A Comparison of Soft Contact Lens and Lens Care Markets in Europe in 2008

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Introduction

International manufacturers of contact lenses and care systems (see Table 1 for the names of the contributing companies), acting under the umbrella of EUROMCONTACT, collect and report data on product sales throughout European markets (see Tables 2 and 3 for the assessed and non assessed countries, markets) since 2003. 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 aggregate numbers by country, by segment and for the total of all countries to the reporting companies and to EUROMCONTACT. The report covers all soft lens and lens care market segments. It also shows the change versus previous 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 eye care industry.

This report reflects on the soft lens wearer base within a number of European countries, based on 2008 sales. The participating companies are believed to cover around 80 to 90% of the disposable lens market in these countries.

The wearer base

The number of wearers is a good indicator for the 'success' of contact lenses in the market place. Other factors, such as the value of a country's market and segments , are clearly important, too, but are subject to external factors such as currency fluctuations, price promotions and new product launches.
The number of people who wear contact lenses within a market is usually called the 'wearer base' and is presented here as the fraction of adults (aged 15 and over) who wear contact lenses within a population. It would be more interesting to express it as the fraction of the population needing vision correction, but contrary to population data, this number is not readily available.
The wearer base was calculated by using the EUROMCONTACT provided manufacturer sales information. Data was provided for the following lens categories:

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

Collected, but not used in this publication were:

- total soft frequent replacement (lenses disposed of every month or more frequently, including DD, W/B&M and colored lenses)
- soft coloured/cosmetic lenses (daily disposables, frequent replacement and traditional)
- rigid lenses

This report does go into details on rigid lenses, as a significant proportion of rigid lens sales (for example in the United Kingdom and in the Netherlands) is accounted for by companies not taking part in this data collection process.

This assessment compares only soft lenses and among those the daily disposable (DD), weekly/bi-weekly, monthly (W/B&M) lenses and conventional lenses (CS) and their respective wearer base. The 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 lenses per year for daily disposables[1], 26 lenses per year for frequent replacement lenses[1] and 2.7 lenses per year for soft traditional lenses[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 (in %)[3].

Results

The total value of lenses across all 21 markets was 1.182 billion Euros, and a growth of 7.71%. The total for the 11 reported in here was 1.078 billion (+7.2%), which is 91.2 % of the total 21 markets. All but one market (South Africa, -13.5%) showed a positive growth in value. The strongest growth was seen in United Arab Emirates (+43.3%) and Russia (+31.7%), the slowest in France (+3.8%).

The split in the segments by value) for the total of the 21 markets is: 40.2 % for the Daily Disposables, W/B&M 54.9% and CS 2.7%. (see also figure 2 and table 5).

The **Nordic** region has again the **highest total penetration rate**. Its **8.9% is up +2.9%** versus 2007. The lowest penetration among the countries covered in this publication report is in Russia (0.65%, +35.6%). This number for Russia does not include the daily disposable segment data, which is not available (following non disclosure rules in the data collection system, i.e. suppressing one segment in order to show the total.) Beside South Africa, only Italy (-0.04%) and Hungary (-0.26%) showed a decline in the total number of wearers. With a growth of 3.4% to 7.01%, the Netherlands lost the number two position again to UK-IE (+5.1% to 7.17%). The interesting point about this is, that the value growth in the Netherlands was actually higher than that of the UK-IE (+7.34% versus 4.65%). Part of the reason is in the split of the segments (DD, W/B&M, CS). The number of Daily Disposable wearers in the UK-IE is much larger than in the NL, which is dominated by the W/B&M wearers. Switzerland's total of 6.95% (+10.4%) is just shy of the 7% mark.

Daily disposables (DD) are worn by more than 4% in Nordic (4.71%, 52.8 of all wearers). Next biggest is UK-IE with 3.2%, 44.4% of all). W/B&M lens wearers represent 78.6% of all wearers in the Netherlands.

Silicone-Hydrogel lenses

Over the past years, daily disposables and silicone-hydrogel lenses 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)

Russia is leading this line up with close to 3/4 of the value going to Silicone Hydrogels. Interesting to note, that Nordic, the UK-IE and Switzerland, the highest, second and fourth highest penetration countries, also have shares above 60%, as has Austria!. The high penetration in the Netherlands are not following this pattern. Despite its otherwise not great performance, Germany is doing well in SiHy (51.3%).

Potential errors and caveats

A potential source of error in this model is that the assumptions of the annual consumption rates of lenses are imprecise. 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 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.
A shown decline may not be a real one, as sales may be shifting from participating to non participating manufacturers. Launches of new products and an 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 contact lenses. It is also recognized that some local lens suppliers (mainly gas permeable and some traditional soft lenses), 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 contact lenses such as Germany and the Netherlands.

Lens Care Products

For the lens care 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. **Soaking** solutions (mainly **RGP care products**); non-multipurpose chemical disinfectants
4. **Cleaners** (for rigid and soft lenses)
5. **Enzymatic protein removal** products
6. **Rinsing** solutions (saline)
7. **Rewetting** (drops, solutions)
8. **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 and the largest segments (HP and MPS) only.**

The total Lens Care market across all 21 markets grew by 2.5% to € 252.6 million. 14 out of the 21 markets had a positive Lens Care growth, the other seven declined.

MPS grew by 5.6% in value, while HP declined by 8.4%. Together, HP and MPS make up 75.2% of the total LCP market.

The total MPS market value is now 3.22 times the HP one (up from 2.81). (see Table 4 for all countries, which had MPS and HP data)

Annual Lens Care Value per Wearer

Weekly / Bi-weekly and Monthly wearers, as well as Conventional Soft lens wearers use MPS or HP solutions to disinfect their lenses when not worn. Therefore, when taking the combined value of the MPS and HP and dividing it by the number of the W/B&M wearers plus the CS wearers, one can calculate an annual lens care value per wearer. This ignores the fact that some do wearer their weekly/biweekly & monthly lenses on an extended or even an continuous wear basis and thus do not use lens care products.
This annual value of lens care per wearer is highest in Austria and lowest in UK-Ireland. The difference is 5.0 times! 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 lenses, one can have an annual cost of lenses per wearer. Adding into this the annual lens care (for W/B&M as well as CS), one can get the 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. This was only done for countries that had all lens segment (W/B&M and CS) and MPS and HP data. (See Figure 5)

The countries are listed in the order of lowest to highest cost for DD in that country. It is interesting to note, that in some countries, like the Nordic, Switzerland and Austria, there is little difference between the systems, at least on the ECP level. In others the differences are huge, e.g. France, where CS are more expensive. Like for the lens care, 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), which may be a driver in the Nordic, as the W/B are strong in Denmark. It can also be the price, which can then again be the actual price or the mix of more expensive Si-Hy, toric and bi focal versus simple spheres. For each country there is a mix of the reasons which will apply. It goes too far to discuss this in detail here.

Summary

This is the sixth occasion on which pan-European data from the Euromcontact member companies has been used to investigate the size of national contact lens wearer bases. On the basis of this data, the largest soft lens wearer base is in the Nordic region, at 8.90% of all adults. The smallest soft lens wearer base among the reported 11 countries is Germany, with 2.86% of adults.

In most countries, weekly/bi-weekly and monthly replacement lenses are the most commonly used, with daily disposables particularly common in the Nordic countries, UK and Ireland and Switzerland. Daily disposables are a strong growth diver, even more than 10 years after their first introduction.

Among the W/B&M, the silicone hydrogel lenses are growing strong and are therefore driving the change and growth.

EUROMCONTACT thanks all participating companies for their contribution and cooperation.

Table 1: Reporting companies (in alphabetical order)
AMO
Alcon
Avizor
Bausch & Lomb
CIBA Vision
Cooper Vision
Johnson & Johnson Vision Care
Menicon Europe

Table 2: Split of all 21 markets in segments (by value) for 2008

Table 3: Markets assessed
The Nordic countries (NO-SE-DK-FI)
The United Kingdom and the Republic of Ireland (UK-IE)
Austria (AT)
Belgium and Luxembourg (BE-LU)
France (FR)
Germany (DE)
Italy (IT)
Russia (RU) (partial data only)
Spain (ES)
Switzerland (CH)
The Netherlands (NL)

Table 4: Markets collected, but not assessed in this report
United Arab Emirates (AE)
Czech (CZ)
Greece (GR)
Hungary (HU)
Israel (IL)
Poland (PL)
Portugal (PT)
Kingdom of Saudi Arabia (SA)
Turkey (TU)
South Africa (ZA)

Table 5
Size of MPS segment versus the HP one, by country

Figures 1 through 5 as mentioned in the text.

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/