



**MEDICAL
AESTHETIC MARKET
ANALYSIS &
FORECAST**

 **KELLY
SCIENTIFIC**
CUTTING-EDGE MARKET INTELLIGENCE

Kelly Scientific's latest cutting-edge report **Global Medical Aesthetics Industry: Injectables, Energy-Based Devices, Cosmeceuticals, Cosmetic Surgery, Facial Aesthetics, Implants, Cosmetic Tourism. Market Analysis & Forecast to 2021** (Published August 2016) is a most comprehensive analysis on this vertically growing market. This detailed report provides strategic business development information and is supported by 180 tables & figures over 335 pages and is presented as follows:

The **global market for the medical aesthetics industry** is presented by the following categories:

- By **Geography** (North America, Europe, Asia/Pacific, Latin America)
- By **Segment** (Facial injectables, Cosmetic implants, Home-use devices, Physician-dispensed cosmeceuticals, Energy-based skin tightening devices, Skin rejuvenation devices, Body Contouring, Facial Reconstruction/Rejuvenation, Cosmetic Implants, Breast Lift, Liposuction, Abdominoplasty, Male Aesthetics)
- By **Sub-Market** (Injectable procedures, Facelift, Laser resurfacing/Photorejuvenation, Eyelid lift, Dermabrasion, chemical peel, Rhinoplasty, Forehead lift, Lip augmentation, Breast implants, Facial implants, Buttock, calf, pectoral implants, Skincare cosmeceuticals, Skin lightening cosmeceuticals, Eyelash cosmeceuticals, Scar removal products)
- By **Product Segment** (Facial injectables, Botox, Dermafillers, Neuromodulators, Hyaluronic Acid, Collagen)
- By **Company** (e.g Allergan, Mentor, Galderma, Valeant, Merz, Syneron, ZetiQ, Ulthera, Cynosure, Solta/Valeant, Alma/Fosun Pharma)
- By **Market Leaders and Market Share** in Cosmetic Neurotoxins, Derma Fillers, Home Use Devices, Body Shaping and Skin Tightening Devices

Business strategy information can be gleaned from the following high impact analyses:

- Geographic Share of Cosmetic Surgery Procedures (Top Eight Countries Globally)
- Popular Cosmetic Surgeries in the USA, Brazil, Japan, South Korea & Mexico
- Top Ten Cosmetic Surgical Procedures in the World, USA, UK, Germany, France, Ireland, Singapore
- Top Ten Non-Surgical Cosmetic Procedures in the World, USA, the UK, France, Ireland
- Top Five Cosmetic Surgery Procedures in the U.S.
- Top Five Countries for Noninvasive Cosmetic Procedures
- Top Five Noninvasive Cosmetic Procedures in the U.S.
- Price & Number of Botulinum Toxin, Hyaluronic Acid, Calcium Hydroxylapatite & Poly-L-Lactic Acid Injections, Chemical Peel, Dermabrasion, Laser Skin Resurfacing, Laser Hair Removal Procedures Worldwide & in the US, Brazil, Japan, South Korea, Mexico, Germany, France & Colombia
- Surgeon's Fee for Various Cosmetic Procedures in the U.S
- Comparison of Cosmetic Surgery Prices in Americas (USA, Brazil, Mexico, Costa Rica)
- Comparison of Cosmetic Surgery Prices in Europe (UK Vs Poland & Hungary)
- Comparison of Cosmetic Surgery Prices in Asia (India, Thailand, Malaysia)

- Detailed review of Cosmeceuticals used to date
- Increase in Sensitive Body Issue Procedures (Labiaplasty, Stretch mark removal, Wart removal, Gynecomastia)
- Increase in the number of Men undergoing surgical and non-surgical aesthetic procedures
- How medical tourism in Singapore, United Arab Emirates, India, China, Poland, Turkey, Brazil, Mexico, Costa Rica is strengthening the market
- Demand for Kybella and Fat Dissolving Technologies
- Demand for Female Genital Rejuvenation Technology
- Leading Brands of Cosmeceuticals for Hyperpigmentation, Acne, Eyelash Products, Scar Care,
- Disruptive Tech Driving the Market - Nanocosmeceuticals, Liposomes, Nanocapsules, Solid Lipid Nanoparticles (SLN), Dendrimers, Cubisomes
- Current Nanocosmeceutical Patents
- Current Clinical Trials for Aging Skin
- DNA Tests for Skincare – Personalized Dermatology
- Cosmeceuticals: Major Companies and Product Lines by Acne, Collagen Stimulation, Exfoliation, Firming, Peel, Post-Procedure, Scar Reduction, Skin Lightening, Sun Protection, Wrinkle Reduction
- Cosmetic Surgery Products and Technologies (Breast, Gluteal, Facial Implants, Fillers, Neurotoxins, Energy Based Devices)
- Dominance of Aesthetic Applications for Energy-Based Technologies
- Emerging Technologies in Aesthetic Sector (Hydroimpact, BTL Protégé Intima, SculpSure, Eclipse Reverse, Eclipse MicroPen Elite, Eclipse Skinfinity RF, Eclipse Firma, Intensif, Intimalase, FemTouch, INFINI FR, N-532 Laser System, miraDry, INTRAcel, Prima Pico, Rejuvapen Micropigmentation System, Ultherapy)

A comprehensive account of company product portfolios are provided for 105 Cosmetic Surgery and Service providers globally including:

- Allergen
- Mentor
- Galderma
- Valeant
- Merz
- Syneron
- ZetiQ
- Ulthera
- Cynosure
- Solta/Valeant
- Alma/Fosun Pharma

You will discover a wealth of strategic information throughout this report and find out -

- Who is leading the market?
- Which companies are struggling?
- What has the most attractive acquisition potential?
- What areas your business should focus on
- How to develop your business in the right direction

It is specifically written for the busy high level professional in mind - Presidents, VP's, C-suite managers, MD, commercial director, global compensation manager and leaders of marketing, strategic planning and business development.

1.0 Introduction

Kelly Scientific analysis indicates that the current medical aesthetic industry is worth \$52,405 million for both service and product revenue. Over the next five years a CAGR of 5.5% is expected and the market will hit \$69,786 million in 2021. Currently, invasive aesthetic procedures generated revenues of \$27,843.5 million in 2015. Kelly Scientific analysis indicate that by 2021, invasive aesthetic procedures will grow at a CAGR of 4.3%, to reach \$27,843.5 million. Non-invasive procedures generated approximately \$16,738 million in 2015 and will grow at a CAGR of 4.5% over the coming five years. They are expected to generate revenues of \$16,738.0 million in 2021. Cosmetic surgery products generated \$7,824.0 million in 2015 and have the potential to reach \$13,934.0 million in 2021.

Nonsurgical treatments lead the way across the globe and are broadly classified into three major categories: injectable products, energy based devices and active cosmetics. Injectable products include neurotoxins such as Botox and dermal fillers such as Restylane and they have the largest market share. These are followed by energy-based devices such as lasers, radio frequency and intense pulsed light (IPL). Cosmeceuticals include skin care, eye care, skin lightening and scar care products.

The North American market accounts for about 45% of the global market. However, the dominance of the U.S. is shifting towards Asia, particularly in the energy-based devices segment. Asia is regarded as the next frontier and the number of physicians and clinics in China and India has been steadily rising, along with medical tourism in the region. In the injectables and devices category, the E.U. occupies the second position behind the U.S. Brazil continues to be a strong market for aesthetics and cosmetic procedures. The Russian market is also experiencing fast growth compared to many E.U. countries and the Russian market is particularly strong for devices and topicals.

Along with the global giants such as Allergan, Galderma and Merz, a lot of smaller players are offering wrinkle relaxing agents and wrinkle fillers. These products have only temporary effects requiring repeated procedures. The market for these products is nearing maturity and they are widely accepted only in the U.S. and E.U., whereas, permanent fillers are widely in demand in Asia. Artefill is considered to be a semi-permanent to permanent filler. It contains a synthetic ingredient known as polymethyl methacrylate (PMMA) mixed with animal collagen. Use of off-the-shelf dermal fillers and fillers containing lidocaine for pain management is becoming a gold standard in the E.U. and U.S. markets.

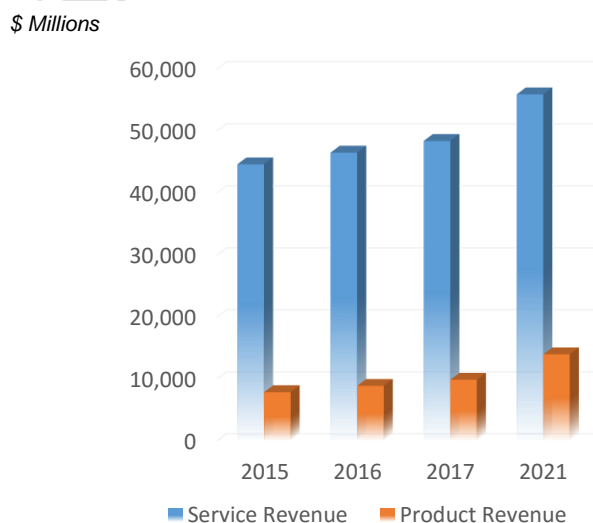
Aesthetic practitioners have now the choice of new instrumentations such as soft and bendable needles, blunt-tip cannulas and injector pens for minimally invasive procedures. Recent years have seen wide acceptance by consumers for microneedle treatments administered via handheld guns, for restoring skin with vitamins, amino acids and hyaluronic acid. Consumer aesthetic products such as “micro-botox” and “bro-tox” are experiencing a steady growth. Adipose derived stem cells (ADSC) have gained acceptance for rejuvenating face and breasts, and stem cells from green apple, lilac and alpine roses are now being used as ingredients in topical cosmetics.

Another growth market is for body shaping procedures that involves reduction of fat, cellulite, skin laxity and vein removal. An injectable drug ATX-101 (deoxycholic acid), currently in clinical trials is most likely to become a game changer in body contouring segment in the near future. On July 10, 2014, the FDA accepted the filing of New Drug Application (NDA) for this drug by Kythera Biopharmaceuticals. Plug-in at-home devices for treating sun damage, hair removal, skin discoloration, acne, hair growth, skin texture, microdermabrasion and cellulite continue to expand particularly in developed markets. As a new innovation, the aesthetic market is expected to witness the launch of transepidermal drug delivery technologies for facilitating topical treatments.

According to a latest report published by the official journal of the American Society of Plastic Surgeons (ASPS), service revenues for plastic surgeries rise and fall with economic trends. According to analysis, revenues from surgical procedures are reflected by indicators of macroeconomic climate such as stock market averages. When the stock exchange average rises, revenues from cosmetic surgeries also rise. When unemployment rate goes up, revenues from cosmetic surgeries go down. In the U.S. which is the largest market for cosmetic procedures, overall revenues increased 20%, but there was 10% decline in service revenues from surgical procedures such as breast augmentation and facelift.

On the other hand, trends in minimally invasive procedures are seen reflecting microeconomic indicators. Revenues from minimally invasive procedures increase along with home prices, disposable income per capita and real Gross Domestic Product per capita. Thus, in the recent past, there was a 200% increase in service revenues generated by minimally invasive cosmetic procedures such as botulinum toxin and dermal fillers. The market share for service revenues from these procedures increased from 30% in 2000 to about 50% in past two years. Consequently, service revenues from surgical procedures have nearly remained stable. ASPS surgeons earned service revenues \$1,061.4 million for breast augmentation surgeries in 2015.

Figure 1.1: Global Cosmetic Surgery Market by Services and Products, Through 2021



1.1 Objectives of Report

The main objective of this report is to describe in detail the trends, opportunities and the market for the different medical aesthetic segments such as reconstructive surgery, cosmetic surgery, products associated with cosmetic surgery procedures, home-based cosmetic devices and cosmeceuticals. The objectives of this analysis are:

- To provide descriptions of the most popular surgical cosmetic procedures, energy-based and other devices, home-use devices and cosmeceuticals.
- To understand the customer demand for different elective surgical cosmetic procedures.
- To focus on the different types of devices such as lasers, ultrasound equipment, implants and dermal fillers and toxins available in the global market place and their applications in aesthetic treatments.
- To present the recently available data on the number of procedures performed at the global and regional levels.
- To provide data on the estimated of markets in various segments of the aesthetic industry.
- To gain an insight into the value of the product segment in 2015 and make a projection through 2021.
- To offer the details of profiles for 105 companies and their contribution to the growth of the industry.
- To identify the emerging technologies in the recent years.

1.2 Scope of the Study

- The report takes into account, the cosmetic surgeon's fee structure in different geographies and estimates the global service revenues for both invasive and non-invasive cosmetic procedures.
- The report provides a thorough overview of the various cosmetic procedures in the U.S. and other regional markets in 2015, the opportunities for the future, the obvious shift from surgical to non-surgical procedures and emergence of new technologies.
- A section of this report focuses on the cosmetic surgery prices in countries of cosmetic tourism destinations.
- The report provides global and regional statistics for the number of cosmetic surgery procedures, the most popular procedures in different geographies and the annual earnings of cosmetic surgeons.
- To identify the currently available aesthetic medical devices for vascular applications, acne treatment, body shaping, hair removal and dermabrasion.
- To identify the currently available neurotoxins and dermal fillers for aesthetic applications.
- To estimate the projected market for devices, neurotoxins, dermal fillers and cosmeceuticals through 2021.
- To identify the leading players in the devices and cosmeceuticals segments and give market share analysis for specific areas.

Global Medical Aesthetics Industry: Injectables, Energy-Based Devices, Cosmeceuticals, Cosmetic Surgery, Facial Aesthetics, Implants, Cosmetic Tourism. Market Analysis & Forecast to 2021

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