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PLASTIC SURGERY MARKETS

(SAMPLE COPY, NOT FOR RESALE)

Trends, Industry Participants, Product Overviews and Market Drivers

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1. Overview

1.1 Statement of Report

Modern advances in plastic surgery have allowed patients with severe physical deformities to live normal lives. Where at one time an individual suffering from an extreme physical abnormality simply had to “live with it,” plastic surgical techniques can now ameliorate or even completely correct the original physical ailment. Beyond addressing serious physical handicaps, plastic surgery for purely cosmetic reasons has exploded around the world. For the purposes of this report, the term “plastic surgery” is divided into two distinct groups: 1) reconstructive surgery focused on restoring normal physical function resulting from an abnormality or injury to the body, and 2) cosmetic surgery focused on simply improving one’s physical appearance. Moreover, this study provides a comprehensive analysis of the trend in medical tourism to seek lower-cost procedures, advances in minimally-invasive surgical techniques that can be performed on an outpatient basis in doctor’s and dentist’s offices, and purchases of over-the-counter beauty products, such as traditional cosmetic make-up and new non-invasive devices marketed to consumers who wish to change their physical appearance without surgery.

The main objectives of this review are:

- Presenting recently-available data on the number of procedures performed for reconstructive and cosmetic surgery.
- Focusing on the various types of medical devices such as lasers, ultrasound devices, implants and dermal fillers available in the global market and their applications in the beauty industry.
- Providing data on the estimated growth of markets in various segments of cosmetic dentistry and beauty products.
- Gaining an insight into the beauty industry and identifying the top market leaders.
- Understanding the price structure for cosmetic surgery procedures in the developed countries and comparing them with the prices offered in the top ten destinations of medical tourism.
- Identifying recent trends in the beauty industry and the gravitation of the industry towards the development of new tools and products to meet changing trends.
- Identifying the total number of companies focusing on plastic surgery products, dental products and OTC cosmetics.

Key questions answered in this study are:

- What is required of plastic surgery practitioners to adjust their practices to suit the changing needs of patients who have become selective in their demands?
- What is the major discernible shift in patients’ demand and which company was the largest beneficiary of this shift?
- What were the aesthetic devices used for body shaping and skin tightening most sought after by consumers?
- What are the largest markets for plastic surgery procedures in the world?
- What different aesthetic medical devices are available in the global market for vascular applications, acne treatment, body shaping, dermabrasion and hair removal?
- What are the global markets for neuromodulators, dermal fillers, skin-tightening and body shaping devices, phototherapy equipments, physician-dispensed cosmeceuticals and skin rejuvenation devices?
- What have been the top reconstructive surgical procedures, cosmetic surgical procedures and minimally-invasive procedures in the U.S.?
- Who are the leading players in the aesthetic devices market?
- What is the global market for breast implants?
- How large is the total global market for beauty products?
- What are the prices for cosmetic procedures in the top ten medical tourism destinations in the world?

This report contains:

- A description of all of the different reconstructive and cosmetic surgery procedures.
- A discussion on the segments of cosmetic dentistry.
- An overview of hair restoration procedures.
- An account of the beauty industry and its segments.
- A discussion on global medical tourism.
- The listing of globally available aesthetic devices used in vascular applications, acne treatment, dermabrasion, hair removal, etc.
- The largest markets for plastic surgery procedures in the world.
- Estimated global markets for neuromodulators, dermal fillers, skin tightening and body shaping devices, phototherapy equipment, physician-dispensed cosmeceuticals and skin rejuvenation devices.
- Profiles of companies engaged in aesthetic, dental, cosmetics and medical tourism.
- Analysis of business performance, research and development (R&D), and product offerings of the various participating companies.

1.2 Scope of the Report

As plastic surgery focuses on the improvement of physical features of individuals, this report also discusses in detail cosmetic dentistry procedures, hair restoration procedures and developments in the cosmetics industry. Moreover, this study provides data on the available plastic surgery procedures in some of the developing countries which are relatively low-priced. A section of this analysis provides information on medical tourism, the top ten medical tourism destinations around the globe and the cost of cosmetic surgery procedures in these host countries. The report also offers profiles of companies with a specific emphasis on their products used in plastic surgery, beauty cosmetics, dental procedures, etc. Additionally, the appendix contains recent information regarding the earning potentials of plastic surgeons in different parts of the world, the emergence of Botox® Boutiques and the influence of celebrities in plastic surgery procedures. Besides providing data on the plastic surgery market in the U.S. and Europe, this study also analyzes the growth of the beauty market in the Asia region. Other TriMark Publications reports related to various other healthcare segments can be found at http://www.trimarkpublications.com.

1.3 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. The detailed study of this review is based mainly on the publications of plastic surgery associations of different regions of the globe. Other information was gleaned from trade association publications and meetings, product brochures and catalogs, and company literature. Where the companies under discussion were publicly held, their annual reports, 10-K filings and financial reports were examined. Important data sources include the American Society for Aesthetic Plastic Surgery (ASAPS), the American Society of Plastic Surgeons (ASPS), the European Society of Plastic Reconstruction and Aesthetic Surgery (ESPRAS), the European Association of Plastic Surgeons (EURAPS), the American Academy of Facial Plastic and Reconstructive Surgery (AAFPRS) and the European Society of Aesthetic Surgery (ESAS). The information set forth 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.

Primary Sources

TriMark collects information from hundreds of database tables and many comprehensive multi-client research projects, as well as Sector Snapshots that we publish annually. We extract relevant data and analytics from TriMark's research as part of this data collection.

Secondary Sources

TriMark uses research publications, journals, magazines, newspapers, newsletters, industry reports, investment research reports, trade and industry association reports, government-affiliated trade releases and other published information as part of its secondary research materials. The information is then analyzed and translated by the Industry Research Group into a TriMark study. The Editorial Group reviews the complete package with product and market forecasts, critical industry trends, threats and opportunities, competitive strategies, and market share determinations.

TriMark Publications Report, Research and Data Acquisition Structure

The general sequence of research and analysis activity prior to the publication of every report in TriMark Publications includes the following items:

- Completing an extensive secondary research effort on an important market sector, including gathering all relevant information from corporate reporting, publicly-available data and proprietary databases.

- Formulating a study outline with the assigned writer, including the following important items:

  - Market and product segment grouping, and evaluating their relative significance.
  - Key competitors' evaluations, including their relative positions in the business and other relevant facts to prioritize diligence levels and assist in designing a primary research strategy.
  - End-user research to evaluate analytical significance in market estimation.
  - Supply chain research and analysis to identify any factors affecting the market.
  - New technology platforms and cutting-edge applications.

- Identifying the key technology and market trends that drive or affect these markets.

- Assessing the regional significance for each product and market segment for proper emphasis of further regional/national primary and secondary research.

- Completing a confirmatory primary research assessment of the report's findings with the assistance of expert panel partners from the industry being analyzed.

1.4 Executive Summary

This study highlights trends, opportunities and the market for all the different plastic surgery segments such as reconstructive surgery, cosmetic surgery, treatment options, company products for plastic surgery, business performance by leading companies in this sector and sales data of the different plastic surgery products. The current trends among plastic surgery patients confirm the fact that the global recession and the weakened U.S. economy have had a negative impact on both patient spending for plastic surgery procedures and budget allocation by plastic surgeons for devices. However, practitioners voice their optimism within the industry, identifying the areas of consumer needs and adjusting their practices to suit the changing demands of patients for less-expensive and non-invasive plastic surgery procedures. The aesthetic practices continue to enlarge into new treatments and procedures, but patients have become more selective than in years past. In spite of the gloomy economic scenario, about [redacted]% of plastic surgeons still manage to earn more than $[redacted] per year.

There has been a noticeable shift from surgical cosmetic procedures to non-invasive cosmetic procedures, and the largest beneficiary of this shift is Botox. Thus, Botox is the most popular aesthetic product, followed by other dermal fillers and physician-dispensed topicals. The most popular among the dermal fillers are Juvederm® (Allergan), Restylane® (Medicis), Radiesse® (BioForm), Perlane® (Medicis) and Prevelle® (Johnson & Johnson/Mentor). The most popular physician-dispensed topicals prescribed by practitioners are from Obagi, SkinMedica and SkinCeuticals. Fractional skin rejuvenation is another popular procedure among plastic surgery patients, and practitioners use devices such as Fraxel® (Solta Medical), Matrix RF™ or Matrix IR™ or eMatrix™ (Syneron™) and Active FX or Deep FX or Total FX (Lumenis). Skin tightening is another popular aesthetic treatment, and the practitioners mostly use such devices as Thermage® (Solta), Accent™ (Alma Lasers) and Titan® (Cutera). The other three commonly-used laser devices in this segment are Aluma (Lumenis), StarLux® (Palomar) and ReFirme™ (Syneron).

Another aesthetic procedure which has gained some ground is body shaping. The devices used most often for body shaping are Thermage, Smartlipo™, Smartlipo MPX™ and Smartlipo Triplex™ from Cynosure. Other devices used commonly were VASER® (Sound Surgical), SlimLipo™ (Palomar) and VelaSmooth™ or VelaShape™ (Syneron).

According to a survey conducted by the American Academy of Cosmetic Surgery (AACS), more than [redacted] cosmetic procedures were carried out in the U.S. in [redacted]. The most sought-after procedures, as of [redacted], were the eyelid lift, the tummy tuck and nose reshaping surgery. The most sought-after minimally-invasive procedures over the last five years were laser skin resurfacing, injectable fillers and chemical peels. The [redacted] survey results reveal that the average age of patients for facelifts, eyelid lifts, Botox injections and dermal fillers was [redacted], [redacted], [redacted] and [redacted], respectively.

According to the British Association of Aesthetic Plastic Surgeons, the U.K. increased [redacted]% in demand for cosmetic procedures from [redacted] to [redacted] and increased [redacted]% from [redacted] to [redacted]. The U.K. plastic surgery industry registered a total market value of $[redacted] million by the end of [redacted]. The major reason for this growth is believed to be the arrival of a number of new products and services that provide effective results with shorter recovery periods. What's more, prices have generally decreased slightly after several years of increases. On average, the cost for breast enlargements in [redacted] was about $[redacted], and in [redacted] it was only $[redacted]. Facelift surgeries cost about $[redacted] in [redacted] and declined to $[redacted] in [redacted]. The average cost of liposuction treatment was about $[redacted] in [redacted], and declined to $[redacted] in [redacted].[1]

According to data published by the [redacted] of the U.K., the minimally-invasive and non-invasive procedures market registered strong growth in [redacted], with dermal fillers and chemical peels showing increased growth by [redacted]% and [redacted]%, respectively. The year [redacted] also witnessed an increase in the number of male patients (up [redacted]%), with "Boytox" (male Botox) and "Sweatox" (anti-sweat Botox) driving the growth. Breast augmentation is the most sought-after surgery, according to the [redacted]. Statistics provided by the group reveal that the third most common type of post-natal procedure with mothers is breast augmentation. Post-birth surgery now constitutes [redacted]% of abdominoplasty operations. Another popular procedure with mothers is the breast uplift with post-birth surgery constituting an estimated [redacted]% of all breast uplifts. As the [redacted] anticipates a [redacted]% growth for cosmetic surgery in the U.K., it plans to open eight new clinics in [redacted].

While looking into the latest Wall Street analysts' reports, public company earnings for the first quarter of [redacted] and the April [redacted] published by [redacted], one is led to believe that the beauty industry has fully resumed its expansion trend. When these two reports are read along with the data published by the ASPS, it becomes clear that facial injectables have been relatively immune to temporary economic down cycles. Patients consider the cost of treating wrinkles and volume loss with injectables as unavoidable investments in their physical appearance. The facial injectables are simply perceived to be luxury items, just as hair coloring and designer clothing are. The expansion trend is further supported by the emergence of more convenient and less expensive distribution points. Plastic surgeons and physicians' assistants are developing new business models for offering these treatments to consumers in easily-accessible mall locations, virtually on demand. Indeed, the shift towards less expensive cosmetic treatments is alarming to the dermatologists and plastic surgeons who monopolized the aesthetic procedure market previously.

The lure of revenue from aesthetic procedures and the negative economic pressure from managed healthcare reforms have made new medical providers gravitate towards aesthetic medicine in large numbers. According to Medical Insight, currently there are about [redacted] aesthetic providers in the U.S. alone. The cosmetic dermatologists who dominated the scene for many years have now become a minority in this fast-changing market. Consumers have gained more freedom of choice and their buying pattern is mainly governed by cost. Now that consumers have more choices, they are in control of the market. Cosmetic patients view cosmetic procedures as commodities, and their disposable income determines the market for cosmetic procedures. While dermatologists continue to add invasive procedures to their offerings, plastic surgeons are expanding their practice to include non-invasive procedures and to compete with provider groups on price and service.

[redacted]