A Comparison of European Soft Contact Lens and Lens Care Markets in 2012

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Abstract
In 2012, the market value of soft contact lenses (SCLs) at industry to eye care professionals (ECP) level grew by 1.7% to € 1'396 million. The market is defined as the 31 countries for which EUROMCONTACT collects data for Daily Disposables (DD), Weekly / Bi-Weekly and Monthly (W/B&M) and conventional soft (CS) CLs. Not all countries had data in all segments of for 2012 and 2011, though, e.g. Russia did not have data for DD and CS in '12 and '11. All had data for W/B-W&M in both years. More gaps existed in the small market of the CS CLs.

Belgium was combined with Luxemburg, as was Slovakia with Czech Republic and Ireland with the UK. Hence there were 28 reported countries / clusters covering the 31 countries.

The CL market for the eleven reported countries in this paper declined by 0.7%, and the value was € 1'143 millions. The reported eleven countries represent 81.9% of the total collected.
DD grew by +2.1%, W/B&M declined by 2.0%. CS declined by 32.5%.

With a total of 13.3% (+6.4%) of the 15-64 years old population wearing CLs, Sweden is leading the penetration ranks, ahead of Norway (10.5%, +3.1%) and Denmark (9.8%, -9.5%)). Lowest is Germany (3.41%, +2.2%).

Silicone Hydrogels (SiHy) are now at 71 % share in the W/B&M segment (in total) and above 50% in all of the reported eleven countries.

The total lens care market shrunk 5.5% for all 31 countries. All countries had total data, but not data for all segments and all years. For the eleven markets reported here, the lens care products market shrunk 7.7%.

Introduction
Since 2003, EUROMCONTACT's provided the framework for its members (international manufacturers of contact lenses and care systems to do syndicate market data analysis. Table 1 shows the names of the companies that participated and contribute to the data collection in 2012. The total data collection covers 31 countries, six of which are tied with another one to form three clusters (BE and LU, UK and IE. and CZ with SL). This report covers only the eleven major countries, while occasionally making a reference to the total of the 31. (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, shipping data) and their market value (lenses and lens care products) at ex-manufacturers' prices (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. It also shows the change versus previous year (where needed the past years values are adjusted to the same exchange rate to the € as for the reporting year). The data is primarily for the contributing manufacturers, who are thus able to learn about their relative performance. 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 2012 unit (one CL) sales. The participating companies are believed to cover around 80 to 90% of the disposable / planned replacement CL market in these 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 market segments are important, but are subject to external factors such as currency fluctuations, price promotions and new product launches etc. 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. Data was provided for the following soft CL categories (values and 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, also included in the W/B&M and DD)

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 rigid lens sales (for example in the United Kingdom, Germany and in the Netherlands) is accounted for by companies not taking part in this data collection process.

This assessment compares only 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 for units sold, and then dividing these values by an assumed annual 'consumption' rate for each 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 was then divided by the population of 15 year to 64 years of age for each country or region to provided a wearer base value as a proportion of the population 15- 64 years old (in %)[3].

Results

Reported countries represent 81.9% of the total collected. DD (+2.1%) is still growing, W/B&M (-2.0%) and CS are declining (-32.5%). CS are, however, a very small part of the total market (1.2% in the eleven, 1.1 % in all).

Sweden has 13.3% penetration, growing again versus prior year (+6.4%) Norway also grew (10.5%, 3.18%), while Denmark declined (9.8%, -9.5%). Switzerland remained at 7.9%. Lowest among the eleven is Germany (3.4%), despite the growth of 2.2%.

Si-Hy CLs are now at 71% for all 28 in the W/B&M segment. Among the eleven, all are now above 50%.

The Lens Care Product (LCP) market is shrinking (-5.5%) for all 31countries collected and -7.7% for the eleven countries reported. .

The total value of lenses across all 31 markets grew by 1.7% to € 1'396 millions. The total for the 11 reported declined by 0.7% to € 1'143 millions. Strongest growth among the reported countries was in Sweden (+6.7%), followed by Germany (+6.5%). Denmark decline most in value (-11.9%). Also declining were Switzerland (-8.0%), Spain (-6.1%) and France (-5.1%).

The eleven reported countries represent 81.9% of the total collected. DD grew 2.1%, W/B&M declined by 2.0%. CS declined strongly (-32.5%).

The split in the segments by value) for the total of the 31 markets is: 43 % for the DD, 56% for W/B&M and 1.1 % for CS. (see also figure 2).

Sweden and Norway increased in wearers and in value. Denmark declined in both. Switzerland declined in value but not in wearers. Sweden has the **highest total penetration rate**. It is **13.2%, +6.4%**. The lowest penetration among the countries covered in this publication report is in Germany (3.4%, up 2.2%). (see table 5).

Daily disposables (DD) are worn by more than 5% in Sweden (6.3%), Denmark (6.7%) and Norway (6.8%). W/B&M is the strongest segment in the market (% of all wearers) in Spain (83.4%), the Netherlands (79.8%), Germany (78.4%), BE-LU (78.0%) and France (74.3%).

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, Norway has the highest percentage of SiHy among the W/W-B&M (87.3%), followed by UK-IE (84.4%), CH (79.7%). The rate is the lowest in IT (51.7%) just above the 50% mark.

Potential errors and caveats
A potential source of error in this model is that 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 markets declined by 5.5% and had a volume of € 229 million. For the eleven markets, it declined 7.7%.

In the eleven markets, MPS declined 5.6% (in value) while HP declined 8.6%. Together, HP and MPS make up 88.4% of the total LCP market.

The MPS market value in the eleven countries is 2.63 times the HP one. (See Table 4 for all 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 an 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 UK-IE. There can be several reasons. The main one is that a major supplier of LCP in the UK-IE is missing (SAUFLON). Other factors could be that the prices in Austria are much higher or that the wearers in Austria 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. Adding into this the annual 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 some countries, like the DK, NL and CH, there is little difference between the systems, at least on the ECP level. In others the differences are large, e.g. 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 mix of the reasons which will apply. It goes too far to discuss this in detail here.

Silicone Hydrogel lenses (W/B-W&M)
In ten of the eleven countries, SiHy CLs represent more than 50% of the W/VB-W&M segment. Only in IT the share is still below 50%, while well up versus 2010. (See Figure 4) The highest share among the eleven is in NO (more than 80%), closely followed by UK-IE, CH etc.

Closing remarks
This is the ninth occasion on which pan-European data from the Euromcontact member companies has been used to investigate the size of national CL wearer bases. On the basis of this data, the largest soft CL wearer base is in SE, DK and NO (above 10% 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 particularly. DDs are a strong growth diver, even more than 16 years after their first introduction in Europe.

Among the W/B&M, the SiHy CLs are growing strong, also 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
Alcon / CIBA VISION
Avizor
Bausch & Lomb
Cooper Vision
Johnson & Johnson Vision Care
Menicon Europe

Table 2: List of Markets assessed
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)
Croatia (HR)
Czech Republic & Slovakia (CZ-SK)
Greece (GR)
Hungary (HU)
Israel (IL)
Kuwait (KW)
Poland (PL)
Portugal (PT)
Romania (RO)
Kingdom of Saudi Arabia (SA)
Turkey (TR)
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 28collected, value, in %) 2011

Figure 3: DD-W/B&M-CS wearers in population 15 - 64 years of age 2012 vs. 2011

Figure 4: SiHys as % of W/B&M 2012 vs. 2011

Figure 5: Comparison of the 2012 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

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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/