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U.S. Optical Industry Reaches \$69.5 Billion Despite Declines in Product Volume and Eye Exams

Industry shows growth in value, but decreases in volume across nearly all product categories

Alexandria, VA – January 27, 2026 – The U.S. optical industry grew in value in 2025 even as Americans purchased fewer optical products and underwent fewer eye exams, according to **Market inSights 2025 with 2026 Forecast**, released today by The Vision Council. The industry is now estimated to be valued at **\$69.5 billion**, underscoring a shift toward higher spending per purchase amid ongoing economic uncertainty.

While total unit volume declined across nearly all major optical categories in 2025, increased prices and a greater emphasis on value helped sustain overall revenue growth. The findings point to more deliberate consumer purchasing behavior, as shoppers prioritized fewer, higher-value optical purchases.

Built on sophisticated analytics and multiple data sources, **Market inSights 2025** integrates transaction data, retail location data, and consumer surveys to deliver a comprehensive view of the U.S. optical market. The report covers all major categories, including eye exams, frames, ophthalmic lenses, contact lenses, plano sunglasses, and reading glasses, and examines vision correction usage, managed vision care participation, and the national optical retail footprint.

Key Findings from 2025:

- **Industry Value Growth Amid Volume Declines** – The total market value increased modestly from 2024, reaching **\$69.5 billion**. Ophthalmic lenses remained the highest-value prescription category, while plano sunglasses led non-prescription sales.
- **Fewer Eye Exams, Higher Costs** – The market value of eye exams continued to grow, despite fewer exams conducted. The average cost of an exam increased by \$10 compared to 2024.
- **Shifting Consumer Behavior** – Economic uncertainty and evolving tariff policy weighed on consumer sentiment, yet spending remained more resilient than typically expected during sentiment downturns. This suggests that consumers were selective rather than disengaged.
- **Plano Sunglasses Recorded Volume Gains** – Plano sunglasses saw a 2% increase in unit volume in 2025, even as volume declined across most other optical categories.
- **Retail and Channel Dynamics** – In-person purchases continued to dominate, with more than 80% of frames and lenses purchased in physical locations. Of all products, contact lenses had the highest percentage purchased online.

“About 94% of U.S. adults, or 250 million people, regularly use some form of eyewear, making vision care a fundamental part of everyday life,” said **Alysse Henkel, Vice President of Research and inSights**. “This year’s Market inSights findings show how economic pressure reshaped consumer behavior. People bought fewer products and had fewer exams, but they

spent more per purchase, signaling a clear shift toward value-driven decision-making in the optical market.”

Included in the report is a forecast for 2026, which highlights areas for optimism despite negative consumer sentiment. Continued spending, combined with potential changes to tax refunds, could work to offset the trend of lower volume that was observed in 2025.

Report Access

The report is available for download [here](#). Members of The Vision Council can access the full report with complete analysis for free. Non-members can create an account and purchase the report for \$6,000.

The download includes market value and volume of a range of optical products, the number of people using each product in the U.S., and an industry forecast for 2026.

Supplemental Reports – Market inSights+

The Market inSights+ report, published by The Vision Council, provides crosstabulations of market value and volume by channel and demographics for the major product categories: exams, frames, lenses, contact lenses, plano sunglasses, and readers. The tables show the value, volume, and unit price for each product category by channel, as well as demographic data by age, gender, income, ethnicity, and race.

These tables are a supplement to the full-length 2025 report and available for purchase [here](#).

For more information about the Market inSights report or The Vision Council's research program, visit thevisioncouncil.org.

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About The Vision Council

The Vision Council brings the power of sight to all through education, government relations, research, and technical standards. A leading advocate for the optical industry, the association positions its members to deliver the eyewear and eyecare people need to look and feel their best. Vital to health, independence, and safety, better vision leads to better lives.