



# Ophthalmic Drugs – Data, Analysis and Forecasts to 2024

*Pharmaceutical, Commercial & Strategic Developments in the Global Ophthalmology Market  
to 2024*



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## 1.1. Chapter Breakdown

**Chapter 1** is an executive summary.

**Chapter 2** introduces ophthalmological disorders, types, symptoms and treatments available.

**Chapter 3** analyses the global ophthalmology pharmaceutical drug market in 2013-14 and forecasts market growth for 2014-2024.

**Chapter 4** analyses the anti-glaucoma drugs market in 2013-14 and forecasts market growth for 2014-2024.

**Chapter 5** analyses the ophthalmic anti-allergy/inflammatory/infective drugs market in 2013-14 and forecasts market growth for 2014-2024.

**Chapter 6** analyses the retinal disorders drugs market in 2013-14 and forecasts market growth for 2014-2024.

**Chapter 7** analyses the dry eye drugs market in 2013-14 and forecasts market growth for 2014-2024.

**Chapter 8** analyses the ophthalmic pharmaceutical drugs market in major countries and forecasts market growth for 2014-2024.

**Chapter 9** analyses the ophthalmic pharmaceutical drugs R&D pipeline.

**Chapter 10** discusses the leading companies operating in the ophthalmic pharmaceutical drugs market, looking at those with currently marketed therapies, as well as those with promising R&D pipeline products.

**Chapter 11** contains two exclusive interviews with experts in the field of Ophthalmology.

## 1.3 Research and Analysis Methods

This report harnesses primary and secondary research. This study provides world market forecasts and analyses of market drivers and restraints, including forecast analyses and principal developments. We also provide geographical breakdowns of the world market. Our analyses are original, benefiting from our consulting experts in industry, academia, medical practice and other roles. Our analysts also refer to industry data, company reports, news and trade articles, public health data, policy documents and other analysts' views. We conduct primary research by telephone interviews, correspondence or face-to-face discussions.

Our report contains quantitative and qualitative analytical content, covering the present and the future of healthcare markets. Although our report is a market-centered, we include medical and technical information. We include analyses of under-met market needs from the present looking forward. Our revenue forecasting assesses the magnitude and effects of driving and restraining forces, to determine annual growth and total sales across a series of years. We base our forecasts upon knowledge of financial performance, disease prevalence, product/technology characteristics and other factors, as well as data and opinions gathered from our primary and secondary research.

Products and vendors listed in this report are provided for reference and constitute neither a complete list, necessarily, nor an endorsement of any specific vendor or product.

Revenue figures in this report are for the respective world market, or market segment, unless stated otherwise. Tabulated revenue values for later years (2014 onwards) are whole-year predictions (January to December). Because of rounding, values may not add up exactly. Compound annual growth rate (CAGR) values are for 2014-2024. In this report, all revenue figures and market values are expressed in USD.

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### 4.3 Market Size & Forecast, Global Glaucoma Market

Global sales of Anti-Glaucoma drugs are dominated by Alcon, Allergan and Pfizer, who combined account for more than XX% of the market. Xalatan, Lumigan, Travatan, AlphaganP, Combigan, Cosopt, Azopt are the major Glaucoma drugs.

Pre 2011, Xalatan dominated the Anti-Glaucoma drug market, claiming revenue of \$1.8bn in 2010, however after its patent expiry in the US and Europe, Xalatan sales declined by more than 50% and reached \$XXm by 2012. In 2012 Xalatan, Lumigan, Travatan were the top Anti-Glaucoma drugs, each accounting for more than \$XXm in sales.

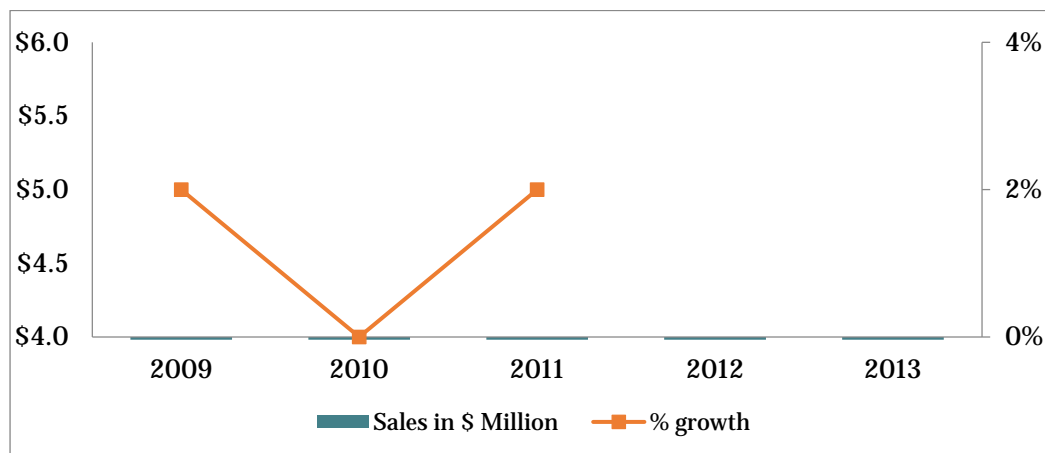
Since 2011, the market has seen a marginal decline year on year due to the patent expiry of major drugs such as Cosopt, Xalatan, Lumigan, with the entry of generic versions of the same drugs in the US and the EU markets.

Table 4.3.1 Global Anti-Glaucoma Market 2009-2013 (\$/bn)

	2009	2010	2011	2012	2013
\$ /bn	xx	xx	xx	xx	xx
AGR	xx%	xx%	xx%	xx%	xx%

GMR Data 2014

Figure 4.3.1 Global Anti-Glaucoma Market 2009-2013 (\$/bn)



GMR Data 2014



The global anti-glaucoma market has been in constant decline since 2009, due to the impact of generic drugs in the market. A major factor in this reduction in overall revenue was the introduction of the generic Latanoprost after the patent expiry of Xalatan/Xalacom in the US, 2011 and EU, 2012. GMR Data forecast that the global anti-glaucoma market will decline

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