

United States Eyewear Market Segmented By Product Type (Sunglasses, Spectacles, Contact Lenses, Sports Eyewear, Others (Safety & Protection Eyewear, Transparent Eyeglasses)), By End User (Women, Men and Unisex), By Sales Channel (Supermarkets/Hypermarkets, Specialty Stores, Online, and Others (Hospitals, Clinics, Make Up & Beauty Stores, etc.)), By Region, Competition, Forecast and Opportunities, 2018-2028F

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Abstracts

United States Eyewear Market has valued at USD 30.55 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.92% through 2028. The United States eyewear market is a diverse and robust industry encompassing a wide range of products, from prescription glasses and contact lenses to sunglasses and fashionable eyewear. This market is marked by a combination of factors, including changing consumer preferences, advancements in eyewear technology, and the evolving role of eyewear as a fashion accessory.

Prescription eyewear, including eyeglasses and contact lenses, is a fundamental component of the U.S. eyewear market. This segment is driven by factors such as the aging population, increasing cases of vision-related issues, and the growing awareness of the importance of eye health. With the rise of digital devices and prolonged screen time, there is a growing need for corrective eyewear to address issues like myopia and astigmatism.

The market for prescription eyewear has seen significant technological advancements,

with the introduction of high-definition and anti-reflective coatings, thinner and lighter lens materials, and progressive lenses that eliminate the need for multiple pairs of glasses. Additionally, the trend of online eyewear retail has disrupted traditional distribution channels, making prescription eyewear more accessible and convenient for consumers.

Sunglasses have become more than just a protection from the sun's harmful UV rays; they are now a fashion statement. The U.S. sunglasses market is influenced by fashion trends and the desire for UV protection, making it a blend of style and function. Premium and designer sunglasses brands have gained popularity, with consumers willing to invest in high-quality eyewear that complements their personal style.

The eyewear industry has seen a surge in fashion eyewear, including non-prescription glasses and frames that serve as accessories. These frames come in various shapes, sizes, and materials, and they cater to consumers looking to make a style statement. Celebrities and influencers often drive the demand for these fashionable frames, making eyewear a significant component of personal style.

The United States eyewear market faces challenges related to price sensitivity, counterfeit eyewear, and the emergence of online marketplaces. Consumers often seek value for their eyewear purchases and may be tempted by lower-cost options. However, concerns about quality and authenticity remain.

On the other hand, ongoing trends in the market include a growing awareness of eye health, an aging population that requires vision correction, and the increasing use of eyewear as a fashion accessory. The market also continues to witness technological innovations, such as smart glasses and contact lenses that monitor health metrics and augmented reality (AR) capabilities.

Key Market Drivers

Evolving Fashion Trends and Style Preferences

One of the primary drivers of the United States eyewear market is the ever-changing landscape of fashion trends and style preferences. Eyewear is no longer seen solely as a vision correction tool; it has become a fashion accessory and a means of self-expression. As a result, consumers are increasingly seeking eyewear that complements their personal style and enhances their overall appearance.

In recent years, the eyewear industry has witnessed a surge in demand for a wide variety of eyeglasses and sunglasses, each catering to different fashion preferences. From retro-inspired frames to minimalist, ultra-modern designs, consumers have an array of choices to match their individual aesthetics.

Celebrities, influencers, and fashion icons often play a pivotal role in setting eyewear trends. When a prominent figure is seen sporting a particular style of eyeglasses or sunglasses, it can quickly become a sought-after fashion statement, influencing consumer choices.

The eyewear industry has responded to this trend by offering a diverse range of frame styles, materials, and color options. Eyewear brands and retailers now collaborate with fashion designers to create exclusive collections, further blurring the line between eyewear and fashion. This dynamic fusion of fashion and eyewear choices continues to be a driving force in the U.S. eyewear market.

Technological Advancements and Innovation

Technological advancements represent another significant driver of the eyewear market in the United States. Innovations in materials, coatings, lens technology, and manufacturing processes have transformed the eyewear industry, enhancing both the functionality and aesthetics of eyeglasses and sunglasses.

Digital Lenses: Digital lens technology has revolutionized the vision correction aspect of eyewear. High-definition and digitally surfaced lenses offer improved clarity, reduced distortion, and enhanced visual comfort. These innovations are particularly valuable for those with higher prescription needs, astigmatism, or presbyopia.

Blue Light and UV Protection: With increased screen time and digital device usage, the demand for eyewear with blue light and UV protection has surged. These specialized lenses help reduce eye strain, protect against harmful UV rays, and enhance overall eye health.

Lightweight and Durable Materials: The introduction of lightweight and durable materials, such as memory metals and high-quality acetates, has made eyeglasses more comfortable and long-lasting. These materials offer flexibility and resilience, reducing the risk of breakage.

Customization and 3D Printing: Customization has become a focal point of innovation in

the eyewear market. 3D printing technology allows for personalized frame designs, ensuring a perfect fit and style alignment with the individual wearer's face shape and preferences.

Smart Eyewear: The emergence of smart eyewear, including augmented reality (AR) and virtual reality (VR) glasses, is set to revolutionize not only the tech industry but also the eyewear market. Smart eyewear offers features like heads-up displays, voice commands, and real-time data integration, expanding the utility of eyewear beyond vision correction and sun protection.

Incorporating these technological advancements has led to increased consumer interest in eyewear that not only meets their visual needs but also enhances their lifestyle and well-being. As technology continues to advance, the eyewear market is likely to see further innovations that drive consumer engagement and market growth.

Aging Population and Vision Health Awareness

The demographic landscape of the United States is changing, with an aging population that is increasingly focused on vision health. This demographic shift has a profound impact on the eyewear market as older individuals often require vision correction and eye health maintenance.

As people age, the prevalence of vision-related conditions, such as presbyopia, cataracts, and age-related macular degeneration, tends to increase. This has led to a growing demand for eyeglasses and sunglasses that provide not only clear vision but also address specific age-related vision challenges.

Furthermore, awareness of the importance of regular eye exams and vision care has been on the rise. With the aging population becoming more proactive in preserving their eye health, routine eye check-ups are becoming the norm. This increased awareness drives demand for eyewear, both prescription and non-prescription, that is designed to meet the unique needs of older individuals.

The eyewear market has responded by offering specialized products such as multifocal lenses, progressive lenses, and glare-reducing coatings to cater to the aging demographic. The availability of a wide range of stylish frames and options for vision correction, including bifocals and progressive lenses, ensures that older individuals can maintain their visual acuity without compromising on style.

Key Market Challenges

Changing Consumer Behavior and Preferences

One of the major challenges confronting the eyewear market in the United States is the shifting consumer behavior and preferences. While eyewear has been traditionally perceived as a necessity for vision correction, it has increasingly become a fashion accessory. Consumers, especially the younger demographic, are now driven by style, brand identity, and the desire to make a fashion statement when choosing eyewear.

This shift has created a challenge for traditional eyewear retailers and manufacturers. They must adapt to the changing landscape by offering a wider variety of frame styles and designs, often in collaboration with fashion brands. At the same time, the market must address the demand for affordable, fashionable eyewear options, which may lead to pricing pressures.

Moreover, the rise of e-commerce and direct-to-consumer eyewear brands has altered how consumers shop for eyewear. Consumers now have the option to purchase eyewear online, often at lower prices, which poses a challenge for brick-and-mortar retailers who must provide value and personalized services to remain competitive.

Increasing Competition and Consolidation

The United States eyewear market is highly competitive, with numerous players, including established eyewear manufacturers, retailers, online startups, and fashion brands entering the space. This increased competition is driven by the growing demand for eyewear, technological advancements, and shifting consumer preferences.

In response to the intense competition, many eyewear companies have engaged in consolidation, mergers, and acquisitions to strengthen their market position. For instance, Luxottica and Essilor merged to form EssilorLuxottica, one of the world's largest eyewear companies, with significant market power. While such consolidation can lead to economies of scale, it may also limit consumer choice and potentially result in higher prices.

Additionally, the growth of online retailers and the direct-to-consumer model has disrupted the traditional eyewear distribution chain. These newcomers often offer lower-priced eyewear by cutting out intermediaries, which has forced established players to reevaluate their pricing strategies.

The challenge for the eyewear market is to strike a balance between healthy competition and market consolidation, ensuring that consumers have access to a variety of eyewear options while maintaining affordability and quality.

Rising Healthcare Costs and Insurance Issues

The cost of eyewear in the United States can be a significant financial burden for many consumers. While vision insurance plans exist, they often have limitations, leaving consumers to bear a substantial portion of the cost. The challenge here is twofold: rising healthcare costs and insurance limitations.

First, the overall healthcare cost in the United States, including eye care, has been steadily increasing. This includes the cost of eye exams, frames, lenses, and contact lenses. As a result, consumers may delay or forego purchasing eyewear due to financial constraints, which could negatively impact their eye health.

Second, many insurance plans have limited coverage for eyewear or may not cover certain designer frames or specialized lenses. This puts the onus on consumers to navigate the complex landscape of insurance options, co-pays, deductibles, and out-of-pocket expenses, making the purchase of eyewear an intricate process. The challenge is to make eyewear more affordable and accessible for consumers while addressing the issue of rising healthcare costs and insurance limitations.

To address these challenges, the eyewear market in the United States may need to work closely with healthcare providers, policymakers, and insurance companies to develop more comprehensive and affordable vision care solutions. Moreover, eyewear companies can explore innovative pricing models and partnerships with insurance providers to make quality eyewear more accessible to a broader range of consumers.

Key Market Trends

Growing Demand for Digital Eye Strain Solutions

One of the prominent trends in the United States eyewear market is the increasing demand for eyewear designed to alleviate digital eye strain. As digital devices like smartphones, tablets, and computers have become integral parts of daily life, more people are spending extended periods in front of screens. This prolonged screen time can lead to symptoms of digital eye strain, such as eye fatigue, dryness, and

headaches.

In response to this trend, eyewear manufacturers are developing and marketing specialized lenses and frames designed to reduce the impact of digital eye strain. These eyeglasses often feature blue light filtering technology, which can block a portion of the harmful high-energy blue light emitted by screens. Additionally, anti-reflective coatings are applied to lenses to reduce glare and improve visual comfort.

As remote work and online learning become more prevalent, the demand for digital eye strain solutions is expected to continue to grow. Eyewear retailers are likely to expand their product offerings in this category, and consumers may prioritize eyeglasses that not only correct vision but also provide relief from the discomfort associated with prolonged screen use.

Rise of Fashion-Forward Eyewear and Sustainable Choices

Another notable trend in the United States eyewear market is the convergence of fashion and sustainability. Eyeglasses and sunglasses are no longer just functional accessories; they have become fashion statements. Consumers are increasingly looking for eyewear that complements their personal style while also reflecting their values, including sustainability and environmental consciousness.

Many eyewear brands are responding to this trend by offering a wide range of stylish frames and designs. Whether it's classic, retro, minimalistic, or bold, consumers can find eyewear that matches their fashion preferences. Additionally, the use of sustainable materials, such as recycled plastics, wood, and eco-friendly acetates, is on the rise. Brands that prioritize sustainability in their manufacturing processes are gaining favor among environmentally conscious consumers.

This fashion-forward and sustainable eyewear trend is also driven by the popularity of social media and online influencers. People are increasingly influenced by celebrities and style icons who showcase eyewear as a fashion accessory. The desire to emulate these fashion-forward trends has contributed to a shift in consumer buying patterns, with a greater emphasis on style and sustainability.

Expansion of Online Eyewear Retail

The United States eyewear market is witnessing a substantial expansion of online eyewear retail. E-commerce has transformed the way consumers shop for eyeglasses

and sunglasses. The convenience of online shopping, combined with the ability to browse a vast selection of frames from the comfort of one's home, has driven the growth of online eyewear retailers.

Many online retailers offer virtual try-on tools that allow customers to see how different frames look on their face. This technology helps alleviate one of the main concerns of online eyewear shopping—the inability to physically try on frames before purchasing.

Online retailers can carry a more extensive inventory of frames and styles compared to brick-and-mortar stores with limited shelf space. This variety allows consumers to explore a broader range of choices.

Online retailers often offer competitive pricing and promotions. The direct-to-consumer model, without the overhead costs of physical stores, can result in cost savings for consumers.

Many online eyewear retailers offer customizable options, allowing customers to select frame styles, lens options, coatings, and even add prescriptions according to their specific needs.

The convenience of having eyeglasses delivered to one's doorstep is a compelling reason for consumers to opt for online purchases. This convenience has become even more important during the COVID-19 pandemic.

Despite the growth of online eyewear retail, traditional brick-and-mortar stores remain essential for certain consumers who prefer in-person consultations and fittings. However, the online trend is expected to continue growing, and established eyewear brands, as well as new entrants to the market, are likely to expand their online presence to meet the demand for convenient and customizable eyewear shopping experiences.

Segmental Insights

Product Type Insights

Sunglasses have carved out a substantial and influential share in the United States eyewear market, reflecting their dual role as both a fashion accessory and a practical necessity. Several factors contribute to the prominence of sunglasses in this market, making them a ubiquitous and enduring element of American style and lifestyle.

Sun Protection and Eye Health: The primary function of sunglasses is to provide protection from the harmful effects of UV (ultraviolet) radiation. Prolonged exposure to UV rays can lead to various eye health issues, including cataracts and photokeratitis. As awareness of the importance of eye protection has grown, so too has the demand for sunglasses.

Fashion Accessory: Sunglasses have evolved beyond their utilitarian function to become a key fashion accessory. They add an element of style, enhance one's overall look, and provide an avenue for self-expression. The diverse styles, designs, and brands available in the market allow consumers to choose sunglasses that align with their personal style and preferences.

Celebrity and Pop Culture Influence: The influence of celebrities and pop culture cannot be underestimated in the popularity of sunglasses. Iconic figures from the entertainment industry and fashion world often sport distinctive sunglasses, setting trends that consumers eagerly follow.

Outdoor Lifestyle: The United States is known for its outdoor lifestyle. Sunglasses are an essential part of various outdoor activities, including sports, leisure, and recreation. Athletes, hikers, bikers, and beachgoers rely on sunglasses to enhance their performance and protect their eyes.

Demographic Diversity: Sunglasses appeal to a broad demographic spectrum. They are worn by people of all ages, from children to the elderly. Each age group seeks sunglasses tailored to their specific needs, whether it's stylish kids' sunglasses, trendy youth-oriented designs, or functional and sophisticated options for seniors.

Brand and Designer Appeal: The presence of renowned eyewear brands and fashion designers in the sunglasses market elevates their desirability. Brands like Ray-Ban, Oakley, Maui Jim, and designer labels such as Gucci, Prada, and Versace have a dedicated following, with consumers valuing their quality and status.

Seasonal Variations: The seasonal nature of sunglasses also contributes to their significant share in the market. While they are essential year-round, demand typically surges during the spring and summer months, when outdoor activities increase, and sun exposure is at its peak.

Health and Wellness Trends: The growing emphasis on health and wellness has reinforced the importance of eye care. Consumers are increasingly making conscious

choices to protect their eyes, and sunglasses are viewed as an integral part of maintaining overall well-being.

Customization and Personalization: Many consumers seek customized and personalized sunglasses. Brands offer options for selecting frame styles, lens colors, and even engraving, allowing customers to create sunglasses that align with their unique tastes and needs.

E-commerce and Online Shopping: The rise of e-commerce and online shopping has made it more convenient than ever for consumers to browse and purchase sunglasses. Online retailers provide an extensive selection and the ability to virtually try on different styles, making the shopping experience more accessible and enjoyable.

Sales Channel Insights

Online retail has emerged as a significant player in the United States eyewear market, transforming the way consumers shop for prescription glasses, sunglasses, and other vision-related products. The rise of e-commerce, technological advancements, changing consumer preferences, and convenience have collectively propelled the online eyewear market to a prominent position within the broader eyewear industry.

One of the primary drivers of online eyewear retail's success is the convenience it offers to consumers. With just a few clicks, shoppers can browse through a vast selection of eyewear options, including various styles, shapes, and brands, all from the comfort of their homes. This convenience is particularly appealing to consumers who lead busy lives or may have limited access to brick-and-mortar optical stores.

The wide range of choices available online has significantly expanded the eyewear market's reach. Customers can explore a diverse assortment of frames, lens types, and coatings. This variety enables shoppers to find eyewear that suits their personal style, face shape, and specific vision needs. It has also made niche and specialized eyewear more accessible to those seeking unique designs or specialized functionality.

Pricing and affordability are other factors that contribute to the online eyewear market's success. Online retailers often offer competitive pricing due to lower overhead costs compared to physical stores. This makes it easier for consumers to find quality eyewear at various price points, catering to both budget-conscious shoppers and those looking for premium, designer eyeglasses or sunglasses.

Virtual try-on tools and augmented reality applications have bridged the gap between the online and offline shopping experience. Customers can upload a photo or use their device's camera to virtually try on different frames, helping them make more informed decisions. This technology minimizes the uncertainty associated with purchasing eyewear online.

Another significant aspect of online eyewear retail is the accessibility of prescription eyeglasses and contact lenses. Many online eyewear retailers offer a straightforward process for customers to input their prescription information and order custom eyeglasses or contact lenses, often at a fraction of the cost of traditional optical stores.

The increasing popularity of online eyewear shopping is evidenced by the growth of established online optical retailers, such as Warby Parker, Zenni Optical, and EyeBuyDirect. These companies have disrupted the industry by offering affordable, high-quality eyewear directly to consumers. Their success has encouraged other traditional optical retailers to establish an online presence.

Despite the convenience and advantages of online eyewear shopping, there are some challenges that the industry faces. One of the key challenges is the need for accurate prescriptions, which must be obtained through regular eye examinations. While online retailers typically request prescription details from customers, ensuring the accuracy of these prescriptions remains critical for vision health.

Moreover, there are concerns about fitting and adjustments, as well as the absence of in-person guidance when choosing eyewear. In physical stores, optometrists and trained staff can assist customers in selecting frames that best fit their facial features and provide personalized adjustments for comfort and vision clarity. Online retailers attempt to address this challenge by offering return policies and virtual try-on tools, but the in-person experience remains unmatched.

Regional Insights

The southern region of the United States has emerged as a substantial and influential player in the country's eyewear market. This prominence can be attributed to several key factors, including changing demographics, increased fashion consciousness, a focus on eye health, and the region's vibrant lifestyle and cultural diversity.

Changing Demographics: The southern region of the United States has experienced notable population growth and demographic shifts in recent years. With a mix of young,

urban professionals and a growing aging population, the demand for eyewear has increased significantly. Younger consumers seek fashionable eyewear, while older individuals require prescription glasses for age-related vision issues.

Fashion Consciousness: The South has become increasingly fashion-conscious, with cities like Atlanta, Miami, and Austin emerging as fashion hubs. Eyewear is no longer just a functional accessory but a fashion statement. As a result, consumers in the South are more inclined to invest in stylish eyeglasses and sunglasses to enhance their overall look.

Eye Health Awareness: There is a growing awareness of the importance of eye health in the southern region. Regular eye check-ups and the need for corrective eyewear are emphasized, leading to an increased demand for prescription eyeglasses. Additionally, the high levels of sun exposure in many southern states drive the need for sunglasses to protect the eyes from harmful UV rays.

Cultural Diversity: The South's rich cultural diversity has led to a demand for a wide variety of eyewear styles. Different communities and cultures often have unique eyewear preferences. This diversity has created a market for a broad range of eyeglass frames and lens options to cater to the specific needs and preferences of various communities.

Outdoor Lifestyle: The mild climate and abundance of outdoor activities in the South encourage an active outdoor lifestyle. Whether it's hiking, golfing, or simply enjoying the sunny weather, people in the region recognize the importance of protecting their eyes. This has resulted in a higher demand for performance sunglasses that offer both style and UV protection.

Urban Centers: Southern urban centers are hubs for business, fashion, and entertainment. Residents of these cities often seek the latest eyewear trends, making eyewear retailers and optometrists a vital part of the urban shopping experience. Southern cities' dynamic lifestyles and flourishing arts and culture scenes contribute to the demand for eyewear that complements various occasions and settings.

Access to Healthcare: Many southern states have made efforts to improve access to healthcare services, including vision care. This has made it easier for residents to get their eyes checked, obtain prescriptions, and access eyewear, which, in turn, has boosted the eyewear market.

Rising Disposable Income: The South has witnessed rising disposable income levels, allowing consumers to allocate more of their budget to eyewear. This financial capacity enables them to explore a wider range of eyewear options, from luxury designer brands to custom-made frames.

Key Market Players

EssilorLuxottica SA

Bausch Health Companies Inc.

Johnson & Johnson Vision Care, Inc.

Alcon Vision LLC

The Cooper Companies, Inc.

Safilo USA, Inc.

Menicon America, Inc.

Hoya Vision Care

Carl Zeiss Vision Inc.

Zenni Optical, Inc.

Report Scope:

In this report, the United States eyewear market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Eyewear Market, By Product Type:

Sunglasses

Spectacles

Contact Lenses

Sports Eyewear

Others

United States Eyewear Market, By End User:

Women

Men

Unisex

United States Eyewear Market, By Sales Channel:

Supermarkets/Hypermarkets

Specialty Stores

Online

Others

United States Eyewear Market, By Region:

South

West

Mid-West

North-East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States eyewear market.

Available Customizations:

United States Eyewear market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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