The EYEWEAR SECTOR
WHERE WE PLAY
Retail value of eyewear market, 2021, €B

SAFILO’S MARKETPLACE
CAGR

PRE COVID
(16-19)
~ +4 %

POST COVID
(23-27E)
~ +3 %

TOTAL
Safilo’s Market

30
Spectacles frames

16
Sunglasses

3
Ready made
Reading glasses

49
WHERE WE PLAY
Eyewear market size in the long-term

**DEMOGRAPHICS**
- Ageing population
- Increasing incidence of myopia

**LIFESTYLE CHANGES**
- Use of digital devices increasing risk of blue light damage
- Higher awareness of importance of sun protection against UV light

**PREMIUMIZATION**
- Eyewear as a relevant accessory in the fashion world

Source: Management’s estimates
WHERE WE PLAY

DIGITAL

ONLINE TO CONTINUE TO GROW FASTER OVER COMING YEARS

CAGR

Low double digits

Low single digits

ONLINE

OFFLINE

12% 16%

2021 2027E

Online Offline
WHERE WE PLAY

A NEW CONSUMER

BY 2030, GEN Z WILL MAKE UP THE LARGEST CONSUMER SEGMENT WORLDWIDE

Young, wealthy consumers value:

- Something crafted
- Unique
- Sustainable
- Experiential
WHERE WE PLAY

SUSTAINABILITY

POSITIVE SOCIAL IMPACT
CIRCULAR ECONOMY
RACE TO NET ZERO

No longer a nice-to-have but a must-have
Consumers are keen to make the switch to a trend that’s here to stay