

Glaucoma Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Disease Type (Open Angle Glaucoma, Angle Closure Glaucoma, Others), By Drug Class (Prostaglandins Analogs, Beta-blockers, Adrenergic Agonists, Carbonic Anhydrase Inhibitors, Others), By Distribution Channel (Hospital Pharmacy, Retail Pharmacy, Online Pharmacy), By Region and Competition

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Abstracts

Global Glaucoma Market was valued at USD 6.47 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.55% through 2029. The glaucoma market refers to the industry encompassing a range of products, treatments, and services aimed at diagnosing, managing, and treating glaucoma—a group of eye conditions that can lead to vision loss by damaging the optic nerve. This market includes pharmaceuticals such as eye drops and pills, surgical devices, laser therapies, and various diagnostic tools. With a growing global aging population and rising prevalence of diabetes, the demand for glaucoma management solutions is on the rise, driving innovation and competition among healthcare providers and medical device manufacturers.

Key Market Drivers

Increase in Incidences of Glaucoma

Glaucoma is a chronic, advancing eye condition that can be defined as an irregularity in

the eye's drainage system which results in fluid accumulation. It results in elevation of pressure which leads to damage in optic nerve. Glaucoma is a combination of vascular, genetic, anatomical, and immune factors. In 2020, it was approximated that 57.5 million individuals globally are impacted by primary open-angle glaucoma (POAG). Changing lifestyle of people across the world is considered as the significant cause of glaucoma disorder. For instance, regular intense physical activity carried out on a daily basis is connected to a greater occurrence of glaucoma. The American Academy of Ophthalmology suggested that vigorous exercise can enhance the amount of unbound radicals in the body, whereas oxidative stress has been connected to physical damage of the optic nerve, inflammatory responses, and may play a role in the progression of glaucoma. Primary angle-closure glaucoma (PACG) is a highly formidable variant of glaucoma and constitutes 90 percent of all instances of vision loss due to glaucoma in China. Based on the data released by Dove Medical Press on the burden of glaucoma in China in 2022, it was noted that the prevalence of cases and the number of disability-adjusted life years (DALYs) associated with blindness and vision impairment caused by glaucoma was 67.29% in 2019. Compared to neighboring nations, China ranked third in 2019 with a range of 59.34 to 84.42 cases per 100,000 individuals. Furthermore, another prominent nation that is significantly affected by glaucoma, particularly among African Americans and Hispanics is the United States of America. As per the publication released by Bright Focus Foundation on October 27th, 2022, it has been stated that over three million individuals in the United States are currently residing with glaucoma, with 2.7 million of those are aged above 40 years and are affected by the prevalent type known as open-angle glaucoma. Globally, there are approximately 80 million individuals diagnosed with glaucoma, and it is projected that this figure will rise to exceed 111 million by the year 2040. Growing burden of glaucoma is increasing the fear of vision loss among people which is anticipated to register an impressive growth to glaucoma market in the world. Additionally, some of the common symptoms such as redness in eyes, vomiting, and unbearable eye pain are further increasing the chances of glaucoma in people which are further driving the demand of glaucoma treatment in the forecast period.

Technological Improvements in Ophthalmic Sector

Continuous technological progress in the field of ophthalmology is one of the primary factors driving the market prospects for glaucoma treatment. The rising need for cutting-edge surgical techniques will drive the potential for industry expansion. With growing discovery about the cause of glaucoma, numerous innovative treatment modalities have been created. One notable advancement is the utilization of nanoparticles in administering drugs that reduce intraocular pressure (IOP). Timoptic-XE serves as an

excellent example of this technique. It is a formulation that responds to changes in pH, transitioning from a liquid to a gel upon contact with the tear film. This transformation significantly improves the distribution of the medication to the surface of the eye to cure glaucoma. Furthermore, developments in optical coherence tomography (OCT), visual fields, medical imaging, and progression analysis software have additionally transformed the optometric treatment of individuals with glaucoma. Furthermore, minimally invasive glaucoma surgery (MIGS) techniques effectively decrease intraocular pressure. Instead of creating an artificial drainage system in the eye, they unblock the inherent ocular drainage system and enhance the flow of fluid. In 2022, a new platform named the OMNI Glaucoma Treatment System was introduced for MIGS. Developed by Sight Sciences, the OMNI 360 is the sole device that combines two well-established MIGS procedures into one, utilizing a single device and a single transparent corneal incision. With two modes of action that target the trabecular meshwork and collector channels, OMNI® is designed to address the entire natural outflow pathway of the trabeculocanalicular system. The physicians at Assil Gaur Eye Institute were among the initial doctors in the United States to conduct this procedure after clinical trials. The majority of patients experience a significant response due to the dual modes of action.

Growth in Geriatric Population

Rise in global elderly population with their vulnerability to different eye issues is another one of the remarkable factors behind the profitable expansion of the glaucoma market in the projected timeframe. According to the statistics published by Population Reference Bureau, it has been observed that China has the highest ratio of elder people which accounts for approximately 166.37 million people out of total population aged above 65 years followed by 84.9 million people in India aged above 65 years, 52.76 million people aged above 65 years in United States, 35.58 million people above 65 years of age in Japan, and 21.42 million people out of total population in Russian Federation aged above 65 years. Glaucoma can occur at any age but is more prevalent in elderly individuals. It is one of the leading causes of blindness for people over the age of 60. An older optic nerve is not as capable of enduring different affronts, such as increased pressure in the eye. Moreover, the route through which eye fluid drains from the eye may also start to decline with age. According to the data provided by Verywell Health in 2023, it has been observed that Glaucoma disproportionately targets African American individuals in the United States, impacting approximately 34 out of every 1,000. Hispanic Americans above 60 years old are more likely to acquire glaucoma. Among individuals aged 65 to 70, glaucoma impacts 2 out of every 100 Hispanic individuals, but by the age of 80 or older, this figure rises to 10 out of 100. Preventive options available for geriatric population to cure from glaucoma involve prescription eye drops, oral

medicines, laser treatment, surgery, or a combination of approaches. However, growing cases of glaucoma among elder people is further increasing the demand of effective glaucoma treatment across the world which is anticipated to register a lucrative growth to glaucoma market in upcoming years.

Advancements in Glaucoma Surgery

Advancements in glaucoma surgery are significantly bolstering the demand for glaucoma treatment globally. Glaucoma, a leading cause of irreversible blindness, requires timely and effective management to prevent vision loss. Traditional treatments like medication and laser therapy have limitations, particularly for advanced cases. However, recent innovations in surgical techniques, such as minimally invasive glaucoma surgery (MIGS) and trabecular micro-bypass stents, offer promising outcomes with reduced risks and quicker recovery times.

These advancements provide ophthalmologists with more options to tailor treatments to individual patient needs, particularly those who may not respond adequately to conventional therapies. As awareness of these innovative surgical options spreads and as healthcare systems strive to offer cutting-edge treatments, the demand for glaucoma surgeries is expected to rise globally. Ultimately, these advancements are not only improving patient outcomes but also driving the global demand for glaucoma treatment as more individuals seek effective solutions to preserve their vision and quality of life.

Key Market Challenges

Inadequate Healthcare Infrastructure in Developing Countries

The inadequate healthcare infrastructure in developing countries poses a significant barrier to meeting the demand for glaucoma care globally. Limited access to healthcare facilities, ophthalmologists, and diagnostic tools in these regions often results in undiagnosed and untreated cases of glaucoma. Additionally, the lack of awareness and education about eye health further compounds the issue, leading to delayed or missed opportunities for early intervention. In many developing countries, resources for glaucoma treatment are scarce, with prioritization often given to more immediate health concerns.

Moreover, the high cost of specialized treatments and surgeries can be prohibitive for many individuals in these settings, further reducing the demand for glaucoma care. As a result, the burden of glaucoma-related vision loss and blindness remains

disproportionately high in developing countries, highlighting the urgent need for improved healthcare infrastructure, access to affordable treatment options, and comprehensive public health initiatives to address this disparity and increase the demand for glaucoma care globally.

Accessibility to Medication in Low-Income Regions

The limited accessibility to medication in low-income regions presents a significant obstacle to meeting the global demand for glaucoma treatment. Glaucoma management often requires long-term use of medications to control intraocular pressure and prevent further vision loss. However, in many low-income areas, access to essential glaucoma medications is severely restricted due to factors such as inadequate healthcare infrastructure, limited availability of medications, and financial constraints among patients. As a result, individuals with glaucoma in these regions may struggle to obtain and afford the medications they need to manage their condition effectively. This lack of access not only leads to untreated or poorly managed glaucoma cases but also diminishes the demand for glaucoma care on a global scale. Addressing the accessibility challenges associated with glaucoma medications in low-income regions is essential to ensuring equitable access to treatment and reducing the burden of glaucoma-related vision loss worldwide.

Key Market Trends

Expansion of Healthcare Infrastructure

The expansion of healthcare infrastructure is playing a crucial role in increasing the demand for glaucoma treatment globally. As healthcare systems expand and become more accessible, individuals previously underserved or lacking access to specialized eye care now have the opportunity to seek diagnosis and treatment for glaucoma. With more hospitals, clinics, and specialized eye care centers being established in various regions worldwide, there is a greater capacity to diagnose and manage glaucoma cases effectively.

Moreover, the expansion of healthcare infrastructure often goes hand in hand with advancements in medical technology and training, allowing healthcare professionals to offer a wider range of treatment options, including innovative surgical procedures and advanced therapies for glaucoma. As a result, the demand for glaucoma treatment is increasing globally, driven by improved access to healthcare services and a growing awareness of the importance of early detection and intervention in preserving vision and

preventing blindness.

Increased Awareness About Glaucoma Prevention & Treatment

The rise in awareness about glaucoma prevention and treatment is significantly contributing to an increase in the demand for glaucoma care worldwide. With concerted efforts from healthcare organizations, advocacy groups, and educational campaigns, more people are becoming aware of the importance of regular eye exams and early detection of glaucoma. As awareness spreads about the potentially devastating consequences of untreated glaucoma, individuals are proactively seeking preventive measures and timely treatment to preserve their vision.

Moreover, as knowledge about available treatment options, including medications, laser therapy, and surgical interventions, becomes more widespread, individuals are more likely to pursue appropriate care for their condition. This growing awareness not only leads to higher rates of diagnosis but also drives the demand for glaucoma treatment globally as more individuals prioritize their eye health and take proactive steps to prevent vision loss.

Segmental Insights

Disease Type Insights

Based on the Disease Type, Open Angle Glaucoma, also known as primary open-angle glaucoma, is currently the most prevalent and widely recognized form of glaucoma, making it a dominant force in the global market of eye conditions. This type of glaucoma is often characterized by a gradual progression, silently affecting the optic nerve and causing damage to the field of vision. Its insidious nature often results in the condition remaining undiagnosed until significant vision loss occurs, highlighting the importance of regular eye examinations.

Open Angle Glaucoma accounts for a substantial majority of glaucoma cases worldwide, driving extensive research efforts and the development of innovative treatment modalities in the field of ophthalmology. Researchers and clinicians are dedicated to understanding the underlying mechanisms of this condition, exploring new diagnostic techniques, and advancing therapeutic interventions to mitigate its impact on individuals' visual health. By unraveling the intricate complexities of Open Angle Glaucoma, experts aim to develop personalized approaches to treatment, considering individual risk factors, genetic predisposition, and lifestyle influences. This

comprehensive understanding will not only revolutionize the management of glaucoma but also pave the way for preventative strategies and early detection methods. Through ongoing research and collaborative efforts, the global medical community strives to enhance the quality of life for individuals affected by this prevalent eye condition.

Drug Class Insights

Based on the Drug Class segment, within the global glaucoma market, Prostaglandin Analogs (PGAs) have emerged as the dominant class of medications. This is primarily due to their remarkable efficacy in reducing intraocular pressure (IOP), a key risk factor for glaucoma. PGAs are often the preferred first-line treatment option for patients, owing to their advantages over other classes of medications, such as Beta-blockers or Adrenergic Agonists. One of the key advantages of PGAs is their convenience in dosing. They require less frequent administration, making them more convenient for patients to incorporate into their daily routine. Additionally, PGAs are associated with fewer systemic side effects compared to other classes of glaucoma medications, further enhancing their appeal.

Moreover, the ease of use and strong patient adherence to PGAs play a significant role in their market dominance. Patients find PGAs more user-friendly and are more likely to adhere to their prescribed treatment regimen. This, in turn, contributes to better disease management and improved outcomes for glaucoma patients. Overall, the remarkable efficacy, convenience in dosing, and favorable side effect profile of Prostaglandin Analogs have propelled them to the forefront of glaucoma treatment, solidifying their dominant position in the global glaucoma market.

Regional Insights

In the Global Glaucoma Market, North America stands out as the dominant region. This is primarily attributed to a multitude of factors that contribute to its leadership position. Firstly, North America boasts a high prevalence of glaucoma, necessitating a robust healthcare infrastructure to address the needs of patients effectively. Additionally, significant investments in ophthalmic research and development have further propelled the region's advancements in glaucoma treatment and management. Moreover, the presence of key pharmaceutical and medical device companies in North America has fostered an environment of innovation, driving the development of cutting-edge solutions for glaucoma. It is this combination of factors that solidifies North America's position at the forefront of the Global Glaucoma Market, ensuring the provision of state-of-the-art treatment options for individuals affected by this condition.

Key Market Players

Pfizer Inc.

Santen Pharmaceutical Co., Ltd.

Novartis Ag

Akron Operating Company Llc

Thea Pharma NV

Abbvie, Inc.

Bausch + Lomb Corporation

Teva Pharmaceuticals Industries Ltd.

Alcon Inc.

Report Scope:

In this report, the Global Glaucoma Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Glaucoma Market, By Disease Type:

Open Angle Glaucoma

Angle Closure Glaucoma

Others

Glaucoma Market, By Drug Class:

Prostaglandins Analogs

Beta-blockers

Adrenergic Agonists

Carbonic Anhydrase Inhibitors

Others

Glaucoma Market, By Distribution Channel:

Hospital Pharmacy

Retail Pharmacy

Online Pharmacy

Glaucoma Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Glaucoma Market.

Available Customizations:

Global Glaucoma market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization

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options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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