A Comparison of European Soft Contact Lens and Lens Care Markets in 2020

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Abstract
EUROMCONTACT collects data for Daily Disposables (DD), Weekly / Bi-Weekly and Monthly (W/B&M) and conventional soft (CS) CLs in 33 countries. Four are in pairs, which makes for 31 countries / clusters in total. Not all countries had data in all segments for 2020 and / or 2019, though, mainly in CS. All had data for W/B-W&M and DD in both years.

In 2020, the market value of soft contact lenses (SCLs) at industry to eye care professionals (ECPs) level declined by 9.63% to € 1'814 million. The comparable total (data in '20 & '19) is the same, € 1'813 million. The CL market for the eleven reported countries in this paper declined by 9.1%, to € 1'376 million. They represent 75.9% of the total collected. In the eleven markets DD declined by -9.4% and W/B&M by -8.4%), CS declined (-24.0%).

With a total of 13.6% (-7.2%) of the 15-64 years old population wearing CLs, Denmark (DK) is leading the penetration ranks, ahead of Sweden (SE) (also 12.4%, -15.5%) and Norway (NO) (11.7%, +4.7%). Lowest among the eleven is Spain (ES) (3.5%, -14.5%), next is Germany (DE) (3.8%; -7.8%).

Silicone Hydrogels (SiHy) have an 86.4 % value share in the W/B&M segment (across all 33 countries) and range from 75% (IT) up to 95% (NO) in the reported eleven countries.

The total lens care market declined by 6.40% to € 204 million for all 33 countries/31 clusters. All countries had total data for 2020, while not for 2019, plus not all had data for all segments and both years. Total declined 10.6%, when looking at the total where there was data in both years. In the eleven countries, total care market was € 144 million (-9.9%).

Introduction
EUROMCONTACT has run this syndicated market data analysis since 2003. Table 1 shows the names of the companies that participated and contributed to the data collection in 2020. The total data collection covers 33 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 referencing to the total 31/33 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, so called 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 soft lens 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 (2020) 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 vision / eye care industry. The participating companies believe they cover around 80 to 90% of the disposable / planned replacement CL market in the covered countries.

The wearer bases

The value of a country's total market and the split of the market segments are important, but even more so is the number of users (wearers) as it is a good indicator for 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 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 unlike general population data, this number is not readily or publicly available. This report calculates the number of soft CL wearers using the 2020 unit (one CL) sales divided by an assumed annual consumption. The wearer base is calculated for the following soft CL categories:

- daily disposable (DD)
- weekly/bi-weekly and monthly replacement lenses (W/B&M)
- conventional soft lenses (all other replacement frequencies than the above, CS)

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] 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 15-64 years of age for each country or region, to provide a wearer base value as a proportion of the population 15-64-year old's (in %)[3] per country and in total. The eleven countries and regions evaluated in this article are listed in Table 2.

Results

The reported countries represent 75.9% (comparable basis) of the total value collected. In the difficult year of COVID lock downs etc., DD declined 10.6% in value, while W/B&M declined a bit less, at -8.8%, and CS declined (-24.6% on a comparable basis, i.e. only looking at markets that had data in both years) for all 33 markets.

DK has the highest penetration (13.6%, - 7.2%), followed by SE (12.4%, -15.53%) and NO, which grew 4.7% to 11.7%). Next are NL at 8.6% (-1.3%) and the UK & IE (8.5%, -6.1%). Lowest among the eleven is heavily COVID impacted Spain (ES) (3.5%, -14.5%), not far behind Germany (DE) (3.8%, -7.8%).

Silicone Hydrogels (SiHy) are now at 86.4 % value share in the W/B&M segment (across all 33 countries) and range from 75% (IT) up to 95% (NO) in the reported eleven countries.

The total lens care market declined by 6.4% to € 204 million for all 33 countries/31 clusters (-11.5% for those with data in both years). In the eleven countries, total care market was € 144 million (-9.9%). All countries had total data, but not all had data for all segments and both years.

The total value of lenses across all 31/33 markets declined by 9.6% to € 1'813 million on a comparable basis. The total for the 11 reported declined by 9.1% to € 1'376 millions. Strongest decline among the reported countries was in IT (-19.8%), SE (-14.7%) and ES (-13.7%), while NL (+1.4%) and NO (+1.8%) even grew. The biggest market, UK-IE, declined only 5.1%. This is even more than decline in units (-3.8%), showing that the currency effect was not favorable either. This robustness, may be due to the high amount of subscriptions in the UK-IE. This means automatic home delivery with monthly direct debit payment, thus not requiring open shops. What was likely postponed, was the physical after care visit.

The eleven reported countries represent 75.9% of the total. DD value in the group declined 10.2%, W/B&M declined by 8.8%. This may be due to less occasional wear of DD when going out or doing sports, as these activities were restricted under COVID lockdowns. CS declined 24.6% on a comparable basis.

The split in the segments (by value) for the total 31/33 markets is: 55.0 % for DD, 44.6% for W/B&M and 0.4 % for CS. (see also Figure 2). For the eleven it is 58.1 % for DD, 41.3% for W/B&M and 0.6 % for CS.

DK and SE have the highest total penetration rate. It is 13.6% in DK (-7.2%) and 12.4% in SE (-15.5%). NO grew to 11.7% (+4.7%), despite the difficult times! The lowest penetration among the countries covered in this publication report is ES (3.5%, -14.5%). (see Table 5).

DD are worn by more than 10% in DK (10.5%), and more than 5% in SE (6.7%) and NO (8.1%). DD wearers in % of total wearers are 77.2% in DK and 69.6% in NO. W/B&M is the strongest segment in the market (% of all wearers) in ES (77.2%) and DE (74.8%).

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 (95.0%) has the highest percentage of SiHy among the W/W-B&M, followed by SE (93.0%) and UK-IE (91.7%). The rate is the lowest in IT (74.8%).

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 does not allow for a simple 'units' system). 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 all 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 31/33 markets declined by 6.4% and had a volume of € 204 million (on a comparable basis the decline is 10.6%). In the eleven markets it declined by 9.9%, total value is € 144 million. Total soft disinfection (HP and MPS) makes up 78.3% (81.9% with data in both years) 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 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. The relatively small number of conventional wearers could not be calculated for all countries either.

This annual value (ship-in prices) of lens care per wearer is highest in CH and lowest in UK-IE (among the eleven reported). There can be several reasons. The prices in CH may be higher, the wearers in CH are using more bottles in the year (higher compliance), or it may be a combination. Another option is the mix between less expensive MPS and more expensive HP (in CH total HP value is higher than total MPS, while in Milliliters MPS is bigger).

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 difference is somewhat favorable for W/B-W&M, but then not all countries had complete coverage of the care market. CS plus care products usually cost more than W/B-W&M plus care products.

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
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)
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)
Russia (RU)
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 %) 2020

Figure 3: DD-W/B&M-CS wearers in population 15 - 64 years of age 2020 vs. 2019

Figure 4: SiHys as % of W/B&M 2020 vs. 2019

Figure 5: Comparison of the 2020 yearly cost of the different systems to the ECP, relative to DD, per country, includes lens care usage 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/