A Comparison of European Soft Contact Lens and Lens Care Markets in 2017

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Abstract
In 2017, the market value of soft contact lenses (SCLs) at industry to eye care professionals (ECP) level grew by 5.7% to € 1'789 million. EUROMCONTACT collects data for Daily Disposables (DD), Weekly / Bi-Weekly and Monthly (W/B&M) and conventional soft (CS) contact lenses (CL) in 33 countries. Four are clustered. Therefore there are 31 countries / clusters to be reported on. Not all countries had data in all segments for 2017 and 2016, though. E.g. Russia did not have data for DD and CS in '17 and '16. Almost all had data for W/B-W&M in both years. More gaps existed in the some market(s) of the CS CLs.

The CL market for the eleven reported countries in this paper grew by 4.3%, and the value was € 1'4316 millions. The eleven countries represent 79.9% of the total collected. In these eleven markets DD grew by +7.6%, W/B&M grew (0.4%). CS grew by 5.5%, but when looking only at those with data in '17 and '16 CS declined by 8.7%.

With a total of 14.8% (-0.22%) of the 15-64 years old population wearing CLs, Sweden is leading the penetration ranks, ahead of Denmark (13.19%, -0.38%) and Norway (11.37%, +3.25%)). Lowest among the eleven is Spain (4.05%, -0.37%), next is Germany (4.28%; +3.52%).

Silicone Hydrogels (SiHy) are now at 83.5 % share in the W/B&M segment (across all 33 countries) and well above 60%, even 70% (except IT) in all of the reported eleven countries.

The total lens care market declined by 0.4% to € 250 million for all 33 countries/31 clusters. All countries had total data, but not all had data for all segments and all years.

Introduction
Since 2003, EUROMCONTACT runs a syndicated market data analysis. Table 1 shows the names of the companies that participated and contributed to the data collection in 2017. The total data collection covers 33 countries, two of which are clustered to form two clusters (BE with LU and UK with IE). This report covers only the eleven major countries, while occasionally making a reference to the total of the 31/33. (see Tables 2 and 3 for the assessed and non-assessed countries, markets). To facilitate trend observation, this report closely follows the earlier ones.

The data collection process
The European Headquarters of the participating companies submit each quarter the numbers of lenses sold (units) and their market value (lenses and lens care products) at ex-manufacturers' prices (shipping data, sell in data) to an independent company. This company then removes manufacturer-specific information and returns the aggregated numbers by country, by segment and for the total of all countries to the reporting companies and to EUROMCONTACT. The collection covers all soft lens and lens care market segments. For non EUR countries the past years values are adjusted to the 2017 exchange rate to the €. The data is primarily used by the contributing manufacturers, who are thus able to learn about their relative performance and market development. It is however also of interest to contact lens practitioners and the whole vision / eye care industry.

This report reflects on the soft CL wearer base within a number of European countries, based on 2017 unit (one CL) sales. The participating companies are believed to cover around 80 to 90% of the disposable / planned replacement CL market in the covered countries.

The wearer base

The number of wearers is a good indicator for the success of CLs in the market place. The value of a country's total market and the split of the market segments are important, but even more is the number of wearers. The number of people who wear CLs within a market is called the 'wearer base' and is presented here as the fraction of CL wearers within the 15 to 64 years old population[1]. It would be more interesting to express it as the fraction of the population needing vision correction, but contrary to general population data, this number is not readily available.

The wearer base was calculated by using the EUROMCONTACT provided manufacturer sales (units) information for the following soft CL categories (units):

- daily disposable (DD)
- weekly/bi-weekly and monthly replacement lenses (W/B&M)
- conventional soft lenses (all other replacement frequencies than the above, CS)
- silicone-hydrogel lenses (SiHy, already included in the W/B&M and DD respectively)

Collected, but not used in this publication were:

- total soft frequent replacement FRP (CLs disposed of every month or more frequently, includes all DD and W/B&M)
- split of W/B-W&M, DD and SiHy CLs into spheres, torics and bi-/multi-focals
- soft coloured/cosmetic lenses (DD, frequent replacement and traditional)
- rigid lenses

This report does not go into details on rigid lenses, as a significant proportion of the rigid lens sales (for example in the United Kingdom, Germany and in the Netherlands) are accounted for by companies not taking part in this data collection process. It only looks at soft CLs and among those the DD, W/B&M CLs and CS ones, and their respective wearer base. The eleven countries and regions evaluated in this article are listed in Table 2.

For each lens category and for each country or region, the number of wearers was calculated by taking the yearly figures of units sold, and then dividing these values by an assumed annual 'consumption' rate per wearer. Analog to the previous years, in this analysis, these values were set as 350 CLs per year for DD[1], 26 CL per year for W/B-W&M CLs[1] and 2.7 CLs per year for CS CLs[2]. The number of wearers for each category and country was then divided by the population of 15 year to 64 years of age for each country or region, to provide a wearer base value as a proportion of the population 15- 64 years old (in %)[3] per country and in total.

Results

The reported countries represent 79.9% of the total collected. For all 33 markets DD (+8.5%) is still growing strong. W/B&M grew slightly (-0.4%), while CS declined (-8.5%) when comparing where three was data for '17 and '16. CS are, however, a very small part of the total market (0.7% in the eleven, 0.6 % in all 33).

Sweden has 14.8% penetration, down 0.22% versus prior year. Denmark stands at 13.19% (-0.38%) and Norway at 11.37% (+3.25%). UK and Ireland grew 8.2% to 8.3%. Lowest among the eleven is Spain (4.09%; +4.3%), tied with Germany (4.1%, +3.6%).

Si-Hy CLs are now at 83.5% for all 31/33 in the W/B&M segment. Among the eleven, all are now above 60%, even above 70% (except Italy).

The Lens Care Product (LCP) market declined (-0.4%) for all 31/33 countries collected.

The total value of lenses across all 31/33 markets grew by 5.7% to € 1'789 million. The total for the 11 reported increase by 4.3% to € 1'431 millions. Strongest growth among the reported countries was in NO (9.19%) and UK-IE (+8.18%). Among the eleven, SE was the only one to decline (-0.5%, with CH being flat 0.00%).

The eleven reported countries represent 79.98% of the total collected. DD in the total grew 8.5%, W/B&M decreased by 2.9%. CS declined strongly (-8.5%) for those with data in '17 &'17.

The split in the segments (by value) for the total of the 31/33 markets is: 50.5 % for the DD, 48.9% for W/B&M and 0.6 % for CS. (see also figure 2). For the eleven it is 55.7 % for the DD, 43.6% for W/B&M and 0.7 % for CS.

Sweden and Denmark decreased very little in number of wearers, while Norway increased. Sweden has the **highest total penetration rate**. It is **14.8%, -0.2%**. The lowest penetration among the countries covered in this publication report is in Spain (4.05%; -0.4%). (see table 5).

Daily disposables (DD) are worn by more than 5% in Sweden (8.1%), Denmark (10.1%) and Norway (7.9%). DD wearers in % of total are 76.2% in Denmark and 69.3% in Norway. W/B&M is the strongest segment in the market (% of all wearers) in the Netherlands (75.6% of the total) and Spain (76.7.5%).

Silicone-Hydrogel lenses

Over the past years, DD and SiHy CLs were important drivers for the contact lens market. It is therefore of interest to see, what percentage the silicone hydrogel lenses have of the W/B&M segment. (see figure 4)

Among the eleven countries in this report, NO (92.9%) has the highest percentage of SiHy among the W/W-B&M (91.7%), followed by SE (89.8%) and UK-IE (89.6%). The rate is the lowest in IT (67.4%).

Potential errors and caveats

A potential source of error in this model is the assumptions of the annual consumption rates of CLs. However, in similar market analyses in the United Kingdom, the assumed rates used have proven to be robust and seem generally well accepted. In any case, any general error with these values would still provide a good *relative* comparison between markets and their consistent use a good trend with regard to the markets development.

It may also very well be that consumption rates per modality differ between markets. People in Russia might use more or less daily disposable lenses each year than wearers in Switzerland for example. At this time, there is little available information about differences in wearing patterns across Europe, and no allowance has been made for this within this model. It is quite possible that wearing patterns across the total wearer population are reasonably similar between countries, and that the overall data would therefore not be greatly affected.
Launches of new products and an accompanying initial sell in of stocks and / or product recalls, out of stocks may also affect shown wearers numbers.

An important caveat to this work is that it only covers soft CLs. It is also recognized that some local CL suppliers (mainly gas permeable and some traditional soft CLs), who may have significant market shares, may have been excluded (for example, in Germany, Switzerland UK and Ireland). Therefore, the total CL wearer base demonstrated here may be different to the actual total wearer base, especially in countries with high usage of gas permeable CLs such as Germany and the Netherlands.

Lens Care Products (LCPs)
For the LCP market, only values were collected, as different bottle sizes and usage quantities needed per system and case does not allow for a simple 'units' system). The following segments were collected (no change in the collected segments to previous reports, years). :

1. **Hydrogen Peroxide (HP)** based solutions / systems
2. **Multipurpose (MPS)** solutions
3. **Total Soft Disinfecting** (sum of HP and MPS)
4. **RGP Soaking** solutions non-multipurpose chemical disinfectants
5. **Daily Cleaners** (for rigid and soft lenses)
6. **Enzymatic Cleaners** products
7. **Rinsing** solutions (saline)
8. **Rewetting** (drops, solutions)
9. **Total** (sum of all segments)

However data was not available in such detail in all countries, even not for the first two, which are the most important ones. **This report will therefore look at totals, total soft disinfecting and the largest segments (HP and MPS) only.**

The total LCP market across all 31/33 markets declined by 0.4% and had a volume of € 250 million. In the elven markets it declined by 3.2%, total value is € 170 Mio. Total soft disinfection (HP and MPS) makes up 83.7% of the total LCP market (31/33). The MPS market relative to the HP market (value) in the eleven countries can be seen on Table 4 (for the countries, which had MPS and HP data per country).

Annual Lens Care Value per Wearer

W/B-W&M wearers, as well as CS CLs wearers use MPS or HP solutions to disinfect and store their CLs when not worn. Therefore, when taking the total soft disinfecting (combined value of the MPS and HP) and dividing it by the number of the W/B&M plus the CS wearers, one can calculate an annual lens care value per wearer. This ignores the fact that some do wearer their W/B-W&M CLs on an extended or even on a continuous wear basis and thus do not use lens care products.

This annual value of lens care per wearer is highest in CH and lowest in ES (among the eleven reported). There can be several reasons. The prices in CH may be higher or that the wearers in CH are using more bottles in the year or it can be a combination. Another option is the mix between less expansive MPS and more expansive HP.

Comparison of the total cost of the different systems for the eye care professional
Taking the assumed consumption of CLs, one can have an annual cost of CLs per wearer for the eye care professional. Adding into this the annual cost of lens care (for W/B&M as well as CS), one can get the total costs at which the eye care professionals purchase the annual supply for all different systems.

Taking the annual cost for DD as a basis (100) in each country, one can express the other systems costs relative to the DD. (See Figure 5)

The countries are listed in the order of lowest to highest cost for DD in all countries. It is interesting to note that in Denmark is little difference between the systems, at least on the ECP level. In others, the differences are large, e.g. in France, where CS are more expensive. This can have different reasons. Next to the differences already discussed in the lens care section above, it could again be the compliance, then the mix (here between weekly/bi-weekly and monthly among the W/B&M). For each country / cluster there is a bundle of reasons which will apply. It goes too far to discuss this in detail here.

Silicone Hydrogel lenses (W/B-W&M)
In all eleven countries, SiHy CLs represent more than 60%, except Italy even more than 70% of the W/VB-W&M segment. (see Figure 4) The highest share among the eleven is in SE, closely followed by NO, UK-IE and CH etc.

Closing remarks
This report uses data that the Euromcontact member companies have collected. It is used to calculate the size of the national CL wearer base. The largest number of soft CL wearer is in SE, DK and NO (above 11% of the 15 – 64 year old population).

In most countries, W/Bi-W&M replacement CLs are the most commonly used, with DD particularly common in the DK, NO and CH. DDs are a strong growth driver, even more than 20 years after their first introduction in Europe.

Among the W/B&M, the SiHy CLs are driving the growth.

EUROMCONTACT thanks all participating companies for their contribution and cooperation.

(For the references, please see at the end of this document)

Table 1: Reporting companies (in alphabetical order)
AMO, now part of Johnson & Johnson Vision Care
Alcon Vision Care
Avizor
Bausch & Lomb
Cooper Vision
Johnson & Johnson Vision Care
mark ‘ennovy
Menicon Europe

Table 2: List of Markets assessed and reported on
Belgium & Luxembourg (BE-LU)
Denmark (DK)
France (FR)
Germany (DE)
Italy (IT)
Netherlands (NL)
Norway (NO)
Spain (ES)
Sweden (SE)
Switzerland (CH)
United Kingdom & Ireland (UK-IE)

Table 3: List of Markets collected but not assessed

United Arab Emirates (AE)
Bulgaria (BG)
Croatia (HR)
Czech Republic (CZ)
Egypt (EG)
Greece (GR)
Hungary (HU)
Israel (IL)
Kuwait (KW)
Poland (PL)
Portugal (PT)
Romania (RO)
Kingdom of Saudi Arabia (SA)
Turkey (TR)
Slovakia (SK)
Slovenia (SI)
South Africa (ZA)

Table 4: Size of MPS segment versus the HP one, by country

Table 5: Wearer Penetration by segment for population 15 - 64 years of age

Figure 1: Contact Lens Market (Value) Growth rates (in the 11 assessed markets)

Figure 2: Split of Market (all 33 collected, value, in %) 2017

Figure 3: DD-W/B&M-CS wearers in population 15 - 64 years of age 2017 vs. 2016

Figure 4: SiHys as % of W/B&M 2017 vs. 2016

Figure 5: Comparison of the 2017 yearly cost of the different systems to the ECP, relative to DD, per Country, includes lens care for W/B&M and CS system

References

1. Based on the annual survey of contact lens wear at Eurolens Research, UMIST.
2. Jones L, Woods CA and Efron N. Life expectancy of rigid gas permeable and high water content contact lenses. CLAO J. **22:** 258-261.
3. http://www.cia.gov/cia/publications/factbook/