

## Combination Aesthetics Market, 2012-2023

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### **Abstracts**

Global Combination Aesthetics Market

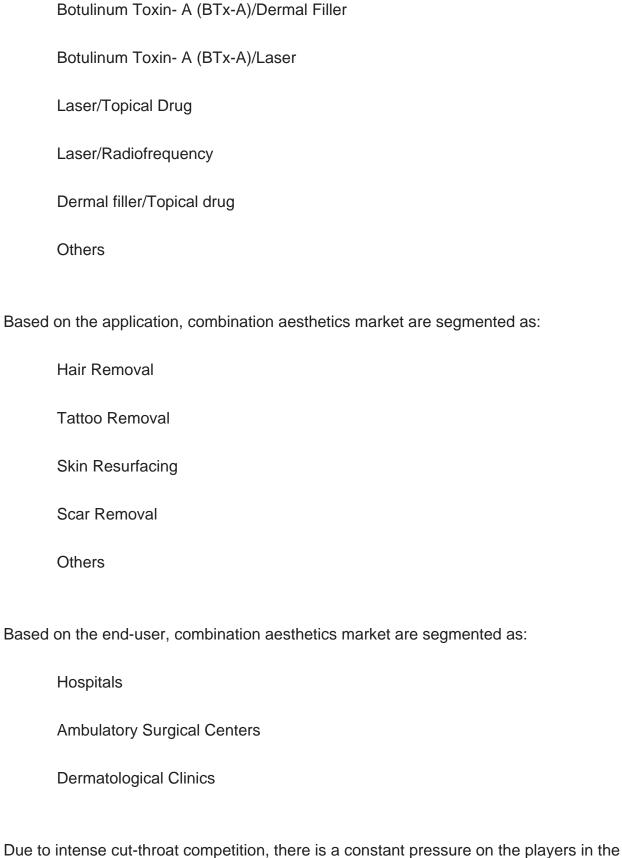
Combination aesthetics therapy is also called as polytherapy that is a treatment pathway uses more than one modality The practice is not new to medicine, but is a fairly new approach in aesthetic medicine. One of the example for combination aesthetics is botulinum toxin and fillers, which is more effective when administered along with other filler than administering alone. Some of the other types of combinations are Tissue tightening plus fillers, Tissue tightening plus fractional resurfacing with carbon dioxide, cellulite remodelling with tissue tightening etc. Over recent years there has been a sharp increase in combination therapies, with many aesthetics professionals recommending combination therapies to maximise results in anti-ageing and body contouring treatments.

The major factors that are augmenting the growth of the market are; increase in adoption of minimally invasive and non-invasive process, growing demand of aesthetic treatment among male, rise in aging population, growing awareness of cosmetics procedures, and availability of user-friendly aesthetic devices, among others. However, high cost of treatment, low reimbursements, and risk of device malfunctions associated mostly with implants, low focus on combination aesthetics for the dermatological conditions, stringent regulation on aesthetics procedures and increase in adoption of branded beauty and cosmetics product are major factors that hamper the growth of global combination aesthetics market.

Combination aesthetics market are segmented on the basis of treatment, application, end-user and by region.

Based on the treatment, combination aesthetics market are segmented as:





Due to intense cut-throat competition, there is a constant pressure on the players in the facial rejuvenation market to introduce newer products that is still in its nascent stage and in a constant state of flux. Due to this intense competitive pressure, there is a compulsion for early introduction of products, especially peels, topical solutions, etc. In



2014, the American Society for Aesthetic Plastic Surgery stated that about 3.5Mn botulinum toxin procedures were performed in the US. In the same year International Society of Aesthetic Plastic Surgery also reported that about 4.8 Mn procedures of botulinum toxin were done globally. and in 2013, American Society for Dermatologic Surgery survey reported that 20% rise in the botulinum toxin procedures compared to 2012. There is an abundance of dermatology service providers in low-income countries such as India, Thailand, Malaysia, and Vietnam who tend to prescribe chemical peels and various creams and lotions as the best treatment options for facial rejuvenation. However, in contrast to this, in economically affluent countries such as U.S., U.K., UAE and Japan, the use of only approved Botulinum type-A neurotoxins is seen and in such countries, close to 50% procedures are done using Botulinum type-A injections. Hence, easier availability of products and affordability is set to increase the demand for combination therapy for enhanced results and is therefore set to boost the global aesthetics combination therapy market.

On the basis of region presence, combination therapies in aesthetics market is segmented into five key regions: North America, Latin America, Europe, Asia Pacific, and Middle East and Africa. North America and Europe are the biggest markets for the combination therapies in aesthetics market. North America market is expected to continue to dominate over the next few years due to higher number of U.S. FDA approvals for botulinum products in the region. However, it is harder to get Health Canada approvals. Asia-Pacific market is comparatively smaller and less penetrated than other regional markets. However, it is one the fastest growing market due to rising patient awareness for various therapeutic options and increase in accessibility to these procedures. Combination treatments such wrinkle lifting plus volume restoring are gaining popularity in this region. Healthy economic growth and disposable income levels in Brunei, Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand, and Vietnam contribute largely to increasing demand for facial injectable products.

Some of the key market players in the combination therapies in aesthetics market are Merz Pharma GmbH & Co. KGaA (Germany), Biopolymer GmbH &Co KG (Germany), Revance Therapeutics Inc. (U.S.), Mentor Worldwide LLC (U.S.), Alma Lasers (Israel), Anika Therapeutics.Inc. (U.S.), Contura International A/S (Denmark), Cynosure. Inc. (U.S.), and GaldermaS.A. (Nestle) (Switzerland)

In April 2016, Galderma and Mentor Worldwide LLC, entered into new nationwide collaboration in order to partner with the surgeons globally to elevate the patient experience across the company innovative aesthetic & corrective brands and offerings



In April 2017, Allergan plc successfully completed the acquisition of ZELTIQ® Aesthetics, Inc., to strengthen its body contouring business segment



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