

# Advances in Ophthalmology: Markets in the Treatment of Eye Disorders and Corrective Vision, 2nd Edition

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## Abstracts

The information represented in this report is a comprehensive analysis of the eye care market globally with a special focus on the United States and selected international sectors. The year ending December 31, 2008 was used as the base year with forecasts to the year 2013. Market statistics are given in U.S. dollars and in units [where appropriate]. Basis for the market analysis consists of key data, statistics; references, and information from a large data base of primary and secondary research sources documented in the report consisting of interviews, professional meetings; conferences; presentations; journals; consumer media [radio, TV, magazines, newspapers]; and Internet content involving more than 40,000 sources. Data were collected for global populations and medical providers who represent the key influences in the eye care market.

The market analysis is comprised of two major sectors:

refractive vision correction [addressing myopia, hyperopia, presbyopia, and astigmatism]

and major eye diseases [addressing cataracts, glaucoma, AMD, retinal disorders].

Within the primary sectors the analysis includes the top RVC treatment modalities [traditional and advanced laser systems; RVC lens implants, and alternative surgical implants] and surgical intervention for each of the major diseases [retinal laser surgery, photo dynamic therapy, pneumatic thermoplasty, capsulectomy, and trabeculectomy]. Competitive market shares are given for the key manufacturers of RVC treatment

methodologies and for major devices and ophthalmic therapeutics employed in the management of eye diseases. New technologies and treatment modalities for both visual acuity and major eye diseases may dramatically change the composition and competitive dynamics of the ophthalmology market. This report explores these dynamics and discoveries along with their profound impact on clinical eye care and the competitive positions of the market supplier. Also examined are traditional [conventional] approaches, the role of medical skills and techniques developed and cultivated over past years, and the importance of supporting increasingly global demand to correct vision deficiencies.

Other competitive technologies presented herein under the heading of refractive vision correction [RVC] include:

Integrated [diagnostic] laser surgery

RF conductive keratoplasty

Earlier versions of corrective laser systems.

This segment also includes RVC breakthrough technologies such as

Imaging topography

Accommodating implants

Special vision lens

Vision restoration systems and

Other evolving technologies

Vision abnormalities [restoration of impaired vision] presented and investigated are confined to following four primary conditions:

Myopia [nearsightedness]-leading eye disorder affecting all age groups

Hyperopia [farsightedness]-second leading eye disorder affecting all age groups

Presbyopia [near focus abnormality]-phenomenon of aging, mostly 40 + year olds

Astigmatism [cornea irregularities, eye globe distortion]-affects all age groups

The range of therapeutic modalities mentioned above offers multiple options in treating one or more of the four primary diseases. While some modalities like ophthalmic pharmaceuticals are used to treat one disease, other medical devices like lasers and implants [Refocus Group's PresView SRP-Scleral Lens Spacers] are more flexible and used in multiple applications for disease-specific procedures.

The market described herein is also positioning itself to resolve its most compelling problems effecting older populations-the alarming increase in loss of vision worldwide resulting from diseases, aging, and declining health conditions. The race is underway to develop and exploit cutting-edge technologies [diagnostics, imaging, therapeutics, devices] that will address the growing threat of deteriorating vision and blindness caused by the most serious eye diseases, including:

Cataracts-surgery & replacement intra ocular lens [IOL] and accommodating lens,

Glaucoma/Ocular Hypertension-chronic opened-angle and acute closedangle

Age-Related Macular Degeneration [AMD]-both wet and dry, and

Retinal Disorders-diabetic retinopathy, diabetic edema, detached retina.

While technological innovations continue to play a crucial role in slowing [or stopping] the progress of vision loss through laser surgery and other medical and therapeutic intervention, early diagnosis of these diseases and knowledge of available treatment options is equally crucial to prevent the progression and further deterioration of vision. However, the availability of technologies, medical disciplines, and skills to take advantage of the gains made in managing eye diseases has yet to realize its full competitive and market potential. And many players entering this field will find this report a useful resource.

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