

Glaucoma Therapeutics Market Report by Drug Class (Prostaglandin Analogs, Beta Blockers, Alpha Adrenergic Agonists, Carbonic Anhydrase Inhibitors, Combination Drugs, and Others), Indication (Open Angle Glaucoma, Angle Closure Glaucoma, and Others), End User (Hospitals, Ophthalmic Clinics, Ambulatory Surgery Centers, and Others), and Region 2023-2028

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Abstracts

The global glaucoma therapeutics market size reached US\$ 7.4 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 10.8 Billion by 2028, exhibiting a growth rate (CAGR) of 6.5% during 2022-2028. The growing prevalence of glaucoma across the globe, continual advancements in diagnostic technologies for early detection, the rising adoption of telemedicine in ophthalmology, and numerous technological innovations in surgical procedures represent some of the factors that are propelling the market.

Glaucoma is a group of eye conditions resulting in optic nerve damage, which can lead to vision loss. Typically managed through medications, laser treatment, or surgery, these interventions aim to reduce intraocular pressure (IOP), which is a key factor in glaucoma progression. Glaucoma therapeutics typically include medications such as prostaglandins, beta-blockers, and alpha agonists are commonly administered in eye drop form, targeting the reduction of eye fluid production or its improved outflow. Laser treatment, such as trabeculoplasty, is another method where laser beams focus on the eye's drainage system to facilitate fluid exit. Surgical procedures like trabeculectomy and drainage implant surgery are the final resorts to create alternative channels for fluid drainage. These therapeutics are used either in isolation or in combinations depending

on the severity and type of glaucoma.

The global market is primarily driven by the growing prevalence of glaucoma across the globe, particularly among the geriatric population. In line with this, continual advancements in diagnostic technologies for early detection are providing an impetus to the market. Moreover, the development of new drug delivery methods is acting as a significant growth-inducing factor. In addition to this, increased investment in research and development by pharmaceutical companies is creating new avenues in the market. Besides this, the rising awareness about the importance of regular eye check-ups and timely treatment of glaucoma symptoms is encouraging the adoption of these therapeutics. Also, initiatives by health organizations to disseminate knowledge about glaucoma are positively impacting the market. Apart from this, growth in the number of specialized eye care centers is propelling the market. Some of the other factors contributing to the market include an expanding middle-class population with access to healthcare, a growing focus on personalized medicine, and the introduction of innovative therapeutic products.

Glaucoma Therapeutics Market Trends/Drivers:

Numerous technological innovation in surgical procedures

The advent of technological innovation in surgical procedures has significantly influenced the global market. One of the most groundbreaking developments is Minimally Invasive Glaucoma Surgeries (MIGS). These surgical interventions have proved to be transformative by causing fewer complications, necessitating shorter recovery periods, and being easier to perform than traditional surgical methods like trabeculectomy. The ease of MIGS has empowered surgeons with more options to manage the disease effectively while minimizing the potential risks and discomfort to the patient. In addition, advancements in surgical medical devices such as micro-stents and new drainage systems have further improved the effectiveness of glaucoma surgeries. These advancements have, in turn, increased the trust among healthcare practitioners and patients across the globe in surgical solutions as viable treatment options for glaucoma.

Rising adoption of telemedicine in ophthalmology

Telemedicine has increasingly become an integral part of healthcare, and its applications in ophthalmology are particularly noteworthy when it comes to the glaucoma therapeutics market. The digitalization of healthcare, coupled with technological advancements in software and hardware, has made remote consultations both practical and effective. Patients can now have their conditions monitored without the need for frequent hospital visits, which is especially beneficial for those residing in rural or remote locations. This wider reach of healthcare services enhances patient engagement, thereby contributing to better outcomes. Remote consultations enable continuous monitoring, and real-time data can alert healthcare providers to changes in a

patient's condition that may require immediate intervention. The enhanced data collection capabilities also offer unprecedented opportunities for research, thereby potentially accelerating the development of new treatment modalities.

An enhanced focus on holistic approaches to patient care

An integrated, holistic treatment plan often involves a multi-disciplinary team of healthcare providers, including nutritionists, physiotherapists, and psychological counselors, among others. This not only gives patients a more comprehensive treatment plan but also opens up cross-selling and up-selling opportunities within the healthcare ecosystem. The focus has moved beyond treating the symptoms to a more integrated approach, taking into account patient education, lifestyle changes, and preventive measures alongside medical interventions. A holistic approach also recognizes the role of lifestyle factors such as diet, exercise, and stress management in managing glaucoma. Patients are educated about the types of foods and activities that can help in reducing intraocular pressure, which is a critical factor in glaucoma. This multi-pronged approach not only enhances the effectiveness of medical treatments but also improves the overall quality of life for the patients.

Glaucoma Therapeutics Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global glaucoma therapeutics market report, along with forecasts at the global, regional, and country levels for 2023-2028. Our report has categorized the market based on drug class, indication and end user.

Breakup by Drug Class:

Prostaglandin Analogs

Beta Blockers

Alpha Adrenergic Agonists

Carbonic Anhydrase Inhibitors

Combination Drugs

Others

Prostaglandin analogs represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the drug class. This includes prostaglandin analogs, beta blockers, alpha adrenergic agonists, carbonic anhydrase inhibitors, combination drugs and others. According to the report, prostaglandin analogs represented the largest segment.

The prostaglandin analogs segment in the market is predominantly driven by their efficacy in reducing intraocular pressure with fewer systemic side effects compared to other classes of glaucoma medications. The once-daily dosing convenience of these drugs also contributes to patient compliance, thereby increasing its market demand. Innovation in formulations and delivery mechanisms is another major factor contributing to its market share. Intellectual property expiry and subsequent entry of generics,

however, pose a challenge to market growth. Lastly, their versatile compatibility with other classes of glaucoma medications makes them a preferred choice in combination therapies, bolstering the segment's prominence.

On the other hand, the beta blockers, alpha adrenergic agonists, carbonic anhydrase inhibitors, combination drugs and other segments are influenced by a diverse range of factors such as affordability, varied mechanisms of action, and well-established safety profiles. These drugs are often prescribed in cases where Prostaglandin Analogs are contraindicated or not effective. Despite their efficacy, the need for multiple daily dosing can impact patient compliance. Availability of generics in this category also makes it a cost-effective option for treatment.

Breakup by Indication:

Open Angle Glaucoma

Angle Closure Glaucoma

Others

Open angle glaucoma represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the indication. This includes open angle glaucoma, angle closure glaucoma and others.

According to the report, open angle glaucoma represented the largest segment.

The open-angle glaucoma segment is primarily fueled by its prevalence, constituting the majority of glaucoma cases globally. Increased awareness and advancements in diagnostic techniques have led to earlier and more frequent detection of this condition.

The availability of multiple treatment options, ranging from medications to surgeries, offers a comprehensive approach to managing open-angle glaucoma. Aging demographics further amplify the incidence rates, thereby driving demand for therapeutic products. Government initiatives aimed at eye health contribute to the overall market growth for this segment.

On the other hand, the growth in angle closure glaucoma and other segments is primarily driven by an aging population, as the condition is more prevalent among older adults. Advances in diagnostic technologies have also contributed to the segment's expansion by enabling earlier and more accurate detection of the condition. In addition, the increased awareness about the severity of untreated angle-closure glaucoma, which can lead to blindness, has led to higher demand for effective treatments.

Breakup by End User:

Hospitals

Ophthalmic Clinics

Ambulatory Surgery Centers

Others

Hospitals accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the

end user. This includes hospitals, ophthalmic clinics, ambulatory surgery centers and others. According to the report, hospitals represented the largest segment. Hospitals are major consumers in the glaucoma therapeutics market, given their capability to offer advanced diagnostic and surgical interventions. The consolidation of healthcare facilities and investment in state-of-the-art ophthalmic departments contribute to the segment's growth. Additionally, hospitals are often the first point of contact for emergency eye conditions, thereby positioning them as crucial stakeholders. Public and private insurance coverages also incentivize treatment in hospital settings, increasing patient throughput and consumption of glaucoma medications. On the other hand, the growth in ophthalmic clinics, ambulatory surgery centers, and other segments can be attributed to the specialized focus on eye care, the availability of advanced diagnostic equipment, and faster patient turnover. Increasing consumer preference for specialized care is also a contributing factor. Decentralization of healthcare services and the expansion of ambulatory surgery centers make these settings accessible for minor procedures and regular check-ups. The growth is further supported by flexible payment options and shorter waiting times.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest glaucoma therapeutics market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The market in the North America region is significantly impelled by high healthcare expenditure, robust insurance frameworks, and the presence of leading pharmaceutical companies are primary drivers. Furthermore, the region is home to a diverse and aging population, thereby creating a natural demand for glaucoma treatments. Technological advancements in drug formulation and delivery, backed by substantial investments in research and development, also fuel market growth.

Regulatory support in terms of expedited approvals and grants fosters innovation, providing a favorable environment for market expansion. Government initiatives in healthcare education and eye screenings contribute to early diagnosis and, in turn, drive demand for therapeutics. Accessibility to specialty ophthalmic clinics and ambulatory surgery centers adds another layer of convenience, encouraging timely intervention. The availability of both branded and generic drugs offers options across various price points, catering to a wide consumer base. Furthermore, collaborations between public and private sectors in healthcare initiatives serve to increase awareness as well as facilitate entry and acceptance of novel therapeutic solutions in the market.

Competitive Landscape:

The major players in the market are persistently working to develop more effective and less invasive treatment options. They are investing heavily in clinical trials to produce medicines and devices that provide longer-lasting relief with fewer side effects.

Collaborations with research institutions and healthcare organizations are common strategies these key players are adopting. Market leaders are also expanding their portfolios by launching innovative products specifically designed to manage different types of glaucoma. Furthermore, these companies are working diligently to meet stringent regulatory requirements, ensuring that their products are both safe and effective. Furthermore, they are also focusing on patient education and awareness programs as a part of their market expansion strategies.

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:

Aerie Pharmaceuticals Inc.

Allergan Plc

Bausch & Lomb Incorporated (Bausch Health Companies Inc.)

Inotek Pharmaceuticals Corp.

Merck & Co. Inc.

Novartis AG

Pfizer Inc.

Santen Pharmaceutical Co. Ltd.

SIFI S.p.A

Teva Pharmaceutical Industries Ltd

Recent Developments:

In November 2022, Aerie Pharmaceuticals, Inc. was acquired by Alcon, the global leader in eye care. Through the transaction, Alcon has added the commercial products Rocklatan (netarsudil and latanoprost ophthalmic solution) 0.02%/0.005% and Rhopressa (netarsudil ophthalmic solution) 0.02%, AR-15512, a Phase 3 product candidate for dry eye disease and also a pipeline of ophthalmic pharmaceutical product candidates.

In July 2023, Bausch Health Companies Inc. announced that Bausch Receivables Funding LP, an Ontario limited partnership and wholly-owned subsidiary of Bausch Health, has entered into a \$600 million non-recourse financing facility with KKR and its credit funds and accounts. The facility will be collateralized by certain accounts receivables originated by a wholly-owned subsidiary of Bausch Health.

Merck & Co. announced that the European Commission (EC) has approved KEYTRUDA, Merck's anti-PD-1 therapy, in combination with trastuzumab, fluoropyrimidine- and platinum-containing chemotherapy, for the first-line treatment of locally advanced unresectable or metastatic human epidermal growth factor receptor 2 (HER2)-positive gastric or gastroesophageal junction (GEJ) adenocarcinoma in adults whose tumors express PD-L1 (Combined Positive Score [CPS] ≥ 1).

Key Questions Answered in This Report

1. How big is the global glaucoma therapeutics market?
2. What is the expected growth rate of the global glaucoma therapeutics market during 2023-2028?
3. What are the key factors driving the global glaucoma therapeutics market?
4. What has been the impact of COVID-19 on the global glaucoma therapeutics market?
5. What is the breakup of the global glaucoma therapeutics market based on the drug class?
6. What is the breakup of the global glaucoma therapeutics market based on the indication?
7. What is the breakup of the global glaucoma therapeutics market based on the end

user?

8. What are the key regions in the global glaucoma therapeutics market?

9. Who are the key players/companies in the global glaucoma therapeutics market?

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