

Therapeutic Contact Lenses Market - Global Outlook & Forecast 2022-2027

Market Report | 2023-02-02 | 282 pages | Arizton Advisory & Intelligence

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Report description:

The global therapeutic contact lenses market is expected to grow at a CAGR of 4.90% from 2021-2027

MARKET INSIGHTS

- Therapeutic contact lenses (TCLs) are mainly used for corneal diseases, and the clinical use of TCL after ophthalmic surgery usually focuses on corneal lesions, corneal refractive surgery, and corneal transplantation. These bandages were also used in cataract surgery. It also stimulates corneal metabolism, improves corneal regeneration, increases epithelial adhesion, maintains hydration, reduces collagenase accumulation, reduces edema, improves corneal clarity and vision, and is a vehicle for ophthalmic drug delivery.

- The two most common contact lens variants available in the therapeutic contact lenses market include hard and soft contact lenses. RGP contact lenses are the most common type of hard contact lenses available in the industry. These lenses are usually made from plastic materials. These lenses hold their shape firmly and allow oxygen to flow through the wearer's eye lens. RGP lenses are helpful for people with astigmatism and keratoconus as they enable sharper vision when the cornea is unevenly curved compared to soft contact lenses. Soft contact lenses are made up of hydrogel and silicone hydrogel materials.

- Nearly 125 million people worldwide wear contact lenses to correct regular or common vision problems, such as myopia, hyperopia, presbyopia, and astigmatism. This vision correction can be done per the user's needs without disturbing the physical appearance. By 2050, more than 2 billion people will be aged over 60. There is an increase in the global target population with the number of people requiring vision corrections. For instance, around 153 million people are affected by uncorrected refractive errors, 1.7 billion have presbyopia, 352 million people suffer from dry eyes, and 20 million people are facing blind from cataracts. In addition, the diabetic population does suffer from various vision-related issues. For instance, around 93 million people suffer from diabetic retinopathy, and more than 67 million suffer from glaucoma.

IMPACT OF COVID-19

The COVID-19 pandemic has largely affected customer behavior regarding therapeutic contact lenses. A considerable rise in

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first-time contact lens users has recently been witnessed. However, there has been an increase in the market's percentage of contact lens dropouts. Some first-time contact lens users include medical professionals, management professionals, and office workers who use computers and electronic devices for long hours daily. The common goal of these contact lens users was to eliminate the dependency on spectacle corrections while performing critical tasks. Simultaneously, in 2020, there was an increase in dropouts among long-term contact lens users in the therapeutic contact lenses market. Some reasons for a decline or complete discontinuation in contact lenses include concerns associated with the high risk of contracting infections, worsened dry eye conditions, and low demand for contact lenses due to remote work options from the comfort of homes.

MARKET TRENDS & DRIVERS

Increasing Use of Silicone Hydrogel Contact Lenses

Silicone hydrogel contact lenses have become the most widely used contact lenses. As they are easy and handy to use with no maintenance required, they do not cause any harm to people compared to extended wearable lenses. Also, Silicone hydrogel lenses can treat eye problems such as red eyes, blurred vision, corneal swelling, and general discomfort in the eyes. Many key players in the therapeutic contact lenses market do offer Silicone hydrogel therapeutic contact lenses, such as Acuvue Oasys (Johnson & Johnson Vision Care), Air Optix Aqua (Alcon), Biofinity (CooperVision), and PureVision2 (Bausch & Lomb).

The Coming Rise of Drug-delivery Contact Lenses

Extensive research has been documented recognizing the potential of BCL as a drug delivery system. This is due to their superior drug bioavailability compared to eye drops and their ability to be used on long-wearing schedules, increasing dosing frequency, side effects, and compliance. Desired properties of drug delivery devices include easy, comfortable, and controlled administration over an extended period with preservation of vision and ocular function.

Introduction of Hi-Tech Contact Lenses

Hi-tech contact lenses are used to treat eye disorders and more. The hi-tech contact lenses involve various processes, such as delivering the drug to the eye, providing augmented reality, monitoring eye health conditions, and more. Mojo Vision, a California-based company working on AR (Augmented Reality) based smart contact lenses, has launched contact lenses that elevate users' vision. These lenses are equipped with an inbuilt display that provides timely information regarding the objects focused on without interrupting the real vision.

Growing Prevalence of Ophthalmic Disorders & Geriatric Population

As populations continue to expand, so does the need for eye care. Aging is one of the most significant global demographic factors impacting eye care as the need for vision correction increases and becomes more complex as a person grows older. In 2018, around one-third of the global population was above the age of 45, the average onset of presbyopia (long-sightedness caused by loss of elasticity of the eye's lens).

Further, the rise in urbanization and the expansion of middle classes in fast-developing markets, particularly in Latin America and Asia, have transformed the economy and local eye health requirements. A considerable increase in migration from rural areas to cities in search of better jobs has contributed to the demand for better healthcare requirements and trends. Increased disposable incomes are encouraging people to prefer the luxury products like contact lenses in the market, which is one of the major factors contributing to the growth of the global therapeutic contact lenses market.

Technological Advancements in Contact Lenses

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The key vendors in the contact lenses market are constantly investing in research & development to launch a new variety of contact lenses benefitting the market's users and fulfilling the market's unmet needs. New products are one of the unique strategies to drive customers towards new products with unique features in the therapeutic contact lenses market. In 2019, Bausch & Lomb launched the ULTRA multifocal toric contact lens for presbyopia patients. The ULTRA multifocal for astigmatism features vision at all distances and a stable fit for consistent results.

Public and Private Initiatives to Increase Vision Care Awareness

Favorable initiatives of governments around the world to promote advanced vision aids will support therapeutic contact lenses market growth in the coming years. For example, the US Department of Health and Human Services and the Centers for Disease Control and Prevention (CDC) is actively working to raise awareness of behaviors and risk factors that affect vision in contact lens wearers through the Vision Health Initiative. In addition to government and public health organizations, many private organizations worldwide are actively involved in advancing ophthalmology. For example, in 2018, Johnson & Johnson Vision launched a global campaign called SpotlightSight in honor of World Sight Day.

SEGMENTATION ANALYSIS

INSIGHTS BY MATERIAL

The global therapeutic contact lenses market is segmented into soft and rigid contact lenses by material segment. Among the material segment, the soft contact lenses segment dominates the market with a share of 85.25%, followed by rigid contact lenses in 2021. The soft contact lenses segment will likely witness the highest CAGR of 5.03%, with incremental growth of USD 932.18 million. Hydrogels used to manufacture therapeutic soft contact lenses are commonly synthesized by free radical and UV photopolymerization and cast molding. The main network of hydrogels that make up soft contact lenses is usually based on poly(hydroxyethyl methacrylate) (HEMA), especially methafilcon A. Soft hydrogel contact lenses are typically more comfortable to wear than rigid or hard lenses, as they are more flexible and move and bend with the eyes.

Segmentation by Material

- Soft Contact Lenses
- Rigid Contact Lenses

INSIGHTS BY USAGE

The daily replacement segment dominated the global therapeutic contact lenses market, with a share of 55.24% in 2021, and is likely to witness the highest CAGR of 5.16%. Daily replacement contact lenses are one-time usable lenses that are discarded post-usage. One of the major reasons for the preference is its ease of use, reduced infections, and more comfort on the eye. This has largely driven the usage of daily disposable contact lenses in the market. Daily disposable contact lenses are increasing among specialists and are also largely recommended among users. Further, the adoption of daily contact lenses is high among developed countries, whereas among developing countries, the usage of daily disposable contact lenses is low in the market.

Segmentation by Usage

- Daily Disposable
- Frequently Replacement

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INSIGHTS BY APPLICATION

-□ The post-ocular surgery segment dominated the global therapeutic contact lenses market with a share of 35.77%. The use of therapeutic lenses is safe and effective in protecting the ocular surface and stabilizing the tear film after cataract surgery, has the advantage of preserving the 'immediate vision' of the operated eye, and is a promising alternative to covering the eye patch coverage in the postoperative management of cataracts surgical patients, especially those with monovision.

-□ However, the corneal surgery/disorder segment will likely witness the highest incremental growth of USD 345.57 million over the forecast period. Therapeutic contact lenses are important for treating ocular surface and corneal disorders. A therapeutic contact lens or bandage lens is a contact lens that protects and heals the cornea. Further, the increasing number of corneal surgeries drives the demand for therapeutic lenses. Corneal surgery/transplantation is currently the world's most widely performed tissue transplant procedure.

Segmentation By Application

- Post Ocular Surgery
- Corneal Surgery/Disorder
- Drug Delivery
- Others

INSIGHTS BY DISTRIBUTION CHANNEL

The Omni channel distribution dominates the therapeutic contact lenses market with a share of 73.31%. It is likely to witness incremental growth of USD 864.79 million. The Omni channels comprise retail and online stores. Compared to developed countries, such as Latin America and Asia, distribution through retail stores has increased in developing countries. The reputation, consumer awareness about the brands, and customer satisfaction have increased loyalty, still driving them to prefer retail stores to purchase contact lenses in the market. In addition, multiple commercial campaigns are launched by various retail stores, which attracts users to move towards retail stores.

Segmentation By Distribution Channel

- Omni Channel
- Hospitals & Eye Care Clinics

GEOGRAPHICAL ANALYSIS

In 2021, North America dominated the global therapeutic contact lenses market with a share of 34.68%. The region is one of the major consumers of contact lenses due to people's increased awareness and disposable income. This makes the companies largely focus on launching their products in the market. Countries like the US and Canada have well-developed healthcare systems and a stringent regulatory environment for manufacturers of contact lenses. Also, market vendors are investing in R&D initiatives and advanced technologies to develop efficient contact lens products.

APAC is expected to witness the highest CAGR growth of 5.30% in the global therapeutic contact lenses market over the forecast period. In 2020, APAC had a higher number of customers using contact lenses in the countries such as China, India, and more. In addition, the surge in the target population is majorly driving the demand for contact lenses. The growing myopic population in the region, including teenagers, and elderly individuals, is one of the driving factors. In addition, increasing awareness regarding brand consciousness is accelerating the demand for contact lenses in the region.

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Segmentation by Geography

- APAC
 - o China
 - o Japan
 - o India
 - o South Korea
 - o Australia
- North America
 - o US
 - o Canada
- Europe
 - o Germany
 - o France
 - o UK
 - o Italy
 - o Spain
- Latin America
 - o Brazil
 - o Mexico
 - o Argentina
- Middle East & Africa
 - o Turkey
 - o Saudi Arabia
 - o South Africa
 - o UAE

VENDOR LANDSCAPE

The global therapeutic contact lenses market is highly consolidated, with the key players including Alcon, Bausch & Lomb, Johnson & Johnson, and The Cooper Companies accounting for a major market share. The market is subjected to constant technological advances and regularly evolving vision correction requirements and standards. Vendors compete based on product variety, pricing, quality, technological leadership and innovation, and the efficacy of therapeutic contact lenses.

Key Developments in The Global Therapeutic Contact Lenses Market

- Alcon brands such as Dailies and Air Optix have enabled the company to achieve a significant therapeutic contact lens market share. In 2016, Alcon launched Air Optix plus HydraGlyde in the US and the EU, an innovative upgrade to monthly SiHy contact lenses featuring the HydraGlyde moisture matrix technology for long-lasting lens surface wettability and another product, DAILIES TOTAL1 Multifocal contact lenses in both the US and the EU.
- Johnson & Johnson's growth is primarily driven by its daily disposable lens sales in the ACUVUE OASYS contact lenses category. In 2021, Johnson & Johnson Vision received approval in Canada for ACUVUE Abiliti 1-Day Soft Therapeutic Lenses for Myopia Management.

Key Vendors

- Alcon
- Bausch & Lomb

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- []Johnson & Johnson
- []The Cooper Companies

Other Prominent Vendors

- []ABB Optical Group
- []AccuLens
- []Advanced Vision Technologies
- []Contamac
- []Excellent Hi-Care
- []Medennium
- []Menicon
- []Metro Optics
- []Orion Vision Group
- []POLYTOUCH
- []Shine Optical
- []SURGITECH INNOVATION
- []SynergEyes
- []UltraVision CLPL
- []Walman
- []Visionary Optics

KEY QUESTIONS ANSWERED

- 1.[]What is the size of the therapeutic contact lenses market?
- 2.[]What is the growth rate of the therapeutic contact lenses market?
- 3.[]Who are the key players in the global therapeutic contact lenses market?
- 4.[]Which region has the highest global therapeutic contact lenses market share?
- 5.[]What factors impact the growth of the therapeutic contact lenses market?

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28.1 ABBREVIATIONS

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☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|---|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |
| | | Date | <input type="text" value="2025-05-07"/> |
| | | Signature | <input type="text"/> |

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