

## **Tonometer - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019-2029**

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### **Report description:**

The Global Tonometer Market size is estimated at USD 356.56 million in 2024, and is expected to reach USD 456.16 million by 2029, growing at a CAGR of 5.05% during the forecast period (2024-2029).

The tonometer market has been impacted by the COVID-19 outbreak, which is majorly attributed to the lockdown placed by several countries. The visits to ophthalmic centers or hospitals have reduced drastically, and only emergency procedures are being performed. Moreover, the supply of newer and affected the company revenues of the market players. However, as all the restrictions and ophthalmic services were resumed, the market is expected to grow over the study period. For instance, as per the Carl Zeiss Meditec Group 2022 annual report, the market for ophthalmic devices, including tonometers, grew around 19% in 2021 compared with the prior pandemic year. In the future, the Carl Zeiss Meditec Group expects the market for ophthalmic products to grow annually by a percentage, at least in the low to mid-single-digit range, due to the intact demographic and other growth drivers.

The major factors attributing to the growth of the studied market are the increasing incidence of glaucoma, the rising geriatric population and diabetic patients who are more prone to develop glaucoma, and the increasing number of eye checkup camps and glaucoma awareness programs.

The high burden of glaucoma increases the demand for tonometers, which is expected to drive the market over the study period; for instance, as per the WHO report published in October 2022, 7.7 million people globally had moderate or severe distance vision impairment or blindness due to glaucoma. In addition, as per the same source, glaucoma is more prevalent in high-income countries. Hence, with a high burden of glaucoma, the demand to measure intraocular pressure using a tonometer increases, which is expected to have significant growth in the market over the study period.

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Furthermore, the new product approvals and launches increase the widespread distribution of tonometer devices in various regions. For instance, in November 2022, CATS Disposable Tonometer Prism (CATS-D) was made available through Lovell Government Services for Veterans Affairs (VA) and the Department of Defense (DoD) in the United States. Thus, the new approvals of the market players increase the product portfolio of market players, which is expected to have significant growth in the market over the forecast period.

However, the risk of infection with contact tonometers and the lack of accuracy in non-contact tonometers is expected to hinder the growth of the market over the forecast period.

## Tonometer Market Trends

### Applanation Tonometry Segment is Expected to Hold a Significant Share in the Market Over the Forecast Period

The applanation tonometry test measures the fluid pressure in the eye. The test involves using a slit lamp equipped with forehead and chin supports and a tiny, flat-tipped cone that gently comes into contact with the patient's cornea. The test essentially measures the amount of force needed to flatten a part of the cornea temporarily. It is used in the diagnosis of glaucoma.

In applanation tonometry, the cornea is flattened, and the IOP is determined by varying the applanating force or the area flattened. There are three types of applanation tonometers: Goldmann applanation tonometer, non-contact tonometer, and ocular response analyzer. The advantages of applanation tonometry include its almost universal acceptance as the clinical standard method of IOP assessment, ease of use from the technician's perspective, and acceptability for most patients. Apart from the advantages of the applanation tonometer, the factor boosting the segment growth is the increasing glaucoma prevalence, fueled by the increasing geriatric population and the diabetic population who are more prone to glaucoma.

Furthermore, the comparative studies of applanation tonometry with other tonometry devices are expected to increase the demand for applanation tonometry due to its efficiency in the diagnosis of glaucoma. For instance, according to research published in the Canadian Journal of Ophthalmology in August 2022, handheld rebound tonometry devices tend to underestimate intraocular pressure (IOP) compared with applanation tonometry. Underestimating IOP with handheld rebound tonometry can contribute to underdiagnosis and undertreatment of glaucoma, leading to irreversible vision loss from glaucoma. Hence, the overestimation of IOP of applanation tonometry compared to handheld rebound tonometry is expected to have significant growth in the market over the study period.

### North America is Expected to Hold a Significant Share in the Market Over the Forecast Period

North America is expected to have significant growth in the overall market throughout the forecast period. In this region, the United States is anticipated to have the maximum share due to supportive healthcare policies, the high number of patients, and a developed healthcare market. The market growth is due to factors such as the presence of key players, the high prevalence of glaucoma in the region, and the established healthcare infrastructure. The beneficial government initiatives and an increase in the number of research partnerships are some of the factors expected to drive market growth.

For instance, as per the report published by the Ministry of Health, Mexico, in March 2022, the number of people suffering from glaucoma in Mexico is estimated to be 1.5 million in 2022. It is most common in people over 60 years of age. In addition, the most common type of glaucoma seen in Mexico is reported to be open-angle primary. Thus, the high burden of glaucoma cases in the country increases the demand for tonometers which is expected to have significant growth in the market over the forecast period.

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Moreover, recent product approvals and launches, a growing number of optometrists, and increasing awareness regarding available treatment options are fueling the market growth. For instance, in March 2022, Icare received 510(k) clearance from the United States FDA for their next-generation self-tonometer, the iCare HOME2. The iCare HOME2 tonometer provides ease of use in measuring patients' real-world IOP outside normal clinic hours to help support glaucoma management. These new product approvals increase the widespread applications, raise the demand for tonometers, and likely boost the market over the forecast period.

## Tonometer Industry Overview

The tonometer market is moderately consolidated. The key players have been involved in various strategic alliances, such as mergers and acquisitions, to secure their positions in the global market. Some of the companies currently dominating the market are Halma Plc (Keeler Ltd), Carl Zeiss Meditec AG, Revenio Group PLC (iCare Finland OY), AMETEK Inc. (Reichert Technologies), Oculus Inc, Kowa American Corporation, Nidek Co. Ltd, Rexxam Co. Ltd., Canon Medical Systems Corporation, and some others.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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