

Industry profile

Consumer Optics

In brief

The ophthalmic industry produces all products sold or required by opticians or sometimes ophthalmologist. It also offers its customers a wide range of services, marketing services and sales support. A comparatively small percentage of sales are also generated online, and the trend is rising. The German ophthalmic industry generates 49 percent of its sales on foreign markets.

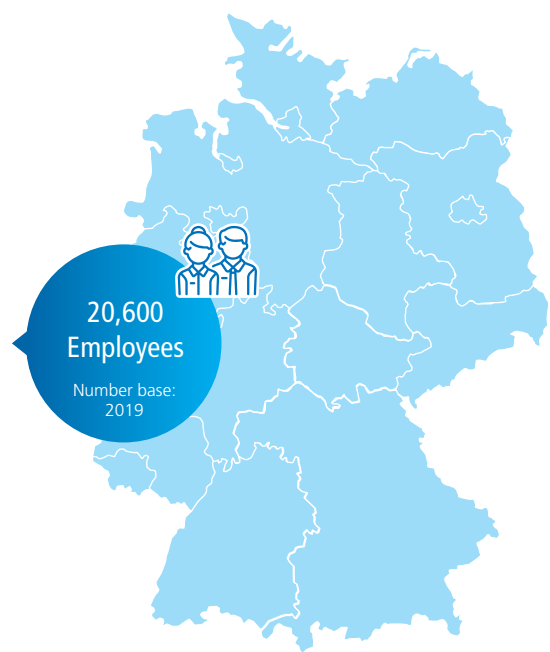
In 2019, the 140 German companies with their 20,600 employees generated sales of EUR 4.7 billion.

Industry structure

The ophthalmic industry in Germany is dominated by medium-sized companies. The density of opticians in Germany is only exceeded by the number of pharmacies. On average, there is one optometrist for every 7,190 inhabitants. In 2019 there were 11,550 businesses with a total of 48,400 employees. In recent years, chain stores have been able to gain significant market shares compared to independent individual companies. In 2019, the ten largest chain stores in Germany owned around 19.3 percent of all German optical operations and generated 48.5 percent of stationary industry turnover. In 2019, online (2%) and multichannel business (9%) accounted for 11 percent of industry sales in Germany.

Companies

The list of selected photonics companies that are members of SPECTARIS can be found at: www.spectaris.de/consumer-optics/mitglieder



Products & technology

- Ophthalmic lenses
- Spectacles: frames/sunglasses
- Contact lenses
- Low vision
- Eye test equipment
- Binoculars

Customers & markets

- Opticians
- Ophthalmologists
- Almost two thirds of mankind have visual deficits and therefore get back some quality of life

Opportunities, challenges, trends

Demographic development in both Germany and world-wide provides the industry with future potential. There is also plenty of unmet need around the globe. Furthermore, the ophthalmic industry offers visual solutions for the various everyday situations that have not been fully exploited by the consumer. On the other hand, the industry is facing a sustained concentration process. Business will be carried out more and more via online channels. Furthermore, glasses and contact lenses are medical devices that are subject to considerable administrative and documentation obligations due to various regulatory requirements - in particular the Medical Device Regulation (MDR).

Further information

- Our annual (chargeable) "Optical Industry Report Germany and the world: markets, consumers and trends" offers a detailed overview of the industry: www.spectaris.de/consumer-optics/zahlen-fakten-und-publikationen (only in German)
- Once a year, at the beginning of November, the optical industry meets at our SPECTARIS trend forum in Berlin: www.spectaris-trendforum.de (German spoken)

Consumer Optics	2016	2017	2018	2019	Dev. 2019/18
Total sales (€ bn.)	4.32	4.44	4.46	4.70	+5.4%
Domestic sales (€ bn.)	2.20	2.25	2.30	2.39	+3.9%
Foreign sales (€ bn.)	2.11	2.19	2.16	2.31	+6.9%
Export rate (%)	49.0	49.3	48.4	49.1	+1.5%
Employees (Thousand)	21.2	20.6	20.5	20.6	+0.3%
Companies	approx. 140				

Companies with 20 employees and over; data contains rounding differences.
Source: SPECTARIS



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