

## **Fundus Camera - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

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### **Report description:**

Fundus Camera Market Analysis

The Fundus Camera Market size is estimated at USD 486.97 million in 2025, and is expected to reach USD 641.47 million by 2030, at a CAGR of 5.67% during the forecast period (2025-2030).

Demand strengthens as artificial-intelligence algorithms move from pilot to routine use, with FDA-cleared platforms such as IDx-DR and EyeArt showing more than 96% sensitivity for diabetic-retinopathy detection. Mandatory screening programs, improved reimbursement for tele-ophthalmology, and CMS guidance that recognizes AI-interpreted fundus photography as medically necessary are expanding adoption. Product preferences continue to favor non-mydratic systems that integrate smoothly with electronic health records, yet hybrid and ultra-widefield devices are growing fastest because they capture up to 200 degrees of retinal surface. Portable hand-held cameras dominate modality demand, while combination platforms that fuse OCT and fundus photography gain momentum for comprehensive retinal assessment. Regionally, North America leads on market share, but Asia-Pacific posts the highest growth as diabetes prevalence rises and governments invest in community eye-care delivery.

Global Fundus Camera Market Trends and Insights

Accelerating Diabetic-Retinopathy Screening Mandates

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Many countries now require annual retinal exams for people with diabetes, and U.S. Medicare policies deem AI-interpreted fundus images medically necessary. These rules spur bulk purchases of cameras that produce AI-ready images and support telemedicine workflows. More than 4.1 million U.S. adults live with diabetic retinopathy, and systematic screening using fundus cameras prevents avoidable vision loss while lowering long-term care costs.

#### Rapid Adoption of AI-Embedded Imaging Workflows

FDA-cleared AI platforms such as IDx-DR deliver ? 96% sensitivity and ? 93% specificity, producing results within three minutes of capture. Optos, Nikon and Google have co-developed ultra-widefield AI tools that detect macular edema alongside retinopathy. Clinicians value the speed, consistency and reduced dependence on specialist readers, making AI-enabled cameras an essential element of expanded screening programs.

#### High Capex Versus OCT-Combo Systems

Combination imaging platforms command premium pricing due to their sophisticated technology integration, with systems often exceeding USD 100,000 compared to standalone fundus cameras priced below USD 50,000. This cost differential becomes particularly challenging for specialty eye clinics and ambulatory surgical centers operating under tight budget constraints while seeking to offer comprehensive diagnostic capabilities. The economic pressure intensifies when considering ongoing maintenance costs, software licensing fees, and staff training requirements associated with complex imaging systems.

Other drivers and restraints analyzed in the detailed report include:

Prevalence Spike of Age-Related Macular Degeneration / Tele-Ophthalmology Reimbursement Parity / Shortage of Trained Ophthalmic Technicians in LMICs /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Non-mydratiac systems secured 48.17% share of the fundus camera market in 2024 thanks to painless, drop-free imaging that accelerates patient throughput. Their seamless EHR integration enables instant upload for AI review, supporting large screening programs. Zeiss's CIRRUS 6000 adds network-grade cybersecurity and the largest OCT reference database in the United States. Hybrid and wide-field devices are slated to expand at a 6.50% CAGR, capturing up to 200 degrees of retina in a single shot and doubling lesion detection rates.

Demand for ultra-widefield cameras grows in diabetic and peripheral-retinal disease management. Mydratiac cameras remain essential when maximum image clarity or research-grade color depth is required. Pediatric-specific cameras fill niche needs with tailored optics. The product palette thus enables providers to match imaging depth with clinical complexity while balancing capital budgets.

Hand-held devices held 53.84% of the fundus camera market share in 2024 as portability opened doors to rural clinics, emergency rooms and drive-through screenings. Smartphone-coupled models achieve comparable accuracy with lower acquisition cost. Combination platforms that merge OCT and fundus imaging will grow at a 7.25% CAGR, responding to clinics that want comprehensive data in one sitting.

Stationary table-top cameras remain common in high-volume centers that prioritize image consistency over mobility. Portable OCT units such as SightSync extend point-of-care diagnostics to community programs. User-friendly designs reduce technician

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training needs, supporting wider deployment across general-practice offices.

The Fundus Camera Market is Segmented by Product Type (Mydriatic Fundus Cameras, Non-Mydriatic Fundus Cameras, Hybrid Fundus Cameras, and More), Modality (Hand-Held Devices, and More), Application (Diabetic Retinopathy, Glaucoma, and More), End-User (Hospitals, Specialty & Eye Clinics, and More), and Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

#### Geography Analysis

North America maintains market leadership with 41.74% share in 2024, supported by robust healthcare infrastructure, favorable reimbursement policies, and early adoption of AI-enabled diagnostic systems. The region benefits from comprehensive diabetic retinopathy screening programs and established telemedicine frameworks that facilitate fundus camera integration across diverse clinical settings. Major healthcare systems invest in advanced combination platforms that provide multimodal imaging capabilities, while rural areas increasingly adopt portable solutions to address geographic access barriers.

Asia-Pacific demonstrates the highest growth trajectory at 6.86% CAGR through 2030, driven by expanding healthcare access initiatives, rising diabetes prevalence, and government-backed screening programs across China, India, and Southeast Asian countries. The region's growth reflects substantial investments in healthcare infrastructure and increasing recognition of preventive eye care's economic benefits. Rural community-based eye care models emphasize portable fundus cameras and smartphone-based imaging solutions to overcome geographic and economic barriers that traditionally limited specialist access. Europe maintains steady growth supported by ESG-driven procurement policies that favor energy-efficient handheld devices and comprehensive regulatory frameworks that ensure device quality and safety standards.

#### List of Companies Covered in this Report:

Canon / Carl Zeiss / Topcon Healthcare / Nidek / Kowa / Optos / Revenio Group / Heidelberg Engineering / Optomed Oy / Visionix / Epipole / Phelcom Technologies / Forus Health Pvt Ltd. / Visunex Medical Systems / Clarity Medical Systems / Phoenix Technology Group / HEINE Optotechnik / Nikon Corp. / Beye / EssilorLuxottica /

#### Additional Benefits:

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

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