

Global Radiofrequency-Based Aesthetic Devices Market: Focus on Product Type, End User, Modality, Application, Technology, Sales Channel, COVID-19 Impact, Technology Landscape, and Over 22 Countries' Data - Analysis and Forecast, 2021-2030

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Abstracts

Market Report Coverage - Radiofrequency-Based Aesthetic Devices

Market Segmentation

Product Type - Radiofrequency Generators/Systems, Electrodes, Applicators, Others

Modality - Portable Devices, Non-Portable Devices

Application - Skin Tightening, Body Shaping, Fat Reduction, Others

Technology - Monopolar RF, Bipolar RF, Multipolar RF, Fractional RF, Others

End User - Beauty Clinics, Homecare Settings, Others

Sales Channel - Distributor, Retail, E-Commerce

Region - North America, Europe, Asia-Pacific, Latin America, Middle-East and Africa

Regional Segmentation

North America - U.S., Canada

Europe - Germany, U.K., France, Italy, Spain, Russia, Nordic Countries, and Rest-of-Europe

Asia-Pacific - China, Japan, South Korea, India, Australia and New Zealand, and Rest-of-Asia-Pacific

Latin America - Brazil, Mexico, Argentina, Colombia, and Rest-of-Latin America

Middle-East and Africa - Saudi Arabia, U.A.E., South Africa, and Rest-of-Middle East and Africa

Market Growth Drivers

Growing Demand for Minimally Invasive Procedures and Treatments

Increase in Geriatric Population

More Health and Cost Benefits Compared to Alternative Aesthetic Treatments

Technological Advancements in Radiofrequency-Based Devices

Increasing Awareness Toward Aesthetic Treatments

Increasing Intensity of Competition in the Market

Market Challenges

Lack of Reimbursement Policies for Aesthetic Treatments

Lack of Skilled Personnel for Aesthetic Treatments

High-Cost Associated with Radiofrequency-Based Aesthetic Treatments

Market Opportunities

Global Radiofrequency-Based Aesthetic Devices Market: Focus on Product Type, End User, Modality, Application,...

Leveraging the Home Healthcare Trend to Market at-Home Devices

Leveraging Synergies to Expand into Emerging Markets

Key Companies Profiled

Alma Lasers Ltd., Beco Medical Group, Cymedics, Cynosure, Inc., EndyMed Ltd., Ibramed, INDIBA S.A., Inmode Ltd., Lumenis Ltd., Lutronic Corp., SharpLight Technologies Ltd., Syneron Medical Ltd. (Candela Corporation), Venus Concept Inc., Viora, Ya-Man Ltd.

How This Report Can Add Value

Who should buy this report and why?

Radiofrequency-based aesthetic device manufacturers

The report provides detailed information on the market dynamics, opportunities, and the current and future impact of market trends.

Cross-segmentation analysis has been provided for each region by key segments.

Analysis of the COVID-19 impact on the radiofrequency-based aesthetic devices market has been provided, along with the corresponding trends that have been triggered.

Detailed company profiles of some of the key players operating in the market have been provided.

Segment and country-wise market forecast till 2030 has been provided.

The reader has been provided with a detailed picture of the market landscape, along with the competition prevalent in the market.

Healthcare facilities

The report provides information on the end-user demand for

radiofrequency-based aesthetic devices.

A segment-wise forecast has been provided for each end-user segment.

Key Questions Answered in the Global Radiofrequency-Based Aesthetic Devices Market

What are the key regulations governing the global radiofrequency-based aesthetic devices market?

What are the key technological developments that are expected to have a strong impact on the global radiofrequency-based aesthetic devices market in the coming years?

How has the COVID-19 pandemic impacted the growth of the global radiofrequency-based aesthetic devices market?

Who are the leading players holding a major share of the global radiofrequency-based aesthetic devices market?

How has the patent filing trend in the field of radiofrequency-based aesthetic devices grown over the years?

What are the key factors that are expected to promote or restrain market growth?

What are the expected scenarios in which the global radiofrequency-based aesthetic devices market can grow in the future?

What are the potential scenarios and effects of COVID-19 market recovery for the global radiofrequency-based aesthetic devices market?

What is the most common sales channel, and how likely is it to dominate the market during the forecast period?

What is the current revenue contribution of the different product types, and how is it expected to be modified during the forecast period?

What is the current revenue contribution of the different modalities, and how is it expected to be modified during the forecast period?

What is the current revenue contribution of the different applications, and how is it expected to be modified during the forecast period?

What is the current revenue contribution of the different end users, and how is it expected to be modified during the forecast period?

What is the current revenue contribution of the different technologies, and how is it expected to be modified during the forecast period?

Radiofrequency-Based Aesthetic Devices Industry Overview

The integration of radiofrequency (RF) waves is one of the technological advancements in treatment delivery wherein RF waves are utilized for heating and killing of cells in the patient's body. The RF waves are used in various medical specialties, including aesthetics. The competition in the global radiofrequency-based aesthetic devices market is set to intensify in the future, owing to new market entrants and patent expiration. Most of the players in the market have been operating in the industry for at least five years and have crossed the funding phase. Market players have been observed to accelerate the regulatory approval process and increase their R&D efforts to support more product launches. The business synergies that have taken place recently indicate an increased focus on market expansion across regions. The demand for radiofrequency-based aesthetic devices is expected to grow on the backdrop of an increasing consumer base for cosmetic treatments, across the globe, especially in the Asia-Pacific region.

The radiofrequency-based aesthetic devices report highlights that the market was valued at \$1,052.6 million in 2020 and is expected to reach \$3,204.1 million by the end of 2030. The market is expected to grow at a CAGR of 12.11% during the forecast period from 2021 to 2030.

Global Radiofrequency-Based Aesthetic Devices Market Drivers

Presently, the factors driving the growth of the market as per the global radiofrequency-based aesthetic devices market report include growing demand for minimally invasive procedures and treatments, technological advancements in radiofrequency-based

devices, and more health and cost benefits compared to alternative aesthetic treatments.

One of the major technological breakthroughs in the field of surgery in the past few years has been minimally invasive surgeries (MIS). The increase in demand is attributed to persistent efforts to achieve the desired surgical output with minimum complications, recovery time, and hospital admissions. Radiofrequency-based aesthetic devices are used for minimally invasive treatments such as RF microneedling, which is used to rejuvenate the appearance of skin. In addition, advancements in radiofrequency-based aesthetic devices feature combinations of multiple technologies. These technological advancements are pushing the key market players to come up with developed products to perform radiofrequency ablation and aesthetic procedures.

Global Radiofrequency-Based Aesthetic Devices Market Challenges

The challenges that are restricting the growth of the market include lack of reimbursement policies for aesthetic treatments, lack of skilled personnel for aesthetic treatments, and high-cost associated with radiofrequency-based aesthetic treatments.

The high cost of radiofrequency-based aesthetic treatments acts as a major restraint in the low- and middle-income countries (LMICs). Insurance providers are required to make considerable initiatives to reform existing reimbursement policies, and the lack of these reimbursement policies in case of aesthetic treatments can hamper the growth rate of these treatments. In addition, these treatments also require skilled specialists to perform the procedure. Otherwise, temporary swelling and burns are observed. Not having skilled personnel can also be a factor for lower adoption rates of this technology by end users.

Global Radiofrequency-Based Aesthetic Devices Market Opportunities

Potential opportunities that are likely to boost the growth of the market include leveraging the home healthcare trend to market at-home devices and leveraging synergies to expand into emerging markets.

The COVID-19 pandemic has led to healthcare-at-home becoming a highly preferred mode of healthcare. The pandemic has changed the way individuals receive healthcare. Thus, home healthcare is trending in many aspects of healthcare. The concept of at-home radiofrequency-based aesthetic treatments is not new and has been on the market before the pandemic began. Moreover, a wide array of economical machines

and devices have been introduced, which can also be used by non-professionals for the use of radiofrequency-based devices at home. In addition to promoting at-home care, manufacturers of radiofrequency-based aesthetic devices can also partner with local healthcare providers and companies to promote their products in the local market, which can lead to positive financial results and a wide consumer base.

Impact of COVID-19 on the Radiofrequency-Based Aesthetic Devices Industry

The impact of COVID-19 varies depending on the region, country, the extent of lockdowns, and the perception of the local population.

According to safety principles, treatments involving radiofrequency, laser, and others are not advisable as the virus can survive up to nine days on the plastic and stainless-steel surface of the handpieces. This has led to a decline in the number of treatments during the COVID-19 pandemic. Since the outbreak of coronavirus, bans have been implemented and extended globally, thereby severely impacting the business operations of radiofrequency-based devices. Companies are unable to obtain key components, raw materials, and manufactured products from third parties, as worldwide bans and restrictions have been imposed by the respective country governments. The capabilities of the suppliers and third-party manufacturers may be limited or stopped by various government regulations.

The impact of coronavirus on economic activities and its effect on manufacturing facilities, supply chain, and distribution networks was considerably high in 2020.

Market Segmentation

Global Radiofrequency-Based Aesthetic Devices Market (by Product Type)

The global radiofrequency-based aesthetic devices market report includes radiofrequency-based devices used for aesthetic treatments. These products include radiofrequency generators/systems, electrodes (single use, reusable), applicators (handpieces), and others.

Most of the key players have their own proprietary technology and design their new products to be compatible with it. There can be more than one applicator for a single RF generator/system to perform specialized tasks. Companies are also coming up with multi-technology systems for a wide range of aesthetic makeovers and applications.

Global Radiofrequency-Based Aesthetic Devices Market (by Modality)

The global radiofrequency-based aesthetic devices market includes portable devices and non-portable devices.

Most of the devices in the market are non-portable by nature. It is to be noted that wheeled devices have also been considered non-portable. However, there has been an uptick in demand for at-home applications and RF treatments, which has been accelerated by the COVID-19 pandemic. This presents manufacturers with the opportunity to develop low-cost radiofrequency-based aesthetic devices for home users.

Global Radiofrequency-Based Aesthetic Devices Market (by Application)

The global radiofrequency-based aesthetic devices market offers a variety of applications such as skin tightening, body shaping, fat reduction, and others.

The market has witnessed a number of product launches for skin tightening and body shaping purposes. In addition, products with multiple applications are becoming more common. This has been made possible with the addition of multiple applicators for a variety of applications.

Global Radiofrequency-Based Aesthetic Devices Market (by Technology)

Different technologies that are studied and analyzed under the global radiofrequency-based aesthetic devices market include monopolar RF, bipolar RF, multipolar RF, fractional RF, and others.

Most of the devices in the market come with monopolar and bipolar technology. However, the number of devices supporting fractional RF and multipolar RF is expected to go up during the forecast period.

Global Radiofrequency-Based Aesthetic Devices Market (by End User)

The global radiofrequency-based aesthetic devices market by end users includes beauty clinics, homecare settings, and others.

Beauty clinics are the major end users of radiofrequency-based aesthetic devices. However, the number of at-home end users is also expected to grow during the forecast period, mainly accelerated by the COVID-19 pandemic. The beauty clinics segment is

expected to face competition from the homecare setting segment as more players focus on making low-cost at-home alternatives to high-cost radiofrequency-based aesthetic devices.

Global Radiofrequency-Based Aesthetic Devices Market (by Sales Channel)

The global radiofrequency-based aesthetic devices market sales channel includes distributor, retail, and e-commerce.

Some of the market players have been actively partnering with other companies or local suppliers to establish operations in other countries. An increase in the number of local operations would enable the growth of direct sales. However, most MNCs usually form a distribution synergy with a local distributor in a new country.

Global Radiofrequency-Based Aesthetic Devices Market (by Region)

The different regions covered under the global radiofrequency-based aesthetic devices market include North America, Europe, Asia-Pacific, Latin America, and Middle-East and Africa.

North America and Europe are two of the largest markets for radiofrequency-based aesthetic devices, while China and Asia-Pacific represent fastest growing markets, which most players are looking to expand operations to in the near future.

Key Market Players and Competition Synopsis

Some of the key players operating in the market include Alma Lasers Ltd. (Sisram Med), Beco Medical Group, Cymedics, Cynosure, Inc., EndyMed, Ibramed, INDIBA S.A., Inmode Ltd., Lumenis Ltd., Lutronic, SharpLight Technologies Ltd., Syneron Medical Ltd. (Candela Corporation), Venus Concept Inc., Viora, and Ya-Man Ltd.

The global radiofrequency-based aesthetic devices market has witnessed several strategic and technological developments in the past few years undertaken by the different market players to attain their respective market shares in this emerging domain. Some of the strategies covered in this segment are funding activities, mergers and acquisitions (M&A), partnerships, alliances, and business expansion, regulatory and legal activities, and new offerings. The preferred strategy for companies has been new offerings followed by regulatory and legal activities.

Contents

1 PRODUCT DEFINITION

2 SCOPE OF RESEARCH

- 2.1 Scope of the Study
- 2.2 Inclusion and Exclusion Criteria
- 2.3 Key Questions Answered in the Report

3 RESEARCH METHODOLOGY

- 3.1 Data Collection and Analysis
- 3.2 Data Sources
 - 3.2.1 Primary Data Sources
 - 3.2.2 Secondary Data Sources
- 3.3 Data Triangulation
- 3.4 Market Estimation
- 3.5 Forecast Period Selection Criteria
- 3.6 Assumptions and Limitations

4 IMPACT OF COVID-19 ON THE GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET

- 4.1 Impact on Facilities
- 4.2 Impact on Market Size

5 INDUSTRY ANALYSIS

- 5.1 Technology Landscape
 - 5.1.1 Key Trends
 - 5.1.1.1 Short-Term Potential (2-4 Years)
 - 5.1.1.2 Mid-Term Potential (5-10 Years)
 - 5.1.1.3 Long-Term Potential (8-12 Years)
- 5.2 Value Chain/Supply Chain Analysis
- 5.3 Regulatory Framework
 - 5.3.1 Regulations in North America
 - 5.3.1.1 U.S.
 - 5.3.1.2 Canada

- 5.3.2 Regulations in Europe
- 5.3.3 Regulations in Asia-Pacific
 - 5.3.3.1 National Medical Products Administration (NMPA)
 - 5.3.3.2 Pharmaceutical and Medical Device Agency (PMDA)
 - 5.3.3.3 Therapeutic Goods Administration (TGA)
- 5.3.4 Regulations in Rest-of-the-World
- 5.4 Patent Analysis
 - 5.4.1 Patent Filing Trend (by Country)
 - 5.4.2 Patent Filing Trend (by Year)

6 COMPETITIVE LANDSCAPE

- 6.1 Market Share Analysis
- 6.2 Key Strategies and Developments
 - 6.2.1 Funding Activities
 - 6.2.2 Mergers and Acquisitions (M&A)
 - 6.2.3 Partnerships, Alliances, and Business Expansions
 - 6.2.4 Regulatory and Legal Activities
 - 6.2.5 New Offerings
- 6.3 Pricing Analysis

7 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET SCENARIO

- 7.1 Assumptions and Limitations
- 7.2 Key Findings and Opportunity Assessment
- 7.3 Global Radiofrequency-Based Aesthetic Devices Market Size and Forecast
 - 7.3.1 Realistic Growth Scenario
 - 7.3.2 Pessimistic Growth Scenario
 - 7.3.3 Optimistic Growth Scenario
- 7.4 Market Dynamics
 - 7.4.1 Impact Analysis
 - 7.4.2 Market Growth Promoting Factors
 - 7.4.2.1 Growing Demand for Minimally Invasive Procedures and Treatments
 - 7.4.2.2 Increase in Geriatric Population
 - 7.4.2.3 More Health and Cost Benefits Compared to Alternative Aesthetic Treatments
 - 7.4.2.4 Technological Advancements in Radiofrequency-Based Devices
 - 7.4.2.5 Increasing Awareness Toward Aesthetic Treatments
 - 7.4.2.6 Increasing Intensity of Competition in the Market

7.4.3 Market Growth Restraining Factors

7.4.3.1 Lack of Reimbursement Policies for Aesthetic Treatments

7.4.3.2 Lack of Skilled Personnel for Aesthetic Treatments

7.4.3.3 High-Cost Associated with Radiofrequency-Based Aesthetic Treatments

7.4.4 Market Growth Opportunities

7.4.4.1 Leveraging Home Healthcare Trend to Market At-Home Devices

7.4.4.2 Leveraging Synergies to Expand into Emerging Markets

8 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY PRODUCT TYPE)

8.1 Opportunity Assessment

8.2 Radiofrequency Generators/Systems

8.3 Electrodes

8.4 Applicators

8.5 Others

9 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY MODALITY)

9.1 Opportunity Assessment

9.2 Portable Devices

9.3 Non-Portable Devices

10 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY APPLICATION)

10.1 Opportunity Assessment

10.2 Skin Tightening

10.3 Body Shaping

10.4 Fat Reduction

10.5 Others

11 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY TECHNOLOGY)

11.1 Opportunity Assessment

11.2 Monopolar RF

11.3 Bipolar RF

- 11.4 Multipolar RF
- 11.5 Fractional RF
- 11.6 Others

12 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY END USER)

- 12.1 Opportunity Assessment
- 12.2 Beauty Clinics
- 12.3 Homecare Settings
- 12.4 Others

13 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY SALES CHANNEL)

- 13.1 Opportunity Assessment
- 13.2 Distributor
- 13.3 Retail
- 13.4 E-Commerce

14 GLOBAL RADIOFREQUENCY-BASED AESTHETIC DEVICES MARKET (BY REGION)

- 14.1 Overview
- 14.2 North America Radiofrequency-Based Aesthetic Devices Market
 - 14.2.1 Key Findings
 - 14.2.2 Market Dynamics Impact Analysis
 - 14.2.3 Market Size and Forecast
 - 14.2.4 North America Radiofrequency-Based Aesthetic Devices Market (by Product Type)
 - 14.2.5 North America Radiofrequency-Based Aesthetic Devices Market (by End User)
 - 14.2.6 North America Radiofrequency-Based Aesthetic Devices Market (by Country)
 - 14.2.6.1 U.S.
 - 14.2.6.2 Canada
- 14.3 Europe Radiofrequency-Based Aesthetic Devices Market
 - 14.3.1 Key Findings
 - 14.3.2 Market Dynamics Impact Analysis
 - 14.3.3 Market Size and Forecast
 - 14.3.4 Europe Radiofrequency-Based Aesthetic Devices Market (by Product Type)

- 14.3.5 Europe Radiofrequency-Based Aesthetic Devices Market (by End User)
- 14.3.6 Europe Radiofrequency-Based Aesthetic Devices Market (by Country)
 - 14.3.6.1 Germany
 - 14.3.6.2 U.K.
 - 14.3.6.3 France
 - 14.3.6.4 Italy
 - 14.3.6.5 Spain
 - 14.3.6.6 Russia
 - 14.3.6.7 Nordic Countries
 - 14.3.6.8 Rest-of-Europe
- 14.4 Asia-Pacific Radiofrequency-Based Aesthetic Devices Market
 - 14.4.1 Key Findings
 - 14.4.2 Market Dynamics Impact Analysis
 - 14.4.3 Market Size and Forecast
 - 14.4.4 Asia-Pacific Radiofrequency-Based Aesthetic Devices Market (by Product Type)
 - 14.4.5 Asia-Pacific Radiofrequency-Based Aesthetic Devices Market (by End User)
 - 14.4.6 Asia-Pacific Radiofrequency-Based Aesthetic Devices Market (by Country)
 - 14.4.6.1 China
 - 14.4.6.2 Japan
 - 14.4.6.3 South Korea
 - 14.4.6.4 India
 - 14.4.6.5 Australia and New Zealand
 - 14.4.6.6 Rest-of-Asia-Pacific
- 14.5 Latin America Radiofrequency-Based Aesthetic Devices Market
 - 14.5.1 Key Findings
 - 14.5.2 Market Dynamics Impact Analysis
 - 14.5.3 Market Size and Forecast
 - 14.5.4 Latin America Radiofrequency-Based Aesthetic Devices Market (by Product Type)
 - 14.5.5 Latin America Radiofrequency-Based Aesthetic Devices Market (by End User)
 - 14.5.6 Latin America Radiofrequency-Based Aesthetic Devices Market (by Country)
 - 14.5.6.1 Brazil
 - 14.5.6.2 Mexico
 - 14.5.6.3 Argentina
 - 14.5.6.4 Colombia
 - 14.5.6.5 Rest-of-Latin America
- 14.6 Middle East and Africa Radiofrequency-Based Aesthetic Devices Market
 - 14.6.1 Key Findings

- 14.6.2 Market Dynamics Impact Analysis
- 14.6.3 Market Size and Forecast
- 14.6.4 Middle East and Africa Radiofrequency-Based Aesthetic Devices Market (by Product Type)
- 14.6.5 Middle East and Africa Radiofrequency-Based Aesthetic Devices Market (by End User)
- 14.6.6 Middle East and Africa Radiofrequency-Based Aesthetic Devices Market (by Country)
 - 14.6.6.1 Saudi Arabia
 - 14.6.6.2 U.A.E.
 - 14.6.6.3 South Africa
 - 14.6.6.4 Rest-of-Middle East and Africa

15 COMPANY PROFILES

- 15.1 Overview
- 15.2 Alma Lasers Ltd.
 - 15.2.1 Company Overview
 - 15.2.2 Role of Alma Lasers Ltd. in the Global Radiofrequency-Based Aesthetic Devices Market
 - 15.2.3 Financials
 - 15.2.4 Recent Developments
 - 15.2.5 SWOT Analysis
- 15.3 Beco Medical Group
 - 15.3.1 Company Overview
 - 15.3.2 Role of Beco Medical Group in the Global Radiofrequency-Based Aesthetic Devices Market
 - 15.3.3 SWOT Analysis
- 15.4 Cymedics
 - 15.4.1 Company Overview
 - 15.4.2 Role of Cymedics in the Global Radiofrequency-Based Aesthetic Devices Market
 - 15.4.3 SWOT Analysis
- 15.5 Cynosure, Inc.
 - 15.5.1 Company Overview
 - 15.5.2 Role of Cynosure, Inc. in the Global Radiofrequency-Based Aesthetic Devices Market
 - 15.5.3 Recent Developments
 - 15.5.4 SWOT Analysis

15.6 EndyMed Ltd.

15.6.1 Company Overview

15.6.2 Role of EndyMed Ltd. in the Global Radiofrequency-Based Aesthetic Devices Market

15.6.3 Financials

15.6.4 SWOT Analysis

15.7 Ibramed

15.7.1 Company Overview

15.7.2 Role of Ibramed in the Global Radiofrequency-Based Aesthetic Devices Market

15.7.3 SWOT Analysis

15.8 INDIBA S.A.

15.8.1 Company Overview

15.8.2 Role of INDIBA S.A. in the Global Radiofrequency-Based Aesthetic Devices Market

15.8.3 Recent Developments

15.8.4 SWOT Analysis

15.9 Inmode Ltd.

15.9.1 Company Overview

15.9.2 Role of Inmode Ltd. in the Global Radiofrequency-Based Aesthetic Devices Market

15.9.3 Financials

15.9.4 Recent Developments

15.9.5 SWOT Analysis

15.1 Lumenis Ltd.

15.10.1 Company Overview

15.10.2 Role of Lumenis Ltd. in the Global Radiofrequency-Based Aesthetic Devices Market

15.10.3 Recent Developments

15.10.4 SWOT Analysis

15.11 Lutronic Corp.

15.11.1 Company Overview

15.11.2 Role of Lutronic Corp. in the Global Radiofrequency-Based Aesthetic Devices Market

15.11.3 Financials

15.11.4 Recent Developments

15.11.5 SWOT Analysis

15.12 SharpLight Technologies Ltd.

15.12.1 Company Overview

15.12.2 Role of SharpLight Technologies Ltd. in the Global Radiofrequency-Based

Aesthetic Devices Market

15.12.3 Recent Developments

15.12.4 SWOT Analysis

15.13 Syneron Medical Ltd. (Candela Corporation)

15.13.1 Company Overview

15.13.2 Role of Syneron Medical Ltd. (Candela Corporation) in the Global

Radiofrequency-Based Aesthetic Devices Market

15.13.3 Recent Developments

15.13.4 SWOT Analysis

15.14 Venus Concept Inc.

15.14.1 Company Overview

15.14.2 Role of Venus Concept Inc. in the Global Radiofrequency-Based Aesthetic

Devices Market

15.14.3 Financials

15.14.4 Recent Developments

15.14.5 SWOT Analysis

15.15 Viora

15.15.1 Company Overview

15.15.2 Role of Viora in the Global Radiofrequency-Based Aesthetic Devices Market

15.15.3 Recent Developments

15.15.4 SWOT Analysis

15.16 Ya-Man Ltd.

15.16.1 Company Overview

15.16.2 Role of Ya-Man Ltd. in the Global Radiofrequency-Based Aesthetic Devices

Market

15.16.3 Recent Developments

15.16.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global Radiofrequency-Based Aesthetic Devices, Key Barriers to Adoption

Table 2: Global Radiofrequency-Based Aesthetic Devices Market Quarterly Key Developments Analysis, January 2018-May 2021

Table 3: Global Radiofrequency-Based Aesthetic Devices Market COVID-19 Recovery Scenario Impact

Table 4.1: Radiofrequency Treatment, Risk Categorization

Table 5.1: Global Radiofrequency-Based Aesthetic Devices Market, Key Technologies

Table 5.2: European Commission Medical Device Directives

Table 5.3: European Union Classification, Radiofrequency-Based Aesthetic Devices

Table 5.4: Asia-Pacific Regulatory Agencies

Table 5.5: Therapeutic Goods Administration Classification (TGA), Radiofrequency-Based Aesthetic Devices

Table 5.6: Rest-of-the-World Key Regulatory Bodies

Table 6.1: Global Radiofrequency-Based Aesthetic Devices Market Pricing Analysis (by Product Type)

Table 14.1: North America Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

Table 14.2: Europe Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

Table 14.3: Asia-Pacific Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

Table 14.4: Latin America Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

Table 14.5: Middle East and Africa Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

List Of Figures

LIST OF FIGURES

Figure 1: Global Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

Figure 2: Global Radiofrequency-Based Aesthetic Devices Market Potential COVID-19 Recovery Scenarios

Figure 2.1: Global Radiofrequency-Based Aesthetic Devices Market Segmentation

Figure 3.1: Global Radiofrequency-Based Aesthetic Devices Market, Research Methodology

Figure 3.2: Primary Research

Figure 3.3: Secondary Research

Figure 3.4: Data Triangulation

Figure 3.5: Global Radiofrequency-Based Aesthetic Devices Market Research Process

Figure 3.6: Global Radiofrequency-Based Aesthetic Devices Market Forecasting Model

Figure 3.7: Assumptions and Limitations

Figure 4.1: Global Radiofrequency-Based Aesthetic Devices Market, COVID-19 Impact on the Supply Chain

Figure 4.2: Global Radiofrequency-Based Aesthetic Devices Adoption, COVID-19 Impact Analysis

Figure 4.3: Global Radiofrequency-Based Aesthetic Devices Market Forecast Scenario Comparative Analysis

Figure 5.1: Global Radiofrequency-Based Aesthetic Devices Market, Key Trends

Figure 5.2: Global Radiofrequency-Based Aesthetic Devices Market Key Trends, Short-Term Impact Analysis, 2023-2025

Figure 5.3: Global Radiofrequency-Based Aesthetic Devices Market Key Trends, Mid-Term Impact Analysis, 2026-2031

Figure 5.4: Global Radiofrequency-Based Aesthetic Devices Market Key Trends, Long-Term Impact Analysis, 2029-2033

Figure 5.5: Global Radiofrequency-Based Aesthetic Devices Market Supply Chain Analysis

Figure 5.6: Global Radiofrequency-Based Aesthetic Devices Market Supply Chain Roles and Responsibilities

Figure 5.7: U.S. FDA Regulatory Process, Class II Medical Devices

Figure 5.8: Global Radiofrequency-Based Aesthetic Devices Market, Patent Analysis (by Country), 2000-2020

Figure 5.9: Global Radiofrequency-Based Aesthetic Devices Market, Patent Analysis, 2000-2020

Figure 6.1: Global Radiofrequency-Based Aesthetic Devices Market, Company Revenue Share Analysis, 2020

Figure 6.2: Share of Key Developments and Strategies in the Global Radiofrequency-Based Aesthetic Devices Market (by Category), January 2018-May 2021

Figure 6.3: Global Radiofrequency-Based Aesthetic Devices Market Key Developments, January 2018-May 2021

Figure 6.4: Global Radiofrequency-Based Aesthetic Devices Market Mergers and Acquisitions (by Company), January 2018-May 2021

Figure 6.5: Global Radiofrequency-Based Aesthetic Devices Market Partnerships, Alliances, and Business Expansions (by Company), January 2018-May 2021

Figure 6.6: Global Radiofrequency-Based Aesthetic Devices Market Regulatory and Legal Activities (by Company), January 2018-May 2021

Figure 6.7: Global Radiofrequency-Based Aesthetic Devices Market New Offerings (by Company), January 2018-May 2021

Figure 7.1: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity, \$Million, 2020-2030

Figure 7.2: Global Radiofrequency-Based Aesthetic Devices Market, Potential Forecast Scenarios

Figure 7.3: Global Radiofrequency-Based Aesthetic Devices Market Size and Growth Potential (Realistic Scenario), \$Million, 2018-2030

Figure 7.4: Global Radiofrequency-Based Aesthetic Devices Market Size and Growth Potential (Pessimistic Scenario), \$Million, 2018-2030

Figure 7.5: Global Radiofrequency-Based Aesthetic Devices Market Size and Growth Potential (Optimistic Scenario), \$Million, 2018-2030

Figure 7.6: Global Radiofrequency-Based Aesthetic Devices Market Dynamics Impact Analysis

Figure 7.7: Minimally Invasive Surgical Procedures, Rising Demand, 2018-2030

Figure 7.8: Global Population Growth, 1955-2030

Figure 8.1: Global Radiofrequency-Based Aesthetic Devices Market (by Product Type)

Figure 8.2: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Product Type), \$Million, 2020-2030

Figure 8.3: Global Radiofrequency-Based Aesthetic Devices Market (Radiofrequency Generators/Systems), \$Million, 2018-2030

Figure 8.4: Global Radiofrequency-Based Aesthetic Devices Market (Electrodes), \$Million, 2018-2030

Figure 8.5: Global Radiofrequency-Based Aesthetic Devices Market (Applicators), \$Million, 2018-2030

Figure 8.6: Global Radiofrequency-Based Aesthetic Devices Market (Others), \$Million, 2018-2030

Figure 9.1: Global Radiofrequency-Based Aesthetic Devices Market (by Modality)

Figure 9.2: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Modality), \$Million, 2020-2030

Figure 9.3: Global Radiofrequency-Based Aesthetic Devices Market (Portable Devices), \$Million, 2018-2030

Figure 9.4: Global Radiofrequency-Based Aesthetic Devices Market (Non-Portable Devices), \$Million, 2018-2030

Figure 10.1: Global Radiofrequency-Based Aesthetic Devices Market (by Application)

Figure 10.2: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Application), \$Million, 2020-2030

Figure 10.3: Global Radiofrequency-Based Aesthetic Devices Market (Skin Tightening), \$Million, 2018-2030

Figure 10.4: Global Radiofrequency-Based Aesthetic Devices Market (Body Shaping), \$Million, 2018-2030

Figure 10.5: Global Radiofrequency-Based Aesthetic Devices Market (Fat Reduction), \$Million, 2018-2030

Figure 10.6: Global Radiofrequency-Based Aesthetic Devices Market (Others), \$Million, 2018-2030

Figure 11.1: Global Radiofrequency-Based Aesthetic Devices Market (by Technology)

Figure 11.2: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Technology), \$Million, 2020-2030

Figure 11.3: Global Radiofrequency-Based Aesthetic Devices Market (Monopolar RF), \$Million, 2018-2030

Figure 11.4: Global Radiofrequency-Based Aesthetic Devices Market (Bipolar RF), \$Million, 2018-2030

Figure 11.5: Global Radiofrequency-Based Aesthetic Devices Market (Multipolar RF), \$Million, 2018-2030

Figure 11.6: Global Radiofrequency-Based Aesthetic Devices Market (Fractional RF), \$Million, 2018-2030

Figure 11.7: Global Radiofrequency-Based Aesthetic Devices Market (Others), \$Million, 2018-2030

Figure 12.1: Global Radiofrequency-Based Aesthetic Devices Market (by End User)

Figure 12.2: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by End User), \$Million, 2020-2030

Figure 12.3: Global Radiofrequency-Based Aesthetic Devices Market (Beauty Clinics), \$Million, 2018-2030

Figure 12.4: Global Radiofrequency-Based Aesthetic Devices Market (Homecare Settings), \$Million, 2018-2030

Figure 12.5: Global Radiofrequency-Based Aesthetic Devices Market (Others), \$Million,

2018-2030

Figure 13.1: Global Radiofrequency-Based Aesthetic Devices Market (by Sales Channel)

Figure 13.2: Global Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Sales Channel), \$Million, 2020-2030

Figure 13.3: Global Radiofrequency-Based Aesthetic Devices Market (Distributor), \$Million, 2018-2030

Figure 13.4: Global Radiofrequency-Based Aesthetic Devices Market (Retail), \$Million, 2018-2030

Figure 13.5: Global Radiofrequency-Based Aesthetic Devices Market (E-Commerce), \$Million, 2018-2030

Figure 14.1: Global Radiofrequency-Based Aesthetic Devices Market Share (by Region), 2020-2030

Figure 14.2: Global Radiofrequency-Based Aesthetic Devices Market Growth-Share Matrix (by Country), 2020-2030

Figure 14.3: North America Radiofrequency-Based Aesthetic Devices Market Incremental Revenue Opportunity (by Country), \$Million, 2020-2030

Figure 14.4: North America Global Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.5: North America Radiofrequency-Based Aesthetic Devices Market (by Product Type), \$Million, 2018-2030

Figure 14.6: North America Radiofrequency-Based Aesthetic Devices Market (by End User), \$Million, 2018-2030

Figure 14.7: U.S. Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.8: Canada Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.9: Europe Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Country), \$Million, 2020-2030

Figure 14.10: Europe Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.11: Europe Radiofrequency-Based Aesthetic Devices Market (by Product Type), \$Million, 2018-2030

Figure 14.12: Europe Radiofrequency-Based Aesthetic Devices Market (by End User), \$Million, 2018-2030

Figure 14.13: Germany Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.14: U.K. Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.15: France Radiofrequency-Based Aesthetic Devices Market, \$Million,

2018-2030

Figure 14.16: Italy Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.17: Spain Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.18: Russia Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.19: Nordic Countries Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.20: Rest-of-Europe Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.21: Asia-Pacific Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Country), \$Million, 2020-2030

Figure 14.22: Asia-Pacific Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.23: Asia-Pacific Radiofrequency-Based Aesthetic Devices Market (by Product Type), \$Million, 2018-2030

Figure 14.24: Asia-Pacific Radiofrequency-Based Aesthetic Devices Market (by End User), \$Million, 2018-2030

Figure 14.25: China Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.26: Japan Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.27: South Korea Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.28: India Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.29: Australia and New Zealand Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.30: Rest-of-Asia-Pacific Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.31: Latin America Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Country), \$Million, 2020-2030

Figure 14.32: Latin America Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.33: Latin America Radiofrequency-Based Aesthetic Devices Market (by Product Type), \$Million, 2018-2030

Figure 14.34: Latin America Radiofrequency-Based Aesthetic Devices Market (by End User), \$Million, 2018-2030

Figure 14.35: Brazil Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.36: Mexico Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.37: Argentina Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.38: Colombia Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.39: Rest-of-Latin America Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.40: Middle East and Africa Radiofrequency-Based Aesthetic Devices Market Incremental Opportunity (by Country), \$Million, 2020-2030

Figure 14.41: Middle East and Africa Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.42: Middle East and Africa Radiofrequency-Based Aesthetic Devices Market (by Product Type), \$Million, 2018-2030

Figure 14.43: Middle East and Africa Radiofrequency-Based Aesthetic Devices Market (by End User), \$Million, 2018-2030

Figure 14.44: Saudi Arabia Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.45: U.A.E. Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.46: South Africa Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 14.47: Rest-of-Middle East and Africa Radiofrequency-Based Aesthetic Devices Market, \$Million, 2018-2030

Figure 15.1: Shares of Key Companies Profiled

Figure 15.2: Alma Lasers Ltd.: Overall Product Portfolio

Figure 15.3: Alma Lasers Ltd.: Overall Financials, 2018-2020

Figure 15.4: Alma Lasers Ltd.: Net Revenue (by Product Category), \$Million, 2018-2020

Figure 15.5: Alma Lasers Ltd.: Net Revenue (by Region), \$Million, 2018-2020

Figure 15.6: Alma Lasers Ltd.: R&D Expenditure, \$Million, 2018-2020

Figure 15.7: Alma Lasers Ltd.: SWOT Analysis

Figure 15.8: Beco Medical Group: Overall Product Portfolio

Figure 15.9: Beco Medical Group: SWOT Analysis

Figure 15.10: Cymedics: Overall Product Portfolio

Figure 15.11: Cymedics: SWOT Analysis

Figure 15.12: Cynosure, Inc.: Overall Product Portfolio

Figure 15.13: Cynosure, Inc.: SWOT Analysis

- Figure 15.14: EndyMed Ltd.: Overall Product Portfolio
- Figure 15.15: EndyMed Ltd.: Overall Financials, \$Million, 2018-2020
- Figure 15.16: EndyMed Ltd.: Net Revenue (by Product Category), \$Million, 2018
- Figure 15.17: EndyMed Ltd.: Net Revenue (by Region), \$Million, 2018
- Figure 15.18: EndyMed Ltd.: SWOT Analysis
- Figure 15.19: Ibramed: Overall Product Portfolio
- Figure 15.20: Ibramed: SWOT Analysis
- Figure 15.21: INDIBA S.A.: Overall Product Portfolio
- Figure 15.22: INDIBA S.A.: SWOT Analysis
- Figure 15.23: Inmode Ltd.: Overall Product Portfolio
- Figure 15.24: Inmode Ltd.: Overall Financials, \$Million, 2018-2020
- Figure 15.25: Inmode Ltd.: Net Revenue (by Region), \$Million, 2018-2020
- Figure 15.26: Inmode Ltd.: R&D Expenditure, \$Million, 2018-2020
- Figure 15.27: Inmode Ltd.: SWOT Analysis
- Figure 15.28: Lumenis Ltd.: Overall Product Portfolio
- Figure 15.29: Lumenis Ltd.: SWOT Analysis
- Figure 15.30: Lutronic Corp.: Overall Product Portfolio
- Figure 15.31: Lutronic Corp.: Overall Financials, \$Million, 2018-2020
- Figure 15.32: Lutronic Corp.: SWOT Analysis
- Figure 15.33: SharpLight Technologies Ltd.: Overall Product Portfolio
- Figure 15.34: SharpLight Technologies Ltd.: SWOT Analysis
- Figure 15.35: Syneron Medical Ltd. (Candela Corporation): Overall Product Portfolio
- Figure 15.36: Syneron Medical Ltd. (Candela Corporation): SWOT Analysis
- Figure 15.37: Venus Concept Inc.: Overall Product Portfolio
- Figure 15.38: Venus Concept Inc.: Overall Financials, \$Million, 2018-2020
- Figure 15.39: Venus Concept Inc.: Net Revenue (by Product Category), \$Million, 2018-2020
- Figure 15.40: Venus Concept Inc.: Net Revenue (by Region), \$Million, 2018-2020
- Figure 15.41: Venus Concept Inc.: R&D Expenditure, \$Million, 2018-2020
- Figure 15.42: Venus Concept Inc.: SWOT Analysis
- Figure 15.43: Viora: Overall Product Portfolio
- Figure 15.44: Viora: SWOT Analysis
- Figure 15.45: Ya-Man Ltd.: Overall Product Portfolio
- Figure 15.46: Ya-Man Ltd.: SWOT Analysis

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