

Scleral Lens Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Corneo-Scleral Lenses, Semi-Scleral Lenses, Mini-Scleral Lenses, Full Scleral Lenses), By Application (Irregular Cornea, Ocular Surface Disease, Refractive Error, Other), By End User (Hospitals, Eye Clinics, Others) By Region and Competition, 2019-2029F

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Abstracts

Global Scleral Lens Market was valued at USD 275.35 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.12% through 2029. The Global Scleral Lens Market is witnessing significant growth driven by advancements in technology, increasing prevalence of ocular disorders, and rising adoption of scleral lenses for various therapeutic and corrective purposes. Scleral lenses are large-diameter rigid gas permeable contact lenses that vault over the cornea and rest on the sclera, providing improved comfort and visual acuity for individuals with irregular corneas, severe dry eye syndrome, or other ocular conditions. These lenses offer numerous benefits, including enhanced vision quality, prolonged wearing time, and protection of the ocular surface. One of the key drivers of the Global Scleral Lens Market is the growing prevalence of ocular disorders such as keratoconus, corneal ectasia, and dry eye disease. As these conditions continue to rise globally, there is an increasing demand for effective and comfortable vision correction options, thus fueling the adoption of scleral lenses. The technological advancements in lens design, manufacturing techniques, and materials have significantly improved the comfort, fit, and performance of scleral lenses, driving their popularity among both patients and eye care practitioners. These advancements have led to the development of custom-

designed scleral lenses tailored to individual patient needs, further expanding the market's potential. The rising awareness about the benefits of scleral lenses among eye care professionals and patients, coupled with increasing investments in research and development activities, are expected to propel the growth of the Global Scleral Lens Market in the coming years. Additionally, the expanding geriatric population, which is more prone to ocular disorders, is likely to contribute to the market's growth as well. Overall, with ongoing technological innovations and increasing adoption rates, the Global Scleral Lens Market is poised for continued expansion in the foreseeable future.

Key Market Drivers

Increasing Prevalence of Ocular Disorders

The increasing prevalence of ocular disorders globally is a significant factor driving the growth of the Global Scleral Lens Market. Conditions such as keratoconus, corneal ectasia, and severe dry eye syndrome are becoming more common, affecting individuals of all ages. Keratoconus, characterized by a progressive thinning and bulging of the cornea, can lead to irregular astigmatism and impaired vision. Similarly, corneal ectasia results in corneal thinning and distortion, often leading to visual disturbances and discomfort. Additionally, dry eye syndrome, marked by inadequate tear production or poor tear quality, can cause chronic irritation, redness, and blurred vision. Scleral lenses offer effective solutions for individuals with these and other ocular disorders by providing stable, comfortable, and clear vision. These lenses vault over the irregular corneal surface, creating a smooth optical interface and improving visual acuity. Moreover, the fluid reservoir between the lens and the cornea helps maintain ocular surface hydration, alleviating symptoms of dry eye syndrome. As the prevalence of these ocular conditions continues to rise globally, the demand for scleral lenses as a preferred treatment option is expected to increase, driving the growth of the Global Scleral Lens Market.

Technological Advancements

Technological advancements play a pivotal role in driving the growth of the Global Scleral Lens Market. Continuous innovation in lens design, manufacturing techniques, and materials has significantly enhanced the comfort, fit, and performance of scleral lenses, making them increasingly popular among both patients and eye care practitioners. One of the key areas of advancement is in custom-designed scleral lenses tailored to individual patient needs. Advanced imaging technologies such as corneal topography and anterior segment optical coherence tomography (OCT) allow for precise

mapping of corneal irregularities, facilitating the customization of scleral lenses to provide optimal visual correction. Additionally, computer-aided design and manufacturing (CAD/CAM) technologies enable the production of scleral lenses with highly precise geometries, ensuring a perfect fit and maximizing comfort for the wearer. Moreover, improvements in lens materials have led to the development of highly oxygen-permeable materials that promote better ocular health and reduce the risk of hypoxia-related complications. These advancements have expanded the applicability of scleral lenses to a wider range of patients, including those with sensitive eyes or underlying corneal conditions. The technological advancements continue to drive innovation and growth in the Global Scleral Lens Market, improving patient outcomes and expanding the market's potential. As research and development efforts continue to push the boundaries of scleral lens technology, the market is poised for further expansion in the coming years.

Growing Awareness and Acceptance

Growing awareness and acceptance of scleral lenses are significant factors contributing to the expansion of the Global Scleral Lens Market. As understanding of the benefits of scleral lenses among eye care professionals and patients increases, so does their adoption rate. Eye care practitioners are increasingly recognizing scleral lenses as an effective solution for various ocular conditions, including irregular corneas, severe dry eye syndrome, and ocular surface diseases. This heightened awareness leads to greater confidence in prescribing scleral lenses and encourages more patients to consider them as a viable treatment option. Additionally, patient education initiatives and advocacy efforts have played a crucial role in enhancing awareness and acceptance of scleral lenses. Patients are becoming more informed about the advantages of scleral lenses, such as improved comfort, visual acuity, and ocular health. Moreover, testimonials and success stories shared by satisfied scleral lens wearers contribute to positive word-of-mouth referrals, further bolstering acceptance. As awareness continues to grow, more patients are opting for scleral lenses as their preferred vision correction method, driving market demand. With ongoing education efforts and increasing acceptance among both practitioners and patients, the Global Scleral Lens Market is poised for sustained growth in the foreseeable future.

Key Market Challenges

High Cost

One of the significant challenges facing the Global Scleral Lens Market is the high cost

associated with scleral lenses. Scleral lenses, particularly custom-designed ones, often come with a higher price tag compared to traditional contact lenses. This elevated cost can pose a barrier to adoption for many patients, limiting their accessibility to this advanced vision correction option. Several factors contribute to the high cost of scleral lenses. Firstly, the manufacturing process for scleral lenses involves specialized equipment and materials, leading to higher production costs. Additionally, the customization required to fit each lens to the individual's unique ocular anatomy further adds to the expense. Custom-designed scleral lenses are meticulously crafted to address specific corneal irregularities or ocular conditions, necessitating advanced technology and expertise, which increases their price. The fitting process for scleral lenses requires specialized training and expertise from eye care practitioners. This additional training and skill set may lead to higher professional fees associated with fitting and prescribing scleral lenses, further contributing to their overall cost. The high cost of scleral lenses may disproportionately affect certain patient populations, particularly those with limited financial resources or inadequate insurance coverage. As a result, many individuals may opt for less expensive vision correction alternatives, despite the potential benefits offered by scleral lenses. Addressing the issue of high cost in the scleral lens market will require collaborative efforts from manufacturers, eye care professionals, and policymakers. Strategies such as increasing manufacturing efficiency, streamlining regulatory processes, and expanding insurance coverage for scleral lenses can help mitigate the financial burden on patients and improve access to this advanced vision correction technology.

Complex Fitting Process

One of the significant challenges in the Global Scleral Lens Market is the complexity of the fitting process. Unlike traditional contact lenses, which have standardized sizes and parameters, scleral lenses require a highly individualized fitting process. Each lens must be meticulously tailored to the unique ocular anatomy and specific visual needs of the patient, making the fitting process more intricate and time-consuming. The complexity of the fitting process arises from several factors. Firstly, scleral lenses are large-diameter lenses that vault over the cornea and rest on the sclera, requiring precise measurements to ensure proper fit and alignment. Eye care practitioners must carefully assess the curvature, diameter, and elevation of the cornea, as well as the size and shape of the scleral landing zone, to design a lens that provides optimal vision correction and comfort. Additionally, fitting scleral lenses may require specialized diagnostic tools and imaging techniques, such as corneal topography and anterior segment optical coherence tomography (OCT), to accurately map the ocular surface and identify irregularities. Eye care practitioners must undergo extensive training and

acquire specific expertise to perform scleral lens fittings effectively, further adding to the complexity of the process. The intricate nature of the fitting process for scleral lenses presents challenges for both practitioners and patients. Eye care practitioners require specialized knowledge and skills to conduct scleral lens fittings accurately, while patients may experience longer appointment times and multiple fitting sessions before achieving optimal lens fit and comfort. Addressing the complexity of the fitting process in the scleral lens market will require ongoing education and training for eye care practitioners, as well as the development of advanced diagnostic tools and fitting methodologies to streamline the process and improve patient outcomes.

Key Market Trends

Customization and Personalization

Customization and personalization are key trends driving the evolution of the Global Scleral Lens Market. As demand for advanced vision correction options grows, there is a shift towards custom-designed scleral lenses tailored to the individual needs of patients. This trend is fueled by advancements in imaging technologies, such as corneal topography and anterior segment optical coherence tomography (OCT), which allow for precise mapping of corneal irregularities and ocular anatomy. Customization and personalization enable eye care practitioners to design scleral lenses that address specific visual challenges and provide optimal comfort and vision correction. Parameters such as lens diameter, curvature, thickness, and landing zone geometry can be customized to accommodate the unique characteristics of each patient's eyes, ensuring a perfect fit and enhanced visual outcomes. Moreover, customization extends beyond the physical characteristics of the lens to include factors such as lens material, oxygen permeability, and surface coatings. Customized scleral lenses can be made from materials with varying oxygen permeability levels, promoting ocular health and reducing the risk of hypoxia-related complications. Additionally, specialized coatings can be applied to the lens surface to enhance wettability, minimize deposits, and improve overall comfort for the wearer. The trend towards customization and personalization reflects a growing recognition of the importance of individualized care in the treatment of ocular conditions. By offering tailored solutions that meet the unique needs of each patient, the Global Scleral Lens Market is poised to expand its reach and impact, providing improved vision and quality of life for individuals with complex visual challenges.

Rising Demand for Specialty Lenses

The Global Scleral Lens Market is experiencing a surge in demand for specialty lenses driven by various factors. One significant trend contributing to this rising demand is the increasing prevalence of ocular conditions such as keratoconus, corneal ectasia, and severe dry eye syndrome. These conditions pose unique challenges to traditional vision correction methods and often require specialized solutions like scleral lenses. Scleral lenses offer several advantages over conventional contact lenses, including improved comfort, stability, and visual acuity, making them an attractive option for individuals with complex ocular needs. Additionally, there is growing awareness among both patients and eye care professionals about the benefits of scleral lenses in managing challenging ocular conditions. As knowledge about scleral lenses spreads, more patients are seeking out these specialty lenses as a preferred treatment option, driving market growth. Furthermore, advancements in lens design, manufacturing techniques, and materials have expanded the applicability of scleral lenses to a wider range of patients. Custom-designed scleral lenses tailored to individual patient needs are becoming increasingly common, allowing for precise vision correction and optimal comfort.

The COVID-19 pandemic has also accelerated the adoption of scleral lenses, as patients seek alternative vision correction options that minimize the need for frequent visits to eye care providers. Scleral lenses offer long wearing times and reduced risk of complications, making them a preferred choice for many individuals during these uncertain times. The rising demand for specialty lenses like scleral lenses is expected to continue driving growth in the Global Scleral Lens Market, as more patients recognize the benefits of these advanced vision correction solutions for managing complex ocular conditions.

Segmental Insights

Type Insights

Based on Type, mini-scleral lenses segment dominated the Global Scleral Lens Market in 2023. The Mini-Scleral Lenses segment is dominating the Global Scleral Lens Market due to several factors. Firstly, mini-scleral lenses offer a balance between comfort and efficacy, providing excellent visual correction while maintaining sufficient clearance from the cornea for optimal oxygen permeability. Additionally, mini-scleral lenses are easier to fit compared to larger scleral lenses, requiring less chair time and expertise from eye care practitioners. This makes them more accessible to a broader patient population, including those with irregular corneas or ocular surface irregularities. Moreover, mini-scleral lenses offer versatility in correcting a wide range of refractive errors and ocular conditions, making them a preferred choice for many patients seeking advanced vision

correction solutions. Overall, the combination of effectiveness, ease of fitting, and versatility contributes to the dominance of the Mini-Scleral Lenses segment in the Global Scleral Lens Market.

End User Insights

Based on end user, hospitals segment dominated the Global Scleral Lens Market in 2023. The hospitals segment is dominating the Global Scleral Lens Market due to several reasons. Firstly, hospitals serve as major centers for specialized eye care services, attracting patients with complex ocular conditions that require advanced vision correction solutions like scleral lenses. Secondly, hospitals often have multidisciplinary teams of eye care professionals, including ophthalmologists and contact lens specialists, who are trained in fitting and prescribing scleral lenses. This expertise enables hospitals to provide comprehensive care and tailored solutions to patients with diverse ocular needs. Additionally, hospitals have access to advanced diagnostic equipment and imaging technologies, allowing for precise measurements and customization of scleral lenses to individual patient requirements. Overall, the combination of specialized expertise, advanced technology, and comprehensive care available in hospitals makes them the preferred choice for scleral lens fittings and prescriptions, leading to their dominance in the market.

Regional Insights

The North America segment is dominating in the Global Scleral Lens Market due to several factors. North America has a well-established healthcare infrastructure and a high prevalence of ocular conditions such as keratoconus, corneal ectasia, and dry eye syndrome. There is a robust presence of leading manufacturers and eye care practitioners specializing in scleral lens fittings, contributing to greater accessibility and awareness of scleral lenses among patients. The favorable reimbursement policies and higher disposable incomes enable patients in North America to afford scleral lenses, driving market demand. The ongoing technological advancements and research initiatives in the region further support the growth of the scleral lens market, solidifying North America's dominance in this sector.

Key Market Players

Bausch Health Companies Inc.

ABB Optical Group

EssilorLuxottica SA

Art Optical Contact Lens, Inc.

Visionary Optics

BostonSight Inc.

SynergEyes Inc.

Acculens Inc.

Blanchard Contact Lens Inc

TruForm Optics Inc.

Report Scope:

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

Scleral Lens Market,By Type:

oCorneo-Scleral Lenses

oSemi-Scleral Lenses

oMini-Scleral Lenses

oFull Scleral Lenses

Scleral Lens Market,By Application:

oIrregular Cornea

oOcular Surface Disease

oRefractive Error

oOther

Scleral Lens Market,By End User:

oHospitals

oEye Clinics

oOthers

·Scleral Lens Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Scleral Lens Market.

Available Customizations:

Global Scleral Lens 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:

Scleral Lens Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Corneo...

Company Information

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

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