

Global Medical Aesthetics Market: Analysis By Treatment, By Product (Aesthetic Injectables, Energy-based Devices, Physician-dispensed Cosmeceuticals And Breast Implants And Reconstructive Devices), By End User (Clinics, Hospitals And Med spa, Dermatology And Beauty Centers And Others), By Region Size & Forecast with Impact Analysis of COVID-19 and Forecast up to 2028

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Abstracts

Medical aesthetics is the branch of medicine that focuses on enhancing cosmetic appearance through various non-surgical and minimally invasive procedures, encompassing treatments such as Botox, dermal fillers, laser therapy, and other aesthetic interventions to improve the physical attributes and overall well-being of individuals. Medical aesthetics address a wide array of concerns from wrinkles and volume loss to scar revision and body contouring. Global medical aesthetics market in 2022 was valued at US\$18.21 billion. The market value is expected to reach US\$30.61 billion by 2028.

The rising popularity of non-invasive (minimally-invasive) treatments in emerging markets, relatively easy access to developed markets, effective marketing strategies, and increasing demand for affordable but effective treatments are the significant factors driving the demand for medical aesthetics. Furthermore, the medical aesthetics market is predicted to grow as the senior population grows and innovations such as improved laser technologies, more effective energy-based devices, and advanced robotics in surgical procedures, become popular. As a result, the aesthetics industry is booming in the present decade, with a strong increase expected during the projected period.

Increased demand for face injectables, returning customers, new indication, geographic expansion, positive government assistance in terms of product approval for new application areas, and commercialization of creative solutions in the medical aesthetics industry drive mergers, collaborations, partnerships, and agreements among medical aesthetics firms. The global medical aesthetics market value is projected to grow at a CAGR of 9.04%, during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Product: According to the report, the global medical aesthetics market is segmented into four products: Aesthetic injectables, Energy-based devices, Physician-Dispensed Cosmeceuticals and Breast Implants and Reconstructive Devices. Aesthetic Injectables segment acquired majority of share in the market in 2022, because of the growing trend of ageless beauty, and increasing desire to maintain a youthful look. Botox and dermal fillers remain the major procedures in this field and have shown steady growth despite the long history of being the first introduced in the beauty aesthetic industry. Whereas, energy-based devices segment has the fastest CAGR as these devices are cheaper, and safer way to prevent the effects of aging and give more natural looking results. Brazil is the most promising among the major EBD markets. Developed countries such the US, the EU, and Japan have already reached high non-invasive EBD penetration and remain quite competitive.

Aesthetic injectables segment is further segmented into two products: Dermal Fillers and Botox. Dermal Fillers segment held the major share in the injectables market and is the fastest growing segment as well because these procedures are designed to improve the appearance of facial wrinkles, the appearance of the lips, and the treatment of acne scars. The growing trend of ageless beauty, increasing desire to maintain a youthful look and rising disposable income in both developing and developed countries will fuel market expansion for dermal fillers in the coming years.

By Ends User: According to the report, the global medical aesthetics market is bifurcated into three end users: Clinics, Hospitals and Med Spa, Dermatology and Beauty Centers and Others. Clinics, Hospitals and Med Spa segment acquired majority of share in the market in 2022, as these institutions adhere to all regulatory laws and standards established by the government and must be owned by a physician. Whereas, Dermatology and Beauty Centers segment is expected to have the highest CAGR in the future as affordability has spurred demand for medical aesthetics, resulting in an increase in the number of patients attending Dermatology and Cosmetic Centers.

By Treatment: The report provides insight into the medical aesthetics market based on the number of treatments which is segmented into injectables, hair removal, facial rejuvenation and others like non-surgical fat reduction. Global number of treatments in medical aesthetics market is anticipated to grow to 28799.6 thousands by 2028. Injectables segment hold the majority of the share because they offer a non-surgical option with quick, noticeable results and minimal downtime. The variety of options and improved safety contribute to their dominance, along with the growing social acceptance of these procedures. Aesthetic injectables segment is further segmented into three products: Botulinum toxin, Hyaluronic acid and Calcium Hydroxyapatite. Botox has recorded significant volume growth, driven by the declining treatment price over the years.

By Region: The report provides insight into the medical aesthetics market based on the geographical operations, namely North America, Europe, Asia Pacific, and Rest of the World. North America medical aesthetics market enjoyed the highest market share in 2022, due to high disposable income, higher knowledge regarding aesthetic operations, technical improvements in cosmetic procedures, the existence of important market competitors, the growing elderly population, and the increased desire for non-invasive aesthetic procedures. During the forecast period, new product releases by prominent industry players in North America would also drive market growth. The market for North America medical aesthetics is dominated by the US, as there are key product launches, high concentration of market players or manufacturer's presence, and acquisition & partnerships among major players, and increasing demand for non-surgical aesthetic procedures in the US.

The medical aesthetics market in the Asia Pacific region would experience fastest growth in the coming years, driven by several key factors. The strong increase in disposable income in Asian countries, growing awareness about medical beauty treatments, and aging population contribute to the region's growth. Easy regulatory requirements and the influence of Western beauty standards have also increased cosmetic enhancement demand in the region. Within Asia Pacific, China dominates the market. The Chinese medical aesthetics business has grown in recent years due to increasing disposable income, awareness, and enriched products. The market is expected to continue growing due to 'lipstick effects', that people opt to spend on medical aesthetic products rather than apparel.

India is expected to be the fastest-growing region in the medical aesthetic market due to rising income levels and the introduction of new aesthetic procedures. Also, Korea's medical aesthetics market appears more advanced in emerging markets, due to well-

developed medical systems, strong demand, aging population, high treatment volumes for long periods, and substantially attractive treatment prices. The market is majorly driven by the increasing adoption of minimally invasive and non-invasive procedures coupled with growth in medical tourism.

Global Medical Aesthetics Market Dynamics:

Growth Drivers: As people strive to retain a youthful and revitalized appearance without having invasive surgery, these therapies have grown in popularity. The rise in disposable money is a major factor driving the growth of the medical aesthetics market. As many countries' economies and living conditions have improved, customers have more money available for discretionary spending, including cosmetic operations. Further, the market is expected to increase due to increasing geriatric population, surge in chronic skin diseases, rising influence of social media, increasing beauty consciousness among people, growing healthcare expenditure, shift in consumer preference for minimally invasive procedures, etc.

Challenges: The global medical aesthetics market faces challenges due to strict regulatory concerns and market impediments. Regulatory bodies scrutinize products for safety and efficacy, requiring extensive clinical trials and significant financial investments. This raises development costs, which can be passed on to consumers. New market entrants face challenges in achieving regulatory standards, reducing competition and impeding innovation. Moreover, varied regulatory standards across countries make it difficult for multinational corporations to enter new markets. The other challenges that medical aesthetics market faces include threat from fast followers, etc.

Trends: One of the most distinct and pervasive trends observed in the global medical aesthetics market is that a growing proportion of the male population predicted to use medical aesthetics. During the forecast period, the male population is likely to use a variety of injectables, including Botulinum toxin and dermal fillers and hair transplant techniques. For example, a rising number of younger men are opting for tissue fillers before their skin begins to age. Another prominent trend that is expected to drive market growth further is introduction of new technology and devices like micro-needle devices, radio frequency devices, intense pulse laser devices, HIFU devices etc. More trends in the market are believed to augment the growth of medical aesthetics market during the forecasted period include, increasing medical tourism, new product launches and emerging markets, innovation, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 epidemic had a negative impact on market trends in medical aesthetics market. As these procedures are considered non-essential, these were among the first healthcare market procedures to witness widespread restriction and cancellations. In conclusion, the COVID-19 pandemic initially caused a significant decline in the medical aesthetics market due to the closure of clinics, reduced consumer confidence, and supply chain disruptions. However, as the situation improved and safety measures were implemented, the market showed signs of recovery.

Competitive Landscape and Recent Developments:

Global medical aesthetics market is fragmented. Several Asian companies in Korea and China have introduced devices at a substantially cheaper price, thanks to high-quality engineers for R&D and low labor costs. Key players of global medical aesthetics market are:

AbbVie Inc. (Allergan Inc.)
Merz Pharma GmbH & Co. KGaA
Bausch Health Companies Inc.
Shanghai Fosun Pharmaceutical (Group) Co., Ltd.
Cutera, Inc.
Lumenis
Cynosure
Candela
Aerolase Corp.
Sciton Inc.
Lutronic
Venus Concept

The key players are constantly investing in strategic initiatives, such as new product launches, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, in September 2023, Cutera has launched Secret DUO, a skin resurfacing and revitalization platform that uses dual non-ablative fractional technologies. The device is equipped with a radio frequency microneedling (RFMN) handpiece and a fractional non-ablative 1540 nm erbium glass laser, allowing practitioners to provide customizable solutions for fine lines, texture, pigment, stretchmarks, and scars. In March 2022, Lumenis launched triLift, a facial stimulation device targeting aging elements: structure, contour, and texture.

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