

Global Medical Aesthetics Market 2023

<https://marketpublishers.com/r/G294CDBA12B7EN.html>

Date: September 2023

Pages: 99

Price: US\$ 3,550.00 (Single User License)

ID: G294CDBA12B7EN

Abstracts

The global medical aesthetics market is experiencing rapid growth, with a projected compound annual growth rate (CAGR) of 10.2% from 2023 to 2029. This growth is expected to propel the market to reach a value of USD 47.43 billion by 2029, a significant increase from USD 23.46 billion in 2022. Several key trends are driving this growth in the industry.

One of the primary factors contributing to the expansion of the medical aesthetics market is the increasing number of younger consumers seeking aesthetic procedures. This demographic is becoming more conscious of their appearance and is actively seeking ways to enhance their physical features. Additionally, there has been a notable rise in the number of men seeking cosmetic enhancements, further fueling the demand for medical aesthetics procedures.

Another trend shaping the market is the preference for non-invasive options. Patients are increasingly opting for procedures that do not require surgery or extensive downtime. This preference is driven by the desire for quicker recovery times and minimal scarring. The availability of advanced devices and products from both global and local vendors has made non-invasive options more accessible and appealing to consumers.

In terms of specific procedures, popular choices in the medical aesthetics market include facelifts, liposuction, botox injections, skin resurfacing, and intense pulse light (IPL) treatments. These procedures are designed to improve the appearance of individuals through minimally invasive or non-invasive techniques. For example, facelifts can help reduce the signs of aging, while liposuction targets unwanted fat deposits. Botox injections are commonly used to reduce wrinkles, and skin resurfacing procedures aim to improve the texture and tone of the skin. IPL treatments are effective for various skin issues, such as pigmentation and vascular lesions.

Despite the challenges posed by the COVID-19 pandemic, the demand for cosmetic treatments has seen a 3% increase. This indicates the resilience of the medical aesthetics market and the continued interest of individuals in enhancing their appearance. One popular injectable treatment is platelet-rich plasma (PRP), which utilizes the patient's own blood cells to rejuvenate the skin. Laser applications are also widely used for various skin concerns, further contributing to the growth of the market.

Affordability and minimal risk are key factors driving the preference for non-invasive procedures. These treatments offer a more cost-effective option compared to surgical interventions and carry fewer risks and complications. As a result, non-invasive procedures have gained popularity among a wide range of individuals, including both younger and aging populations.

Furthermore, the growth of the medical aesthetics market is also influenced by medical tourism, often referred to as aesthetic medicine tourism. Patients are increasingly traveling to different countries to access high-quality and cost-effective medical aesthetics treatments. This trend has contributed to the expansion of the market on a global scale.

Market Segmentation

The global liquid handling systems market can be analyzed through several important segments that provide insights into the key products, applications, end-users, and regions that comprise this industry:

By Procedure

- Minimally Invasive Procedure
- Non-Invasive Procedure

By Product

- Body Contouring Devices
- Cosmetic Implants
- Filler and Neuromodulators
- Laser and Energy-Based Devices
- Microdermabrasion (MDA)
- Microneedling and Chemical Peels
- Others

By Application

- Body Contouring and Cellulite Reduction

Breast Augmentation
Facial Aesthetics
Skin Tightening and Brightening
Others

By End User
Homecare
Hospital and Skin Clinics
Medical Spa

By Geography
North America – US, Canada
Europe – Germany, France, UK, Italy, Spain
APAC - China, Japan, India, South Korea, Australia
Latin America – Brazil, Mexico, Argentina
Middle East & Africa – South Africa, Saudi Arabia, Turkey

The medical aesthetics market comprises non-invasive and minimally invasive procedures focused on improving cosmetic appearance and enhancing patient satisfaction.

In 2022, minimally invasive procedures represented over half of the total market, holding a 57.3% share. These procedures involve minor skin breaching using specialized devices and include treatments like laser resurfacing, injectables, and minor liposuction. Their minimal surgical intervention coupled with benefits such as shorter recovery periods, reduced pain/discomfort, and higher safety profiles are driving adoption.

The remaining 42.5% share was accounted for by completely non-invasive procedures like skin tightening, body contouring, and cellulite reduction which are performed externally on the skin's surface. These are gaining popularity due to the absence of surgical risks, with technologies like laser and ultrasound providing visible improvements safely and effectively.

Medical aesthetics market is further segmented by product: body contouring devices, cosmetic implants, filler and neuromodulators, laser and energy-based devices, microdermabrasion (MDA), microneedling and chemical peels, others.

Body contouring devices represent the largest product segment in the medical

aesthetics market, commanding a 27.1% market share. This segment comprises minimally invasive devices for fat reduction and body sculpting, including systems like non-invasive laser lipolysis, cryolipolysis, radiofrequency and ultrasound.

The high demand for body contouring procedures is fueled by their ability to reduce localized fat deposits and improve body shape and tone with minimal discomfort or downtime. Patients are increasingly seeking these procedures as an alternative to more invasive surgical options like liposuction. The convenience, safety profile and visible, longer-lasting results delivered by body contouring treatments are key growth drivers.

Following closely behind are laser and energy-based devices, holding a 21.7% market share. This segment covers aesthetic skin treatment systems utilizing laser, radiofrequency and intense pulsed light. These devices enable procedures like skin rejuvenation, tightening, hair removal and vascular lesion removal. Their versatility and technological improvements support continual adoption for both facial and body treatments.

Other product segments each account for smaller yet substantial market shares. Cosmetic implants comprise both facial and breast augmentation implants. Dermal fillers and neuromodulators include injectable anti-wrinkle solutions. Micro-needling and chemical peels are minimally invasive skin revitalization techniques. Microdermabrasion is a mild skin exfoliation method.

The key application segments in the market are body contouring and cellulite reduction, skin tightening and resurfacing, facial aesthetics, breast augmentation, and others. Body contouring and cellulite reduction hold the largest share at 30.8%, driven by the demand for fat reduction and liposuction procedures. Skin tightening and resurfacing procedures are also gaining popularity.

Hospitals and skin clinics are the primary end-users, accounting for 55.0% of the market in 2022. The increasing demand for minimally invasive and non-invasive procedures drives patients to seek treatment in these settings. North America is the largest market, with the United States contributing significantly to industry growth. The Asia-Pacific region is expected to witness faster growth, driven by factors such as an aging population, increased acceptance of cosmetic surgeries, and higher expenditure on medical aesthetic procedures. Countries like Japan, China, India, South Korea, and Australia offer promising market growth opportunities.

Competitive Landscape

The global medical aesthetics market is highly competitive, with numerous vendors offering a wide range of products and treatments. Prominent industry players like Abbvie Inc. (Allergan plc), Sisram Medical Ltd., Cutera Inc., Lumenis Inc., Bausch & Lomb Incorporated, and El. En. S.p.A. have a strong presence. This report profiles key companies including Abbvie Inc. (Allergan plc), Aerolase Corporation, Aesthetics Biomedical, Inc., Asclepion Laser Technologies GmbH, Astanza Laser LLC, Bausch & Lomb Incorporated, Bausch Health Companies Inc., Beijing Sanhe Beauty S & T Co., Ltd., biolitec AG, Biotec Italia Srl, Brera Medical Technologies Srl, Candela Corporation, Cartessa Aesthetics, LLC, Celling Biosciences, LLC. (ThermiGen), Cutera Inc., Cynosure, LLC, Dominion Aesthetic Technologies, Inc., El. En. S.p.A., Endymed Ltd., Erchonia Corporation, Galderma S.A., Inmode Ltd, Johnson & Johnson, Linline Medical Systems, SIA, Lumenis Inc., Lutronic, Inc., Lynton Lasers Ltd, MedArt ApS, Medytox Inc., Merz Pharma GmbH & Co. KGaA, Meyer-Haake GmbH, Microaire Surgical Instruments LLC, Revance Therapeutics, Inc., Sciton, Inc., Sientra, Inc., Sisram Medical Ltd., Venus Concept Inc., WAVEMED SRL, Wuhan Gigaa Optronics Technology Co., Ltd., Zimmer MedizinSysteme GmbH, among others.

Scope of the Report

- To analyze and forecast the market size of the global medical aesthetics market.
- To classify and forecast the global medical aesthetics market based on procedure, product, application, end user, geography.
- To identify drivers and challenges for the global medical aesthetics market.
- To examine competitive developments such as mergers & acquisitions, agreements, collaborations and partnerships, etc., in the global medical aesthetics market.
- To identify and analyze the profile of leading players operating in the global medical aesthetics market.

Why Choose This Report

- Gain a reliable outlook of the global medical aesthetics market forecasts from 2023 to 2029 across scenarios.
- Identify growth segments for investment.
- Stay ahead of competitors through company profiles and market data.
- The market estimate for ease of analysis across scenarios in Excel format.
- Strategy consulting and research support for three months.
- Print authentication provided for the single-user license.

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