

Diabetic Retinopathy – Market Insights, Epidemiology, and Market Forecast—2030

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Abstracts

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DelveInsight's 'Diabetic Retinopathy (DR) – Market Insights, Epidemiology, and Market Forecast—2030' report delivers an in-depth understanding of the Diabetic Retinopathy (DR), historical and forecasted epidemiology as well as the market trends in the United States, EU5 (Germany, Spain, Italy, France, and United Kingdom), and Japan.

The Diabetic Retinopathy (DR) market report provides current treatment practices, emerging drugs and their market share of the individual therapies, current and forecasted Diabetic Retinopathy (DR) symptoms market size from 2017 to 2030 segmented by seven major markets. The report also covers current Diabetic Retinopathy (DR) symptoms treatment practice/algorithm, market drivers, market barriers and unmet medical needs to curate the best of the opportunities and assesses the underlying potential of the market.

Geography Covered

The United States

EU5 (Germany, France, Italy, Spain, and the United Kingdom)

Japan

Study Period: 2017–2030

Diabetic Retinopathy (DR) Disease Understanding and Treatment Algorithm

Diabetic Retinopathy (DR) Overview

Aging of the world population, along with the diabetic epidemic, has created an ongoing, sharp increase in the incidence of many eye diseases. Diabetic retinopathy, in particular, is among the most frequent complication of diabetes. It is caused by damage to the blood vessels of light-sensitive tissue at the back of the eyes. The condition can develop in anyone who has type 1 or type 2 diabetes. The risk of developing diabetic retinopathy is higher, the longer a person has diabetes, especially if it is poorly controlled. Diabetic macular edema is a type of diabetic retinopathy and is defined by significant swelling of the retinal tissue caused by retinal vessels leaking blood and fluid into the macula. Diabetic macular edema is a leading cause of vision loss for people with diabetes.

Though anti-VEGF therapy has proven a breakthrough for Diabetic Retinopathy, there is still a third of sufferers with low or no response. Anti-VEGFs are increasingly available on a global scale but come at high financial cost and treatment burden. There are major opportunities for biosimilars, novel biochemical pathways, and improved treatment regimens, along with delivery techniques, which is aimed at providing more options and easing the patient burden

Diabetic Retinopathy (DR) Diagnosis and Treatment

It covers the details of conventional and current medical therapies and diagnosis available in the Diabetic Retinopathy (DR) market for the treatment of the condition. It also provides the country-wise treatment guidelines and algorithms across the United States, Europe, and Japan.

The DelveInsight Diabetic Retinopathy (DR) market report gives a thorough understanding of Diabetic Retinopathy (DR) symptoms by including details such as disease definition, symptoms, causes, physiology, and diagnosis. It also provides Diabetic Retinopathy (DR) symptoms of treatment algorithms and treatment guidelines for Diabetic Retinopathy (DR) symptoms in the US, Europe, and Japan.

Diabetic retinopathy is detected during an eye examination that includes visual acuity test, pupil dilation, ophthalmoscopy or fundus photography, and others.

For diabetic retinopathy that is threatening or affecting the patient's sight, the main

treatments are:

- a) laser treatment – to treat the growth of new blood vessels at the back of the eye (retina) in cases of proliferative diabetic retinopathy, and to stabilize some cases of maculopathy
- b) eye injections – to treat severe maculopathy “that is threatening your sight
- c) eye surgery – to remove blood or scar tissue from the eye if laser treatment is not possible because retinopathy is too advanced.

Diabetic Retinopathy (DR) Epidemiology

The Diabetic Retinopathy (DR) symptoms epidemiology division provides insights about the historical and current patient pool along with the forecasted trend for every seven major countries. It helps to recognize the causes of current and forecasted trends by exploring numerous studies and views of key opinion leaders. This part of the DelveInsight report also provides the diagnosed patient pool and their trends along with assumptions undertaken.

Key Findings

The diagnosed cases of Diabetic Retinopathy (DR) is increasing in 7MM during the study period, i.e., 2017–2030.

The disease epidemiology covered in the report provides historical as well as forecasted Diabetic Retinopathy (DR) symptoms epidemiology segmented as the Total Prevalent cases of Diabetic Retinopathy (DR), Gender-Specific cases of Diabetic Retinopathy (DR), Age-Specific cases of Diabetic Retinopathy (DR), and Severity-Specific cases of Diabetic Retinopathy (DR). The report includes the prevalent scenario of Diabetic Retinopathy (DR) symptoms in 7MM covering the United States, EU5 countries (Germany, France, Italy, Spain, and the United Kingdom), and Japan from 2017 to 2030.

Country-wise Diabetic Retinopathy (DR) Epidemiology

The epidemiology segment also provides the Diabetic Retinopathy (DR) epidemiology data and findings across the United States, EU5 (Germany, France, Italy, Spain, and the United Kingdom), and Japan.

The total diagnosed cases of Diabetic Retinopathy (DR) associated in 7MM countries

was 16,965,550 in 2017.

Diabetic Retinopathy (DR) Drug Chapters

The drug chapter segment of the Diabetic Retinopathy (DR) report encloses the detailed analysis of Diabetic Retinopathy (DR) early stage (Phase-I/II, II, and III) pipeline drugs, and marketed drugs. It also helps to understand the Diabetic Retinopathy (DR) clinical trial details, expressive pharmacological action, agreements and collaborations, approval and patent details, advantages and disadvantages of each included drug and the latest news and press releases.

Diabetic Retinopathy (DR) Marketed Drug

LUCENTIS: Genentech

LUCENTIS (Ranibizumab), a vascular endothelial growth factor (VEGF) inhibitor, is indicated for the treatment of patients with Neovascular (Wet) Age-related Macular Degeneration (AMD), Macular Edema Following Retinal Vein Occlusion (RVO), Diabetic Macular Edema (DME), and Diabetic Retinopathy in patients with DME, and Myopic Choroidal Neovascularization (mCNV).

EYLEA: Regeneron Pharmaceuticals

EYLEA (Aflibercept) is a vascular endothelial growth factor (VEGF) inhibitor indicated for the treatment of patients with Neovascular (Wet) Age-related Macular Degeneration (AMD), Macular Edema Following Retinal Vein Occlusion (RVO), Diabetic Macular Edema (DME), and Diabetic Retinopathy (DR). Diabetic Retinopathy (DR) Emerging Drug

Brolucizumab: Novartis Pharmaceuticals

Brolucizumab (RTH258) is a humanized single-chain antibody fragment (scFv) and the most clinically advanced, humanized single-chain antibody fragment to reach this stage of development. Single-chain antibody fragments are highly sought after in drug development due to their small size, enhanced tissue penetration, rapid clearance from systemic circulation, and drug delivery characteristics.

Faricimab: Roche

Faricimab is a novel, bispecific antibody that simultaneously binds to and inhibits both vascular endothelial growth factor A (VEGF-A) and Angiopoietin-2 (Ang-2), and is the first bispecific antibody designed specifically for the treatment of retinal eye diseases.

and other therapies in the report...

Products detail in the report...

Diabetic Retinopathy (DR) Market Outlook

The Diabetic Retinopathy (DR) market outlook of the report helps to build the detailed comprehension of the historic, current and forecasted Diabetic Retinopathy (DR) market trends by analyzing the impact of current therapies on the market, unmet needs, drivers and barriers and demand of better technology.

This segment gives a thorough detail of Diabetic Retinopathy (DR) market trend of each marketed drug and early-stage pipeline therapy by evaluating their impact based on annual cost of therapy, inclusion and exclusion criteria's, mechanism of action, compliance rate, growing need of the market, increasing patient pool, covered patient segment, expected launch year, competition with other therapies, brand value, their impact on the market and view of the key opinion leaders. The calculated market data are presented with relevant tables and graphs to give a clear view of the market at first sight.

According to DelveInsight, Diabetic Retinopathy (DR) market in 7MM is expected to grow in the study period 2017–2030.

Current treatments for diabetic retinopathies are limited, and the focus relies heavily on the presence of macular edema. Historically, traditional therapies such as vitrectomy, photocoagulation, and corticosteroids were used. These offer no opportunity for vision improvement and come with high rates of complications. Anti-vascular endothelial growth factor (anti-VEGF) drugs have made a meaningful improvement to DME sufferers over the past decade, but even these have limited to no success in third or more sufferers. Thus, there remains a high-unmet patient need and keen interest on the part of investigators for the continued development of all treatment modalities and biochemical pathways. Fortunately, there is a robust pipeline of potential new treatments currently in Phases II and III.

Lucentis was the first anti-VEGF approved that demonstrated sustained maintenance of

vision improvement. Currently, Eylea is the accepted standard of care and the market-leading drug in virtually all retinal disorders. It has seen particularly rapid growth in the DME market as studies have shown that it may be superior to the alternatives in DME patients with more severe disease. Interestingly, Avastin is used off label in ocular indications but is widely reimbursed. The reasons for choosing one anti-VEGF over another are multifactorial and include retinal thickness, disease progression, best-corrected visual acuity (BCVA), reimbursement, and patient and family influences..

Key Findings

This section includes a glimpse of the Diabetic Retinopathy (DR) market in 7MM. The market size of Diabetic Retinopathy (DR) in the seven major markets was found to be USD 2,842.7 Million in 2017.

The United States Market Outlook

This section provides the total Diabetic Retinopathy (DR) market size and market size by therapies in the United States.

The United States accounts for the largest market size of Diabetic Retinopathy (DR) in comparison to the EU5 (the United Kingdom, Germany, Italy, France, and Spain) and Japan.

EU-5 Countries: Market Outlook

The total Diabetic Retinopathy (DR) market size and market size by therapies in Germany, France, Italy, Spain, and the United Kingdom are provided in this section.

Japan Market Outlook

The total Diabetic Retinopathy (DR) market Size and market Size by therapies in Japan are also mentioned.

Diabetic Retinopathy (DR) Drugs Uptake

This section focusses on the rate of uptake of the potential drugs recently launched or expected to get launched in the market during the study period 2017–2030. The analysis covers Diabetic Retinopathy (DR) market uptake by drugs; patient uptake by therapies; and sales of each drug.

This helps in understanding the drugs with the most rapid uptake, reasons behind the maximal use of new drugs and allow the comparison of the drugs on the basis of market share and size which again will be useful in investigating factors important in the market uptake and in making financial and regulatory decisions.

Diabetic Retinopathy (DR) Pipeline Development Activities

The report provides insights into the therapeutic candidate in Phase I, II and III stage. It also analyses Diabetic Retinopathy (DR) key players involved in developing targeted therapeutics.

Major players include Novartis Pharmaceuticals, Roche, Adverum Biotechnologies, Kubota Vision, KalVista Pharmaceuticals, and Allegro Ophthalmics.

Pipeline Development Activities

The report covers the detailed information of collaborations, acquisition, and merger, licensing and patent details for Diabetic Retinopathy (DR) emerging therapies.

Reimbursement Scenario in Diabetic Retinopathy (DR)

Approaching reimbursement proactively can have a positive impact both during the early stages of product development and well after product launch. In the report, we take reimbursement into consideration to identify economically attractive indications and market opportunities. When working with finite resources, the ability to select the markets with the fewest reimbursement barriers can be a critical business and price strategy.

Despite the long-standing availability of professional guidelines for diabetic retinopathy screening, only 55.7% of adults with diabetes preferred commercial HMO plans and 46.9% of those in commercial preferred provider organization (PPO) plans, received screening in 2013, according to the Healthcare Effectiveness Data and Information Set (HEDIS). HEDIS is a tool used by US health plans to measure performance on important dimensions of care and service. Yet, data are suggesting that patients with diabetes who receive guideline-recommended screening and care for diabetic retinopathy have better outcomes than those who do not. For example, a study assessing the effect of receiving guideline-recommended care with the onset of diabetic retinopathy and its progression in Medicare beneficiaries with diabetes found that those

who received such care were diagnosed with background diabetic retinopathy earlier than those who did not, and they experienced lower rates of the onset of diminished vision or blindness. Furthermore, the data from a novel study that incorporated a simulation of a population of veterans with diabetes who had not yet developed diabetic retinopathy showed that vision loss associated with diabetic retinopathy increased as the screening interval was extended from 1 year to 5 years.

KOL- Views

To keep up with current market trends, we take KOLs and SME's opinion working in Diabetic Retinopathy (DR) domain through primary research to fill the data gaps and validate our secondary research. Their opinion helps to understand and validate current and emerging therapies treatment patterns or Diabetic Retinopathy (DR) market trend. This will support the clients in potential upcoming novel treatment by identifying the overall scenario of the market and the unmet needs.

Competitive Intelligence Analysis

We perform Competitive and Market Intelligence analysis of the Diabetic Retinopathy (DR) Market by using various Competitive Intelligence tools that includes – SWOT analysis, PESTLE analysis, Porter's five forces, BCG Matrix, Market entry strategies, etc. The inclusion of the analysis entirely depends upon the data availability.

Scope of the Report

The report covers the descriptive overview of Diabetic Retinopathy (DR), explaining its causes, signs and symptoms, physiology and currently available therapies

Comprehensive insight has been provided into the Diabetic Retinopathy (DR) epidemiology and treatment in the 7MM

Additionally, an all-inclusive account of both the current and emerging therapies for Diabetic Retinopathy (DR) is provided, along with the assessment of new therapies, which will have an impact on the current treatment landscape

A detailed review of Diabetic Retinopathy (DR) market; historical and forecasted is included in the report, covering drug outreach in the 7MM

The report provides an edge while developing business strategies, by understanding trends shaping and driving the global Diabetic Retinopathy (DR) market

Report Highlights

In the coming years, Diabetic Retinopathy (DR) market is set to change due to the rising awareness of the disease, and Favorable Environment for New Anti-infective Modalities; which would expand the size of the market to enable the drug manufacturers to penetrate more into the market

The companies and academics are working to assess challenges and seek opportunities that could influence Diabetic Retinopathy (DR) R&D. The therapies under development are focused on novel approaches to treat/improve the disease condition

Major players are involved in developing therapies for Diabetic Retinopathy (DR). Launch of emerging therapies will significantly impact the Diabetic Retinopathy (DR) market

Our in-depth analysis of the pipeline assets across different stages of development (Phase II), different emerging trends and comparative analysis of pipeline products with detailed clinical profiles, key cross-competition, launch date along with product development activities will support the clients in the decision-making process regarding their therapeutic portfolio by identifying the overall scenario of the research and development activities

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Market Drivers and Barriers

Key Questions

Market Insights:

What were the Diabetic Retinopathy (DR) Market share (%) distribution in 2017 and how it would look like in 2030?

What would be the Diabetic Retinopathy (DR) total market Size as well as market Size by therapies across the 7MM during the forecast period (2017–2030)?

What are the key findings pertaining to the market across 7MM and which country will have the largest Diabetic Retinopathy (DR) market Size during the forecast period (2017–2030)?

At what CAGR, the Diabetic Retinopathy (DR) market is expected to grow in 7MM during the forecast period (2017–2030)?

What would be the Diabetic Retinopathy (DR) market outlook across the 7MM during the forecast period (2017–2030)?

What would be the Diabetic Retinopathy (DR) market growth till 2030 and what will be the resultant market Size in the year 2030?

How would the market drivers, barriers and future opportunities affect the market dynamics and subsequent analysis of the associated trends?

Epidemiology Insights:

What is the disease risk, burden and unmet needs of the Diabetic Retinopathy (DR)?

What is the historical Diabetic Retinopathy (DR) patient pool in seven major markets covering the United States, EU5 (Germany, Spain, France, Italy, UK), and Japan?

What would be the forecasted patient pool of Diabetic Retinopathy (DR) in 7 major markets covering the United States, EU5 (Germany, Spain, France, Italy, UK) & Japan?

What will be the growth opportunities in the 7MM with respect to the patient population pertaining to Diabetic Retinopathy (DR)?

Out of all 7MM countries, which country would have the largest prevalent

population of Diabetic Retinopathy (DR) during the forecast period (2017–2030)?

At what CAGR the population is expected to grow in 7MM during the forecast period (2017–2030)?

Current Treatment Scenario, Marketed Drugs, and Emerging Therapies:

What are the current options for the treatment of Diabetic Retinopathy (DR) along with the approved therapy?

What are the current treatment guidelines for the treatment of Diabetic Retinopathy (DR) in the USA, Europe, and Japan?

What are the Diabetic Retinopathy (DR) marketed drugs and their MOA, regulatory milestones, product development activities, advantages, disadvantages, safety, and efficacy, etc.?

How many companies are developing therapies for the treatment of Diabetic Retinopathy (DR)?

How many therapies are developed by each company for the treatment of Diabetic Retinopathy (DR)?

How many emerging therapies are in the mid-stage and late stages of development for the treatment of Diabetic Retinopathy (DR)?

What are the key collaborations (Industry–Industry, Industry-Academia), Mergers and acquisitions, licensing activities related to the Diabetic Retinopathy (DR) therapies?

What are the recent novel therapies, targets, mechanisms of action and technologies developed to overcome the limitation of existing therapies?

What are the clinical studies going on for Diabetic Retinopathy (DR) and their status?

What are the key designations that have been granted for the emerging

therapies for Diabetic Retinopathy (DR)?

What are the global historical and forecasted market of Diabetic Retinopathy (DR)?

Reasons to buy

The report will help in developing business strategies by understanding trends shaping and driving the Diabetic Retinopathy (DR) market

To understand the future market competition in the Diabetic Retinopathy (DR) market and Insightful review of the key market drivers and barriers

Organize sales and marketing efforts by identifying the best opportunities for Diabetic Retinopathy (DR) in the US, Europe (Germany, Spain, Italy, France, and the United Kingdom) and Japan

Identification of strong upcoming players in the market will help in devising strategies that will help in getting ahead of competitors

Organize sales and marketing efforts by identifying the best opportunities for Diabetic Retinopathy (DR) market

To understand the future market competition in the Diabetic Retinopathy (DR) market

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