

Global Ophthalmoscopes Market - Focused Insights 2024-2029

Market Report | 2024-10-28 | 139 pages | Arizton Advisory & Intelligence

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Report description:

The global ophthalmoscopes market is expected to grow at a CAGR of 5.73% from 2023 to 2029.

RECENT VENDORS ACTIVITIES

Product Launched

- In 2024, NIDEK, Inc., announced the commercial launch of its new Mirante Scanning Laser Ophthalmoscope in the US market. It is a multimodal fundus imaging platform that combines Optical Coherence Tomography and Scanning Laser Ophthalmoscopy with ultrawide-field imaging.
- In 2023, Baxter- one of the leading ophthalmoscope companies, developed and launched a digital image capture capability (iExaminer Pro) for PanOptic Plus Ophthalmoscope for an eye examination. This advanced system will help connect smart devices to capture images for further eye exams and treatments.
- In 2023, NEITZ INSTRUMENTS, Co. Ltd launched the BX? LED ophthalmoscope. This product has a unique boost mode for more brightness, which is a useful feature for screening even in brighter environments.
- In 2021, Baxter-Hillrom launched the Welch Allyn PanOptic Plus Ophthalmoscope globally. This product boasts a 20X larger viewing area and comes with the QuickEye alignment technology, which enables direct patient gaze for better optic disc alignment. It also enables clinicians to capture digital images that help evaluate eye diseases.
- In 2021, Heine launched Omega 600, an updated indirect ophthalmoscope. It is lightweight and high-end, and it comes with VisionBOOST technology, which provides better illumination.

MARKET DRIVERS & OPPORTUNITIES

Continue Development and Advancements in Ophthalmoscopes

The ophthalmoscope industry witnessed continuing development and advancement in quality, efficacy, and technology. Modern

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and smart ophthalmoscope cameras are now simple color fundus cameras. In addition, many of them now integrate/incorporate indocyanine green angiography, fluorescein angiography, and ocular biometry and have made several advancements. However, in recent years, ophthalmoscopes have been revolutionized with advanced technologies such as digital tools, smartphone connectivity, and color-scanning ophthalmoscopes, tremendously revolutionizing industrial growth. Digital ophthalmoscopes are becoming more popular. The rising use of digital ophthalmoscopes is due to the integration e-health platforms across global healthcare settings. Telemedicine is supporting the increased use of digital ophthalmoscopes. Smartphone-based ophthalmoscopes were gaining momentum as an effective training tool for students and an accompaniment to learning ophthalmoscope methods. This advanced ophthalmoscope is now available as a cheaper and alternative solution for glaucoma, diabetic retinopathy (DR), and retinopathy prematurity and is specifically widely used for a pediatric patient population.

Attention Towards Scanning Laser Ophthalmoscopy

Scanning Laser Ophthalmoscopes (SLO) are becoming more popular in ophthalmology clinics and centers since these devices have advanced in capturing wide-field images in a single chance without mydriasis. Furthermore, multimodal assessments with optical coherence tomography, fluorescein/indocyanine green angiography, microperimetry, and color photography have been recommended for optimum eye assessment. With this single instrument, some of these functions are combined with SLO, supporting the complete analysis and assessment of retinal diseases. It will help to reduce the cost of investment for end-users. Moreover, the applications of scanning laser ophthalmoscopes have been widely increasing for fluorescence or autofluorescence reflectance and have recently been used for retro-illumination imaging. Confocal scanning laser ophthalmoscopes (CSLO) are also becoming popular for this purpose.

Continue Rising Volume of Eye Examinations

In developed countries, the rate of eye examinations is significantly high. Over 110 million routine (refractive) eye exams are done annually in the US. In addition, over 350 million eye examinations are performed globally, driving the significant demand for ophthalmoscopes. With the economic stability and rising health expenditure in eye care, the volume of eye examinations is growing rapidly, as well as in developing markets. These factors led to increasing demand for ophthalmoscopes. The burden of eye diseases is significantly high in APAC, Middle East & Africa, and Latin America. Today, in the rapidly changing world, where digital devices and technology are becoming integral to human life, the demand for protecting and preventing eye diseases becomes essential. The increasing use of digital screens and continuously rising screen time have led to the growing prevalence of several eye diseases that require eye examinations.

INDUSTRY RESTRAINTS

Lack of Access to Eye Care Services

Vision care is a major burden in emerging markets, and it crucially impacts low- and middle-income countries due to a lack of awareness and insufficient expenditure on eye care. The Economic Forum Report 2021 revealed that around 90% of the world's blind population lives in low- and middle-income countries. The leading cause behind this is untreated cataracts due to the lack of eye care services or low access to these services. The report also states that poverty and blindness are related to each other, and most people do not realize that vision loss is not normal. Near vision impairment is prevalent in Western, Eastern, and Central Africa. The shortage of eye care professionals and ophthalmologists in these areas will likely negatively impact the market growth. The number of ophthalmologists in developing Asian countries is low, which hampers eye care delivery. Cataracts, diabetic retinopathy, glaucoma, and other critical eye diseases are highly prevalent in APAC.

SEGMENTATION INSIGHTS

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INSIGHTS BY PRODUCT TYPE

The global ophthalmoscopes market by product type is segmented into direct and indirect ophthalmoscopes. The direct ophthalmoscope segment dominates and has the largest market share. Direct ophthalmoscope is a widely used eye instrument across every eye care facility. Due to their portability, magnification power, fundus and pupil evaluation, and fluorescence staining, they are more popular. A direct ophthalmoscope is a handheld device used to inspect the fundus or back of the eye. Medical professionals and physicians majorly use it. A direct ophthalmoscope can develop upright, unreversed, and around 15 times magnified images of the fundus of the eye. Furthermore, this device is commonly preferred among medical students and physicians for fundus examinations. With the growing number of medical students with eye care specialization and a growing number of hospitals and clinics, the demand for direct ophthalmoscopes is rising among medical students and physicians.

By Product Type

- Direct Ophthalmoscopes
- Indirect Ophthalmoscopes

INSIGHTS BY INDICATION

The global ophthalmoscopes market by indication is categorized into glaucoma, diabetic retinopathy (DR), age-related macular degeneration (AMD), retinal detachment, and other indications. The age-related macular degeneration (AMD) segment shows significant growth, with the fastest-growing CAGR of 6.17% during the forecast period. Increasing age is a major risk factor for AMD development. Early-stage AMD can be treated and prevented through eye examinations. Eyesight could be saved if AMD is diagnosed early. Ophthalmoscopy is one of the widely performed eye exams in AMD diagnosis. The growing aging and geriatric population led to millions of eye exams annually, thus resulting in segmental growth.

By Indication

- Glaucoma
- Diabetic Retinopathy (DR)
- Age-related Macular Degeneration (AMD)
- Retinal Detachment
- Other Indications

INSIGHTS BY END-USER

Based on the end-user, the eye clinics segment accounted for the largest share of the global ophthalmoscopes market. Eye clinics are major revenue contributors to the global ophthalmoscopes market. The segment's growth is attributed to the growing potential patient population and their associated demand for eye care services. Eye clinics are the primary point of contact for eye care and management. The rising number of ophthalmologists and their independent eye clinics creates the highest demand for ophthalmoscopes. The cost of care in eye clinics is comparatively lower than in hospitals. It is a major factor in attracting more patients to eye clinics. The increasing volume of eye exams in clinics led to an increase in demand for ophthalmoscopy. Direct ophthalmoscopes are a major choice in eye clinics in developing countries due to their affordable price. On the other hand, the demand for indirect ophthalmoscopes is growing slowly in eye clinics in developing countries.

By End-Users

- Eye Clinics
- Hospitals
- Other End-user

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GEOGRAPHICAL ANALYSIS

North America accounted for 38% of the global ophthalmoscopes market share. North America is the leading market for Ophthalmoscopes. The growing awareness about eye health and associated preventive measures in North America contributes to the high demand for eye examinations and equipment. The US dominates the region due to the significant burden of eye diseases and attention towards preventive eye care, the growing aging population with eye conditions and associated volume of eye examinations, high screen time, and growing expenditure on eye health. Major factors contributing to the growth of the market in this region include the burden of glaucoma, diabetic retinopathy, cataracts, and age-related macular degeneration (AMD).

By Geography

- North America
 - o□ US
 - o□ Canada
- Europe
 - o□ Germany
 - o□ France
 - o□ UK
 - o□ Italy
 - o□ Spain
- APAC
 - o□ China
 - o□ Japan
 - o□ India
 - o□ Australia
 - o□ South Korea
- Latin America
 - o□ Brazil
 - o□ Mexico
 - o□ Argentina
- Middle East & Africa
 - o□ Turkey
 - o□ Saudi Arabia
 - o□ South Africa

COMPETITIVE ANALYSIS

The global ophthalmoscopes market report consists of exclusive data on 23 vendors. Major players dominate the market. However, there are moderate growth opportunities for new entrants. Baxter, Halma plc, HEINE Optotechnik, IRIDEX Corporation, Rudolf Riester GMBH, Nidek CO., LTD, and Zumax Medical Co. Ltd. are some of the leading companies dominating the ophthalmoscopes market. These vendors continuously develop advanced solutions and are expected to dominate the market with continuous engagement. Most leading players are focusing on implementing various strategies, such as marketing and promotional activities, product launches, increased R&D investment, and strengthening their networks and market penetration to enhance their share and presence in the market.

Key Vendors

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- Baxter
- Halma plc
- HEINE Optotechnik
- IRIDEX Corporation
- Rudolf Riester GMBH
- Nidek CO., LTD
- Zumax Medical Co. Ltd.

Other Prominent Vendors

- Lumibird (Ellex)
- Albert Waeschle
- American Diagnostic Corporation
- Invotek Excel
- NEITZ INSTRUMENTS
- Suzhou Kangjie Medical
- Topcon Corporation
- Lumenis
- Oscar Boscarol S.r.l.
- 66 Vision Tech
- Zhejiang Honsun Medical Technologies Co. Ltd,
- Naugra
- Luxamed
- Hongdee Ophthalmic Equipment
- New Med Instruments
- Heidelberg Engineering

KEY QUESTIONS ANSWERED:

- 1.□What is the market size and expected growth of the ophthalmoscopes market in the global market?
- 2.□What are the factors driving the growth of the global ophthalmoscopes market?
- 3.□Which region will have the highest growth in the global ophthalmoscopes market?
- 4.□Who are the major players in the global ophthalmoscopes market?

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