THE EMEA MARKET FOR DIAGNOSTIC OPHTHALMOLOGY EQUIPMENT — 2007 EDITION

A unique report analysing the Europe, Middle East and Africa (EMEA) market for diagnostic ophthalmology equipment, including autorefractors, corneal topographers, fundus cameras, indirect ophthalmoscopes, OCT, perimeters, slit lamps and tonometers. Compiled after extensive research and industry consultation, the report provides an unrivalled depth of analysis. Numerous tables and figures present market revenues, unit shipments, average selling prices and market shares.

The report answers key questions such as:

- What was the value of the EMEA market for diagnostic ophthalmology equipment in 2006?
- How much is the market for OCT equipment worth and how quickly is it growing?
- Who had the largest revenue share in non-mydriatic fundus cameras in 2006?
- How is digital imaging impacting the slit lamp market?
- Are combination autorefractor/keratometers going to replace single function devices?
- Which manufacturer sold the most non-contact tonometers in 2006?

- Detailed revenue, unit shipment and average selling price (ASP) analysis on the Europe, Middle East and Africa (EMEA) market for diagnostic ophthalmology equipment, with growth rate forecasts to 2011.
- Market segmentations for 8 different equipment types: autorefractors, corneal topographers, fundus cameras, indirect ophthalmoscopes, OCT, peripherals, slit lamps and tonometers.
- Further market breakdowns include: autorefractors vs. combination autorefr/keratometers, non-mydriatic fundus cameras vs. mydriatic fundus cameras, desktop slit lamps vs. handheld slit lamps, and non-contact tonometers vs. contact tonometers.
- Geographic market statistics, covering over 13 different individual regions.
- 22 market share tables, providing estimated revenue and unit shipment shares of the leading manufacturers for each different equipment type.
- Qualitative analysis accompanies the statistical data, highlighting key growth drivers and major trends impacting the market.
- Report (PDF) with Single User License: $6,400 / €5,000 / £3,450

**Report Introduction**

Diagnostic ophthalmology equipment is evolving. Digital imaging is rejuvenating established markets and patient-friendly automated equipment is becoming the new standard. OCT equipment stands out as an exciting prospect, having the potential to revolutionise the way ophthalmologists detect and monitor eye diseases.

The specification of this study was developed in conjunction with numerous leading manufacturers of diagnostic ophthalmology equipment. As a result, the report focuses on key issues that are fundamental to an in-depth understanding of the current structure and future development of this market.

### By Equipment Type
- Autorefractors
- Corneal Topographers
- Fundus Cameras
- Indirect Ophthalmoscopes
- OCT
- Perimeters
- Slit Lamps
- Tonometers

### By Geographic Region

Europe, Middle East & Africa: Austria, Benelux, EU Accession Countries, France, Germany, Italy, Middle East & Africa, Nordic Countries, Russia, Spain & Portugal, Switzerland, U.K. & Eire and Rest of Region.

### Further Segmentation
- Autorefractors vs. Autorefr/keratometers
- Non-Mydriatic Fundus Cameras vs. Mydriatic Fundus Cameras
- Desktop Slit Lamps vs. Handheld Slit Lamps
- Non-Contact Tonometers vs. Contact Tonometers

---

**The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type**

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>CAGR ('06 - '11)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autorefractors &amp; Keratometers</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Corneal Topographers</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Fundus Cameras</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Indirect Ophthalmoscopes</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>OCT</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Automated Perimeters</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Slit Lamps</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Tonometers</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
</tbody>
</table>

*June 2007 Source: InMedica*

**The EMEA Market for Fundus Cameras by Equipment Type**

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>CAGR ('06 - '11)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Mydriatic</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>Mydriatic</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XXX.X</td>
<td>XX.X%</td>
</tr>
</tbody>
</table>

*June 2007 Source: InMedica*
TABLE OF CONTENTS

Executive Summary

Chapter 1 — Introduction, Scope & Methodology
1.0 Introduction
1.1 Scope
1.1.1 Equipment Definitions
1.1.2 Geographic Definitions
1.2 Report Objectives
1.3 Report Contents
1.4 Methodology
1.4.1 Information Sources
1.4.2 Forecasting Methodology
1.5 Exchange Rates

Chapter 2 — Market Statistics & Trends
2.0 Introduction
2.1 Factors Influencing Growth
2.1.1 The Economic Outlook
2.1.2 The Ageing Population
2.1.3 Emerging Markets
2.1.4 Technology Developments
2.2 The EMEA Market for Diagnostic Ophthalmology Equipment
2.2.1 The EMEA Market Overall
2.2.2 The EMEA Market by Equipment Type
2.2.3 The EMEA Market by Geographic Region

Chapter 3 — Competitive Environment
3.0 Introduction
3.1 Industry Structure
3.1.1 Prospects for New Entrants
3.2 Market Share Estimates
3.2.1 EMEA Share Estimates for Manufacturers of Diagnostic Ophthalmology Equipment in 2006 (Unit Shipments)
3.2.2 EMEA Market Share Estimates for Manufacturers of Diagnostic Ophthalmology Equipment in 2006 (Revenues)
3.2.3 EMEA Share Estimates for Manufacturers of Non-Contact Tonometers in 2006 (Unit Shipments)
3.2.4 EMEA Market Share Estimates for Manufacturers of Non-Contact Tonometers in 2006 (Revenues)

List of Figures
2.1 Measurement Point for Market Analysis
2.2 Forecast Development of the EMEA Market for Diagnostic Ophthalmology Equipment
2.3 Forecast Development by Equipment Type (Revenues)
2.4 The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type (Revenues)
2.5 The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type (Unit Shipments)
2.6 The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type (ASP)
2.7 The EMEA Market for Autorefractors & Keratometers by Equipment Type (Revenues)
2.8 The EMEA Market for Autorefractors & Keratometers by Equipment Type (Unit Shipments)
2.9 The EMEA Market for Autorefractors & Keratometers by Equipment Type (ASP)
2.10 The EMEA Market for Fundus Cameras by Equipment Type (Revenues)
2.11 The EMEA Market for Fundus Cameras by Equipment Type (Unit Shipments)
2.12 The EMEA Market for Fundus Cameras by Equipment Type (ASP)
2.13 The EMEA Market for Slit Lamps by Equipment Type (Unit Shipments)
2.14 The EMEA Market for Slit Lamps by Equipment Type (Revenues)
2.15 The EMEA Market for Slit Lamps by Equipment Type (Unit Shipments)
2.16 The EMEA Market for Slit Lamps by Equipment Type (ASP)
2.17 The EMEA Market for Tonometers by Equipment Type (Revenues)
2.18 The EMEA Market for Tonometers by Equipment Type (Unit Shipments)
2.19 The EMEA Market for Diagnostic Ophthalmology Equipment by Region (Revenues)
2.20 The EMEA Market for Diagnostic Ophthalmology Equipment by Region (Unit Shipments)
3.1 EMEA Share Estimates for Manufacturers of Diagnostic Ophthalmology Equipment in 2006 (Revenues)
3.2 EMEA Share Estimates for Manufacturers of Diagnostic Ophthalmology Equipment in 2006 (Unit Shipments)
3.3 EMEA Market Share Estimates for Manufacturers of Autorefractors in 2006 (Revenues)
3.4 EMEA Market Share Estimates for Manufacturers of Autorefractors in 2006 (Unit Shipments)
3.5 EMEA Market Share Estimates for Manufacturers of Combination Autoref/Keratometers in 2006 (Revenues)
3.6 EMEA Market Share Estimates for Manufacturers of Combination Autoref/Keratometers in 2006 (Unit Shipments)
3.7 EMEA Market Share Estimates (by Brand) for Manufacturers of Corneal Topographers in 2006 (Revenues)
3.8 EMEA Market Share Estimates (by Brand) for Manufacturers of Corneal Topographers in 2006 (Unit Shipments)
3.9 EMEA Market Share Estimates for Manufacturers of Non-Mydriatic Fundus Cameras in 2006 (Revenues)
3.10 EMEA Market Share Estimates for Manufacturers of Non-Mydriatic Fundus Cameras in 2006 (Unit Shipments)
3.11 EMEA Market Share Estimates for Manufacturers of Mydriatic Fundus Cameras in 2006 (Revenues)
3.12 EMEA Market Share Estimates for Manufacturers of Mydriatic Fundus Cameras in 2006 (Unit Shipments)
3.13 EMEA Market Share Estimates for Manufacturers of Direct Ophthalmoscopes in 2006 (Revenues)
3.14 EMEA Market Share Estimates for Manufacturers of Direct Ophthalmoscopes in 2006 (Unit Shipments)
3.15 EMEA Market Share Estimates for Manufacturers of OCT Equipment in 2006 (Revenues)
3.16 EMEA Market Share Estimates for Manufacturers of OCT Equipment in 2006 (Unit Shipments)
3.17 EMEA Market Share Estimates for Manufacturers of Automated Perimeters in 2006 (Revenues)
3.18 EMEA Market Share Estimates for Manufacturers of Automated Perimeters in 2006 (Unit Shipments)
3.19 EMEA Market Share Estimates for Manufacturers of Desktop Slit Lamps in 2006 (Revenues)
3.20 EMEA Market Share Estimates for Manufacturers of Desktop Slit Lamps in 2006 (Unit Shipments)
3.21 EMEA Market Share Estimates for Manufacturers of Non-Contact Tonometers in 2006 (Revenues)
3.22 EMEA Market Share Estimates for Manufacturers of Non-Contact Tonometers in 2006 (Unit Shipments)

List of Tables
2.1 EMEA GDP Growth Rates by Major Region - Western Europe
2.2 EMEA GDP Growth Rates by Major Region - Central & Eastern Europe
2.3 EMEA GDP Growth Rates by Major Region - Middle East & Africa
2.4 The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type (Revenues)
2.5 The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type (Unit Shipments)
2.6 The EMEA Market for Diagnostic Ophthalmology Equipment by Equipment Type (ASP)
2.7 The EMEA Market for Autorefractors & Keratometers by Equipment Type (Revenues)
2.8 The EMEA Market for Autorefractors & Keratometers by Equipment Type (Unit Shipments)
2.9 The EMEA Market for Autorefractors & Keratometers by Equipment Type (ASP)
2.10 The EMEA Market for Fundus Cameras by Equipment Type (Revenues)
2.11 The EMEA Market for Fundus Cameras by Equipment Type (Unit Shipments)
2.12 The EMEA Market for Fundus Cameras by Equipment Type (ASP)
2.13 The EMEA Market for Slit Lamps by Equipment Type (Unit Shipments)
2.14 The EMEA Market for Slit Lamps by Equipment Type (Revenues)
2.15 The EMEA Market for Slit Lamps by Equipment Type (Unit Shipments)
2.16 The EMEA Market for Slit Lamps by Equipment Type (ASP)
2.17 The EMEA Market for Tonometers by Equipment Type (Revenues)
2.18 The EMEA Market for Tonometers by Equipment Type (Unit Shipments)
2.19 The EMEA Market for Diagnostic Ophthalmology Equipment by Region (Revenues)
2.20 The EMEA Market for Diagnostic Ophthalmology Equipment by Region (Unit Shipments)
3.1 EMEA Share Estimates for Manufacturers of Diagnostic Ophthalmology Equipment in 2006 (Revenues)
3.2 EMEA Share Estimates for Manufacturers of Diagnostic Ophthalmology Equipment in 2006 (Unit Shipments)