

Ray-Ban Maker Soars on Meta AI Glasses Boom

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Shares of EssilorLuxottica rose about 14% on October 17, 2025, reaching a record high. The surge added nearly US\$20 billion in market value, signalling strong investor confidence. This move was the largest single-day gain since the company's merger in 2008.

Overall rally was widely for the fast-growing wearable smart glasses business. Investor sentiment appears to have shifted. Where traditional eyewear businesses are stable, the potential of AI and “smart” eyewear is flourishing.

Strong Q3 Results Provide a Foundation

The strong stock move followed a robust third-quarter result by EssilorLuxottica. Thus company reported revenue of **€6.867 billion** in Q3 2025, up **11.7%** at constant exchange rates compared to the year earlier period. At current exchange rates the growth was around 6.7%.

Growth was broad across regions and channels:

- North America: +12.1% year-on-year in Q3.
- EMEA (Europe, Middle East & Africa): +12.7% in Q3.
- Asia-Pacific: +10.5% in Q3.

Furthermore, the company's traditional business of vision care and sunglasses still grew, about 5% (constant exchange) indicating that the core business remains healthy.

The Smart Glasses Opportunity

A key driver behind the optimism is the “wearables” category — specifically the smart glasses by EssilorLuxottica and Meta under the Ray-Ban brand. Although still a small share of total revenue today, the smart glasses contributed more than **four percentage points**.

Analysts are excited: one forecast from Barclays suggests global sales of smart glasses could hit **60 million units by 2035**, potentially making this a transformational category akin to mobile phones.

Therefore latest models are priced from US\$379 up to US\$799 for the flagship version with built-in display.

Strategic Implications & Outlook

The surge in smart eyewear momentum suggests EssilorLuxottica is entering a new phase. While the core business remains solid, the “inflection point” appears to have arrived where growth is being driven by new technologies. J.P.

Morgan commented that the group’s “growth algorithm” is shifting.

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