

ASEAN Medical Aesthetics Industry Research Report 2026-2030

<https://marketpublishers.com/r/ABF63E6F2165EN.html>

Date: June 2026

Pages: 40

Price: US\$ 3,200.00 (Single User License)

ID: ABF63E6F2165EN

Abstracts

The Association of Southeast Asian Nations (ASEAN) is a key regional cooperation organization in Southeast Asia, encompassing 11 countries in the region. With a population exceeding 680 million and a combined economic output of over US\$ 3 trillion, it has become a vital region for the shifting of global supply chains, manufacturing investment, and consumption growth.

Medical aesthetics refers to a sector of medical services that employs medical techniques and procedures to enhance physical appearance, body contours, or skin condition, aiming to achieve aesthetic improvement, rejuvenation, and functional enhancement.

In recent years, medical aesthetics has gradually shifted from an optional consumption for high-income groups to a daily health and personal image management need for the urban middle class. This is driven by economic growth in the ASEAN region, increased disposable income, heightened aesthetic awareness.

With their lower healthcare costs, abundant tourism resources, developed private healthcare systems and international patient base, ASEAN countries are becoming one of the most important markets for medical aesthetics and medical tourism in Asia.

The demand for medical aesthetics in ASEAN is primarily driven by demographic shifts, consumption upgrades, the influence of social media and the demand for medical tourism.

The medical aesthetics market in ASEAN continues to expand, driven by rising household incomes, the upgrading of aesthetic consumption, the growth of medical

tourism, and the increasing popularity of non-surgical medical aesthetic procedures.

According to CRI estimates, the market size of medical aesthetics in ASEAN is projected to reach approximately US\$ 3-4 billion in 2026. The market is expected to grow at a CAGR of around 12% from 2026 to 2030, with the market size projected to reach US\$ 5.0-5.5 billion by 2030.

CRI recommends that global private medical groups, medical aesthetic chain institutions, skin management centers, private equity (PE) funds and venture capital (VC) firms conduct timely market research on the ASEAN region to prepare for their strategic entry into the ASEAN medical Aesthetics market.

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