business expansion opportunities. Furthermore, partnerships with clinics also facilitate real-world evidence analysis for the companies. The key advantages of such a partnership for a company include the development of a customer base and market presence. Moreover, for patients and ophthalmologists, such a partnership would enable access to advanced drug delivery devices, increased compliance with therapy, and minimal wastage of the drugs.

Nanotechnology is one of the key technologies that can be used in manufacturing drug formulations. The key advantages of the technology include sustained drug delivery, target delivery, minimal wastage, and cost-efficacy. Furthermore, such formulations can pass through barriers such as cornea and can be used instead of invasive techniques such as implants.

Impact of COVID-19 on Global Ophthalmic Drug Delivery Devices Market

In the short term, i.e., 2-4 years from 2020, COVID-19 would have a medium impact on the global ophthalmic drug delivery devices market. The demand for add-on devices is anticipated to be high during this timeframe.

5-10 years from 2020, the resumption of elective surgeries and normalization of the supply chain would be the key factors for market recovery. Finally, in the long term, i.e., 8-12 years from 2020, the reinstatement of supply chain and entry of advanced ophthalmic drug delivery devices are expected.

Market Segmentation

Global Ophthalmic Drug Delivery Devices Market (by Product)

The global ophthalmic drug delivery devices market (by product) has been segmented into pre-filled syringes, multidose eyedroppers, contact lenses, add-on devices, mist sprayers, squeeze dispensers, and others.

Global Ophthalmic Drug Delivery Devices Market (by Formulation)

The global ophthalmic drug delivery devices market (by formulation) has been segmented into eye drops, liquid sprays, ointments, gels, and others.

Global Ophthalmic Drug Delivery Devices Market (by Sales Channel)

The global ophthalmic drug delivery devices market has been segmented into direct sales and indirect sales.

Global Ophthalmic Drug Delivery Devices Market (by End User)

The global ophthalmic drug delivery devices market (by end user) has been segmented into hospitals, clinics, homecare settings, and others

Global Ophthalmic Drug Delivery Devices Market (by Region)

The different regions covered under the global ophthalmic drug delivery devices market report include North America, Europe, Asia-Pacific, Latin America, and the Middle East, and Africa.

North America dominated the global ophthalmic drug delivery devices market in 2018 and is anticipated to uphold its dominance throughout the forecast period. The growth in the market is majorly driven by the increasing research and development activities and adoption of advanced ophthalmic drug delivery devices. Also, the ongoing trend for digital transformation through the development of platforms and mobile applications is putting a significant impact on the market growth.

Key Market Players and Competition Synopsis

Aero Pump GmbH, AptarGroup, Inc., Bausch Health Companies Inc., Becton, Dickinson and Company, EyePoint Pharmaceuticals, Inc., Gaplast GmbH, Gerresheimer AG, Jotteq Inc., Nemera, Nipro Corporation, Ocular Therapeutix, Inc., Owen Mumford, Silgan Holdings Inc., Terumo Corporation, West Pharmaceutical Services, Inc., Kedalion Therapeutics, Inc., Re-Vana Therapeutics, Mati Therapeutics, Inc., Biocorp,

and Ocumedic, Inc.

The global ophthalmic drug delivery devices market has witnessed several strategic and technological developments in the past few years undertaken by the different market players to attain their respective market shares in this emerging domain. Some of the strategies covered in this segment are regulatory and legal activities, partnerships and alliances, new offerings, mergers and acquisitions, expansion activities, and funding activities.

Contents

1 PRODUCT DEFINITION

2 SCOPE OF RESEARCH

- 2.1 Scope of Study
- 2.2 Inclusion and Exclusion Criteria
 - 2.2.1 Inclusion Criteria
 - 2.2.2 Exclusion Criteria
- 2.3 Key Questions Answered in the Report

3 RESEARCH METHODOLOGY

- 3.1 Data Collection and Analysis
- 3.2 Data Sources
 - 3.2.1 Primary Data Sources
 - 3.2.2 Secondary Data Sources
- 3.3 Data Triangulation
- 3.4 Market Estimation
- 3.5 Forecast Period Selection Criteria
- 3.6 Assumptions and Limitations

4 IMPACT OF COVID-19 ON OPHTHALMIC DRUG DELIVERY DEVICES

- 4.1 Impact on Treatment Facilities
- 4.2 Impact on Market Size
 - 4.2.1 Scenario Comparative Analysis (Pre-COVID-19, During COVID-19, Post-COVID-19)
- 4.3 Future Outlook and Recommendations

5 INDUSTRY ANALYSIS

- 5.1 Technology and Innovation Landscape
 - 5.1.1 Key Trends
 - 5.1.1.1 Short-Term Impact
 - 5.1.1.2 Mid-Term Impact
 - 5.1.1.3 Long-Term Impact
 - 5.1.1.4 Future Outlook

- 5.2 Epidemiological Landscape
 - 5.2.1 Glaucoma
 - 5.2.2 Age-Related Macular Degeneration
 - 5.2.3 Cataract
- 5.3 Value Chain Analysis
- 5.4 End User Perceptions
- 5.5 Regulatory Framework
 - 5.5.1 Regulatory Framework in North America
 - 5.5.1.1 Key Takeaways
 - 5.5.2 Regulatory Framework in Europe
 - 5.5.2.1 Key Takeaways
 - 5.5.3 Regulatory Framework in Asia-Pacific
 - 5.5.3.1 Key Takeaways
- 5.6 Patent Analysis
 - 5.6.1 Patent Filed, by Year
 - 5.6.2 Patent Filed, by Country/Cluster
- 5.7 Product Benchmarking

6 COMPETITIVE LANDSCAPE

- 6.1 Market Share Analysis
- 6.2 Key Strategies and Developments
 - 6.2.1 Regulatory and Legal Activities
 - 6.2.2 Partnerships, Alliances, and Business Expansions
 - 6.2.3 New Offerings
 - 6.2.4 Funding Activities
 - 6.2.5 Mergers and Acquisitions
- 6.3 Business Model Analysis
- 6.4 Key Players-Competitive Benchmarking

7 GLOBAL OPHTHALMIC DRUG DELIVERY DEVICES MARKET SCENARIO

- 7.1 Assumptions and Limitations
- 7.2 Key Findings and Opportunity Assessment
 - 7.2.1 Key Findings
 - 7.2.2 Opportunity Assessment
- 7.3 Global Ophthalmic Drug Delivery Devices Market Size and Forecast
 - 7.3.1 Realistic Growth Scenario
 - 7.3.2 Pessimistic/Conservative Growth Scenario

7.3.3 Optimistic Scenario

7.4 Market Dynamics

7.4.1 Impact Analysis

7.4.2 Market Growth Promoting Factors

7.4.2.1 Increasing Prevalence of Ocular Disorders

7.4.2.2 Development of Novel Drug Dispensers

7.4.2.3 Integration of Digital Solutions in Ophthalmic Drug Delivery Devices

7.4.2.4 Regular Funding Cycles for Emerging Companies

7.4.3 Market Growth Restraining Factors

7.4.3.1 High Upfront Cost of Advanced Ophthalmic Drug Delivery Devices

7.4.3.2 Prolonged Regulatory Approval Process

7.4.4 Market Opportunities

7.4.4.1 Entry of Regional Companies in Global Ophthalmic Drug Delivery Devices

Market

7.4.4.2 Partnerships between Companies and Ophthalmic Clinics

7.4.4.3 Inclusion of Nanotechnology in Ophthalmic Drugs Formulation

7.4.4.4 Opportunities Potential

7.4.4.4.1 Short-Term

7.4.4.4.2 Mid-Term

7.4.4.4.3 Long-Term

8 GLOBAL OPHTHALMIC DRUG DELIVERY DEVICES MARKET (BY PRODUCT), 2018-2030

8.1 Growth Share Matrix

8.2 Pre-Filled Syringes

8.3 Multidose Eyedroppers

8.4 Squeeze Dispenser

8.5 Mist Sprayers

8.6 Add-On Devices

8.7 Contact Lenses

8.8 Others (Tubes, Ocular Inserts)

9 GLOBAL OPHTHALMIC DRUG DELIVERY DEVICES MARKET (BY FORMULATION), 2018-2030

9.1 Growth Share Matrix

9.2 Eye Drops

9.3 Liquid Sprays

9.4 Ointments

9.5 Gels

9.6 Others (Emulsions, Suspensions, Etc.)

10 GLOBAL OPHTHALMIC DRUG DELIVERY DEVICES MARKET (BY SALES CHANNEL), 2018-2030

10.1 Opportunity Assessment

10.2 Growth Share Matrix

10.3 Direct Sales

10.4 Indirect Sales

11 GLOBAL OPHTHALMIC DRUG DELIVERY DEVICES MARKET (BY END USER), 2018-2030

11.1 Opportunity Assessment

11.2 Hospitals

11.3 Clinics

11.4 Homecare Settings

11.5 Others (Standalone, Specialty Centers)

12 GLOBAL OPHTHALMIC DRUG DELIVERY DEVICES MARKET (BY REGION), 2018-2030

12.1 Overview

12.2 North America Ophthalmic Drug Delivery Devices Market

12.2.1 Key Findings and Opportunity Assessment

12.2.2 Market Dynamics: Impact Analysis

12.2.3 Market Size and Forecast

12.2.3.1 by Sales Channel

12.2.3.2 by End User

12.2.3.3 by Country

12.2.3.3.1 U.S.

12.2.3.3.2 Canada

12.3 Europe Ophthalmic Drug Delivery Devices Market

12.3.1 Key Findings and Opportunity Assessment

12.3.2 Market Dynamics: Impact Analysis

12.3.3 Market Size and Forecast

12.3.3.1 by Sales Channel

- 12.3.3.2 by End User
- 12.3.3.3 by Country
 - 12.3.3.3.1 Germany
 - 12.3.3.3.2 U.K.
 - 12.3.3.3.3 France
 - 12.3.3.3.4 Italy
 - 12.3.3.3.5 Spain
 - 12.3.3.3.6 Nordic Countries
 - 12.3.3.3.7 Rest-of-Europe
- 12.4 Asia-Pacific Ophthalmic Drug Delivery Devices Market
 - 12.4.1 Key Findings and Opportunity Assessment
 - 12.4.2 Market Dynamics: Impact Analysis
 - 12.4.3 Market Size and Forecast
 - 12.4.3.1 by Sales Channel
 - 12.4.3.2 by End User
 - 12.4.3.3 by Country
 - 12.4.3.3.1 Japan
 - 12.4.3.3.2 China
 - 12.4.3.3.3 India
 - 12.4.3.3.4 South Korea
 - 12.4.3.3.5 Australia and New Zealand
 - 12.4.3.3.6 Singapore
 - 12.4.3.3.7 Rest-of-Asia-Pacific
- 12.5 Latin America Ophthalmic Drug Delivery Devices Market
 - 12.5.1 Key Findings and Opportunity Assessment
 - 12.5.2 Market Dynamics: Impact Analysis
 - 12.5.3 Market Size and Forecast
 - 12.5.3.1 by Sales Channel
 - 12.5.3.2 by End User
 - 12.5.3.3 by Country
 - 12.5.3.3.1 Brazil
 - 12.5.3.3.2 Mexico
 - 12.5.3.3.3 Argentina
 - 12.5.3.3.4 Colombia
 - 12.5.3.3.5 Rest-of-Latin America
- 12.6 Middle East and Africa Ophthalmic Drug Delivery Devices Market
 - 12.6.1 Key Findings and Opportunity Assessment
 - 12.6.2 Market Dynamics: Impact Analysis
 - 12.6.3 Market Size and Forecast

- 12.6.3.1 by Sales Channel
- 12.6.3.2 by End User
- 12.6.3.3 by Country
 - 12.6.3.3.1 K.S.A.
 - 12.6.3.3.2 Israel
 - 12.6.3.3.3 South Africa
 - 12.6.3.3.4 Rest-of-Middle East and Africa

13 COMPANY PROFILES

13.1 Overview

13.2 Established Companies

13.2.1 Aero Pump GmbH

13.2.1.1 Company Overview

13.2.1.2 Role of Aero Pump GmbH in Global Ophthalmic Drug Delivery Devices

Market

13.2.1.3 SWOT Analysis

13.2.2 AptarGroup, Inc.

13.2.2.1 Company Overview

13.2.2.2 Role of AptarGroup, Inc. in Global Ophthalmic Drug Delivery Devices Market

13.2.2.3 Financials

13.2.2.4 R&D Insights

13.2.2.5 Recent Developments

13.2.2.6 SWOT Analysis

13.2.3 Bausch Health Companies Inc.

13.2.3.1 Company Overview

13.2.3.2 Role of Bausch Health Companies Inc. in Global Ophthalmic Drug Delivery

Devices Market

13.2.3.3 Financials

13.2.3.4 R&D Insights

13.2.3.5 Recent Developments

13.2.3.6 SWOT Analysis

13.2.4 Becton, Dickinson and Company

13.2.4.1 Company Overview

13.2.4.2 Role of Becton, Dickinson and Company in the Global Ophthalmic Drug

Delivery Devices Market

13.2.4.3 Financials

13.2.4.4 R&D Insights

13.2.4.5 Recent Developments

13.2.4.6 SWOT Analysis

13.2.5 EyePoint Pharmaceuticals, Inc.

13.2.5.1 Company Overview

13.2.5.2 Role of EyePoint Pharmaceuticals, Inc. in Global Ophthalmic Drug Delivery

Devices Market

13.2.5.3 Financials

13.2.5.4 R&D Insights

13.2.5.5 Recent Developments

13.2.5.6 SWOT Analysis

13.2.6 Gaplast GmbH

13.2.6.1 Company Overview

13.2.6.2 Role of Gaplast GmbH in Global Ophthalmic Drug Delivery Devices Market

13.2.6.3 Recent Developments

13.2.6.4 SWOT Analysis

13.2.7 Gerresheimer AG

13.2.7.1 Company Overview

13.2.7.2 Role of Gerresheimer AG in Global Ophthalmic Drug Delivery Devices

Market

13.2.7.3 Financials

13.2.7.4 R&D Insights

13.2.7.5 Recent Developments

13.2.7.6 SWOT Analysis

13.2.8 Jotteq Inc.

13.2.8.1 Company Overview

13.2.8.2 Role of Jotteq Inc. in Global Ophthalmic Drug Delivery Devices Market

13.2.8.3 SWOT Analysis

13.2.9 Nemera

13.2.9.1 Company Overview

13.2.9.2 Role of Nemera in Global Ophthalmic Drug Delivery Devices Market

13.2.9.3 Recent Developments

13.2.9.4 SWOT Analysis

13.2.10 Nipro Corporation

13.2.10.1 Company Overview

13.2.10.2 Role of Nipro Corporation in Global Ophthalmic Drug Delivery Devices

Market

13.2.10.3 Financials

13.2.10.4 R&D Insights

13.2.10.5 Recent Developments

13.2.10.6 SWOT Analysis

13.2.11 Ocular Therapeutix, Inc.

13.2.11.1 Company Overview

13.2.11.2 Role of Ocular Therapeutix, Inc. in Global Ophthalmic Drug Delivery

Devices Market

13.2.11.3 Financials

13.2.11.4 R&D Insights

13.2.11.5 Recent Developments

13.2.11.6 SWOT Analysis

13.2.12 Owen Mumford

13.2.12.1 Company Overview

13.2.12.2 Role of Owen Mumford in the Global Ophthalmic Drug Delivery Devices

Market

13.2.12.3 SWOT Analysis

13.2.13 Silgan Holdings Inc.

13.2.13.1 Company Overview

13.2.13.2 Role of Silgan Holdings Inc. in Global Ophthalmic Drug Delivery Devices

Market

13.2.13.3 Financials

13.2.13.4 SWOT Analysis

13.2.14 Terumo Corporation

13.2.14.1 Company Overview

13.2.14.2 Role of Terumo Corporation in Global Ophthalmic Drug Delivery Devices

Market

13.2.14.3 Financials

13.2.14.4 R&D Insights

13.2.14.5 Recent Developments

13.2.14.6 SWOT Analysis

13.2.15 West Pharmaceutical Services, Inc.

13.2.15.1 Company Overview

13.2.15.2 Role of West Pharmaceutical Services, Inc. in the Global Ophthalmic Drug

Delivery Devices Market

13.2.15.3 Financials

13.2.15.4 R&D Insights

13.2.15.5 SWOT Analysis

13.3 Company Snapshots

13.3.1 Kedalion Therapeutics, Inc.

13.3.1.1 Company Overview

13.3.1.2 Role of Kedalion Therapeutics, Inc. in Global Ophthalmic Drug Delivery

Devices Market

13.3.1.3 Recent Developments

13.3.2 Re-Vana Therapeutics

13.3.2.1 Company Overview

13.3.2.2 Role of Re-Vana Therapeutics in Global Ophthalmic Drug Delivery Devices

Market

13.3.2.3 Recent Developments

13.3.3 Mati Therapeutics, Inc.

13.3.3.1 Company Overview

13.3.3.2 Role of Mati Therapeutics, Inc. in Global Ophthalmic Drug Delivery Devices

Market

13.3.4 Biocorp

13.3.4.1 Company Overview

13.3.4.2 Role of Biocorp in Global Ophthalmic Drug Delivery Devices Market

13.3.4.3 Recent Developments

13.3.5 Ocumedic, Inc.

13.3.5.1 Company Overview

13.3.5.2 Role of Ocumedic, Inc. in Global Ophthalmic Drug Delivery Devices Market

13.3.5.3 Recent Developments

List Of Tables

LIST OF TABLES

Table 1: Global Estimates of Common Ocular Conditions

Table 2: Global Ophthalmic Drug Delivery Devices Market, Quarterly Regional Impact, 2020

Table 2.1: Global Ophthalmic Drug Delivery Devices Market, Exclusion Criteria

Table 4.1: Pre-COVID-19 Patient Volume in Private Ophthalmology Practices, July 2020

Table 5.1: Regulatory Framework in North America

Table 5.2: Regulatory Framework in Europe

Table 5.3: Regulatory Framework in Asia-Pacific

Table 5.4: Global Ophthalmic Drug Delivery Devices Market: Product Benchmarking

Table 6.1: Global Ophthalmic Drug Delivery Devices Market, Business Model Analysis

Table 7.1: Global Ophthalmic Drug Delivery Devices Market, Funding Cycles

Table 12.1: Prevalence of Ocular Disorders in North America, 2016, 2019, and 2030

Table 12.2: North America Ophthalmic Drug Delivery Devices Market, Impact Analysis

Table 12.3: Prevalence of Ocular Disorders in the U.S., 2000, 2010, and 2019

Table 12.4: Prevalence of Ocular Disorders in Canada, 2000, 2010, and 2019

Table 12.5: Prevalence of Ocular Disorders in Europe, 2016, 2019, and 2030

Table 12.6: Europe Ophthalmic Drug Delivery Devices Market, Impact Analysis

Table 12.7: Prevalence of Ocular Disorders in Germany, 2000, 2010, and 2019

Table 12.8: Prevalence of Ocular Disorders in the U.K., 2000, 2010, and 2019

Table 12.9: Prevalence of Ocular Disorders in France, 2000, 2010, and 2019

Table 12.10: Prevalence of Ocular Disorders in Italy, 2000, 2010, and 2019

Table 12.11: Prevalence of Ocular Disorders in Spain, 2000, 2010, and 2019

Table 12.12: Prevalence of Ocular Disorders in Nordic Countries, 2000, 2010, and 2019

Table 12.13: Prevalence of Ocular Disorders in Asia-Pacific, 2016, 2019, and 2030

Table 12.14: Asia-Pacific Ophthalmic Drug Delivery Devices Market, Impact Analysis

Table 12.15: Prevalence of Ocular Disorders in Japan, 2000, 2010, and 2019

Table 12.16: Prevalence of Ocular Disorders in China, 2000, 2010, and 2019

Table 12.17: Prevalence of Ocular Disorders in India, 2000, 2010, and 2019

Table 12.18: Prevalence of Ocular Disorders in South Korea, 2000, 2010, and 2019

Table 12.19: Prevalence of Ocular Disorders in Australia and New Zealand, 2000, 2010, and 2019

Table 12.20: Prevalence of Ocular Disorders in Singapore, 2000, 2010, and 2019

Table 12.21: Prevalence of Ocular Disorders in Latin America, 2016, 2019, and 2030

Table 12.22: Latin America Ophthalmic Drug Delivery Devices Market, Impact Analysis

Table 12.23: Prevalence of Ocular Disorders in Brazil, 2000, 2010, and 2019

- Table 12.24: Prevalence of Ocular Disorders in Mexico, 2000, 2010, and 2019
- Table 12.25: Prevalence of Ocular Disorders in Argentina, 2000, 2010, and 2019
- Table 12.26: Prevalence of Ocular Disorders in Colombia, 2000, 2010, and 2019
- Table 12.27: Prevalence of Ocular Disorders in Middle East and Africa, 2016, 2019, and 2030
- Table 12.28: Middle East and Africa Ophthalmic Drug Delivery Devices Market, Impact Analysis
- Table 12.29: Prevalence of Ocular Disorders in the K.S.A., 2000, 2010, and 2019
- Table 12.30: Prevalence of Ocular Disorders in Israel, 2000, 2010, and 2019
- Table 12.31: Prevalence of Ocular Disorders in South Africa, 2000, 2010, and 2019

List Of Figures

LIST OF FIGURES

- Figure 1: Global Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030
- Figure 2: Global Ophthalmic Drug Delivery Devices Market, Impact Analysis
- Figure 3: Global Ophthalmic Drug Delivery Devices Market, Companies Benchmarking
- Figure 4: Global Ophthalmic Drug Delivery Devices Market (by End User), 2018 and 2030
- Figure 5: Global Ophthalmic Drug Delivery Devices Market (by Region), 2018 and 2030
- Figure 2.1: Global Ophthalmic Drug Delivery Devices Market Segmentation
- Figure 3.1: Global Ophthalmic Drug Delivery Devices Market: Research Methodology
- Figure 3.2: Primary Research
- Figure 3.3: Secondary Research
- Figure 3.4: Data Triangulation
- Figure 3.5: Assumptions and Limitations
- Figure 4.1: Global Ophthalmic Drug Delivery Devices Market, Scenario Comparative Analysis
- Figure 5.1: Global Ophthalmic Drug Delivery Devices Market: Key Trends
- Figure 5.2: Global Ophthalmic Drug Delivery Devices Market, Short-Term Impact of Key Trends
- Figure 5.3: Global Ophthalmic Drug Delivery Devices Market, Mid-Term Impact of Key Trends
- Figure 5.4: Global Ophthalmic Drug Delivery Devices Market, Long-Term Impact of Key Trends
- Figure 5.5: Global Prevalence, Glaucoma, 2016-2030
- Figure 5.6: Glaucoma Prevalence, by Region, 2016-2030
- Figure 5.7: Global Prevalence, Age-Related Macular Degeneration, 2016-2030
- Figure 5.8: Age-Related Macular Degeneration Prevalence, by Region, 2016-2030
- Figure 5.9: Global Prevalence, Cataract, 2016-2030
- Figure 5.10: Cataract Prevalence, by Region, 2016-2030
- Figure 5.11: Global Ophthalmic Drug Delivery Devices Market: Value Chain Analysis
- Figure 5.12: Global Ophthalmic Drug Delivery Devices Market: End User Perception
- Figure 5.13: Global Ophthalmic Drug Delivery Devices Market, Patent Filing Trend, January 2016-July 2021
- Figure 5.14: Global Ophthalmic Drug Delivery Devices Market, Patent Filing Trend (by Country)
- Figure 6.1: Global Ophthalmic Drug Delivery Devices Market Share Analysis (by Company), 2020

Figure 6.2: Share of Key Developments and Strategies in the Global Ophthalmic Drug Delivery Devices Market (by Category), January 2018-June 2021

Figure 6.3: Regulatory and Legal Activities (by Company), January 2018-June 2021

Figure 6.4: Partnerships, Alliances, and Business Expansions (by Company), January 2018-June 2021

Figure 6.5: New Offerings (by Company), January 2018-June 2021

Figure 6.6: Funding Activities (by Company), January 2018-June 2021

Figure 6.7: Mergers and Acquisitions (by Company), January 2018-June 2021

Figure 6.8: Global Ophthalmic Drug Delivery Devices Market, Growth Share Matrix (by Product), 2018-2030

Figure 7.1: Global Ophthalmic Drug Delivery Devices Market, Realistic Growth Scenario, \$Million, 2018-2030

Figure 7.2: Global Ophthalmic Drug Delivery Devices Market, Pessimistic/Conservative Growth Scenario, \$Million, 2018-2030

Figure 7.3: Global Ophthalmic Drug Delivery Devices Market, Optimistic Growth Scenario, \$Million, 2018-2030

Figure 7.4: Global Ophthalmic Drug Delivery Devices Market, Impact Analysis

Figure 7.5: Increasing Prevalence of Ocular Disorders, 2016-2019

Figure 8.1: Global Ophthalmic Drug Delivery Devices Market, Incremental Opportunity, (by Product), \$Million, 2018 and 2030

Figure 8.2: Global Ophthalmic Drug Delivery Devices Market (by Product), Growth Share Matrix

Figure 8.3: Global Ophthalmic Drug Delivery Devices Market (Pre-Filled Syringes), \$Million, 2018-2030

Figure 8.4: Global Ophthalmic Drug Delivery Devices Market (Multidose Eyedroppers), \$Million, 2018-2030

Figure 8.5: Global Ophthalmic Drug Delivery Devices Market (Squeeze Dispenser), \$Million, 2018-2030

Figure 8.6: Global Ophthalmic Drug Delivery Devices Market (Mist Sprayers), \$Million, 2018-2030

Figure 8.7: Global Ophthalmic Drug Delivery Devices Market (Add-On Devices), \$Million, 2018-2030

Figure 8.8: Global Ophthalmic Drug Delivery Devices Market (Contact Lenses), \$Million, 2018-2030

Figure 8.9: Global Ophthalmic Drug Delivery Devices Market (Others), \$Million, 2018-2030

Figure 9.1: Global Ophthalmic Drug Delivery Devices Market, Incremental Opportunity, (by Formulation), \$Million, 2018 and 2030

Figure 9.2: Global Ophthalmic Drug Delivery Devices Market (by Formulation), Growth

Share Matrix

Figure 9.3: Global Ophthalmic Drug Delivery Devices Market (Eye Drops), \$Million, 2018-2030

Figure 9.4: Global Ophthalmic Drug Delivery Devices Market (Liquid Sprays), \$Million, 2018-2030

Figure 9.5: Global Ophthalmic Drug Delivery Devices Market (Ointments), \$Million, 2018-2030

Figure 9.6: Global Ophthalmic Drug Delivery Devices Market (Gels), \$Million, 2018-2030

Figure 9.7: Global Ophthalmic Drug Delivery Devices Market (Others), \$Million, 2018-2030

Figure 10.1: Global Ophthalmic Drug Delivery Devices Market, Incremental Opportunity, (by Sales Channel), \$Million, 2018 and 2030

Figure 10.2: Global Ophthalmic Drug Delivery Devices Market (by Sales Channel), Growth Share Matrix

Figure 10.3: Global Ophthalmic Drug Delivery Devices Market (Direct Sales), \$Million, 2018-2030

Figure 10.4: Global Ophthalmic Drug Delivery Devices Market (Indirect Sales), \$Million, 2018-2030

Figure 11.1: Global Ophthalmic Drug Delivery Devices Market (by End User), Incremental Opportunity, (by End User), \$Million, 2018 and 2030

Figure 11.2: Global Ophthalmic Drug Delivery Devices Market (Hospitals), \$Million, 2018-2030

Figure 11.3: Global Ophthalmic Drug Delivery Devices Market (Clinics), \$Million, 2018-2030

Figure 11.4: Global Ophthalmic Drug Delivery Devices Market (Homecare Settings), \$Million, 2018-2030

Figure 11.5: Global Ophthalmic Drug Delivery Devices Market (Others), \$Million, 2018-2030

Figure 12.1: Global Ophthalmic Drug Delivery Devices Market, (by Region), 2018 and 2030

Figure 12.2: North America Ophthalmic Drug Delivery Devices Market, Incremental Growth Opportunity, \$Million, 2018 and 2030

Figure 12.3: North America Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.4: North America Ophthalmic Drug Delivery Devices Market, (by Sales Channel), \$Million, 2018-2030

Figure 12.5: North America Ophthalmic Drug Delivery Devices Market, (by End User), \$Million, 2018-2030

Figure 12.6: North America Ophthalmic Drug Delivery Devices Market (by Country)

Figure 12.7: U.S. Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.8: Canada Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.9: Europe Ophthalmic Drug Delivery Devices Market, Incremental Growth Opportunity, \$Million, 2018 and 2030

Figure 12.10: Europe Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.11: Europe Ophthalmic Drug Delivery Devices Market, (by Sales Channel), \$Million, 2018-2030

Figure 12.12: Europe Ophthalmic Drug Delivery Devices Market, (by End User), \$Million, 2018-2030

Figure 12.13: Europe Ophthalmic Drug Delivery Devices Market (by Country)

Figure 12.14: Germany Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.15: U.K. Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.16: France Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.17: Italy Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.18: Spain Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.19: Nordic Countries Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.20: Rest-of-Europe Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.21: Asia-Pacific Ophthalmic Drug Delivery Devices Market, Incremental Growth Opportunity, \$Million, 2018 and 2030

Figure 12.22: Asia-Pacific Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.23: Asia-Pacific Ophthalmic Drug Delivery Devices Market, (by Sales Channel), \$Million, 2018-2030

Figure 12.24: Asia-Pacific Ophthalmic Drug Delivery Devices Market, (by End User), \$Million, 2018-2030

Figure 12.25: Asia-Pacific Ophthalmic Drug Delivery Devices Market (by Country)

Figure 12.26: Japan Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.27: China Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.28: India Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.29: South Korea Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.30: Australia and New Zealand Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.31: Singapore Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.32: Rest-of-Asia-Pacific Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.33: Latin America Ophthalmic Drug Delivery Devices Market, Incremental Growth Opportunity, \$Million, 2018 and 2030

Figure 12.34: Latin America Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.35: Latin America Ophthalmic Drug Delivery Devices Market, (by Sales Channel), \$Million, 2018-2030

Figure 12.36: Latin America Ophthalmic Drug Delivery Devices Market, (by End User), \$Million, 2018-2030

Figure 12.37: Latin America Ophthalmic Drug Delivery Devices Market (by Country)

Figure 12.38: Brazil Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.39: Mexico Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.40: Argentina Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.41: Colombia Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.42: Rest-of-Latin America Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.43: Middle East and Africa Ophthalmic Drug Delivery Devices Market, Incremental Growth Opportunity, \$Million, 2018 and 2030

Figure 12.44: Middle East and Africa Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.45: Middle East and Africa Ophthalmic Drug Delivery Devices Market, (by Sales Channel), \$Million, 2018-2030

Figure 12.46: Middle East and Africa Ophthalmic Drug Delivery Devices Market, (by End User), \$Million, 2018-2030

Figure 12.47: Middle East and Africa Ophthalmic Drug Delivery Devices Market (by Country)

Figure 12.48: K.S.A. Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.49: Israel Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.50: South Africa Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 12.51: Rest-of-Middle East and Africa Ophthalmic Drug Delivery Devices Market, \$Million, 2018-2030

Figure 13.1: Shares of Key Companies Profiled

Figure 13.2: Aero Pump GmbH: Overall Product Portfolio

Figure 13.3: Aero Pump GmbH: SWOT Analysis

Figure 13.4: AptarGroup, Inc.: Overall Product Portfolio

Figure 13.5: AptarGroup, Inc.: Overall Financials, 2018-2020

Figure 13.6: AptarGroup, Inc.: Net Revenue (by Segment), \$Million, 2018-2020

Figure 13.7: AptarGroup, Inc.: Net Revenue (by Region), \$Million, 2018-2020

Figure 13.8: AptarGroup, Inc.: R&D Expenditure, 2018-2020

- Figure 13.9: AptarGroup, Inc: SWOT Analysis
- Figure 13.10: Bausch Health Companies Inc.: Overall Product Portfolio
- Figure 13.11: Bausch Health Companies Inc.: Overall Financials, 2018-2020
- Figure 13.12: Bausch Health Companies Inc.: Revenue (by Segment), 2018-2020
- Figure 13.13: Bausch Health Companies Inc.: Revenue (by Region), 2018-2020
- Figure 13.14: Bausch Health Companies Inc.: R&D Expense, 2018-2020
- Figure 13.15: Bausch Health Companies Inc.: SWOT Analysis
- Figure 13.16: Becton, Dickinson and Company: Overall Product Portfolio
- Figure 13.17: Becton, Dickinson and Company: Overall Financials, 2018-2020
- Figure 13.18: Becton, Dickinson and Company: Net Revenue (by Segment), \$Million, 2018-2020
- Figure 13.19: Becton, Dickinson and Company: Net Revenue (by Region), \$Million, 2018-2020
- Figure 13.20: Becton, Dickinson and Company: R&D Expenditure, 2018-2020
- Figure 13.21: Becton, Dickinson and Company: SWOT Analysis
- Figure 13.22: EyePoint Pharmaceuticals, Inc.: Overall Product Portfolio
- Figure 13.23: EyePoint Pharmaceuticals, Inc.: Overall Financials, 2018-2020
- Figure 13.24: EyePoint Pharmaceuticals, Inc.: Revenue (by Region), 2018-2020
- Figure 13.25: EyePoint Pharmaceuticals, Inc.: R&D Expenditure, 2018-2020
- Figure 13.26: EyePoint Pharmaceuticals, Inc.: SWOT Analysis
- Figure 13.27: Gaplast GmbH: Overall Product Portfolio
- Figure 13.28: Gaplast GmbH: SWOT Analysis
- Figure 13.29: Gerresheimer AG: Overall Product Portfolio
- Figure 13.30: Gerresheimer AG: Overall Financials, 2018-2020
- Figure 13.31: Gerresheimer AG: Revenue (by Segment), 2018-2020
- Figure 13.32: Gerresheimer AG: Revenue (by Region), 2018-2020
- Figure 13.33: Gerresheimer AG: R&D Expense, 2018-2020
- Figure 13.34: Gerresheimer AG: SWOT Analysis
- Figure 13.35: Jotteq Inc.: Overall Product Portfolio
- Figure 13.36: Jotteq Inc.: SWOT Analysis
- Figure 13.37: Nemera: Overall Product Portfolio
- Figure 13.38: Nemera: SWOT Analysis
- Figure 13.39: Nipro Corporation: Overall Product Portfolio
- Figure 13.40: Nipro Corporation: Overall Financials, 2018-2020
- Figure 13.41: Nipro Corporation: Revenue (by Segment), 2018-2020
- Figure 13.42: Nipro Corporation: Revenue (by Region), 2018-2020
- Figure 13.43: Nipro Corporation: R&D Expense, 2018-2020
- Figure 13.44: Nipro Corporation: SWOT Analysis
- Figure 13.45: Ocular Therapeutix, Inc.: Overall Product Portfolio

Figure 13.46: Ocular Therapeutix, Inc.: Overall Financials, 2018-2020

Figure 13.47: Ocular Therapeutix, Inc.: R&D Expense, 2018-2020

Figure 13.48: Ocular Therapeutix, Inc.: SWOT Analysis

Figure 13.49: Owen Mumford: Overall Product Portfolio

Figure 13.50: Owen Mumford: SWOT Analysis

Figure 13.51: Silgan Holdings Inc.: Overall Product Portfolio

Figure 13.52: Silgan Holdings Inc.: Overall Financials, 2018-2020

Figure 13.53: Silgan Holdings Inc.: Revenue (by Segment), 2018-2020

Figure 13.54: Silgan Holdings Inc.: Revenue (by Region), 2018-2020

Figure 13.55: Silgan Holdings Inc.: SWOT Analysis

Figure 13.56: Terumo Corporation: Overall Product Portfolio

Figure 13.57: Terumo Corporation: Overall Financials, 2018-2020

Figure 13.58: Terumo Corporation: Revenue (by Segment), 2018-2020

Figure 13.59: Terumo Corporation: Revenue (by Region), 2018-2020

Figure 13.60: Terumo Corporation: R&D Expense, 2018-2020

Figure 13.61: Terumo Corporation: SWOT Analysis

Figure 13.62: West Pharmaceutical Services, Inc.: Overall Product Portfolio

Figure 13.63: West Pharmaceutical Services, Inc.: Overall Financials, 2018-2020

Figure 13.64: West Pharmaceutical Services, Inc.: Net Revenue (by Segment), \$Million, 2018-2020

Figure 13.65: West Pharmaceutical Services, Inc.: Net Revenue (by Region), \$Million, 2018-2020

Figure 13.66: West Pharmaceutical Services, Inc.: R&D Expenditure, 2018-2020

Figure 13.67: West Pharmaceutical Services, Inc.: SWOT Analysis

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