

## **Global Retinal Imaging Devices Market Forecast 2026-2034**

Market Report | 2026-02-10 | 342 pages | Inkwood Research

### **AVAILABLE LICENSES:**

- Single User Price \$2900.00
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### **Report description:**

#### **KEY FINDINGS**

The global retinal imaging devices market size is valued at \$4,344.61 million as of 2026 and is expected to reach \$7,934.97 million by 2034, growing at a CAGR of 7.82% during the forecast period 2026-2034. The base year considered for the study is 2025, and the forecast period is between 2026 and 2034. The market study has also analyzed the crisis impact on the retinal imaging devices market qualitatively as well as quantitatively.

Retinal imaging devices represent sophisticated diagnostic equipment used to capture detailed images of the retina's internal structures. These advanced ophthalmic imaging devices include optical coherence tomography systems, fundus cameras, and ultra-widefield retinal imaging technology. Healthcare providers utilize these instruments to diagnose and monitor sight-threatening conditions such as diabetic retinopathy, age-related macular degeneration, and glaucoma.

Moreover, technological innovations have transformed retinal screening from simple photography to complex three-dimensional visualization. Modern retinal imaging equipment incorporates artificial intelligence algorithms that enhance diagnostic accuracy. Consequently, these devices have become indispensable tools in ophthalmology clinics, hospitals, and diagnostic centers worldwide.

The global retinal imaging devices market experiences robust growth driven by escalating diabetes prevalence and aging demographics. According to the CDC, approximately 9.6 million Americans lived with diabetic retinopathy in 2021, representing 26.4% of those with diabetes. Furthermore, projections indicate this number will reach 14.7 million by 2050. Similarly, age-related macular degeneration affects millions globally, creating sustained demand for retinal diagnostic imaging equipment. Additionally, government-sponsored screening initiatives and technological breakthroughs in OCT angiography systems continue to accelerate market expansion across developed and emerging economies.

#### **MARKET INSIGHTS**

Key enablers of the global retinal imaging devices market growth:

- Increasing global prevalence of diabetes and an aging population is expanding the at-risk patient base
- Government and NGO led eye screening programs are boosting demand for retinal diagnostic tools
- Technological advances in OCT, AI-assisted diagnostics, and image quality are improving clinical outcomes
- Rising awareness among physicians and patients about early detection of retinal disorders is supporting market expansion
- o□ Rising awareness among physicians and patients about early detection of retinal disorders significantly influences market dynamics. Educational campaigns by organizations like the International Agency for the Prevention of Blindness emphasize that

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approximately 5% of global blindness cases stem from age-related macular degeneration. Meanwhile, healthcare professionals increasingly recognize the value of routine retinal screening for diabetic patients.

o Teleophthalmology programs leverage portable retinal imaging devices to reach underserved populations. Consequently, early detection initiatives reduce treatment costs and prevent irreversible vision loss. Patient advocacy groups also promote regular eye examinations, particularly for high-risk demographics. This heightened awareness drives consistent demand for ophthalmology imaging devices across all care settings.

Key growth restraining factors of the global retinal imaging devices market:

- High capital cost of advanced retinal imaging systems limits adoption in small clinics
- Lack of trained ophthalmologists and technicians constrains effective utilization in low-income regions
- Reimbursement variability across countries affects purchase decisions by healthcare providers
- Regulatory approval and device certification requirements can delay product commercialization

o Regulatory approval and device certification requirements create substantial barriers for market entry and product launches. Manufacturers must navigate complex approval processes across multiple jurisdictions before commercializing new retinal imaging cameras or OCT systems. For instance, the U.S. FDA's 510(k) clearance process requires extensive clinical validation and safety documentation.

o Similarly, European CE marking and other regional certifications demand rigorous testing protocols. These regulatory pathways typically span 12-24 months, delaying revenue generation.

o Moreover, post-market surveillance obligations and periodic recertification add ongoing compliance costs. Startups and smaller manufacturers face particular challenges in meeting these stringent requirements. Nevertheless, regulatory standards ensure device safety and efficacy, protecting patient welfare despite commercial implications.

Global Retinal Imaging Devices Industry | Top Trends

- AI-powered retinal diagnostic imaging systems now achieve expert-level accuracy in detecting diabetic retinopathy and other sight-threatening conditions. According to research published in JAMA Ophthalmology, foundation models like RETFound demonstrate superior performance in image recognition tasks compared to traditional systems. The FDA has approved algorithms such as IDx-DR, EyeArt, and AEYE Diagnostic Screening for automated diabetic retinopathy detection. Furthermore, deep learning systems can predict disease progression up to five years in advance, enabling personalized screening intervals. Healthcare providers increasingly deploy AI-assisted diagnostics to address ophthalmologist shortages and expand screening capacity in primary care settings.

- Non-mydriatic fundus cameras eliminate the need for pupil dilation, significantly enhancing patient comfort and examination efficiency. In January 2023, Topcon released the NW500 nonmydriatic retinal camera in the United States, providing high-quality imaging without dilation drops. These patient-centric devices reduce appointment duration and eliminate the temporary vision impairment associated with traditional mydriatic photography. Additionally, non-mydriatic retinal imaging systems enable same-day screening in busy clinical environments. Patients appreciate avoiding the inconvenience of dilated pupils, which typically affects vision for several hours. Consequently, this technological advancement removes a significant barrier to regular diabetic eye screenings, improving adherence rates.

- Healthcare systems deploy portable retinal imaging devices equipped with wireless connectivity to serve underserved rural populations. According to recent implementations, approximately 198 AI-equipped cameras have been deployed across five health systems since 2020, covering roughly 151,000 diabetic patients. These connected systems enable primary care physicians to conduct retinal screenings while ophthalmologists review images remotely. Moreover, tele-ophthalmology reduces patient travel burdens and improves screening efficiency. Reimbursement policies increasingly support remote diagnostic services, further accelerating the adoption of networked ophthalmic imaging devices.

- Handheld retinal imaging devices represent one of the fastest-growing segments within the retinal imaging equipment market. These portable systems enable bedside examinations in hospital wards and mobile screening programs in community settings. Topcon's SIGNAL handheld retinal camera exemplifies this trend, operating for five continuous hours and featuring low-intensity lighting suitable for pediatric examinations. Furthermore, reduced device costs, with some systems priced as low as \$5,000, democratize access to retinal screening technology. Portable designs transform ophthalmology imaging devices from fixed installations into versatile diagnostic tools deployable anywhere.

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## SEGMENTATION ANALYSIS

### Market Segmentation - Device, Application, and Indication -

#### Market by Device:

##### -□ Optical Coherence Tomography (OCT) Devices

o□ Optical coherence tomography devices utilize low-coherence light waves to generate high-resolution cross-sectional images of retinal layers with micron-level precision. These sophisticated ophthalmic diagnostic imaging systems dominate the retinal imaging devices market, capturing the largest revenue share.

o□ Moreover, OCT technology encompasses spectral-domain OCT (SD-OCT), swept-source OCT (SS-OCT), and handheld OCT variants, each offering distinct advantages. SD-OCT provides rapid scanning speeds up to 100,000 A-scans per second, while SS-OCT delivers superior tissue penetration using 1050nm wavelengths. Additionally, OCT angiography systems visualize retinal vasculature without contrast dye injection.

o□ This sub-segment supports overall market growth by establishing OCT as the gold standard for retinal disease diagnosis and treatment monitoring. Hospitals, especially tertiary and quaternary care facilities, require sophisticated imaging technology for advanced diagnostics. Furthermore, declining equipment costs and expanding clinical applications beyond ophthalmology, including cardiology and dermatology, broaden the addressable market significantly.

##### ?□ Spectral-Domain OCT (SD-OCT)

##### ?□ Swept-Source OCT (SS-OCT)

##### ?□ Handheld OCT

##### -□ Fluorescein Angiography Devices

##### -□ Fundus Cameras

##### o□ Mydriatic Fundus Cameras

##### o□ Non-Mydriatic Fundus Cameras

##### o□ Hybrid Fundus Cameras

##### o□ ROP fundus cameras

##### -□ Retinal Ultrasound Imaging Systems

##### o□ Ophthalmic A-Scan Ultrasound

##### o□ Ophthalmic B-Scan Ultrasound

##### o□ Ophthalmic Ultrasound Biomicroscopes

##### o□ Ophthalmic Pachymeters

##### -□ Ultra Widefield Retinal Imaging Devices

##### -□ Widefield Retinal Imaging Devices

##### -□ Other Devices

#### Market by Application:

##### -□ Disease Diagnosis

##### -□ Treatment Monitoring

##### -□ Research and Development

#### Market by Indication:

##### -□ Diabetic Retinopathy

##### -□ Age-Related Macular Degeneration (AMD)

##### -□ Glaucoma

##### -□ Retinal Vein Occlusion

##### -□ Other Indications

## REGIONAL ANALYSIS

### Geographical Study based on Four Major Regions:

##### -□ North America: The United States and Canada

##### -□ Europe: The United Kingdom, Germany, France, Italy, Spain, Poland, Belgium, and Rest of Europe

##### -□ Asia-Pacific: China, India, Japan, Australia & New Zealand, South Korea, Thailand, Indonesia, Vietnam, and Rest of Asia-Pacific

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o China represents a rapidly expanding market for retinal imaging devices, driven by escalating diabetes prevalence, healthcare infrastructure modernization, and government emphasis on preventive eye care. The country's aging population faces mounting risks of diabetic retinopathy and age-related macular degeneration, creating substantial demand for ophthalmic diagnostic equipment.

o Urban hospitals increasingly adopt advanced optical coherence tomography systems and AI-powered fundus cameras to manage growing patient volumes. Meanwhile, government initiatives promote telemedicine and mobile screening programs to extend retinal diagnostic capabilities into rural areas. However, challenges persist regarding ophthalmologist distribution and reimbursement standardization across provinces.

o Nevertheless, Chinese manufacturers like Topcon's regional partners contribute to market expansion by offering cost-effective alternatives to Western-branded retinal imaging equipment. Looking forward, China's "Healthy China 2030" initiative prioritizes chronic disease management, positioning the nation as a critical growth engine for the global retinal imaging devices market through 2034 and beyond.

- Rest of World: Latin America, the Middle East & Africa

Our market research reports offer an in-depth analysis of individual country-level market size and growth statistics. We cover the segmentation analysis, key growth factors, and macro-economic trends within the retinal imaging devices market, providing detailed insights into -

- South Korea Retinal Imaging Devices Market

- India Retinal Imaging Devices Market

- France Retinal Imaging Devices Market

The major players in the global retinal imaging devices market are:

- Canon Inc

- Carl Zeiss Meditec AG

- Escalon Medical Corp

- Forus Health Pvt Ltd

- Heidelberg Engineering GmbH

Key strategies adopted by some of these companies:

In May 2024, Carl Zeiss Meditec AG announced enhancements to its CIRRUS 6000 OCT system, incorporating the largest reference database in the U.S. market alongside newly enhanced cybersecurity features. This advancement enables highly efficient, data-driven workflows for ophthalmologists while ensuring robust patient data protection in clinical environments.

Carl Zeiss Meditec AG, in 2024, acquired 100% ownership of the Dutch Ophthalmic Research Center (D.O.R.C.) from investment firm Eurazeo SE. This acquisition strengthens Zeiss's position in vitreoretinal surgery and expands its comprehensive ophthalmic device portfolio, enabling integrated solutions across diagnostic and therapeutic ophthalmology segments.

Heidelberg Engineering Inc received FDA approval in July 2024 for its Spectralis OCT angiography (OCTA) module with integrated SHIFT technology. This regulatory milestone enables U.S. clinicians to access advanced OCTA capabilities for improved visualization of retinal vasculature without invasive contrast dye procedures.

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Frequently Asked Questions (FAQs):

Q1: What are the primary factors driving growth in the global retinal imaging devices market?

The market experiences robust expansion due to rising diabetes and aging populations, which significantly increase the at-risk patient base for sight-threatening retinal conditions. Additionally, technological innovations in artificial intelligence, OCT angiography, and portable device designs enhance diagnostic capabilities while government-sponsored screening programs expand access to retinal diagnostic tools globally.

Q2: Which device type dominates the retinal imaging equipment market?

Optical coherence tomography (OCT) devices command the largest market share among retinal imaging systems due to their superior resolution and ability to visualize deeper retinal layers with exceptional precision. Hospitals and specialty clinics prefer OCT technology for diagnosing diabetic retinopathy, age-related macular degeneration, and glaucoma, establishing it as the clinical gold standard.

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Q3: How is artificial intelligence transforming diabetic retinopathy screening?

AI-powered retinal imaging analysis achieves expert-level accuracy in detecting diabetic retinopathy while addressing ophthalmologist workforce shortages. The FDA has approved multiple autonomous AI systems, including IDx-DR and EyeArt, enabling primary care physicians to conduct screenings with remote specialist oversight through teleophthalmology platforms, significantly improving screening accessibility and efficiency.

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4. FORUS HEALTH PVT LTD
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