

Medical Aesthetics Market Report by Product (Devices, Aesthetic Implants), Application (Surgical, Non Surgical), End User (Hospitals and Clinics, Medical Spas and Beauty Centers), and Region 2024-2032

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Abstracts

The global medical aesthetics market size reached US\$ 16.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 35.7 Billion by 2032, exhibiting a growth rate (CAGR) of 8.6% during 2024-2032. The market is primarily driven by the rising emphasis on youthful appearance and self-confidence, the escalating consumer demand for non-invasive cosmetic procedures, the continuous technological advancements, and the widespread availability and accessibility of medical aesthetics.

Medical Aesthetics Market Analysis:

Major Market Drivers: The growing popularity of non-invasive or minimally invasive procedures, such as Botox, dermal fillers, and laser treatments, is among the key factors propelling the medical aesthetics market outlook. Moreover, the increasing number of social media platforms and the growing celebrity culture are also catalyzing the global market. Additionally, the continuous advances in the medical field, including laser technology, ultrasound treatments, and advanced injectables for the development of more effective and safer methods, are positively influencing the market growth.

Key Market Trends: The escalating consumer demand for personalized treatment plans tailored to their individual needs and preferences is acting as a significant growth-inducing factor. Besides this, the emerging trend of combination therapies, such as injectables, laser cures, radiofrequency

treatments, and skincare routines to achieve optimal outcomes is also stimulating the medical aesthetics market statistics.

Competitive Landscape: Some of the major market players in the medical aesthetics industry include A.R.C. Laser GmbH, AbbVie Inc., Alma Lasers Ltd., Bausch Health Companies Inc., Cutera Inc., Cynosure, El.En. S.p.A., Fotona d.o.o., Johnson & Johnson, Lutronic, Merz Pharma GmbH & Co. KGaA, Venus Concept, among many others.

Geographical Trends: North America accounted for the largest market share, on account of the expanding cosmetic industry, the advanced medical infrastructure, and the increasing focus on self-improvement and individual appearance among individuals. Apart from this, the shifting consumer preferences towards surgical and non-surgical beauty treatments are also catalyzing the market growth of medical aesthetics in the region.

Challenges and Opportunities: The implementation of stringent regulations by government bodies can pose numerous challenges for market entry, product approval, and compliance with safety standards. However, the growing popularity of advanced technologies, including artificial intelligence (AI), robotics, and 3D printing, presents significant growth opportunities for the medical aesthetics industry growth.

Medical Aesthetics Market Trends:

Growing Demand for Non-Invasive Procedures

The escalating demand for non-invasive procedures is primarily driving the market growth. Besides this, the shifting consumer preferences towards cosmetic enhancements are also catalyzing the medical aesthetics market outlook. Moreover, the growing popularity of various beauty treatments, such as dermal fillers, Botox injections, and laser therapy is further augmenting the market growth. For instance, in July 2021, Allergan received the US FDA approval of a label expansion of BOTOX to include eight new muscles for the treatment of upper limb spasticity in adults. The new muscles for treatment include additional muscles of the elbow and forearm (brachialis, brachioradialis, pronator teres, and pronator quadratus). The American Society of Plastic Surgeons study found that Botox injections were the most popular non-invasive cosmetic procedure in 2020, with 4.4 million procedures performed in the year. Hence,

the use of botulinum toxins in aesthetic medicine has increased remarkably. Botox injections are used to treat frown lines, crow's feet, and horizontal forehead lines, which are cosmetic indications approved by the US FDA.

Ongoing Technological Advancements

The ongoing innovations in laser technology, injectables, and energy-based devices are positively influencing the market growth. Moreover, the elevating requirement for advanced technologies to target specific skin issues, including pigmentation, wrinkles, and tattoo removal, owing to their effectiveness and versatility, is also catalyzing the medical aesthetics industry growth. For example, the extensive utilization of surgical robots, such as the da Vinci Surgical System, has revolutionized the field of surgery by providing enhanced precision, dexterity, and control to surgeons during minimally invasive procedures. Additionally, the growing popularity of longer-lasting and more natural-looking injectables to make cosmetic enhancements more accessible and appealing to individuals is also stimulating the medical aesthetics market demand. For instance, GC Aesthetics, a long-established brand in breast aesthetics, and Bimini Health Tech ("Bimini"), a pioneer in healthcare solutions, announced their joint venture partnership aimed at revolutionizing breast reconstruction worldwide. This strategic collaboration combines GC Aesthetics' 40 years' experience in design, manufacturing, and distribution of Silicone Breast Implants with Bimini's expertise in Breast Reconstruction innovation. The result: an unprecedented commitment to providing women with best-in-class solutions for breast reconstruction across the globe, including the USA, LATAM, EMEA, and APAC.

Rising Emphasis on Self-Confidence and Youthful Appearance

As per the medical aesthetics market overview, the rising cultural shift towards prioritizing self-assurance and youthfulness is among the primary factors bolstering the medical aesthetics market. Additionally, the approval of products by various regulatory authorities is also boosting the market's growth. For instance, in January 2022, Lumenis launched the Splendor X device, CE cleared for hair removal, vascular treatments, pigmented lesions, and wrinkles in the United Kingdom. Moreover, the growing popularity of botulinum toxin procedures, the increasing beauty-conscious populations, and the launch of products are also propelling the growth of the market segment. Botulinum toxin is a neurotoxic protein produced by the bacterium *Clostridium botulinum*. The botulinum toxin injections tend to block the nerve signals to the muscle in which it is injected. It is also reported that patients aged 31- 45 year most commonly seek botulinum toxin type A cosmetic procedures. Apart from this, an ISAPS survey released

in December 2021 revealed that among all the non-surgical cosmetic procedures performed globally in 2020, 43.2% were Botulinum Toxin procedures.

Medical Aesthetics Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, country levels for 2024-2032. Our report has categorized the market based on product, application, and end user.

Breakup by Product:

Devices

Aesthetic Implants

The report has provided a detailed breakup and analysis of the market based on the product. This includes devices and aesthetic implants. According to the report, aesthetic implants represented the largest segment. The growing popularity of aesthetic implants for procedures, such as breast augmentation and facial enhancements is propelling the market growth. For example, in May 2022, GC Aesthetics, Inc. launched FixNip NRI, its Nipple Areola Complex Reconstruction Implants, to cater to women's clinical needs. Moreover, the escalating consumer demand for personalized, natural-looking results is also catalyzing the market growth.

Breakup by Application:

Surgical

Non Surgical

The report has provided a detailed breakup and analysis of the market based on the application. This includes surgical and non-surgical. According to the report, surgical accounted for the largest market share. The growing popularity of surgical procedures in medical aesthetics, on account of their ability to provide comprehensive and long-lasting results, is primarily driving the market growth. For instance, GC Aesthetics launched PERLE, the next generation of breast implants, a highly innovative line of smooth breast implants with surface technology (BioQ), in Europe. This launch helped the company to

offer the broadest product portfolio with a full selection of surfaces, fillings, sizes, and projections to meet every patient's and surgeon's demands for both reconstructive and aesthetic procedures.

Breakup by End User:

Hospitals and Clinics

Medical Spas and Beauty Centers

The report has provided a detailed breakup and analysis of the market based on the end user. This includes hospitals and clinics and medical spas and beauty centers. According to the report, hospitals and clinics represented the largest segment. These established healthcare facilities provide various medical aesthetic services, on account of their experienced medical staff and comprehensive resources. Moreover, hospitals and clinics are a preferred choice for patients seeking surgical procedures, as they offer a secure and regulated environment for complex treatments.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share, owing to the increasing healthcare infrastructure development and the escalating demand for surgical and non-surgical cosmetic procedures. Apart from this, the rising product launches and the high

concentration of leading players are also propelling the market growth. For example, Alma Lasers launched Alma PrimeX, the ultimate non-invasive platform for body contouring and skin tightening. Moreover, the elevating number of medical institutions and the utilization of advanced technologies are also stimulating the growth of the market in the region. For instance, NanoPass Technologies and Aesthetic Management Partners (AMP) signed an agreement to commercialize NanoPass's MicronJet 600 intradermal delivery device in the United States.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Competitive analysis such as market structure, key player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. Some of the major market players in the Medical Aesthetics industry include A.R.C. Laser GmbH, AbbVie Inc., Alma Lasers Ltd., Bausch Health Companies Inc., Cutera Inc., Cynosure, El.En. S.p.A., Fotona d.o.o., Johnson & Johnson, Lutronic, Merz Pharma GmbH & Co. KGaA, Venus Concept, among many others.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Medical Aesthetics Market News:

October 2023: GC Aesthetics, a long-established brand in breast aesthetics, and Bimini Health Tech (“Bimini”), a pioneer in healthcare solutions, announced their groundbreaking Joint Venture partnership aimed at revolutionizing breast reconstruction worldwide. This strategic collaboration combines GC Aesthetics' 40 years' experience in design, manufacturing, and distribution of Silicone Breast Implants with Bimini's expertise in Breast Reconstruction innovation.

January 2024: United Aesthetics Alliance (“UAA” or “the Company”), a holding company created to consolidate market-leading, clinically differentiated plastic surgery practices and affiliated medical spa service providers, today announced it has recently established a new partnership with The Bengtson Center for Aesthetics & Plastic Surgery (“BCAPS” or “the Practice”).

February 2024: Galderma, the emerging pure-play dermatology category leader, presented “NEXT by Galderma.” A ground-breaking report, NEXT takes a deep-dive into the global aesthetics trends set to shape 2024 and beyond. This project is the culmination of a year of comprehensive trend-forecasting research, conducted in collaboration with a network of renowned experts.

March 2024: Merz Aesthetics, the one of the world’s largest dedicated medical aesthetics businesses, announced the latest extension of their first-of-its kind, multi-year campaign, ‘Beauty on Your Terms’ with the addition of award-winning actor and musician Demi Lovato as the newest XEOMIN (incobotulinumtoxinA) brand partner.

Key Questions Answered in This Report

1. What was the size of the global medical aesthetics market in 2023?
2. What is the expected growth rate of the global medical aesthetics market during 2024-2032?
3. What has been the impact of COVID-19 on the global medical aesthetics market?
4. What are the key factors driving the global medical aesthetics market?
5. What is the breakup of the global medical aesthetics market based on the product?
6. What is the breakup of the global medical aesthetics market based on the application?
7. What is the breakup of the global medical aesthetics market based on the end user?
8. What are the key regions in the global medical aesthetics market?
9. Who are the key players/companies in the global medical aesthetics market?

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