

Eyewear in Western Europe

August 2024

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Key findings

REGIONAL OVERVIEW

Spectacles dominate eyewear sales in Western Europe

Western Europe underperforming the global market

Modest growth expected in the region following the ups and downs of recent years

The UK has the highest sales of daily disposable lenses

Sunglasses sales were struggling over the 2019-2024 period in Turkey

All three main categories lost sales during the 2019-2024 period

Eyewear continues to see more functional segmentation in Germany

RAC 0 initiative helps keep a lid on price rises in French eyewear

Optical goods stores continue to dominate Western European eyewear sales

E-commerce accounts for almost a third of contact lens sales

Industry players increasingly adopting an omnichannel approach

LEADING COMPANIES AND BRANDS

Top five players tend to account for 40%-plus of sales in most countries

EssilorLuxottica remains a strong leader in Western European eyewear

China is the main revenue generator for half of the top 10 players

Glasses brands dominate the top 10 rankings

FORECAST PROJECTIONS

Positive if modest annual value growth expected for Western European eyewear

Increasing segmentation and personalisation expected in German eyewear

Rising incidences of myopia and presbyopia will continue to drive volume growth

COUNTRY SNAPSHOTS

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

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Italy: Competitive and Retail Landscape

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