

India Retinal Imaging Devices Market Forecast 2026-2034

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Report description:

KEY FINDINGS

The India retinal imaging devices market size is valued at \$184.51 million as of 2026 and is expected to reach \$418.89 million by 2034, progressing with a CAGR of 10.79% during the forecast years, 2026-2034.

MARKET INSIGHTS

India represents one of the fastest-growing markets for retinal imaging devices globally, driven by an enormous diabetic population, expanding private healthcare infrastructure, and increasing government focus on preventable blindness initiatives. The nation harbors approximately one-fifth of the world's adults with diabetes, creating unprecedented demand for systematic retinal screening programs across urban and rural healthcare facilities.

According to research published in The Lancet Global Health, the estimated national prevalence of diabetic retinopathy stands at 12.5% among people with diabetes, with vision-threatening diabetic retinopathy affecting 4.0% of this population, translating to approximately 3 million individuals aged 40 years and older requiring urgent medical attention. Moreover, India's burgeoning middle class increasingly seeks quality eye care services, supporting the expansion of specialized ophthalmology chains and diagnostic centers throughout metropolitan areas and tier-II cities.

The market benefits from growing domestic manufacturing capabilities, with Indian companies developing cost-effective retinal imaging solutions specifically adapted to local infrastructure constraints and budget limitations. Additionally, government initiatives under the National Programme for Control of Blindness and Visual Impairment prioritize diabetic retinopathy screening, allocating resources for equipment procurement and workforce training throughout public health facilities.

Furthermore, teleophthalmology programs gain traction as viable solutions for extending retinal screening access to underserved rural populations, where traditional eye care infrastructure remains inadequate despite high disease prevalence. Consequently, manufacturers offering robust, low-maintenance retinal imaging devices suitable for high-volume settings at competitive price points capture substantial market share throughout India's diverse and rapidly evolving healthcare landscape.

SEGMENTATION ANALYSIS

The India retinal imaging devices market is segmented into device, application, and indication. The device segment is further categorized into optical coherence tomography (OCT) devices, fluorescein angiography devices, fundus cameras, retinal ultrasound imaging systems, ultra widefield retinal imaging devices, widefield retinal imaging devices, and other devices. Fundus cameras, under the device segment, are essential within India's retinal imaging market due to their optimal balance between clinical utility, affordability, and operational simplicity suited to diverse healthcare settings. Healthcare providers

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throughout India deploy non-mydratic fundus cameras extensively for diabetic retinopathy screening programs, eliminating the need for pupil dilation that would otherwise require additional personnel, time, and patient cooperation.

These portable retinal photography systems enable rapid image capture in primary care clinics, diabetes centers, mobile screening camps, and community health facilities lacking specialized ophthalmology infrastructure. Moreover, fundus cameras require minimal training for operation compared to advanced optical coherence tomography systems, addressing India's shortage of specialized ophthalmic technicians, particularly acute in rural and semi-urban areas.

The segment benefits from the growing availability of affordable fundus imaging equipment from domestic manufacturers like Forus Health, which develops solutions specifically designed for Indian market conditions, including variable power supply, hot and humid environments, and high patient volumes. Additionally, fundus cameras integrate seamlessly with emerging artificial intelligence-powered diabetic retinopathy detection algorithms, enabling automated preliminary screening that reduces ophthalmologist workload while maintaining diagnostic accuracy.

Healthcare facilities appreciate the technology's cost-effectiveness, with entry-level non-mydratic fundus cameras priced substantially lower than spectral-domain OCT systems, making them accessible to smaller clinics and government primary health centers operating under tight budget constraints. Furthermore, fundus photography generates permanent image records suitable for remote grading through teleophthalmology networks, connecting rural screening sites with urban retina specialists who provide expert consultation without requiring patient travel.

Private eye hospital chains like Aravind Eye Care System and Dr. Agarwal's Eye Hospital deploy fundus cameras across their multi-location networks, standardizing diabetic retinopathy screening protocols while building comprehensive databases for research and quality monitoring. The segment also witnesses increasing adoption of hybrid fundus cameras capable of both mydratic and non-mydratic imaging modes, providing flexibility for comprehensive examinations when pupil dilation becomes clinically necessary.

Consequently, fundus cameras remain a primary retinal diagnostic tool throughout India's healthcare system, balancing technological sophistication with practical considerations of cost, ease of use, and suitability for mass screening applications essential to addressing the nation's enormous diabetic eye disease burden.

COMPETITIVE INSIGHTS

Some of the top players operating in the India retinal imaging devices market include Canon Inc, Carl Zeiss Meditec AG, Forus Health Pvt Ltd, Heidelberg Engineering GmbH, Kowa Company Ltd, Nidek Co Ltd, Optos PLC, Topcon Corporation, etc.

Forus Health Pvt Ltd stands as India's leading domestic manufacturer of ophthalmic diagnostic equipment, headquartered in Bengaluru, Karnataka, with strong pan-India presence and expanding international operations throughout Asia, Africa, and Latin America. The company specializes in affordable, robust retinal imaging solutions specifically engineered for emerging market conditions, particularly its flagship 3nethra series of portable fundus cameras and screening devices.

Moreover, Forus Health's product portfolio encompasses comprehensive retinal diagnostic platforms, including the 3nethra classic non-mydratic fundus camera offering true color imaging without pupil dilation, the 3nethra neo compact imaging system designed for mobile screening programs, handheld retinal cameras for bedside examinations, and integrated artificial intelligence software for automated diabetic retinopathy detection.

Additionally, Forus Health pioneered India's first indigenously developed swept-source optical coherence tomography device, demonstrating technological capabilities matching international competitors while maintaining price points accessible to Indian healthcare providers. The company serves diverse customer segments throughout India, including government hospitals participating in national blindness control programs, private eye hospital chains like Aravind Eye Care and Sankara Nethralaya, diabetes care centers, optical retail outlets offering comprehensive eye examinations, and corporate wellness programs conducting employee health screenings.

COMPANY PROFILES

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3. □ FORUS HEALTH PVT LTD
4. □ HEIDELBERG ENGINEERING GMBH
5. □ KOWA COMPANY LTD

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6. NIDEK CO LTD
7. OPTOS PLC
8. TOPCON CORPORATION

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