

# **Global Medical Aesthetics Industry: Injectables, Energy-Based Devices, Cosmeceuticals, Cosmetic Surgery, Facial Aesthetics, Implants, Cosmetic Tourism. Market Analysis & Forecast to 2022**

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## **Abstracts**

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 2022 (Published August 2017) 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 385 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:

Allergan

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.

## **EXECUTIVE SUMMARY**

Kelly Scientific analysis indicates that the current medical aesthetic industry is worth \$53.3 billion for both service and product revenue. Over the next five years a CAGR of 5.5% is expected and the market will hit \$73.6 billion in 2022. Currently, invasive aesthetic procedures generated revenues of over \$27.8 billion, annually. Kelly Scientific analysis indicate that by 2022, invasive aesthetic procedures will grow at a CAGR of 4.3%. Non-invasive procedures generate approximately \$16.7 billion per annum and will grow at a CAGR of 4.5% over the coming five years. Cosmetic surgery products generated \$8.8 billion in 2016 and have the potential to reach \$15.3 billion in 2022.

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.

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