

Eye Health

Envisioning Opportunities for Eye Care & Eye Health Supplements



Key Features

- An in-depth exploration of the **Eye Health** market globally
- Coverage of **15 major markets** from around the world, with topline sales, brand performances, new developments, launches and promotional campaigns
- Very latest **year-end 2020** sales from **DB6**, our dedicated CHC sales database, plus historical growth rates back to 2016
- Case studies of **key brands**, highlighting strategies and success factors, sales, NPD activity and consumer & HCP promotion
- Dedicated **Outlook** chapter focused on the most likely future scenarios

Envisioning Opportunities for Eye Care & Eye Health Supplements

The latest deep-dive category report from *Nicholas Hall's CHC Reports* analyses the **Eye Health** market, with comprehensive coverage of **Eye Care** and **Eye Health Supplements** across the globe.

The report profiles **15 countries**, spanning every region, each with a dedicated chapter covering topline trends & developments, the competitive landscape, launch activity & NPD, regulatory changes and challenges (including Rx-to-OTC switch) and a look to the future.

All data is sourced from **DB6**, Nicholas Hall's global CHC sales database, featuring year end-2020 sales and historical sales back to 2016, from global and regional toplines down to brand & marketer level detail in individual countries.

The Eye Health market comprises Eye Care and Eye Health Supplements. 2020 sales in Eye Care are further segmented into Dry eye, Allergy eye, Red eye & Other.

Forecast sales data projects the size of market in the short term, as well as longer-term prospects to 2025 & 2030.

Chapters include:

Executive Summary

Global overview • Competitive landscape • Eye care topline trends • Eye health supplements topline trends
Scientific studies important, but what's new? • NPD & Switch • Online space offers opportunity?
Cross-category eye health brands • Outlook for Eye Health

Brand Case Studies

Hylo • Lumify • MacuShield • Pataday • Systane • TheraTears

Outlook

Global outlook for eye health • North America • Asia-Pacific • Western Europe • Central & Eastern Europe • Latin America • Five fresh ideas

Key questions investigated in this report

-  Why do certain markets have high per capita eye health spends but others are significantly underdeveloped?
-  Why are so few eye care brands crossing over into supplements?
-  Is the recent trend for blue light protection a sustainable driver of sales?
-  Can marketers do more to attract older consumers to their brands?
-  What does the rapid rise of online purchasing mean for sales via traditional retail channels?



15 individual market profiles

- | | | | | | | | |
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|  |  |  |  |  |  |  |  |
| Australia | Brazil | Canada | China | France | Germany | India | Italy |
|  |  |  |  |  |  |  | |
| Japan | Poland | Russia | S Korea | Spain | UK | USA | |

Each country profile contains multiple charts including leading brands within Eye Care and Eye Health Supplements, historical category sales 2016-20, classification of key ingredients, as well as forecast sales data with prospects & opportunities.

To order your copy of our **Eye Health Report** please contact Melissa.Lee@NicholasHall.com

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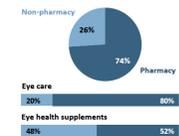
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Executive Summary – Global overview

Shifting patterns of consumption: Trend is “from bricks to clicks”, but in-store shopping still popular

- Looking beyond CHC and eye health to the wider trends in e-Commerce during the pandemic highlights the shift in consumer shopping habits; YouGov's *International Omni-Channel Report 2021*, covering 17 markets, found:
 - 74% of global consumers shop via both online and bricks & mortar channels
 - Essentials are more likely to be purchased in-store (78%) versus online (57%), compared with discretionary items, which are more often bought online (72%) than in-store (57%)
 - Despite shopping shifting online during the pandemic, consumer preference for bricks & mortar remains high
 - Home delivery is the top benefit cited by shoppers for online retail (57%) and delivery charges are main barrier (46%)

Global eye health sales by pharmacy / non-pharmacy channel 2020 (MSP, \$mm)



- Nevertheless, retail point-of-sale presently remains the dominant channel for CHC sales across the globe and will likely remain so for many years yet, with eye health no exception
- Eye health sales are heavily skewed towards the pharmacy channel (see left) – even more so if USA is taken out of the equation, leading to an 89:11 split
- Most of this is the result of eye care sales generating vast majority of their sales in pharmacy, either owing to sales restrictions (which differ from market to market) or consumer desire for advice
- Eye health supplements are split more evenly between both channels, with availability in mass market outlets (in most markets) a factor in their sales growth, benefiting from easy access and self-selection for consumers

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Australia – Eye care

Australia eye care sales by segment 2020 (MSP, \$mm)

- Current focus of promotion for **Optrex** is for eye spray presentation ActiMist 2 in 1, marketed as “so easy you can do it with your eyes closed”
- Product is a vitamin-enriched saline spray applied to closed eyes to provide a cooling and soothing effect
- Range also includes an eye wash and naphazoline medicated eye drops



- Visine** comprises core Clear presentation for red eye relief, tetrahydrozoline-based Advanced and pheniramine + naphazoline Allergy presentation; promotion features an animated eye mascot, although there has been little NPD or promotional activity in recent years
- AFT Pharmaceuticals fields **Hylo** and **NovoTears** (\$0.9m, +70%) as well as 2018 launch **Opt-Soothe**, with its eye care portfolio (see right) seeing a significant upturn in 2020 as a result of the pandemic; higher levels of brand activity than competitors helped drive sales
- Unified promotion at mydryeyes.com.au highlights importance of different products for different conditions; Hylo offers Fresh (for mild and moderate) and Forte for severe and chronic dry eye

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Germany – Eye health supplements

Schlechte Aussichten? Ich tue alles für dein gutes Augenblick.

Orthomol Vision clearly targets older consumers, with core Vision presentation and dedicated AMD Extra

Latter claims to be specially designed for management of advanced AMD, via elevated amounts of vitamins E, C and zinc

A&P positions the brand for seniors looking to make the most of their eyesight, with taglines such as “Bad outlook? I do everything for the moment” and “Limit yourself to losing sight of life? I have my support”

Brand's premium price may explain its ongoing sales decline, perhaps losing out to cheaper options in the mass market

Retaron is positioned to counter age-related eye diseases, primarily AMD, formulated with aronia berry extract, lutein, zeaxanthin, plus zinc, selenium and vitamins C and E; it is available as capsules and liquid

In the lower tier, the standout growth brand was **Blue Berry Eyebright** which makes much of its Swedish origins, its all natural herbal ingredients and the provenance of the blueberries at the heart of its formulation (blueberry, eyebright, marigold, lutein, vitamin A, zinc)

Launch activity included **NHCO Vision** (Chiesi) in March 2021, a day & night supplement claimed to reduce ocular fatigue and protect against oxidative stress; presented as vegetarian capsules for morning and soft gel capsules for evening

In late 2020 VISUfarm launched **VisuComplex Plus MaquiBright** (also in Italy and Spain), which is positioned to maintain vision by protecting retinal cells from oxidative stress, protecting eyes from natural ageing and UV light

It claims to be the first and only dietary supplement based on maqui berries, alpha lipoic acid and vitamin D

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Eye Health 100

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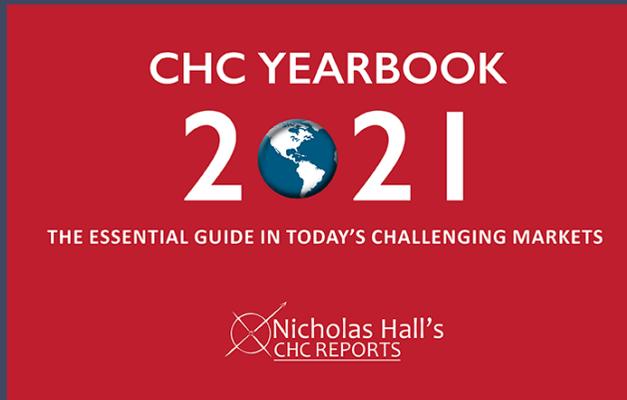
Dedicated to benchmarking consumer healthcare markets and providing business solutions, we are specialists in consumer healthcare, with an international network of contacts, offering data & analysis, strategic advice and competitive intelligence on a global, regional or local basis.

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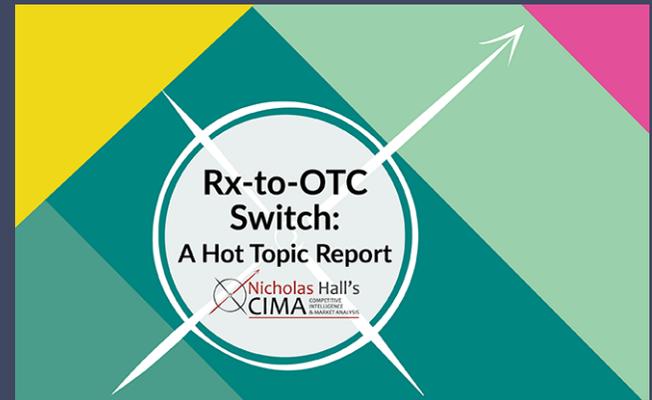
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