

# **Glaucoma Surgery Devices Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Punches, USC marker, USC planner, USC shaver, forceps, algerbrush, probes, diamond knives, Glaucoma Drainage Device, Laser System, Others), By Surgery Method (Traditional glaucoma surgery, Minimal invasive glaucoma surgery, Laser surgery), By End Use (Hospitals, Ophthalmic clinics, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

In 2022, the Global Glaucoma Surgery Devices Market reached a valuation of USD 1.44 billion and is expected to with a projected Compound Annual Growth Rate (CAGR) of 5.14% through 2028. The Global Glaucoma Surgery Devices Market is characterized by its dynamic nature, propelled by the escalating prevalence of glaucoma, a leading cause of irreversible blindness. Within this market, a wide array of surgical devices and procedures is available, all aimed at reducing intraocular pressure and preventing optic nerve damage.

As the elderly population continues to grow and eye-related disorders become more widespread, there is an increasing demand for effective glaucoma treatment options, including surgical interventions. Moreover, the market's evolution is influenced by ongoing technological advancements and innovations in minimally invasive surgical techniques. Key players in the industry are placing significant emphasis on product

development and strategic collaborations to address the unmet medical needs of glaucoma patients, thereby enhancing the safety and efficacy of surgical procedures.

## Key Market Drivers

### Increasing geriatric population

The Global Glaucoma Surgery Devices Market is strongly influenced by the increasing geriatric population worldwide. This demographic shift is a significant driver for several reasons. Glaucoma is primarily an age-related eye disease, with the risk of developing the condition increasing significantly after the age of 60. As the global population ages, the prevalence of glaucoma cases rises, leading to a greater demand for effective treatment options, including surgical interventions. The elderly are more susceptible to various eye conditions, including glaucoma. With the geriatric cohort expanding, there is a parallel increase in the overall burden of glaucoma cases. This drives the need for advanced and efficient glaucoma surgery devices to manage the condition. Improved healthcare and medical advancements have extended the average life expectancy globally. While this is a positive development, it also means that individuals are at a higher risk of age-related diseases like glaucoma, necessitating timely diagnosis and treatment. Many developed and developing countries are experiencing a demographic shift toward older populations. This demographic transition, coupled with increasing urbanization, contributes to the prevalence of glaucoma and the demand for surgical interventions.

Glaucoma can lead to vision impairment or blindness, affecting the quality of life and increasing healthcare costs. As governments and healthcare systems strive to address the economic burden associated with glaucoma-related vision loss, investment in glaucoma surgery devices becomes more critical. The rise in the elderly population has spurred innovations in glaucoma surgery techniques and devices. Surgeons are increasingly adopting minimally invasive procedures, such as micro-invasive glaucoma surgery (MIGS), to provide safer and more effective options for older patients. In conclusion, the increasing geriatric population is a pivotal driver of the Global Glaucoma Surgery Devices Market. This demographic trend not only amplifies the prevalence of glaucoma but also underscores the importance of advanced surgical devices and procedures to effectively manage and treat this vision-threatening condition in older individuals. As the aging population continues to grow, the demand for innovative glaucoma surgery solutions is expected to remain robust.

### Growing adoption of surgical treatments for glaucoma

The Global Glaucoma Surgery Devices Market is experiencing significant growth due to the growing adoption of surgical treatments for glaucoma. This trend is driven by a confluence of factors that collectively highlight the increasing preference for surgical interventions in managing this sight-threatening condition. Firstly, surgical treatments have gained traction as effective options for glaucoma management. While medications and laser therapies remain important, they may not provide long-term control over intraocular pressure (IOP), a key factor in glaucoma progression. Surgical procedures, on the other hand, offer a more durable solution by creating new drainage pathways or reducing IOP through various mechanisms. As a result, both ophthalmologists and patients are increasingly turning to surgical options to achieve better and more sustainable outcomes. Secondly, advancements in surgical techniques and technologies have enhanced the safety and efficacy of glaucoma surgeries. Minimally invasive glaucoma surgery (MIGS) procedures, for example, have gained popularity as they offer a safer and less invasive alternative to traditional surgeries, reducing the risk of complications and improving patient comfort.

Additionally, the aging population plays a pivotal role in driving the adoption of surgical treatments. As glaucoma prevalence increases with age, elderly individuals are more likely to require surgical interventions to manage the condition effectively. Moreover, advancements in healthcare infrastructure and accessibility have made surgical treatments more widely available to patients, further promoting their adoption. Furthermore, the economic burden associated with glaucoma underscores the significance of surgical solutions. Vision loss due to uncontrolled glaucoma can result in increased healthcare costs and reduced quality of life. Surgical treatments that effectively manage the condition and preserve vision are seen as valuable investments in reducing long-term healthcare expenses and improving patients' well-being. In conclusion, the growing adoption of surgical treatments for glaucoma is a pivotal driver in the Global Glaucoma Surgery Devices Market. Enhanced surgical techniques, the aging population, increased accessibility, and the economic considerations of managing glaucoma collectively contribute to the rising preference for surgical interventions, fueling market growth and innovation in glaucoma surgery devices.

### Rising number of government and non-government glaucoma care

The Global Glaucoma Surgery Devices Market is witnessing substantial growth, partly attributed to the increasing number of government and non-government initiatives focused on glaucoma care and awareness. These initiatives play a pivotal role in driving market expansion for several compelling reasons. Firstly, glaucoma is often referred to

as the 'silent thief of sight' because it can progress without noticeable symptoms until significant vision loss occurs. Governments and non-governmental organizations (NGOs) recognize the importance of early detection and treatment to prevent irreversible blindness caused by glaucoma. As a result, they invest in awareness campaigns, screening programs, and public education to encourage regular eye check-ups and early diagnosis. Secondly, these initiatives emphasize the significance of timely and effective treatment, which often includes surgical interventions for advanced cases. By promoting the availability and accessibility of surgical options, governments and NGOs contribute to the growing adoption of glaucoma surgery devices.

Thirdly, collaborations between healthcare institutions, professionals, and organizations facilitate the dissemination of best practices in glaucoma care. This includes the promotion of advanced surgical techniques and technologies, such as minimally invasive glaucoma surgery (MIGS), which are safer and more accessible to a wider range of patients. Moreover, the economic burden associated with untreated glaucoma is a driving force behind these initiatives. Vision loss can lead to increased healthcare costs, reduced productivity, and a diminished quality of life for affected individuals. Governments and NGOs recognize that investing in glaucoma care, including surgical treatments, can alleviate this economic burden in the long run.

Furthermore, partnerships between government healthcare systems and the private sector can lead to improved access to glaucoma surgeries and devices. These collaborations foster innovation and the development of advanced surgical technologies, which further stimulate market growth. In conclusion, the rising number of government and non-government initiatives focused on glaucoma care is a significant driver of the Global Glaucoma Surgery Devices Market. These initiatives promote awareness, early diagnosis, effective treatment, and innovation in surgical interventions, collectively contributing to the market's expansion and the improvement of glaucoma care on a global scale.

### Growing prevalence of diabetes

The Global Glaucoma Surgery Devices Market is experiencing an upsurge in growth due to the growing prevalence of diabetes, a major risk factor for glaucoma. This intricate connection between diabetes and glaucoma underscores the impact of the rising diabetes epidemic on the market. Firstly, individuals with diabetes are at an elevated risk of developing glaucoma. Diabetic patients often experience fluctuations in blood sugar levels, which can lead to damage to the blood vessels in the eye, ultimately increasing the risk of glaucoma. As the global diabetes population surges, so does the

pool of individuals susceptible to glaucoma, driving the demand for effective treatment options, including surgical interventions. Secondly, diabetes-related eye complications, such as diabetic retinopathy, can exacerbate glaucoma or complicate its management. This comorbidity necessitates comprehensive eye care, often involving surgical procedures to address both conditions simultaneously. As diabetes-related eye issues become more prevalent, there is a growing need for advanced glaucoma surgery devices to cater to these complex cases.

Thirdly, the aging population is at a higher risk of both diabetes and glaucoma, creating a demographic convergence that amplifies the prevalence of both conditions. This demographic trend is further exacerbated by lifestyle factors, including sedentary lifestyles and poor dietary habits, which contribute to the diabetes epidemic. Moreover, the economic burden associated with diabetes-related eye diseases, including glaucoma, drives governments, healthcare systems, and medical institutions to prioritize the availability and accessibility of advanced surgical interventions. This leads to increased investments in glaucoma surgery devices and technologies to address the growing healthcare demands. In conclusion, the growing prevalence of diabetes is a significant driver of the Global Glaucoma Surgery Devices Market. The intricate relationship between diabetes and glaucoma, coupled with the increasing burden of diabetes worldwide, fuels the demand for innovative surgical solutions and devices to effectively manage glaucoma in diabetic individuals, driving market growth and innovation in the field.

## Key Market Challenges

### Availability of alternative treatment methods

The availability of alternative treatment methods poses a significant challenge to the Global Glaucoma Surgery Devices Market. While surgical interventions for glaucoma are effective, there are alternative treatment modalities that compete for patient preference and ophthalmologists' attention, presenting obstacles for the market's growth. Firstly, pharmaceutical treatments in the form of eye drops remain a commonly prescribed and less invasive option for managing glaucoma. These medications aim to lower intraocular pressure (IOP), a key factor in glaucoma progression. Patients often prefer the convenience of eye drops over surgical procedures, especially in the early stages of the disease.

Secondly, laser therapy, particularly selective laser trabeculoplasty (SLT) and laser peripheral iridotomy (LPI), is another non-surgical approach to lowering IOP. These



procedures are less invasive and typically involve shorter recovery times compared to surgical interventions, making them appealing alternatives for patients. Thirdly, the emergence of minimally invasive glaucoma surgery (MIGS) has provided a middle ground between medication and traditional glaucoma surgeries. MIGS procedures are less traumatic and can often be combined with cataract surgery, reducing the need for separate interventions. Additionally, patient factors such as age, overall health, and disease severity play a crucial role in treatment selection. Ophthalmologists must consider these factors when recommending treatment options, and non-surgical approaches may be preferred in certain cases.

Furthermore, economic considerations also come into play. Surgical interventions, while effective, can be more expensive than pharmaceutical or laser treatments, which may influence both patients' and healthcare systems' decisions. Overcoming the challenge of alternative treatments necessitates ongoing innovation in glaucoma surgery devices. Manufacturers must focus on developing devices that are safer, more effective, and provide unique advantages over existing treatments. Demonstrating the superior long-term outcomes of surgical interventions compared to alternatives can also help mitigate this challenge and encourage ophthalmologists and patients to choose surgical solutions. In summary, while alternative treatment methods present challenges to the Glaucoma Surgery Devices Market, continued advancements in surgical technology and strong clinical evidence can help maintain and expand the market's position in glaucoma management.

Lack of awareness about glaucoma and its treatment procedures in underdeveloped

The lack of awareness about glaucoma and its treatment procedures in underdeveloped regions poses a significant challenge to the Global Glaucoma Surgery Devices Market. This challenge is multifaceted and affects various aspects of glaucoma care and device adoption. Firstly, underdeveloped regions often face a dearth of accessible healthcare infrastructure, including eye care facilities and ophthalmologists. This limited healthcare infrastructure impedes early glaucoma diagnosis and comprehensive patient education, as individuals may not have easy access to regular eye check-ups or eye health information.

Secondly, the lack of awareness about glaucoma as a 'silent' eye disease means that patients often seek medical attention only when the condition is in advanced stages. This delays the initiation of treatment, including surgical interventions, and may result in poorer outcomes. Thirdly, surgical treatments for glaucoma can be intimidating for patients, especially in regions with low awareness and limited access to information.

Fear of surgery and lack of understanding about its benefits can deter individuals from considering surgical options, further delaying timely interventions. Additionally, healthcare disparities in underdeveloped regions can lead to unequal access to surgical treatments. Patients from disadvantaged backgrounds may face financial barriers or lack insurance coverage for glaucoma surgeries, limiting their ability to undergo these procedures. Moreover, ophthalmologists and healthcare providers in underdeveloped regions may have limited exposure to the latest advancements in glaucoma surgery devices and procedures. This can result in suboptimal patient care, as clinicians may not be aware of or have access to the most effective surgical options.

To address these challenges, concerted efforts are needed to raise awareness about glaucoma and its treatment, particularly in underdeveloped regions. Public health campaigns, community education, and outreach programs can play a crucial role in increasing awareness and early detection. Additionally, improving healthcare infrastructure and ensuring that ophthalmologists receive training in the latest surgical techniques and technologies can enhance access to and the quality of glaucoma care in these regions. In summary, the lack of awareness about glaucoma and its treatment procedures in underdeveloped regions poses a formidable challenge to the Glaucoma Surgery Devices Market. Addressing this challenge requires a multi-pronged approach involving public health initiatives, education, improved healthcare infrastructure, and equitable access to surgical treatments.

## Key Market Trends

### Minimally Invasive Glaucoma Surgery (MIGS) Dominance

The dominance of Minimally Invasive Glaucoma Surgery (MIGS) represents a significant and transformative trend in the Global Glaucoma Surgery Devices Market. This trend is driven by a combination of factors that collectively underscore the growing preference for MIGS procedures among ophthalmologists and patients. Firstly, MIGS procedures are characterized by their less invasive nature compared to traditional glaucoma surgeries. They typically involve smaller incisions, reduced trauma to eye tissues, and shorter recovery times. This makes them appealing to patients who are seeking effective glaucoma treatment with minimal disruption to their daily lives.

Secondly, the safety profile of MIGS procedures is a compelling factor. With lower risk of complications such as infection or bleeding, MIGS enhances patient comfort and satisfaction. Ophthalmologists are also drawn to the reduced surgical risk and improved safety profile, making them more inclined to recommend MIGS to their patients. Thirdly,

MIGS procedures are often performed in conjunction with cataract surgery, addressing both conditions simultaneously. Given the high prevalence of both glaucoma and cataracts in the aging population, this combination approach offers efficiency and convenience for patients and surgeons alike. Moreover, MIGS procedures have demonstrated their ability to provide sustained intraocular pressure (IOP) reduction, which is a crucial goal in glaucoma management. This efficacy, combined with the minimally invasive nature of MIGS, positions these procedures as attractive options for a broad range of glaucoma patients, from early to more advanced stages.

Furthermore, regulatory agencies have expedited approvals for MIGS devices, encouraging innovation and market entry. This has led to a proliferation of MIGS options and a competitive landscape that fosters continuous improvement. In summary, the dominance of MIGS in the Global Glaucoma Surgery Devices Market is driven by its minimally invasive nature, safety, efficacy, and compatibility with cataract surgery. These factors collectively reflect a trend toward patient-centered care and enhanced surgical options, making MIGS a transformative force in glaucoma treatment. As MIGS continues to evolve and expand, it is expected to play a central role in shaping the future of glaucoma management.

### Advanced Implantable Devices

Advanced implantable devices represent a significant trend in the Global Glaucoma Surgery Devices Market, reshaping the landscape of glaucoma treatment. These devices are designed to provide sustained and precise intraocular pressure (IOP) control, offering several key advantages. Firstly, advanced implantable devices, such as microstents and shunts, provide a long-term solution for managing glaucoma. They create alternative pathways for aqueous humor drainage, reducing IOP and slowing the progression of the disease. This sustained control often means reduced dependence on medications and fewer visits for follow-up treatments, enhancing the patient's quality of life. Secondly, these devices offer a more predictable and customizable approach to glaucoma management. Surgeons can tailor the placement and configuration of these implants to suit individual patient needs, optimizing outcomes and minimizing side effects.

Thirdly, advanced implantable devices are often compatible with minimally invasive procedures, such as Minimally Invasive Glaucoma Surgery (MIGS). This combination approach allows for effective treatment while minimizing trauma to eye tissues and expediting recovery. Furthermore, the development and refinement of these implantable devices continue to drive innovation in the glaucoma surgery field. Manufacturers are



investing in research and development to enhance the safety, efficacy, and durability of these devices, positioning them as a promising trend in glaucoma care. In summary, the trend toward advanced implantable devices in the Global Glaucoma Surgery Devices Market is revolutionizing glaucoma treatment. These devices offer sustained IOP control, personalization, and compatibility with minimally invasive procedures, ultimately benefiting patients by providing effective, long-term solutions for this sight-threatening condition.

## Segmental Insights

### Product Insights

Glaucoma drainage devices emerged as the dominant segment in the Global Glaucoma Surgery Devices Market due to several compelling factors. Firstly, glaucoma is a chronic eye condition characterized by increased intraocular pressure (IOP), and effective IOP management is crucial to prevent vision loss. Glaucoma drainage devices play a pivotal role in achieving sustained IOP reduction, making them indispensable in the treatment of this sight-threatening disease. Secondly, the prevalence of glaucoma is rising globally, especially among the aging population. As a result, there is a growing demand for effective glaucoma treatment options, and drainage devices provide a reliable and proven solution for patients at various stages of the disease.

Thirdly, the synergy between cataract and glaucoma surgeries further bolsters the prominence of glaucoma drainage devices. Ophthalmologists frequently perform these procedures in combination, addressing both conditions simultaneously. This dual approach not only enhances patient convenience but also contributes to the increased utilization of glaucoma drainage devices. Furthermore, advancements in the field of Minimally Invasive Glaucoma Surgery (MIGS) have introduced innovative devices like iStent, which have gained regulatory approvals and contributed significantly to the segment's growth. These MIGS drainage devices offer minimally invasive alternatives, reducing surgical trauma and improving patient outcomes. In summary, glaucoma drainage devices have secured the largest market share due to their effectiveness in managing IOP, rising glaucoma prevalence, the synergy with cataract surgeries, and the introduction of innovative MIGS devices. These factors collectively position them as a cornerstone in the treatment of glaucoma and the driving force behind the segment's dominance in the market.

### Surgery Method Insights

The traditional glaucoma surgery segment's dominance in the Global Glaucoma Surgery Devices Market can be attributed to several significant factors. Firstly, traditional glaucoma surgeries, such as trabeculectomy and tube shunt implantation, have a long-established track record of effectively reducing intraocular pressure (IOP) and managing glaucoma. Ophthalmologists have relied on these procedures for decades to treat patients with various stages of the disease. Secondly, despite the emergence of Minimally Invasive Glaucoma Surgery (MIGS) options, traditional surgeries continue to be the preferred choice in cases of advanced or complex glaucoma. They offer a high degree of IOP control and are particularly valuable when more conservative approaches have proven ineffective.

Thirdly, traditional glaucoma surgeries are considered the gold standard for achieving significant and sustained IOP reduction. This is particularly crucial in cases where preserving vision and preventing further optic nerve damage are top priorities. Furthermore, the traditional glaucoma surgery segment's market share is bolstered by a wealth of clinical experience, well-established surgical techniques, and a robust body of research supporting their efficacy. These factors collectively position traditional glaucoma surgeries as the cornerstone of glaucoma management, explaining their continued dominance in the market.

## Regional Insights

North America's dominance in the Global Glaucoma Surgery Devices Market can be attributed to several key factors. Firstly, the region boasts a well-established healthcare infrastructure, including advanced eye care facilities and a highly skilled workforce of ophthalmologists and eye surgeons. This robust healthcare ecosystem ensures timely access to glaucoma diagnosis and treatment, which significantly contributes to the market's growth. Secondly, North America has a substantial geriatric population, and glaucoma predominantly affects older individuals. The prevalence of glaucoma increases with age, and as the region experiences demographic shifts towards an aging population, the demand for glaucoma surgery devices naturally rises.

Thirdly, the region is characterized by a high level of healthcare expenditure and research and development activities. This fosters innovation in glaucoma surgical techniques and device development, leading to the introduction of advanced and cutting-edge solutions. The regulatory framework in North America is conducive to the approval and adoption of new technologies and devices, further propelling market growth. Moreover, North America has a strong focus on patient care, awareness campaigns, and regular eye check-ups, which promote early diagnosis and intervention for

glaucoma patients. All these factors collectively position North America as the dominant market for glaucoma surgery devices, and its leadership in the field is expected to persist in the foreseeable future.

### Key Market Players

Alcon, Inc.

Abbott Medical Optics Pvt Ltd

Asico LLC

Katalyst Surgical LLC

Ziemer Ophthalmic Systems AG

Lumenis Ltd

Iridex Corporation

Carl Zeiss Meditec AG

Allergan Plc.

Glaukos Corporation

### Report Scope:

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

#### Glaucoma Surgery Devices Market, By Product:

Punches, USC marker, USC planner, USC shaver, Forceps, Algerbrush, Probes, Diamond knives

Glaucoma Drainage Device

Laser System

Others

Glaucoma Surgery Devices Market, By Surgery Method:

Traditional glaucoma surgery

Minimal invasive glaucoma surgery

Laser surgery

Glaucoma Surgery Devices Market, By End Use:

Hospitals

Ophthalmic clinics

Others

Glaucoma Surgery Devices 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

Kuwait

Turkey

Egypt

## Competitive Landscape



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

Available Customizations:

Global Glaucoma Surgery Devices market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

## Contents

### 1. PRODUCT OVERVIEW

### 2. RESEARCH METHODOLOGY

### 3. EXECUTIVE SUMMARY

### 4. VOICE OF CUSTOMERS

### 5. GLOBAL GLAUCOMA SURGERY DEVICES MARKET OUTLOOK

#### 5.1. Market Size & Forecast

##### 5.1.1. By Value

#### 5.2. Market Share & Forecast

5.2.1. By Product (Punches, USC marker, USC planner, USC shaver, forceps, algerbrush, probes, diamond knives, Glaucoma Drainage Device, Laser System, Others)

5.2.2. By Surgery Method (Traditional glaucoma surgery, Minimal invasive glaucoma surgery, Laser surgery)

5.2.2.1. By Traditional glaucoma surgery (Trabeculectomy, Tube shunt surgery)

5.2.2.2. By Minimal invasive glaucoma surgery (Trabecular meshwork bypass, Suprachoroidal space implants, Subconjunctival space implants)

5.2.2.3. By Laser surgery (Trabeculoplasty, Iridotomy, Cyclophotocoagulation)

5.2.3. By End Use (Hospitals, Ophthalmic clinics, Others)

5.2.4. By Company (2022)

5.2.5. By Region

#### 5.3. Market Map

### 6. NORTH AMERICA GLAUCOMA SURGERY DEVICES MARKET OUTLOOK

#### 6.1. Market Size & Forecast

##### 6.1.1. By Value

#### 6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Surgery Method

6.2.3. By End Use

6.2.4. By Country

#### 6.3. North America: Country Analysis

### 6.3.1. United States Glaucoma Surgery Devices Market Outlook

#### 6.3.1.1. Market Size & Forecast

##### 6.3.1.1.1. By Value

#### 6.3.1.2. Market Share & Forecast

##### 6.3.1.2.1. By Product

##### 6.3.1.2.2. By Surgery Method

##### 6.3.1.2.3. By End Use

### 6.3.2. Mexico Glaucoma Surgery Devices Market Outlook

#### 6.3.2.1. Market Size & Forecast

##### 6.3.2.1.1. By Value

#### 6.3.2.2. Market Share & Forecast

##### 6.3.2.2.1. By Product

##### 6.3.2.2.2. By Surgery Method

##### 6.3.2.2.3. By End Use

### 6.3.3. Canada Glaucoma Surgery Devices Market Outlook

#### 6.3.3.1. Market Size & Forecast

##### 6.3.3.1.1. By Value

#### 6.3.3.2. Market Share & Forecast

##### 6.3.3.2.1. By Product

##### 6.3.3.2.2. By Surgery Method

##### 6.3.3.2.3. By End Use

## **7. EUROPE GLAUCOMA SURGERY DEVICES MARKET OUTLOOK**

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Product

#### 7.2.2. By Surgery Method

#### 7.2.3. By End Use

#### 7.2.4. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. France Glaucoma Surgery Devices Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Product

###### 7.3.1.2.2. By Surgery Method

###### 7.3.1.2.3. By End Use

### 7.3.2. Germany Glaucoma Surgery Devices Market Outlook

#### 7.3.2.1. Market Size & Forecast

##### 7.3.2.1.1. By Value

#### 7.3.2.2. Market Share & Forecast

##### 7.3.2.2.1. By Product

##### 7.3.2.2.2. By Surgery Method

##### 7.3.2.2.3. By End Use

### 7.3.3. United Kingdom Glaucoma Surgery Devices Market Outlook

#### 7.3.3.1. Market Size & Forecast

##### 7.3.3.1.1. By Value

#### 7.3.3.2. Market Share & Forecast

##### 7.3.3.2.1. By Product

##### 7.3.3.2.2. By Surgery Method

##### 7.3.3.2.3. By End Use

### 7.3.4. Italy Glaucoma Surgery Devices Market Outlook

#### 7.3.4.1. Market Size & Forecast

##### 7.3.4.1.1. By Value

#### 7.3.4.2. Market Share & Forecast

##### 7.3.4.2.1. By Product

##### 7.3.4.2.2. By Surgery Method

##### 7.3.4.2.3. By End Use

### 7.3.5. Spain Glaucoma Surgery Devices Market Outlook

#### 7.3.5.1. Market Size & Forecast

##### 7.3.5.1.1. By Value

#### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Product

##### 7.3.5.2.2. By Surgery Method

##### 7.3.5.2.3. By End Use

## **8. ASIA-PACIFIC GLAUCOMA SURGERY DEVICES MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Product

#### 8.2.2. By Surgery Method

#### 8.2.3. By End Use

#### 8.2.4. By Country

### 8.3. Asia-Pacific: Country Analysis

### 8.3.1. China Glaucoma Surgery Devices Market Outlook

#### 8.3.1.1. Market Size & Forecast

##### 8.3.1.1.1. By Value

#### 8.3.1.2. Market Share & Forecast

##### 8.3.1.2.1. By Product

##### 8.3.1.2.2. By Surgery Method

##### 8.3.1.2.3. By End Use

### 8.3.2. India Glaucoma Surgery Devices Market Outlook

#### 8.3.2.1. Market Size & Forecast

##### 8.3.2.1.1. By Value

#### 8.3.2.2. Market Share & Forecast

##### 8.3.2.2.1. By Product

##### 8.3.2.2.2. By Surgery Method

##### 8.3.2.2.3. By End Use

### 8.3.3. South Korea Glaucoma Surgery Devices Market Outlook

#### 8.3.3.1. Market Size & Forecast

##### 8.3.3.1.1. By Value

#### 8.3.3.2. Market Share & Forecast

##### 8.3.3.2.1. By Product

##### 8.3.3.2.2. By Surgery Method

##### 8.3.3.2.3. By End Use

### 8.3.4. Japan Glaucoma Surgery Devices Market Outlook

#### 8.3.4.1. Market Size & Forecast

##### 8.3.4.1.1. By Value

#### 8.3.4.2. Market Share & Forecast

##### 8.3.4.2.1. By Product

##### 8.3.4.2.2. By Surgery Method

##### 8.3.4.2.3. By End Use

### 8.3.5. Australia Glaucoma Surgery Devices Market Outlook

#### 8.3.5.1. Market Size & Forecast

##### 8.3.5.1.1. By Value

#### 8.3.5.2. Market Share & Forecast

##### 8.3.5.2.1. By Product

##### 8.3.5.2.2. By Surgery Method

##### 8.3.5.2.3. By End Use

## **9. SOUTH AMERICA GLAUCOMA SURGERY DEVICES MARKET OUTLOOK**

### 9.1. Market Size & Forecast



- 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Product
  - 9.2.2. By Surgery Method
  - 9.2.3. By End Use
  - 9.2.4. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Glaucoma Surgery Devices Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Product
      - 9.3.1.2.2. By Surgery Method
      - 9.3.1.2.3. By End Use
  - 9.3.2. Argentina Glaucoma Surgery Devices Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Product
      - 9.3.2.2.2. By Surgery Method
      - 9.3.2.2.3. By End Use
  - 9.3.3. Colombia Glaucoma Surgery Devices Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Product
      - 9.3.3.2.2. By Surgery Method
      - 9.3.3.2.3. By End Use

## **10. MIDDLE EAST AND AFRICA GLAUCOMA SURGERY DEVICES MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Product
  - 10.2.2. By Surgery Method
  - 10.2.3. By End Use
  - 10.2.4. By Country

### 10.3. MEA: Country Analysis

#### 10.3.1. South Africa Glaucoma Surgery Devices Market Outlook

##### 10.3.1.1. Market Size & Forecast

###### 10.3.1.1.1. By Value

##### 10.3.1.2. Market Share & Forecast

###### 10.3.1.2.1. By Product

###### 10.3.1.2.2. By Surgery Method

###### 10.3.1.2.3. By End Use

#### 10.3.2. Saudi Arabia Glaucoma Surgery Devices Market Outlook

##### 10.3.2.1. Market Size & Forecast

###### 10.3.2.1.1. By Value

##### 10.3.2.2. Market Share & Forecast

###### 10.3.2.2.1. By Product

###### 10.3.2.2.2. By Surgery Method

###### 10.3.2.2.3. By End Use

#### 10.3.3. UAE Glaucoma Surgery Devices Market Outlook

##### 10.3.3.1. Market Size & Forecast

###### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

###### 10.3.3.2.1. By Product

###### 10.3.3.2.2. By Surgery Method

###### 10.3.3.2.3. By End Use

## 11. MARKET DYNAMICS

### 11.1. Drivers

### 11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

### 12.1. Recent Developments

### 12.2. Product Launches

### 12.3. Mergers & Acquisitions

## 13. PESTLE ANALYSIS

## 14. PORTER'S FIVE FORCES ANALYSIS

### 14.1. Competition in the Industry

- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Business Overview
- 15.2. Company Snapshot
- 15.3. Product & Services
- 15.4. Financials (In case of listed companies)
- 15.5. Recent Developments
- 15.6. SWOT Analysis
  - 15.6.1. Alcon, Inc.
  - 15.6.2. Abbott Medical Optics Pvt Ltd
  - 15.6.3. Asico LLC
  - 15.6.4. Katalyst Surgical LLC
  - 15.6.5. Ziemer Ophthalmic Systems AG
  - 15.6.6. Lumenis Ltd
  - 15.6.7. Iridex Corporation
  - 15.6.8. Carl Zeiss Meditec AG
  - 15.6.9. Allergan Plc.
  - 15.6.10. Glaukos Corporation

## **16. STRATEGIC RECOMMENDATIONS**

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