A Comparison of European Soft Contact Lens and Lens Care Markets in 2025

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Abstract
EUROMCONTACT collects data for Soft Contact Lenses (SCL), such as Daily Disposables (DD), Weekly / Bi-Weekly and Monthly (W/B&M), but no longer conventional soft lenses (CS), due to lack of data, in 32 countries. Four countries are in two pairs, which make for a net of 30 countries / clusters in total. For non-disclosure reasons in the syndicated data, two countries had no data in DD and four no data in W/B-W&M in 2025 and 2024.

In 2025, the market value of soft contact lenses (SCLs) at industry level to eye care professionals (ECPs) **grew by 6.03% to € 2,485 million**. **The CL market for the eleven reported countries in this paper grew by 5.69%, to € 2,016 million.** They represent 81.13% of the total collected. In the eleven markets. DD grew by 6.52 and W/B-W&M by 4.26%.

With a total of 14.8% (+4.0%) of the 15-60 years old population wearing SCLs, Sweden (SE) leads the penetration ranks, ahead of Denmark (DK) 13.9% (+4.5%) the Netherlands (NL) 13.7%, (+14.2%) and Norway (NO) 11.0%, -4.0%). Lowest among the eleven is Germany (DE) 5.2% (+0.2%), then comes France (FR) 5.4%(-0.1%) and Spain (ES) with 5.7% (+3.6%). **Across all markets there are 20.7 million wearers (+/- 0.0%).**

Silicone Hydrogels (SiHy) have a 93.8 % value share in the W/B-W&M segment (across all 30 countries / 32 clusters), with a range from 86.4% (IT) up to 96.4% (NO) in the reported eleven countries. In the DD segment, SiHy command a 65.3% share, with CH leading 75.4% and NL trailing at 52.5%,

The total **lens care market** declined 0.2 to **€ 181 million** for all 30 countries / 32 clusters. Less and less countries have in all segments or in both years (2025 and 2024). In the **eleven countries**, the total **lens care market** was **€ 151 million** (-1.1%).

Introduction
EUROMCONTACT has been running this syndicated market data analysis since 2003. Table 1 shows the names of the companies that participated and contributed to the data collection in 2025. The total data collection covers 32 countries, two of which are tied with another one to form two clusters (BE with LU and UK with IE). This report covers only the eleven major countries, while sometimes referring to the total 30/32 data. (Tables 2 and 3 show the assessed and non-assessed countries and markets). To facilitate trend observation, this report closely follows the earlier ones.

The data collection process, syndicated data
The 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 (sum of the invoiced prices, which makes for the shipping or sell-in data) to an independent company. This company then removes manufacturer-specific information and returns the aggregated numbers by country, by segment, by sub-segment etc. for each country to EUROMCONTACT and the participating companies. The collection covers all DD and W/B-W&M and lens care market segments. For non-€ currency countries, the year's exchange is fixed on Jan 2nd for the whole year. Past years' values are adjusted to the current (2025) exchange rate of the €. While the data is primarily used by the contributing manufacturers, it is, however, also of interest to contact lens practitioners and the whole eye care industry. The participating companies believe they cover around 80 to 90% of the disposable / planned replacement CL market in the covered countries.

There is no more coverage of the CS, as this market is mainly served by local / regional manufacturers.

The wearer base

The value of a country's total market and the split into the market segments are important, but even more so is the number of users (wearers) as it is a good indicator of the success of CLs in the marketplace. The number of people who wear CLs within a market is called the 'wearer base' and is presented here as the percentage of CL wearers within the 15 to 60-year-old population. It would be more interesting to express it as a percentage of the population needing vision correction, but unlike general population data, this number is not readily or publicly available. This report calculates the number of SCL wearers using the 2025 units (single CLs, not packs) sold divided by an assumed annual consumption. The wearer base for this report is calculated for the following SCL categories:

- daily disposable (DD)
- weekly/bi-weekly and monthly replacement lenses (W/B-W&M)

For each lens category and for each country, the number of wearers was calculated by taking the yearly figure of units sold and dividing them by an assumed annual 'consumption' rate per wearer. For consistency reasons, these values were kept constant at 350 CLs per year for DD[1], 26 CL per year for W/B-W&M CLs[1]. For CS it would have been 2.7 CLs per year[2].

The number of wearers for each category and country was then divided by the population of 15-60 years of age for each country or region, providing a wearer base value as a percentage of the population 15-60 years old's[3] per country and an aggregated total. **Note:** Until last year, the report took the 15 - 64 age bracket from the CIA Factbook which is no longer available. It is **replaced by the UN population data, which has an age bracket of 15 – 60**. With the calculation of the number of wearers unchanged, this results in an increase in the penetration rate compared to previous years. Table 2 shows the eleven countries and regions evaluated in this article.

Results

The eleven reported countries represent 81.1% of the total value collected. Among the eleven reported DD grew 6.5% in value, while W/B-W&M grew 4.3%.

For all 30/32 clusters/markets the total value is € 2,485 million (+6.0%), with DD growing 6.2%, W/B-W&M at 5.7%.

The total CLs value for the 11 reported increased by 5.7% to € 2,016 million. The strongest growth among the reported countries was NL (+20.03%), followed by BE-LU (+13.16%). The strong growth observed in the Netherlands should be interpreted with caution, as it is likely impacted by centralized logistics operations and may therefore not fully reflect underlying domestic market dynamics. The biggest market, UK-IE, grew 3.68%.

Of all 30/32 and thus also among the eleven SE has the highest penetration (14.8%, +4.0%), followed by DK 13.93% (+4.5%) and NL (13.67%, +14.2%) Next are NO at 10.95% (-4.02%), CH at 10.15% (+0.92%) and the UK & IE (9.57%, -0.97%). Lowest among the eleven is DE at 5.22%, followed by FR (5.40%). (see Table 5).

Silicone Hydrogels (SiHy) are now at 83.1 % value share in the W/B-W&M segment (across all 32/30 countries) and range from 82.7% (IT) up to 95.3% (NO) in the reported eleven countries.

The total lens care market shrunk by 0.2% to € 181 million for all 32 countries / 30 clusters.

The eleven reported countries represent 81.0 of the total value of all 30/32 countries. DD value in the group of the eleven grew 6.5%, W/B-W&M by 4.3%.

The split in the segments (by value) for the total 32/30 markets is: 60.75% for DD, 39.25% for W/B-W&M. (see also Figure 2). For the eleven it is 63.9% for DD, 36.1% for W/B-W&M.

There are 20.7 million wearers across all 30/32 countries/clusters.

DD are worn by more than 5% in DK (10.7%), SE (8.2%), NO (7.4%), UK-IE (6.4%) and CH (5.7%). DD wearers in % of total wearers are 76.9% in DK and 70.6% in NO.

Among the eleven, W/B-W&M is the strongest segment in DE (66.2%) and NL (63.8%) in % of all wearers in those countries.

Silicone-Hydrogel lenses
Over the past 20 years, DD and SiHy CLs have been important drivers for the contact lens market. It is therefore of interest to see the share of silicone hydrogel lenses in the W/B-W&M segment. (see Figure 4)

Among the eleven countries in this report, SE (96.7%) has the highest percentage of SiHy among the W/B-W&M, followed by NO (96.4%) and DK (94.5%). The rate is the lowest in IT (86.4%).

In DD lenses, the overall rate of SiHy is lower, as they have been introduced more recently, compared to SiHy in W/B-W&M. Here CH leads among the 11 reported here (75.4%). Next is FR (71.3%), followed by UK-IE (69.9%). Lowest is in NL (52.5%),

Lens Care Products (LCPs)
For the LCP market only values are reported, while milliliters were also collected. Different bottle sizes and usage quantities needed per system and case do not allow for a simple 'units' system, comparison. The following segments were collected (no change in the collected segments to previous reports in earlier 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)

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

The total LCP market across all 32/30 markets shrunk 0.23% to € 181 million. In the eleven markets it declined 1.1% to € 151 million. Total soft disinfection (HP and MPS) makes up 73.6%

of the total LCP market (32/30). 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 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-W&M, one can calculate an annual lens care value per wearer. This ignores the fact that some do wear their W/B-W&M CLs on an extended or even on a continuous wear basis and thus do not use lens care products. In some markets only MPS data was available. For 2024, there was no data for CS wearers.

This annual value (sell-in prices) 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, the mix between higher priced HP and lower priced MPS is different (while in milliliters MPS is bigger). A last reason can be that sales in other countries go to companies, which are not covered in this report.

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, 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 difference is somewhat favorable for W/B-W&M, but then not all countries had complete coverage of the care market.

Closing remarks
This report uses data that EUROMCONTACT member companies have collected. EUROMCONTACT thanks all participating companies for their contribution and cooperation.
(For the references, please see the end of this document)

Table 1: Reporting companies (in alphabetical order)
Alcon Vision Care
Avizor
Bausch & Lomb
CooperVision
Johnson & Johnson Vision
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)
Austria (AT)
Bulgaria (BG)
Croatia (HR)
Czech Republic (CZ)
Egypt (EG)
Finland (FI)
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)

Country	MPS & H_2O_2	Change vs 2024 %
AT	1.03	16.8%
BE-LU	3.65	12.7%
DE	1,83	42.7%
FR	3.43	5.8%
IT	2.99	-10.1%
NL	2.83	3.5%
NO	10.21	12.0%
UK-IE	6,53	23.2%

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

Country / Cluster	DD	W/B-W&M	Total	Change vs.'24
SE	8.15%	6.62%	14.76%	4.04%
NL	10.71%	3.22%	13.93%	4.50%
DK	4.95%	8.71%	13.67%	14.18%
NO	7.73%	3.22%	10.95%	-4.02%
CH	5.74%	4.40%	10.15%	0.92%
UK-IE	6.43%	3.14%	9.57%	-0.97%
BE-LU	3.67%	4.60%	8.27%	12.46%
IT	4.36%	1.93%	6.29%	-2.28%
ES	1.69%	3.96%	5.65%	3.58%
FR	2.00%	3.39%	5.40%	-0.14%
DE	1.76%	3.46%	5.22%	0.18%

Table 5: Wearer Penetration by segment for population 15 - 60 years of age

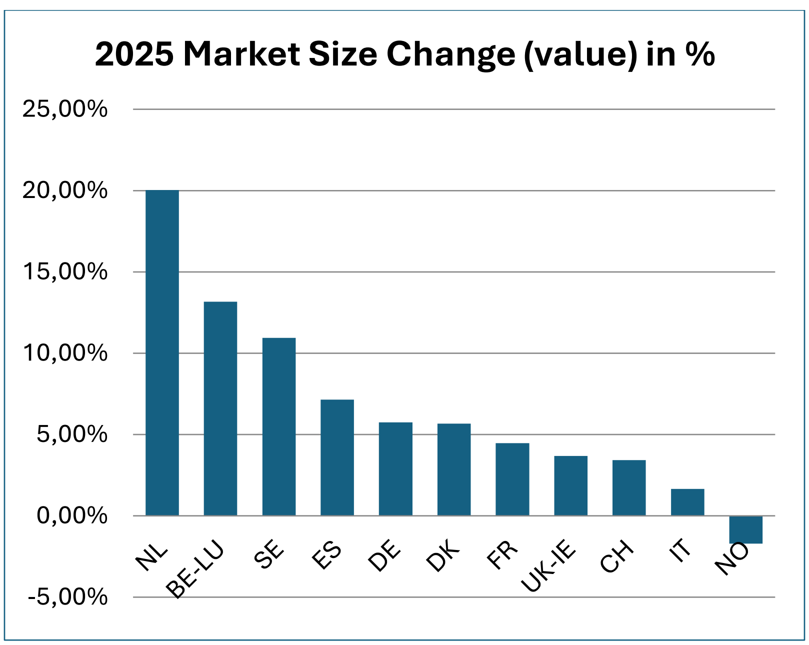

Figure 1: Contact Lens Market (Value) Growth rates in the 11 markets assessed

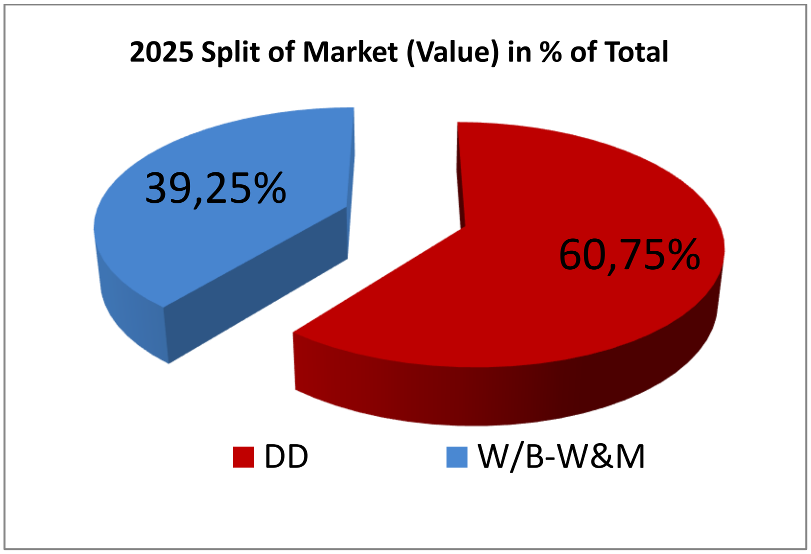

Figure 2: Split of Market (all 30/32 collected, value, in %) 2025

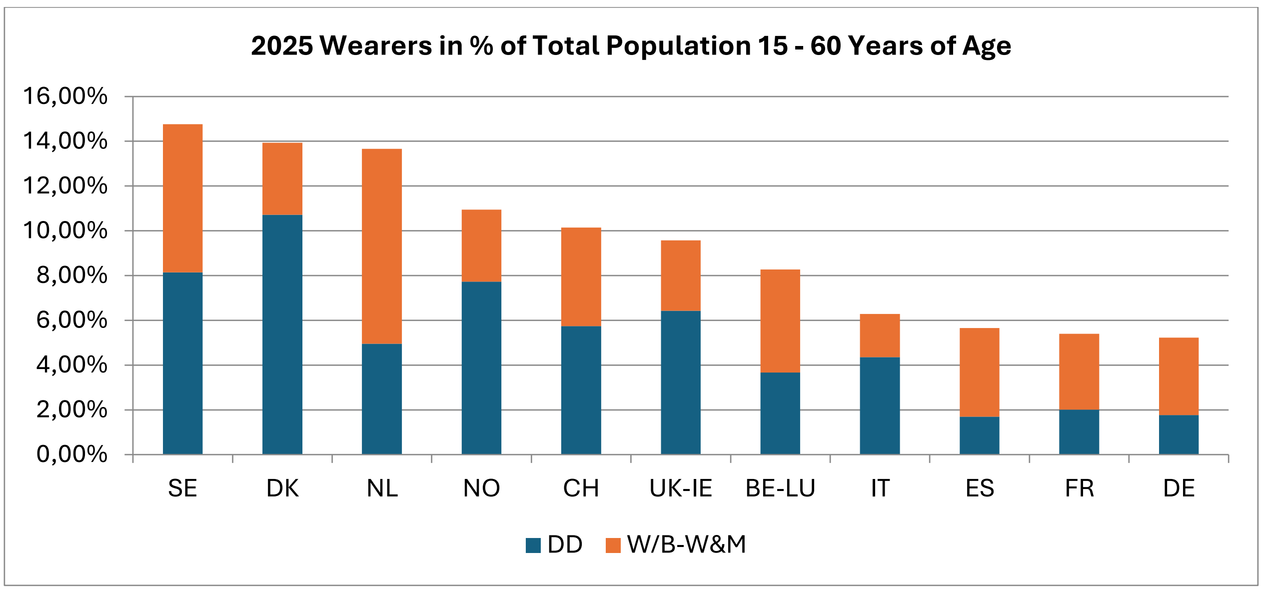

Figure 3: DD-W/B-W&M wearers in population 15 - 60 years of age 2025 vs. 2024

Share of SiHy (value) of W/B-W&M			
Country	SiHy % '24	SiHy % '23	Change in %
BE-LU	89.6%	88.8%	0.91%
CH	91.5%	92.0%	-0.47%
DE	92.1%	92.0%	0.09%
DK	91.1%	88.3%	3.16%
ES	89.1%	89.2%	-0.15%
FR	89.9%	90.5%	-0.65%
IT	82.7%	82.3%	0.49%
NL	91.0%	91.2%	-0.27%
NO	95.3%	95.4%	-0.05%
SE	95.0%	94.9%	0.14%
UK-IE	92.1%	92.5%	-0.46%

Figure 4: SiHys as % of W/B-W&M 2025 vs. 2024

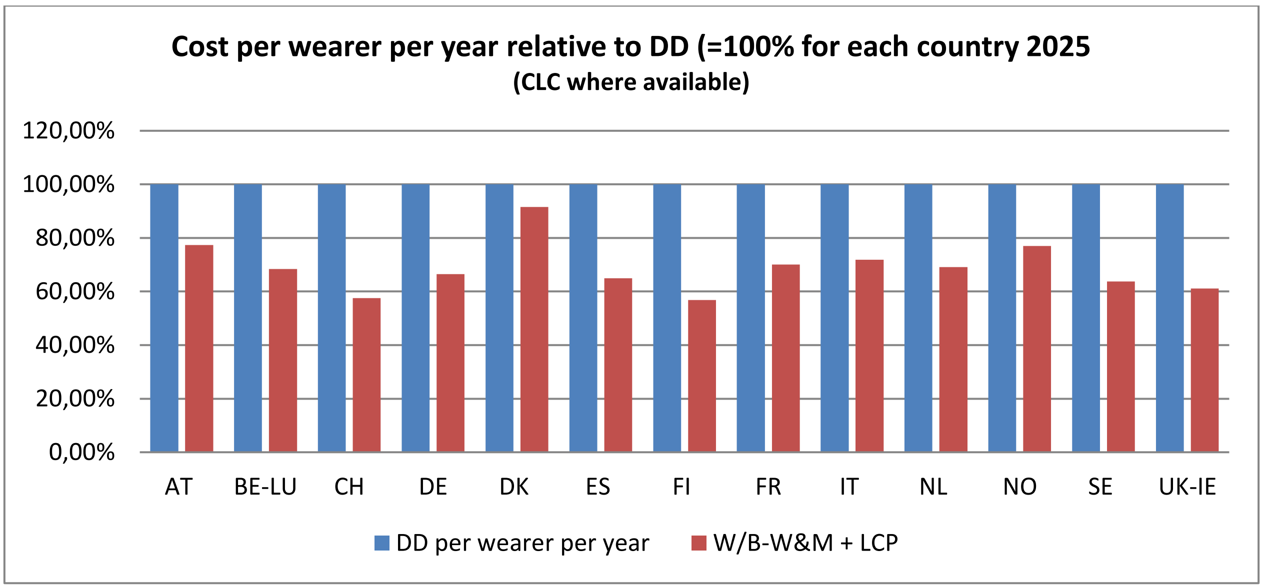

Figure 5: Comparison of the 2025 yearly cost of the different systems to the ECP, relative to DD, per country, includes lens care usage for W/B-W&M

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