

Dry Eye Syndrome Market Report by Disease Type (Evaporative Dry Eye Syndrome, Aqueous Dry Eye Syndrome), Drug Type (Anti-inflammatory Drugs, Lubricant Eye Drops, Autologous Serum Eye Drops), Product (Liquid Drops, Gel, Liquid Wipes, Eye Ointment, and Others), Distribution Channel (Hospital Pharmacies, Retail Pharmacies, Online Pharmacies), and Region 2024-2032

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Abstracts

The global dry eye syndrome market size reached US\$ 4.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 7.5 Billion by 2032, exhibiting a growth rate (CAGR) of 5% during 2024-2032. The rising geriatric population, escalating screen time among various age groups, increasing environmental pollution, recent advancements in diagnostic techniques, rising consumer healthcare spending, heightened awareness among the masses, and expansion of the online retail sectors are some of the major factors propelling the market.

Dry eye syndrome refers to a medical condition affecting the eyes' ability to produce adequate tears for lubrication and nourishment. It causes various symptoms, such as redness, irritation, a gritty feeling, and watery eyes as the body tries to counteract the dryness. Dry eye syndrome is diagnosed through multiple tests that measure tear production and eye surface quality. Its treatment involves over-the-counter (OTC) artificial tears, prescription medications, and surgical interventions, such as punctal plugs. These treatments aid in alleviating discomfort, enhancing visual clarity, improving overall eye health, and augmenting patient's quality of life.

The recent advancement in diagnostic techniques, which have enabled more precise and earlier identification of dry eye syndrome, is propelling the market growth. Additionally, the rising consumer healthcare spending, which showcases willingness to invest in eye health, is acting as another growth-inducing factor. Furthermore, the heightened awareness among the masses, leading to an increase in self-diagnosis and professional consultations regarding eye health issues, is positively influencing the market growth. In addition, the rapid globalization and urbanization, which have caused lifestyle changes that are conducive to eye strain and dry eye conditions, are favoring the market growth. Moreover, the expansion of the online retail sector, which provides easier access to OTC treatments, thus broadening the consumer base, is catalyzing the market growth. Along with this, the increasing availability and affordability of surgical treatments, such as laser procedures, is supporting the market growth.

Dry Eye Syndrome Market Trends/Drivers:

The rising geriatric population

The rising geriatric population is an important driver for the market growth. Dry eye syndrome is more common in the geriatric population due to the natural aging process, which impacts the eye's ability to produce sufficient tears. Furthermore, countries across the globe are experiencing an increase in life expectancy, which, in turn, is increasing the geriatric population. This shift has a direct impact on the prevalence of age-related medical conditions, including dry eye syndrome. Besides this, geriatric adults are more susceptible to chronic health illnesses, and medications used for these conditions often have side effects that exacerbate dry eye symptoms. As a result, healthcare systems are facing an increased demand for both diagnostic services and treatments for dry eye syndrome, such as lubricating eye drops, prescription medications, and specialized eye care services.

The escalating screen time among various age groups

The escalating screen time across various age groups is a substantial factor fueling the dry eye syndrome market. Modern lifestyles are increasingly dependent on digital screens, such as smartphones, tablets, and computer monitors. Furthermore, the emerging remote working culture has extended the exposure of employees to digital screens, which decreases the frequency of blinking, causing dryness in the eyes. Besides this, several studies have indicated a strong association between heightened screen time and symptoms of dry eye syndrome among young adults. Therefore, the escalating need for treatments targeting digital eye strain-induced dry eye is contributing to increased consumer spending on over-the-counter (OTC) artificial tears, prescription

treatments, and devices designed to reduce digital eye strain.

The increasing environmental pollution

Environmental factors also play an important role in the expansion of the dry eye syndrome market. Polluted air and extreme weather conditions in rapidly industrializing regions are exacerbating the symptoms of dry eye syndrome. In line with this, air pollution particles cause irritation and are often toxic to the eye's delicate tissues, thus inducing or aggravating dry eye symptoms. Furthermore, various indoor pollutants, including volatile organic compounds (VOCs) emitted from cleaning products, paints, and other household items, reduce indoor air quality and lead to eye irritation and dryness. Besides this, allergic reactions from polluted environments can trigger dry eye symptoms in individuals who are susceptible to allergies. Moreover, environmental pollution contributes to climate change, which can alter weather patterns and humidity levels. These changes significantly affect tear evaporation rates and exacerbate dry eye symptoms, especially in arid regions.

Dry Eye Syndrome Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global dry eye syndrome market report, along with forecasts at the global and regional levels for 2024-2032. Our report has categorized the market based on disease type, drug type, product, and distribution channel.

Breakup by Disease Type:

Evaporative Dry Eye Syndrome

Aqueous Dry Eye Syndrome

Evaporative dry eye syndrome dominates the market

The report has provided a detailed breakup and analysis of the market based on disease type. This includes evaporative dry eye syndrome and aqueous dry eye syndrome. According to the report, evaporative dry eye syndrome represented the largest segment.

Evaporative dry eye syndrome is dominating the market due to its higher prevalence compared to other types of dry eye syndrome. In this condition, the tear film's lipid layer is compromised, causing faster evaporation of tears, resulting in dryness and irritation. Furthermore, the rising lifestyle-related issues, such as prolonged digital screen usage,

exacerbate the symptoms of evaporative dry eye, making it more common among both younger and geriatric populations. Additionally, the recent technological advancements, which have made the diagnosis of evaporative dry eye more straightforward and cost-effective, are contributing to the market growth. Besides this, evaporative dry eye tends to have more chronic and pronounced symptoms, making patients more likely to seek medical interventions and opt for various treatment modalities.

Breakup by Drug Type:

Anti-inflammatory Drugs

Lubricant Eye Drops

Autologous Serum Eye Drops

Anti-inflammatory drugs hold the largest share in the market

A detailed breakup and analysis of the market based on drug type has also been provided in the report. This includes anti-inflammatory drugs, lubricant eye drops, and autologous serum eye drops. According to the report, anti-inflammatory drugs represented the largest segment.

Anti-inflammatory drugs are dominating the market due to their effectiveness in treating the underlying inflammation associated with dry eye conditions. These drugs act by reducing the inflammation on the eye's surface and tear glands, offering immediate relief and promoting long-term healing. Additionally, they are suitable for treating both aqueous-deficient and evaporative types of dry eye, making them a go-to choice for healthcare providers. Furthermore, anti-inflammatory drugs have a quick onset of action and can be self-administered, making them a preferred choice for those seeking rapid and convenient relief. Besides this, continuous research and development (R&D) in anti-inflammatory medications, leading to the formulation of drugs with fewer side effects and longer-lasting relief, is contributing to the market growth.

Breakup by Product:

Liquid Drops

Gel

Liquid Wipes

Eye Ointment

Others

Liquid drops hold the largest share in the market

A detailed breakup and analysis of the market based on product has also been provided in the report. This includes liquid drops, gel, liquid wipes, eye ointment, and others. According to the report, liquid drops accounted for the largest market share.

Liquid eye drops are dominating the market as they can be quickly and easily administered by patients themselves, providing immediate relief from symptoms. This user-friendly aspect boosts their appeal, especially for people seeking a convenient and fast-acting solution to their eye discomfort. Furthermore, compared to other treatment options such as prescription drugs, surgical interventions, or specialized medical devices, OTC liquid eye drops are generally more affordable, which makes them accessible to a broader population. Additionally, liquid eye drop formulations often include lubricants, electrolytes, and occasionally anti-inflammatory or anti-allergic components that address multiple symptoms at once. Besides this, the small packaging of liquid eye drops allows users to apply them wherever and whenever symptoms arise. This convenience enhances user compliance, making it more likely for patients to adhere to treatment plans.

Breakup by Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Hospital pharmacies hold the largest share in the market

A detailed breakup and analysis of the market based on distribution channel has also been provided in the report. This includes hospital pharmacies, retail pharmacies, and online pharmacies. According to the report, hospital pharmacies accounted for the largest market share.

Hospital pharmacies are dominating the market due to the trust and credibility associated with hospital-based healthcare. Patients often prefer medications and treatments prescribed and dispensed within the same healthcare ecosystem, assuming a higher standard of quality and safety. Besides this, proximity to healthcare professionals provides the ability to fill prescriptions immediately following a consultation or procedure, which is highly appealing to both patients and caregivers. Additionally, hospital pharmacies have a comprehensive inventory of medications, including

specialized formulations that might not be readily available at retail or online platforms. Moreover, they have trained healthcare professionals, including pharmacists specialized in ophthalmology, which ensures that patients receive expert advice on medication administration, side effects, and other treatment-related queries.

Breakup by Region:

North America

Europe

Asia Pacific

Middle East and Africa

Latin America

North America exhibits a clear dominance, accounting for the largest dry eye syndrome market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America, Europe, Asia Pacific, the Middle and Africa, and Latin America. According to the report, North America accounted for the largest market share.

North America has an advanced healthcare infrastructure, which ensures easy access to specialized eye care facilities and experienced professionals. Moreover, the high standard of care encourages timely diagnosis and effective treatment, thereby boosting the market growth. Additionally, the increasing healthcare expenditure in the region, which allows individuals to seek professional medical advice and opt for advanced treatment options, is contributing to the market growth. Furthermore, the region is a hub for pharmaceutical innovation and development, which results in the early availability of new treatments and medications. Apart from this, North America has a well-regulated pharmaceutical industry, with stringent guidelines governing the safety and efficacy of medical products, including those for treating dry eye syndrome. Moreover, the escalating geriatric population, which is highly susceptible to dry eye syndrome, is favoring the market growth.

Competitive Landscape:

Leading players are heavily investing in creating new formulations, devices, and treatment methods to address different forms of dry eye syndrome more effectively. Furthermore, they are working with research institutions, other pharmaceutical companies, and healthcare providers to accelerate the development of new products

and extend their market reach. Besides this, top firms are acquiring smaller companies with innovative technologies to diversify their product portfolio quickly and gain a competitive advantage. Additionally, companies are developing educational campaigns aimed at both healthcare providers and the general public to raise awareness regarding the importance of early diagnosis and effective treatment. Moreover, they are setting up manufacturing units, distribution channels, and partnerships to tap into the growing demand for dry eye treatments in various geographical regions.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Akorn Operating Company LLC

Alimera Science

Allergan plc.

Auven Therapeutics

Bausch + Lomb Incorporated

GlaxoSmithKline plc

Nicox S.A.

Novartis AG

Otsuka Holdings Co., Ltd.

Santen Pharmaceutical Co., Ltd.

Recent Developments:

In March 2022, Th?a, a US-based eye care product company, completed the acquisition of multiple ophthalmic products from Akorn Operating Company LLC.

In September 2021, Bausch + Lomb Incorporated collaborated with Novaliq GmbH to develop a new drug, NOV03, for the treatment of dry eye disease.

In August 2022, Nicox S.A. announced that it will be working on the development of NCX 4251 as a treatment for dry eye disease.

Key Questions Answered in This Report

1. What was the size of the global dry eye syndrome market in 2023?
2. What is the expected growth rate of the global dry eye syndrome market during 2024-2032?
3. What are the key factors driving the global dry eye syndrome market?
4. What has been the impact of COVID-19 on the global dry eye syndrome market?
5. What is the breakup of the global dry eye syndrome market based on the disease type?

6. What is the breakup of the global dry eye syndrome market based on the drug type?
7. What is the breakup of the global dry eye syndrome market based on the product?
8. What is the breakup of the global dry eye syndrome market based on the distribution channel?
9. What are the key regions in the global dry eye syndrome market?
10. Who are the key companies/players in the global dry eye syndrome market?

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