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1.0 Executive Summary

To date, the US is the largest market for cosmetic procedures globally. The cosmetic surgery service segment earned revenues of circa \$[REDACTED] million in 2013 with a CAGR of [REDACTED]% and reach \$[REDACTED] million by 2019. Within this the facial reconstruction sector generated \$[REDACTED] million in 2013 with a CAGR of [REDACTED]%; it is predicted to reach \$[REDACTED] million by 2019.

A recently published report by The American Society of Plastic Surgeons indicated that service revenues for plastic surgeries rise and fall with economic trends. The journal has analyzed the trends in revenues and their possible relationships with different economic indicators. According to their analysis, revenues from surgical procedures are reflected by indicators of macroeconomic climate such as stock market averages. When the stock exchange average rises, the revenues from cosmetic surgeries also rise. When the unemployment rate goes up, the revenues from cosmetic surgeries go down. In the U.S. which is the largest market for cosmetic procedures, the overall revenues increased [REDACTED]%, but there was [REDACTED]% 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 circa [REDACTED]% increase in service revenues generated by minimally invasive cosmetic procedures such as botulinum toxin and dermal fillers. The market share for service revenues from these procedures increased from [REDACTED]% in 2000 to about [REDACTED]% in past two years. Consequently, the service revenues from surgical procedures have nearly remained stable. The ASPS surgeons earned service revenues of \$[REDACTED] million, \$[REDACTED] million and \$[REDACTED] million for breast augmentation surgeries in 2011, 2012 and 2013 respectively.

Nonsurgical treatments lead the way across the globe and they are broadly classified into three major categories: injectable products, energy based devices and active cosmetics. The 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). The cosmeceuticals include skin care, eye care, skin lightening and scar care products.

The North American market accounts for about [REDACTED]% 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. Russian market is also experiencing fast growth than many E.U. countries and the Russian market is particularly strong for devices and topicals.

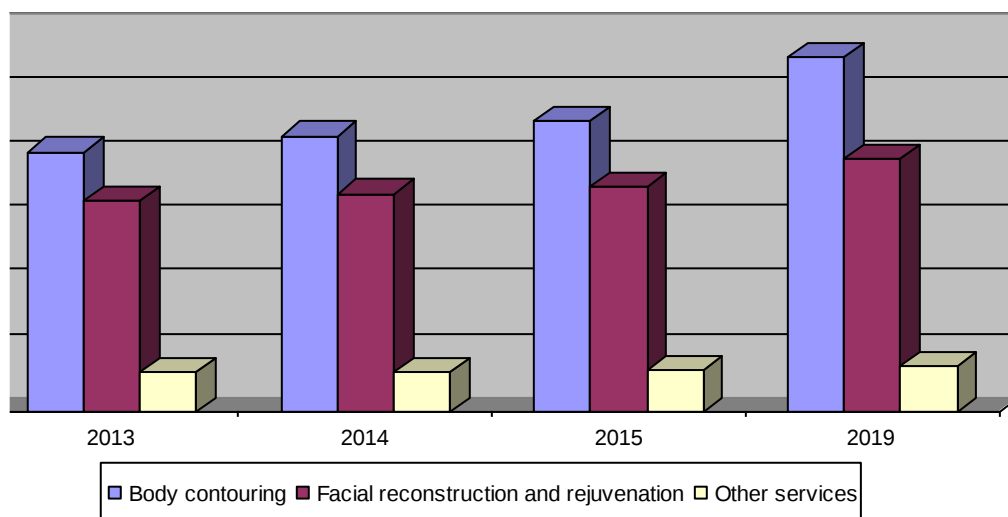
Along with the global giants such as Allergan, Galderma and Merz, a lot of smaller players are offering wrinkle relaxing agents and wrinkle fillers. These products have only temporary effects requiring repeated procedures. The market for these products is nearing maturity and they are widely accepted 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. Facial treatments have gained a significant market share with the availability of plenty of off label products. New technologies to treat excessive sweating, cryoneuromodulation for wrinkles and eradication of toenail fungus offer new areas for physicians.

Another growth market is for body shaping procedures that involves reduction of fat, cellulite, skin laxity and vein removal. An injectable drug, currently in clinical trials is most likely to become a game changer in body contouring segment in the near future. On July 10, 2014, FDA has accepted the filing of New Drug Application

(NDA) for the drug ATX-101 (deoxycholic acid) by Kythera Biopharmaceuticals. Plug-in at-home devices for treating sun damage, hair removal, skin decoloration, 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 launching of transepidermal drug delivery technologies for facilitating topical treatments.

Figure 1: Global Cosmetic Surgery Service Market by Segment, Through 2019



1.1 Objectives of Report

The main objective of this report is to describe in detail the trends, opportunities and the market for the different plastic surgery segments such as reconstructive surgery, cosmetic surgery, products associated with cosmetic surgery procedures, home-based cosmetic devices and cosmeceuticals. The report also makes an attempt to compare the cosmetic surgeon's fee for the different procedures in different parts of the world and the resultant emergence of cosmetic tourism industry. The objectives of this analysis are:

- To provide brief descriptions of reconstructive plastic surgery procedures, the most popular surgical cosmetic procedures, energy-based and other devices, home-use devices, cosmeceuticals and the leading medical tourism centers.
- Understanding the customer demand for the different elective surgical cosmetic procedures.
- To focus on the different types of devices such as lasers, ultrasound equipment, implants and dermal fillers available in the global market place and their applications in aesthetic treatments.
- To present the recently available data on the number of procedures performed at the global and regional levels.
- To provide data on the estimated of markets in various segments of the aesthetic industry.
- To gain an insight into the value of the product segment in 2014 and make a projection through 2019.
- To offer the details of profiles for 116 companies and their contribution to the growth of the industry.
- To identify the emerging technologies in the recent years.

The report is supported by 60 tables & figures over 275 pages. This report is presented as follows:

The global market for cosmetic surgery services by the following sub-categories are presented:

- By **Segment** (Body Contouring, Facial Reconstruction/Rejuvenation, Cosmetic Implants)
- By **Geography** (North America, Europe, Asia/Pacific, Latin America)
- By **Product Segment** (Facial injectables, Botox, Dermafillers, Neuromodulators)
- By **Energy Based and Other Devices** (Home-use Aesthetic Devices)
- By **Company** (e.g Allergen, Mentor, Galderma, Valeant, Merz, Syneron, ZetiQ, Ulthera, Cynosure, Solta/Valeant, Alma/Fosun Pharma)

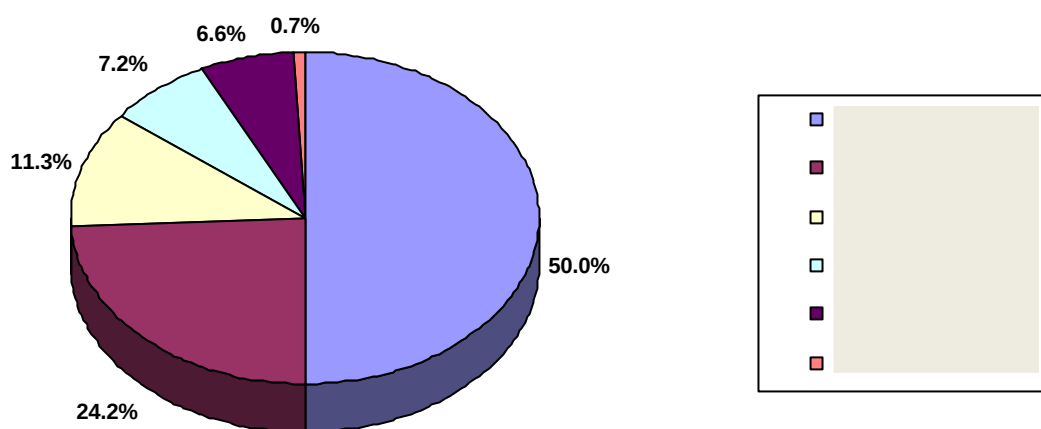
Business strategy information can be gleaned from the following high impact analyses

- Geographic Share of Cosmetic Surgery Procedures
- Minimally-Invasive Cosmetic Procedures
- Most Popular Minimally-Invasive Procedures Globally
- Top Five Countries for Noninvasive Cosmetic Procedures
- Top Five Noninvasive Cosmetic Procedures in the U.S.
- Emergence of Plastic Surgery Tourism (USA, Mexico, Brazil, Costa Rica, UK, Poland, Hungary, Thailand, Malaysia, India)

A comprehensive account of company product portfolios are provided for 116 Cosmetic Surgery and Service providers globally including:

- Allergen
- Mentor
- Galderma
- Valeant
- Merz
- Syneron
- ZetiQ
- Ulthera
- Cynosure
- Solta/Valeant
- Alma/Fosun Pharma

Figure 1: Percent Shares of Non-invasive Cosmetic Surgery Procedures in the U.S.



1.2 Scope of the Study

- The report takes into account, the cosmetic surgeon's fee structure in different geographies and estimates the global service revenues for both invasive and non-invasive cosmetic procedures.
- The report provides a thorough overview of the various cosmetic procedures in the U.S. and other regional markets in 2014, the opportunities for the future, the obvious shift from surgical to non-surgical procedures and emergence of new technologies.
- A section of this report focuses on the emergence of cosmetic surgery tourism.
- The report provides global and regional statistics for number of cosmetic surgery procedures, the most popular procedures in different geographies and the annual earnings of cosmetic surgeons.
- To identify the currently available aesthetic medical devices for vascular applications, acne treatment, body shaping, hair removal and dermabrasion.
- To identify the currently available neurotoxins and dermal fillers for aesthetic applications.
- To estimate the projected market for devices, neurotoxins, dermal fillers and cosmeceuticals through 2019.
- To identify the leading players in the devices and cosmeceuticals segments.

1.3 Data Sources and Methodology

The author of this report is a retired college professor with more than three decades of teaching experience in biochemistry, pharmacology, biotechnology and cell biology. He has written 28 market research reports in biotechnology, pharmaceuticals and healthcare. The detailed study of this report is mainly based on the plastic surgery associations such as American Society for Aesthetic Plastic Surgery (ASAPS), American Society of Plastic Surgeons (ASPS), European Society of Plastic Reconstruction and Aesthetic Surgery (ESPRAS), European Association of Plastic Surgeons (EURAPS), American Academy of Facial Plastic and Reconstructive surgery (AAFPRS) and European Society of Aesthetic Surgery (ESAS). The report also relies on the data obtained from trade association publications, product brochures and catalogs and company literature. The information provided in this study was obtained from sources that we believe to be reliable, but we do not guarantee the accuracy, adequacy or completeness of any information, any omission or the results obtained by the use of such information.

The senior editor of this research obtained a Ph.D. in Medicine from the Royal College of Surgeons in Ireland, following completion of a M.Sc. in Biotechnology (NUIG) and an honours degree in Biochemistry from Trinity College Dublin. With many years of medical writing and publishing the senior editor also has extensive experience and knowledge of molecular biology, immunology, bioinformatics and diagnostic testing. As a pharma/biotech industry analyst she has significant expertise in laboratory diagnostic testing and instrument and reagent development technology

List of Companies Analyzed in this Report as Market Participants in the Cosmetic Surgery and Service Space.

Aerolase Corp.	Invasix Ltd.	Sybaritic Inc.
Adoderm GmbH	Ispen Biopharmaceuticals Inc.	Syneron Medical Ltd.
Aesthetic Dermal S.L.	Jeisys Medical Inc.	Tavger Ltd.
Allergan Inc.	JeNu Biosciences Inc.	TavTech Ltd.
Allied Biomedical	Laboratoires FILORGA	Teoxane Laboratories
Alma Lasers Ltd.	Lasering S.R.L.	The Dezac Group Ltd.
Amiea Med	Lexington International LLC	Theradome Inc.
Andrew Technologies LLC	L'Oreal International	ThermiAesthetics
Anika Therapeutics Inc.	LSO Medical Groupe	Tria Beauty Inc.
Anteis S.A.	Lumenis Ltd	Ulthera Inc.
Apira Science Inc.	Lumiere Medical	Venus Concepts Ltd.
Aqtis Medical B.V.	Lutronic Corp.	Viora
Baby Quasar	Medixsysteme	Won Tech Co., Ltd.
Benev Company	Mentor Worldwide LLC	Ya-Man Ltd.
Biopelle Inc.	Merz Aesthetics Inc.	Zeltiq Aesthetics Inc.
Biotechnique Avance	Mesoesthetic Pharma Group	Zimmer Medizin Systeme
Breit Aesthetics Ltd.	Myoscience Inc.	
BTL Industries Inc.	Nagor Ltd.	
Canfield Imaging Systems	Novoxel Ltd.	
Carol Cole Co.	Obagi Medical Products Inc.	
Chromogenex PLC	Pantec Biosolutions AG	
Classys Inc.	Pacific Bioscience Laboratories Inc.	
Contura International A/S	PCA Skin	
CoolTouch Inc.	Philips	
Cutera Inc.	Photocadmus Technologies Spain Ltd.	
Cynosure Inc.	Photomedex Inc.	
Deka Laser Technologies Inc.	PhytoCeuticals Inc.	
DermaMed Solutions LLC	Pierre Fabre Dermo-Cosmetique USA Inc.	
Eclipse Aesthetic LLC	Polytech Health & Aesthetics GmbH	
Edge Systems LLC	Pollogen Ltd	
Ellipse A/S	Prolenium Medical Technologies Inc.	
Ellman International Inc.	Quanta Systems S.P.A.	
Endymed Medical Ltd.	Radiancy Inc.	
Energist Ltd.	Restoration Robotics Inc.	
Envy Medical Inc.	Rhonda Allison Clinical Enterprises	
E-One-IPL	Sciton	
Episciences Inc.	SharpLight Technologies Ltd.	
Erchonia Corp.	Sientra Inc.	
EunSung Global Corp.	Sinclair Is Pharma	
Eurosilicone S.A.S.	SkinCeuticals Inc.	
Focus Medical	Skin Tech	
Fotona D.D.	Solta Medical Inc.	
Galderma S.A.	Spectrum Brands/Remington	
General Project S.R.L.	Spencer Forrest Inc.	
Hironic Co., Ltd.	Suneva Medical Inc.	
H&O Equipment N.V/S.A	Super Grow Lasers Inc.	
Home Skinovations Ltd.	Surgiform Technology Ltd.	
Hongkong Spring International Industry Ltd.	SurgiSil LLC	
Human Med A.G.		
Ilooda Co., Ltd.		
Illuminage Beauty		