

Global Retinal Biologics Market is Projected to Reach USD 49.5 Billion by 2032, Growing at a CAGR of 9.2% | SNS

Growing Prevalence of Retinal Diseases and Innovations in Biologics Drive Market Expansion

AUSTIN, TX, UNITED STATES, December 9, 2024 /EINPresswire.com/ --

According to SNS Insider, The [Retinal Biologics Market](#) size was estimated at USD 22.5 billion in 2023 and is expected to reach USD 49.5 billion by 2032 at a CAGR of 9.2% during the forecast period of 2024-2032.



Increasing demand for novel therapies to address age-related macular degeneration, diabetic retinopathy, and retinal vein occlusion is expected to support the robust growth of the Retinal Biologics Market. Growth in this market is due to the world's aging population, increased incidence of diabetes, and biological treatment innovation. The World Health Organization reports that the population of individuals aged 65 and older is expected to double to over 1.5 billion by 2050. The incidence of AMD has therefore risen significantly, with 8.7% of people aged 50 and older now affected. Diabetic retinopathy, which affects 35% of people living with diabetes, is also becoming more common. The market is addressing these issues with advanced therapies, including anti-VEGF drugs and novel gene and cell-based therapies, improving access and outcomes. Recent advances, for example, aflibercept and brolucizumab have improved the management of retinal disease by providing better control of retinal edema as well as better visual acuities. Gene therapy candidates, such as RGX-314, have the potential to change treatment paradigms by reducing injection frequencies through sustained protein production. Citing the industry's focus on innovation, Regeneron won approval from the FDA in 2024 for EYLEA 8 mg, a higher dose of anti-VEGF therapy to minimize treatment burdens and improve patient adherence.

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Key Retinal Biologics Market Players:

Regeneron Pharmaceuticals, Inc. (EYLEA, Dupixent)

Novartis International AG (Lucentis, Beovu)

Roche Holding AG (Avastin, Susvimo)

Bausch + Lomb (Visudyne, Lumevoq)

Allergan plc (Ozurdex, Iluvien)

Pfizer Inc. (Ilaris, Xeljanz)

Boehringer Ingelheim (Vargatef, Ofev)

AbbVie Inc. (Humira, Rinvoq)

Sanofi S.A. (Lantus, Dupixent)

Bristol-Myers Squibb Company (Opdivo, Yervoy)

Johnson & Johnson (Stelara, Tremfya)

Amgen Inc. (Erenumab, Enbrel)

Eli Lilly and Company (Taltz, Cyramza)

AstraZeneca plc (Farxiga, Tagrisso)

Mylan N.V. (EpiPen, Xyrem)

Gilead Sciences, Inc. (Biktarvy, Veklury)

Merck & Co., Inc. (Keytruda, Januvia)

Teva Pharmaceutical Industries Ltd. (Ajovy, Copaxone)

Santen Pharmaceutical Co., Ltd. (Ikervis, Yasmin)

Shionogi & Co., Ltd. (Cresemba, Factive)

Others

Market Analysis: Awareness and Screening Programs Driving Growth

Increasing awareness of retinal diseases and regular screening programs are driving factors in the growth of the market. Public awareness programs and government-sponsored campaigns can facilitate early detection and timely intervention in cases of AMD and diabetic retinopathy. Regular eye exams promoted through public health campaigns can identify retinal disorders in their early stages, thereby ensuring timely and effective treatment.

For example, the availability of next-generation anti-VEGF therapies, such as EYLEA and Novartis' Beovu, has dramatically changed the face of patient care by providing more effective treatments with longer dosing intervals. These developments, combined with the efforts of awareness campaigns from the National Eye Institute (NEI) and increased funding for retinal research, have increased the accessibility and effectiveness of biological therapies. Overall, these advances ensure a greater scope of advanced treatments to cater to the increasing demand for retinal care.

Segment Analysis: Dominant Categories Driving Market Expansion

By Drug Class

The VEGF-A antagonists segment dominated the market with 65% of the market share in 2023.

Drugs such as ranibizumab and aflibercept have shown high efficacy in retinal diseases by inhibiting the protein VEGF-A, which is linked to abnormal growth and leakage of blood vessels in the retina. These therapies have proven successful in reducing retinal edema and improving visual acuity, which has made them widely accepted in clinical practice.

By Indication

The macular degeneration segment dominated the market with 35% of the market share in 2023, primarily due to the growing prevalence of AMD around the world. According to studies, by 2040, there will be 300 million people affected by AMD. The successful VEGF-A antagonists, with positive reimbursement policies, have further increased their market share in this segment.

By Distribution Channel

The hospital pharmacies segment dominated the market with a 52% market share in 2023, which indicates their importance in managing the specialized administration of retinal biologics. Intravitreal injections, which require precise administration by healthcare professionals, are mostly provided through hospital pharmacies. These pharmacies are integrated with ophthalmology departments to ensure seamless patient care, which further enhances their market leadership.

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Key Market Segments

By Drug Class

- TNF- α Inhibitor
- VEGF-A Antagonist

By Indication

- Macular Degeneration
- Diabetic Retinopathy
- Uveitis
- Others

By Distribution Channel

- Retail Pharmacies
- Hospital Pharmacies
- Online Pharmacies

Regional Insights: North America Leading the Charge

North America dominated the market, with 42% of the market share in 2023, driven by the presence of major industry players and ongoing advancements in retinal biologics. Companies in the region are actively engaging in strategic initiatives like product launches, acquisitions, and

partnerships to solidify their market position. In fact, in June 2020, Novartis got approval from the FDA regarding a label update to Beovu that may help the patient eliminate risks associated with retinal vasculitis and vascular occlusion. Similarly, the FDA approved the first macular disease biosimilar known as Byooviz, further diversifying treatment choices in the area.

Recent Developments in the Retinal Biologics Market

1. Regeneron Pharmaceuticals (2024): Regeneron secured FDA approval for EYLEA (aflibercept) 8 mg, a higher-dose anti-VEGF therapy designed to extend dosing intervals. This innovation aims to improve patient adherence and reduce treatment frequency, addressing a critical challenge in retinal care.
2. Roche Holding AG (2024): Roche continued advancing its retinal portfolio with the full roll-out of Susvimo, an implantable device that continually releases ranibizumab to treat wet age-related macular degeneration. This offers fewer injections, which makes patients more convenient and compliant.

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