



Eye Care in US

September 2026

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KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

INDUSTRY PERFORMANCE

Leading brands including Systane and Refresh capture share as trust reshapes demand

Premium dry eye solutions drive trading-up and value gains

Trust gap accelerates shift to leading brands while digital channels play an increasingly important role

Chart 1 Value Sales 2021-2031

Chart 2 Value Sales by Category 2026

WHAT'S NEXT?

Premium brands to strengthen position as quality drives demand

E-commerce to accelerate digital shift as brands innovate in engagement

Innovation in delivery systems and wellness will drive value creation

Chart 1 Forecast Value Sales 2021-2031

Chart 2 Forecast Value Sales by Category 2026-2031

COMPETITIVE LANDSCAPE

Alcon and Bausch & Lomb capitalise on trust as private label recedes

Product launches maintain momentum, while some emerging brands gain traction

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Chart 2 Brand Shares 2026

CHANNELS

Grocery retailers maintains lead while pharmacies faces pressure

Shift to retail e-commerce elevates premium products

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Innovation redefines competitive advantage

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