Novel Drugs and Devices to Lower Intraocular Pressure, 2016 - 2026

Description: The Novel Drugs and Devices to Lower Intraocular Pressure, 2016 - 2026 report provides an extensive study of the emerging market of such novel drugs, devices and surgical procedures for the treatment of elevated IOP. The focus of this study is on the applications of these novel treatment options, both marketed and under development, and their likely mid to long term evolution. These treatment options claim to provide consistent benefits related to IOP lowering and are anticipated to gain widespread adoption in the foreseen future.

The report covers various aspects of this market; some of these are outlined below:

- A detailed assessment of the current market landscape of novel drugs and devices, key players involved, the status of development of various pipeline products and the target patient segments.
- Comprehensive profiles covering mechanism of action, clinical trial details and associated developments of Rho-associated protein kinase (ROCK) inhibitors, ROCK / norepinephrine transporter (NET) inhibitors and NO donating prostaglandins in late stage of development.
- Comprehensive profiles highlighting the IOP reduction approach, key performance drivers, safety and efficacy of novel surgical procedures that have been approved or are in advanced stages of development.
- Comparative analysis of MIGS devices based on various parameters such as drainage route, length of the implant, involvement of conjunctiva, type of procedure (ab interno or ab externo), procedure duration and ability of the device to treat 360 degrees.
- An informed view on the likely future evolution of such novel drugs, sustained release drug delivery devices and surgical procedures over the next decade. This includes sales forecasts of six novel drugs, including Rhopressa, Roclatan and Vesneo. Similarly, we have presented our view on the future market size of six drug delivery devices, including Bimatoprost SR, OTX-TP and punctal plug delivery system. We have also determined the likely future revenues for MIGS and non-MIGS surgical devices (BAGS, ABS, NIGP and NPGS).

To account for the uncertainties in the market, we have provided three market forecast scenarios that represent three different tracks of the market's evolution. Given the current unmet need for safer and more effective therapeutic options and the rich pipeline of novel drugs and devices, we expect this market to witness significant growth in the coming few years.

Our opinions and insights presented in this study were influenced by discussions conducted with several key players in this domain. The report features detailed transcripts of interviews held with Bob Butchofsky (Founder and CEO, Mati Therapeutics), Suzana Nahum Zilberberg (CEO, Bio-Light Life Sciences), Ronen Castro (CEO, IOPtima) and Donald Schwartz (CEO and President, Eye Sonix).

Chapter Outlines

Chapter 2 provides an executive summary and offers a high level view on where the market for IOP lowering novel drugs and devices is headed in the mid to long term.

Chapter 3 is a general introduction to IOP and the various diseases associated with elevated IOP. It contains detailed discussions on aqueous humor dynamics and the various factors responsible for an increase in IOP. The chapter also outlines the currently available treatment modalities for IOP related diseases and their shortcomings.

Chapter 4 includes information on novel drugs that are either already available or being evaluated in different stages of development for the treatment of IOP. In this chapter, we have presented a comprehensive pipeline of all such products that we identified during our research. It presents an analysis of the aforementioned pipeline based on a number of different parameters, including phase of development, mechanism of action, disease sub-type, route of administration and dosage schedule.

Chapter 5 presents information on the various types of novel devices (surgical and drug delivery devices) that are either already available in the market or being evaluated in different stages of development. Similar to the previous chapter, we have presented a comprehensive pipeline of all relevant devices that we came across during our research. The chapter provides an analysis of the pipeline based on the phase of development of the product, its purpose, the category of devices it belongs to and the approach / pathway it
employs for IOP reduction. In addition, we have added a separate section on drug delivery devices highlighting details such as the type of drug delivered and the nature of implant (biodegradable or non-biodegradable).

Chapter 6 provides detailed company profiles of the prominent players that are involved in investigating novel drugs for the treatment of elevated IOP. Each company profile includes a brief overview of the company, its financial information, key performance drivers, and its future outlook and strategy. In addition, the profiles cover details of late stage candidate therapies, such as Rho-associated protein kinase (ROCK) inhibitors, ROCK / norepinephrine transporter (NET) inhibitors and NO donating prostaglandins, which are being evaluated for the treatment of elevated IOP. These details include an overview of the product, its mechanism of action, collaborations / partnerships specific to the particular drug, key developmental events and the associated clinical trials landscape.

Chapter 7 provides details on some of the important players involved in the development of MIGS and BAGS devices. Each company profile includes a brief overview of the company, funding instances, financial information, key performance drivers, and its future outlook and strategy. In addition, the profiles cover details of company's approved / clinical stage devices. These details include a brief overview of the product, its specifications (size, shape, material and surgical procedure used to insert the device into the eye), the IOP reduction approach it follows, details of its clinical studies, and efficacy and safety data.

Chapter 8 offers a comprehensive perspective on how the market for novel drugs and devices in this field is likely to evolve over the next ten years. In this chapter, we have forecasted the sales of six novel drugs, including Rhopressa, Roclatan and Vesneo. Similarly, we have presented our view on the future market size of six drug delivery devices, which include Bimatoprost SR, OTX-TP and punctal plug delivery system. We have also determined the likely future revenues for MIGS and non-MIGS devices (BAGS, ABS, NIGP and NPGS). Due to uncertainties surrounding some of the key assumptions made within our forecast model, we have presented three different evolutionary scenarios for the overall market, namely the base, conservative and optimistic scenarios.

Chapter 9 provides information on MIGS devices covering the salient features that distinguish them from traditional surgical interventions. The chapter includes an overview of the current market landscape of MIGS devices and presents an approval timeline highlighting all the approved devices of this nature. We have also presented a comparative spider web analysis of MIGS devices (for both approved and under development devices) based on different parameters, such as drainage route, length of the implant, involvement of conjunctiva, type of procedure (ab interno or ab externo), duration of the procedure, the ability to treat entire Schlemm's canal and the target patient segment.

Chapter 10 summarizes the overall report. In this chapter, we have provided a recap of the key takeaways and our independent opinion regarding the market based on the research and analysis described in the previous chapters.

Chapter 11 is a collection of interview transcripts of our discussions with some of the key players in this industry. We have presented the details of our conversations with Bob Butchofsky (Founder and CEO, Mati Therapeutics), Suzana Nahum Zilberberg (CEO, Bio-Light Life Sciences), Ronen Castro (CEO, IOptima) and Donald Schwartz (CEO and President, Eye Sonix).

Chapters 12 and 13 are appendices, which provide tabulated data and a list of companies that are mentioned in the report.
3.4. Factors Responsible for Elevated IOP
3.5. Diseases Associated with Elevated IOP
3.5.1. Ocular Hypertension
3.5.2. Glaucoma
3.5.3. Retinal Artery Occlusion
3.6. Treatment Options: Ocular Hypertension and Glaucoma
3.6.1. Medical Treatment
3.6.2. Laser Therapy
3.6.2.1. Argon Laser Trabeculoplasty (ALT)
3.6.2.2. Selective Laser Trabeculoplasty (SLT)
3.6.3. Surgical Treatment
3.7. Drawbacks of Currently Available Treatment Options
3.7.1. Drawbacks of Medical Treatment
3.7.2. Drawbacks of Laser Therapy
3.7.3. Drawbacks of Surgical Treatment
3.8. Novel Therapeutic Targets for Lowering IOP
3.9. Novel Devices for Lowering IOP
3.9.1. Novel Surgical Devices
3.9.2. Novel Sustained Release Drug Delivery Devices

4. Market Landscape: Novel Drugs
4.1. Chapter Overview and Scope
4.2. Novel Drugs to Treat Elevated IOP: Clinical and Preclinical Pipeline
4.2.1. Novel Drugs to Treat Elevated IOP: Analysis by Highest Phase of Development
4.2.2. Novel Drugs to Treat Elevated IOP: Analysis by Mechanism of Action
4.2.3. Novel Drugs to Treat Elevated IOP: Analysis by Disease Sub-type
4.2.4. Novel Drugs to Treat Elevated IOP: Analysis by Route of Administration
4.2.5. Novel Drugs to Treat Elevated IOP: Analysis by Dosing Schedule

5. Market Landscape: Novel Devices
5.1. Chapter Overview
5.2. Novel Devices to Treat Elevated IOP: Pipeline Analysis
5.2.1. Novel Devices to Treat Elevated IOP: Analysis by Highest Phase of Development
5.2.2. Novel Devices to Treat Elevated IOP: Analysis by Purpose of the Device
5.2.3. Novel Devices to Treat Elevated IOP: Analysis by Category of the Device
5.2.4. Novel Devices to Treat Elevated IOP: Analysis by Approach / Pathway for IOP Reduction
5.2.5. Sustained Release Drug Delivery Devices

6. Company And Drug Profiles
6.1. Chapter Overview
6.2. Aerie Pharmaceuticals
6.2.1. Company Overview
6.2.2. Funding
6.2.3. Future Outlook
6.2.4. Product Profile: Rhopressa™ (AR-13224 / Netarsudil Mesylate)
6.2.4.1. Drug Specification
6.2.4.2. Mechanism of Action
6.2.4.3. Key Development Events
6.2.5. Product Profile: Roclatan™ (PG324)
6.2.5.1. Drug Specification
6.2.5.2. Mechanism of Action
6.2.5.3. Key Development Events
6.3. Inotek Pharmaceuticals
6.3.1. Company Overview
6.3.2. Funding
6.3.3. Future Outlook
6.3.4. Product Profile: Trabodenoson (INO-8875)
6.3.4.1. Drug Specification
6.3.4.2. Mechanism of Action
6.3.4.3. Key Development Events

6.4. Kowa Company
6.4.1. Company Overview
6.4.2. Future Outlook
6.4.3. Product Profile: Glanatec™ (Ripasudil / K-115)
6.4.3.1. Drug Specification
6.4.3.2. Mechanism of Action
6.4.3.3. Collaboration with D. Western Therapeutics Institute
6.4.3.4. Key Development Events

6.5. Santen Pharmaceutical
6.5.1. Company Overview
6.5.2. Financial Performance
6.5.3. Future Outlook
6.5.4. Product Profile: DE-117
6.5.4.1. Drug Specification
6.5.4.2. Mechanism of Action
6.5.4.3. Collaboration with Ube Industries
6.5.4.4. Key Development Events
6.5.5. Product Profile: Sepetaprost (ONO-9054 / DE-126)
6.5.5.1. Drug Specification
6.5.5.2. Mechanism of Action
6.5.5.3. Collaboration with Ono Pharmaceutical
6.5.5.4. Key Development Events

6.6. Valeant Pharmaceuticals International
6.6.1. Company Overview
6.6.2. Financial Performance
6.6.3. Future Outlook
6.6.4. Product Profile: Vesneo™ (Latanoprostene Bunod)
6.6.4.1. Drug Specification
6.6.4.2. Mechanism of Action
6.6.4.3. Collaboration with NicOx
6.6.4.4. Key Development Events

7. Company And Device Profiles
7.1. Chapter Overview
7.2. Alcon (a Novartis Company)
7.2.1. Company Overview
7.2.2. Acquisition of Transcend Medical
7.2.3. Financial Information
7.2.4. Future Outlook
7.2.5. CyPass® Micro-Stent
7.2.5.1. Product Overview
7.2.5.2. IOP Reduction Approach
7.2.5.3. Product Specifications
7.2.5.4. Key Development Events
7.2.5.5. Clinical Studies
7.2.5.6. Key Clinical Results

7.3. Allergan
7.3.1. Company Overview
7.3.2. Acquisition of AqueSys
7.3.3. Financial Information
7.3.4. Future Outlook
7.3.5. XEN™ Gel Stent
7.3.5.1. Product Overview
7.3.5.2. IOP Reduction Approach
7.3.5.3. Product Specifications
7.3.5.4. Clinical Studies
7.3.5.5. Key Clinical Results

7.4. Ellex
7.4.1. Company Overview
7.4.2. Acquisition of Canaloplasty Business of iScience Interventional
7.4.3. Financial Information
7.4.4. Future Outlook
7.4.5. iTrack™ 250A (to Perform Traditional Canaloplasty)
  7.4.5.1. Product Overview
  7.4.5.2. IOP Reduction Approach
  7.4.5.3. Product Specifications
  7.4.5.4. Key Clinical Results
7.4.6. iTrack™ 250A (to Perform ABiC)
  7.4.6.1. Product Overview
  7.4.6.2. Approach of IOP Reduction
  7.4.6.3. Product Specifications
  7.4.6.4. Key Clinical Results
7.5. Glaukos
  7.5.1. Company Overview
  7.5.2. Financial Information
  7.5.3. Future Outlook
  7.5.4. iStent®
    7.5.4.1. Product Overview
    7.5.4.2. IOP Reduction Approach
    7.5.4.3. Product Specifications
    7.5.4.4. Key Development Events
    7.5.4.5. Clinical Studies
    7.5.4.6. Key Clinical Results
  7.5.5. iStent inject®
    7.5.5.1. Product Overview
    7.5.5.2. IOP Reduction Approach
    7.5.5.3. Product Specifications
    7.5.5.4. Key Development Events
    7.5.5.5. Clinical Studies
    7.5.5.6. Key Clinical Results
  7.5.6. iStent Supra®
    7.5.6.1. Product Overview
    7.5.6.2. IOP Reduction Approach
    7.5.6.3. Product Specifications
    7.5.6.4. Key Development Events
    7.5.6.5. Clinical Studies
    7.5.6.6. Key Clinical Results
7.6. InnFocus
  7.6.1. Company Overview
  7.6.2. Funding
  7.6.3. Future Outlook
  7.6.4. InnFocus Microshunt™
    7.6.4.1. Product Overview
    7.6.4.2. IOP Reduction Approach
    7.6.4.3. Product Specifications
    7.6.4.4. Key Development Events
    7.6.4.5. Clinical Studies
    7.6.4.6. Key Clinical Results
7.7. iSTAR Medical
  7.7.1. Company Overview
  7.7.2. Funding
  7.7.3. Future Outlook
  7.7.4. STARflo™ Glaucoma Implant
    7.7.4.1. Product Overview
    7.7.4.2. IOP Reduction Approach
    7.7.4.3. Product Specifications
    7.7.4.4. Key Development Events
    7.7.4.5. Regional Collaborations
    7.7.4.6. Clinical Studies
7.8. Ivantis
7.8.1. Company Overview
7.8.2. Funding
7.8.3. Future Outlook
7.8.4. Hydrus™ Microstent
7.8.4.1. Product Overview
7.8.4.2. IOP Reduction Approach
7.8.4.3. Product Specifications
7.8.4.4. Key Development Events
7.8.4.5. Clinical Studies
7.8.4.6. Key Clinical Results

7.9. New World Medical
7.9.1. Company Overview
7.9.2. Future Outlook
7.9.3. Kahook Dual Blade™
7.9.3.1. Product Overview
7.9.3.2. IOP Reduction Approach
7.9.3.3. Product Specifications

7.10. Sight Sciences
7.10.1. Company Overview
7.10.2. Funding
7.10.3. Future Outlook
7.10.4. TRAB™360
7.10.4.1. Product Overview
7.10.4.2. IOP Reduction Approach
7.10.4.3. Product Specifications
7.10.4.4. Key Development Events
7.10.5. VISCO™360
7.10.5.1. Product Overview
7.10.5.2. IOP Reduction Approach
7.10.5.3. Product Specifications

8. Market Forecast
8.1. Chapter Overview
8.2. Forecast Methodology and Assumptions
8.3. Overall Glaucoma Market, 2016 - 2026
8.3.1. Novel Drugs Market, 2016 - 2026
8.3.1.1. Glanatec™ (Ripasudil / K-115): Sales Forecast
8.3.1.2. Vesneo™ (Latanoprostene bunod): Sales Forecast
8.3.1.3. Rhopressa™ (AR-13224 / Netarsudil Mesylate): Sales Forecast
8.3.1.4. Trabodenoson (INO-8875): Sales Forecast
8.3.1.5. Roclatan™ (PG324): Sales Forecast
8.3.1.6. DE-117: Sales Forecast
8.3.2. Sustained Release Drug Delivery Devices Market
8.3.2.1. Bimatoprost SR: Sales Forecast
8.3.2.2. Helios™ Insert(Bimatoprost Ring): Sales Forecast
8.3.2.3. Punctal Plug Delivery System Sales Forecast
8.3.2.4. ENV 515: Sales Forecast
8.3.2.5. OTX-TP: Sales Forecast
8.3.2.6. iDose™: Sales Forecast
8.3.3. Novel Surgical Devices Market, 2016 - 2026
8.3.3.1. MIGS Devices: Sales Forecast, 2016 - 2026
8.3.3.2. Non-MIGS Devices: Sales Forecast, 2016 - 2026

9. MIGS Devices: Comparative Spider Web Analysis
9.1. Chapter Overview
9.2. MIGS Devices: An Overview
9.3. MIGS Devices: Approval Timeline
9.4. MIGS Devices: Competitive landscape
9.5. Comparative Analysis of MIGS Devices
9.5.1. Comparative Analysis of Implants
9.5.2. Comparative Analysis of Ablation Devices

10. Conclusion
10.1. Novel Drug Classes have Recently Emerged for the Management of IOP
10.2. Sustained Release Devices are Expected to Eradicate Compliance Issues
10.3. Microinvasive Surgery has the Potential to Revolutionize Glaucoma Treatment
10.4. Significant Shift is Likely to Occur in the Overall Market Landscape in the Mid-Long Term
10.5. Concluding Remarks

11. Interview Transcripts
11.1. Chapter Overview
11.2. Bob Butchofsky, Founder and CEO, Mati Therapeutics
11.3. Donald Schwartz, CEO and President, Eye Sonix
11.4. Ronen Castro, CEO, IOPTima
11.5. Suzana Nahum Zilberberg, CEO, Bio-Light Life Sciences

12. Appendix 1: Tabulated Data
13. Appendix 2: List Of Companies And Organizations

List of Figures

Figure 3.1 Novel Surgical Devices: Approaches for IOP Reduction
Figure 4.1 Novel Drugs to Treat Elevated IOP: Distribution by Highest Phase of Development
Figure 4.2 Novel Drugs to Treat Elevated IOP: Distribution by Mechanism of Action
Figure 4.3 Novel Drugs to Treat Elevated IOP: Distribution by Disease Sub-type
Figure 4.4 Novel Drugs to Treat Elevated IOP: Distribution by Route of administration
Figure 4.5 Novel Drugs to Treat Elevated IOP: Distribution by Dosing Schedule
Figure 5.1 Novel Devices to Treat Elevated IOP: Distribution by Highest Phase of Development
Figure 5.2 Novel Devices to Treat Elevated IOP: Approved Products in the US and EU
Figure 5.3 Novel Devices to Treat Elevated IOP: Distribution by Purpose of the Device
Figure 5.4 Novel Devices to Treat Elevated IOP: Distribution by Category of the Device
Figure 5.5 Novel Devices to Treat Elevated IOP: Distribution by Approach / Pathway for IOP Reduction
Figure 6.1 Rhopressa™: Clinical Development Timeline
Figure 6.2 Roclatan™: Clinical Development Timeline
Figure 6.3 Trabodenoson: Clinical Development Timeline
Figure 6.4 Glanatec™: Clinical Development Timeline
Figure 6.5 Santen Annual Revenues, FY 2010 - FY 2015 (JPY Billion)
Figure 6.6 DE-117: Clinical Development Timeline
Figure 6.7 Sepetaprost: Clinical Development Timeline
Figure 6.8 Valeant Pharmaceuticals Annual Revenues, 2010 - 2015 (USD Billion)
Figure 6.9 Vesneo™: Clinical Development Timeline
Figure 7.1 Alcon Annual Revenues, 2011 - H1 2016 (USD Billion)
Figure 7.2 Allergan Annual Revenues, 2011- H1 2016 (USD Billion)
Figure 7.3 Ellex Annual Revenues, FY 2011 - FY 2015 (USD Million)
Figure 7.4 Glaukos Annual Revenues, 2013 - H1 2016 (USD Million)
Figure 8.1 Overall Glaucoma Market: Distribution by Treatment Modalities, 2016 - 2026, Base Scenario (USD Billion)
Figure 8.2 Glaucoma Market: Share of Different Treatment Options 2016, 2021, and 2026 (Base Scenario)
Figure 8.3 Novel Drugs Market, 2016 - 2026: Base Scenario (USD Billion)
Figure 8.4 Glanatec™ (Ripasudil / K-115) Sales Forecast: Base Scenario (USD Billion)
Figure 8.5 Vesneo™ (Latanoprostene Bunod) Sales Forecast, 2017 - 2026: Base Scenario (USD Billion)
Figure 8.6 Rhopressa™ (AR-13224 / Netarsudil Mesylate) Sales Forecast: Base Scenario (USD Billion)
Figure 8.7 Trabodenoson (INO-8875) Sales Forecast: Base Scenario (USD Billion)
Figure 8.8 Roclatan™ (PG324) Sales Forecast: Base Scenario (USD Billion)
Figure 8.9 DE-117 Sales Forecast: Base Scenario (USD Billion)
Figure 8.10 Sustained Release Devices Sales Forecast: Base Scenario (USD Billion)
Figure 8.11 Bimatoprost SR Sales Forecast: Base Scenario (USD Billion)
Figure 8.12 Helios™ Insert (Bimatoprost Ring) Sales Forecast: Base Scenario (USD Billion)
Figure 8.13 Punctal Plug Delivery System Sales Forecast: Base Scenario (USD Billion)
Figure 8.14 ENV515 Sales Forecast: Base Scenario (USD Billion)
Figure 8.15 OTX-TP Sales Forecast: Base Scenario (USD Billion)
Figure 8.16 iDose™ Sales Forecast: Base Scenario (USD Billion)
Figure 8.17 Novel Surgical Devices Market, 2016 - 2026: Base Scenario (USD Billion)
Figure 8.18 MIGS Devices Market, 2016 - 2026: Base Scenario (USD Billion)
Figure 8.19 Non-MIGS Devices Market, 2016 - 2026: Base Scenario (USD Billion)
Figure 8.20 Non-MIGS Devices Market, 2026: Distribution by Device Category
Figure 9.1 MIGS Devices: Approval Timeline
Figure 9.2 MIGS Devices: Comparative Analysis of Implants
Figure 9.3 MIGS Devices: Comparative Analysis of Ablation Devices
Figure 10.1 Glaucoma Therapies Market: Distribution by Treatment Modalities, 2016, 2021, and 2026 (USD Billion)
Table 3.1 Eye: Description of Tissue Layers
Table 3.2 Currently Available Drugs for Ocular Hypertension and Glaucoma
Table 3.3 Currently Available Fixed Combination Treatments
Table 3.4 Ocular Adverse Reactions by Drug Class
Table 3.5 Systemic Adverse Reactions by Drug Class
Table 3.6 New Therapeutic Targets for Lowering IOP
Table 4.1 Novel Drugs to Treat Elevated IOP: Marketed and Clinical Pipeline
Table 4.2 Novel Drugs to Treat Elevated IOP: Preclinical and Discovery Pipeline
Table 5.1 Novel Devices to Treat Elevated IOP: Pipeline
Table 5.2 Sustained Release Drug Delivery Devices
Table 6.1 Novel Drugs in Advanced Stages of Development
Table 6.2 Aerie Pharmaceuticals: Product Candidates to Treat Elevated IOP
Table 6.3 Kowa's Pharmaceutical Business Division: Therapeutic Areas and Related Indications
Table 6.4 Santen Pharmaceutical: Novel Product Candidates
Table 7.1 List of Company and Device Profiles
Table 7.2 CyPass® Micro-Stent: Industry Sponsored Clinical Trials
Table 7.3 XEN™ Gel Stent: Industry Sponsored Clinical Trials
Table 7.4 Ellex: Novel IOP Lowering Devices
Table 7.5 Ellex 2015 Sales: Key Market Segments
Table 7.6 Glaukos: IOP Lowering Product Portfolio
Table 7.7 iStent®: Industry Sponsored Clinical Trials
Table 7.8 iStent inject®: Industry Sponsored Clinical Trials
Table 7.9 iStent Supra®: Industry Sponsored Clinical Trials
Table 7.10 InnFocus Microshunt™: Industry Sponsored Clinical Trials
Table 7.11 ISTAR Medical: Devices in Development
Table 7.12 ISTAR Medical: Global Distribution Partners
Table 7.13 Hydrus™ Microstent: Industry Sponsored Clinical Trials
Table 7.14 Sight Sciences: Novel IOP Lowering Devices
Table 8.1 Novel Drugs: Estimated Launch Years
Table 8.2 Sustained Release Drug Delivery Devices: Estimated Launch Years
Table 9.1 MIGS Devices Competitive Landscape
Table 9.2 Comparative Analysis of Implants: Details on Parameters
Table 9.3 Comparative Analysis of Ablation Devices: Details on Parameters
Table 10.1 Novel Drugs to Treat Elevated IOP: Distribution by Highest Phase of Development
Table 10.2 Novel Drugs to Treat Elevated IOP: Distribution by Mechanism of Action
Table 10.3 Novel Drugs to Treat Elevated IOP: Distribution by Disease Sub-type
Table 10.4 Novel Drugs to Treat Elevated IOP: Distribution by Route of administration
Table 10.5 Novel Drugs to Treat Elevated IOP: Distribution by Dosing Schedule
Table 10.6 Novel Devices to Treat Elevated IOP: Distribution by Highest Phase of Development
Table 10.7 Novel Devices: Approved Products in the US and EU
Table 10.8 Novel Devices to Treat Elevated IOP: Distribution by Purpose of the Device
Table 10.9 Novel Devices to Treat Elevated IOP: Distribution by Category of the Device
Table 10.10 Novel Devices to Treat Elevated IOP: Distribution by Approach / Pathway for IOP reduction
Table 10.11 Santen Annual Revenues, FY 2010 - FY 2015 (JPY Billion)
Table 10.12 Valeant Pharmaceuticals Annual Revenues, 2010 - 2015 (USD Billion)
Table 10.13 Alcon Annual Revenues, 2011 - H1 2016 (USD Billion)
Table 10.14 Allergan Annual Revenues, 2011- H1 2016 (USD Billion)
Table 10.15 Ellex Annual Revenues, FY 2011 - FY 2015 (USD Million)
Table 10.16 Glaukos Annual Revenues, 2013 - H1 2016 (USD Million)
Table 10.17 Overall Glaucoma Market: Distribution by Treatment Modalities, 2016 - 2026, Base Scenario (USD Billion)
Table 10.18 Overall Glaucoma Market: Distribution by Treatment Modalities, 2016 - 2026, Optimistic
Scenario (USD Billion)
Table 12.19 Overall Glaucoma Market: Distribution by Treatment Modalities, 2016 - 2026, Conservative Scenario (USD Billion)
Table 12.20 Glaucoma Market: Share of Different Treatment Options 2016, 2021, and 2026 (Base Scenario)
Table 12.21 Glaucoma Market: Share of Different Treatment Options 2016, 2021, and 2026 (Optimistic Scenario)
Table 12.22 Glaucoma Market: Share of Different Treatment Options 2016, 2021, and 2026 (Conservative Scenario)
Table 12.23 Novel Drugs Market, 2016 - 2026: Base Scenario (USD Billion)
Table 12.24 Novel Drugs Market, 2016 - 2026: Optimistic Scenario (USD Billion)
Table 12.25 Novel Drugs Market, 2016 - 2026: Conservative Scenario (USD Billion)
Table 12.26 Glanatec™ (Ripasudil / K-115) Sales Forecast: Base Scenario (USD Billion)
Table 12.27 Glanatec™ (Ripasudil / K-115) Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.28 Glanatec™ (Ripasudil / K-115) Sales Forecast: Base Scenario (USD Billion)
Table 12.29 Vesneo™ (Latanoprostene bunod) Sales Forecast: Base Scenario (USD Billion)
Table 12.30 Vesneo™ (Latanoprostene bunod) Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.31 Vesneo™ (Latanoprostene bunod) Sales Forecast: Conservative Scenario (USD Billion)
Table 12.32 Rhopressa™ (AR-13224 / Netarsudil Mesylate) Sales Forecast: Base Scenario (USD Billion)
Table 12.33 Rhopressa™ (AR-13224 / Netarsudil Mesylate) Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.34 Rhopressa™ (AR-13224 / Netarsudil Mesylate) Sales Forecast: Conservative Scenario (USD Billion)
Table 12.35 Trabodenoson (INO-8875) Sales Forecast: Base Scenario (USD Billion)
Table 12.36 Trabodenoson (INO-8875) Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.37 Trabodenoson (INO-8875) Sales Forecast: Conservative Scenario (USD Billion)
Table 12.38 Roclatan™ (PG324) Sales Forecast: Base Scenario (USD Billion)
Table 12.39 Roclatan™ (PG324) Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.40 Roclatan™ (PG324) Sales Forecast: Conservative Scenario (USD Billion)
Table 12.41 DE-117 Sales Forecast: Base Scenario (USD Billion)
Table 12.42 DE-117 Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.43 DE-117 Sales Forecast: Conservative Scenario (USD Billion)
Table 12.44 Sustained Release Devices Sales Forecast: Base Scenario (USD Billion)
Table 12.45 Sustained Release Devices Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.46 Sustained Release Devices Sales Forecast: Conservative Scenario (USD Billion)
Table 12.47 Bimatoprost SR Sales Forecast: Base Scenario (USD Billion)
Table 12.48 Bimatoprost SR Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.49 Bimatoprost SR Sales Forecast: Conservative Scenario (USD Billion)
Table 12.50 Helios™ Insert (Bimatoprost Ring) Sales Forecast: Base Scenario (USD Billion)
Table 12.51 Helios™ Insert (Bimatoprost Ring) Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.52 Helios™ Insert (Bimatoprost Ring) Sales Forecast: Conservative Scenario (USD Billion)
Table 12.53 Punctal Plug Delivery System Sales Forecast: Base Scenario (USD Billion)
Table 12.54 Punctal Plug Delivery System Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.55 Punctal Plug Delivery System Sales Forecast: Conservative Scenario (USD Billion)
Table 12.56 ENV515 Sales Forecast: Base Scenario (USD Billion)
Table 12.57 ENV515 Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.58 ENV515 Sales Forecast: Conservative Scenario (USD Billion)
Table 12.59 OTX-TP Sales Forecast: Base Scenario (USD Billion)
Table 12.60 OTX-TP Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.61 OTX-TP Sales Forecast: Conservative Scenario (USD Billion)
Table 12.62 iDose™ Sales Forecast: Base Scenario (USD Billion)
Table 12.63 iDose™ Sales Forecast: Optimistic Scenario (USD Billion)
Table 12.64 iDose™ Sales Forecast: Conservative Scenario (USD Billion)
Table 12.65 Novel Surgical Devices Market, 2016 - 2026: Base Scenario (USD Billion)
Table 12.66 Novel Surgical Devices Market, 2016 - 2026: Optimistic Scenario (USD Billion)
Table 12.67 Novel Surgical Devices Market, 2016 - 2026: Conservative Scenario (USD Billion)
Table 12.68 MIGS Devices Market, 2016 - 2026: Base Scenario (USD Billion)
Table 12.69 MIGS Devices Market, 2016 - 2026: Optimistic Scenario (USD Billion)
Table 12.70 MIGS Devices Market, 2016 - 2026: Conservative Scenario (USD Billion)
Table 12.71 Non-MIGS Devices Market, 2016 - 2026: Base Scenario (USD Billion)
Table 12.72 Non-MIGS Devices Market, 2016 - 2026: Optimistic Scenario (USD Billion)
Table 12.73 Non-MIGS Devices Market, 2016 - 2026: Conservative Scenario (USD Billion)
Table 12.74 Non-MIGS Devices Market, 2026: Distribution by Device Category
Table 12.75 Glaucoma Therapies Market: Distribution by Treatment Modalities, 2016, 2021, and 2026 (USD Billion)
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