Demand to grow more than 8% annually through 2012

Demand for cosmetic surgery products in the US is forecast to increase 8.1 percent per year to $2.5 billion in 2012, based on increases in cosmetic surgery procedures, which are forecast to reach 16 million over the same time period. America’s obsession with a youthful appearance is longstanding, and is unlikely to subside anytime soon. This coupled with an aging population, a greater societal acceptance of cosmetic surgery, and an increasingly competitive work force will bode well for the cosmetic surgery industry. Due to much more busy lifestyles, less invasive cosmetic surgery procedures and products (such as injections, laser dermal resurfacing and microdermabrasion) that result in little or no recovery time will experience the best opportunities. However, demand for surgical products will continue to be strong in some areas, such as implants, where there are no notable alternatives.

Lasers, microdermabrasion machines will offer steady equipment gains

Equipment was the largest product type in 2007, with one-third of the market. Demand will be driven as a wider variety of practitioners are expected to increasingly offer cosmetic options as these procedures are generally “out-of-pocket” expenses and thus avoid the need to deal with insurance companies. The development of easier-to-use and safer equipment will also continue to open up strong opportunities in other end-users such as beauty salons and spas. Among equipment types, microdermabrasion machines and laser and other light-based systems will continue to achieve steady growth.

Injectables, implants hold best growth prospects

Implants and injectables will register the fastest growth over the forecast period. Implants will benefit from the return of silicone-filled implants in late 2006, after a 14 year hiatus from the mass market. Despite their higher cost, silicone-filled implants are often preferred over their saline counterparts due their more natural look and feel. In addition, the approval of so-called fifth generation silicone implants will also increase their use, as this type is less likely to leak or rupture in the body due to its more solid consistency.

Growth in the injectables sector boomed with the introduction of BOTOX (Allergan) in the 1990s when it was used for “off label” wrinkle treatments. Further growth was achieved with the subsequent introduction of hyaluronic acid injectables. Growth in injectables will benefit from the ability of these products to provide a quick, non-invasive reduction in wrinkles with no required recovery time. Continued market penetration of newer fillers, such as polymethylmethacrylate microspheres and poly-L lactic acid, will also provide opportunities.

Study coverage

Cosmetic Surgery Products is a new Freedonia industry study priced at $4600. It presents historical demand data (1997, 2002, 2007) plus forecasts for 2012 and 2017 in current dollars by raw material, product, and procedure. This study also assesses market environment factors, details market share and profiles 28 US industry competitors.
## Executive Summary

1. Summary Table

## Market Environment

### General
- Demographic Trends
- Macroeconomic Outlook
- Consumer Spending Outlook
- Medical Provider & Facility Trends
- Spa Industry Outlook
- Competitive Product Trends
- Medical Product Market Outlook

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3. Personal Consumption Expenditures
4. Medical Providers & Facilities
5. Spa Facilities by Type
6. Selected Medical Product Demand by Type

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### General

### Surgical
- Reshaping
- Lifts & Tucks
- Implants
- Liposuction

### Nonsurgical
- Injectons
  - Botulinum Toxin
  - Soft Tissue Fillers
  - Hylauronic Acid
  - Collagen
  - Fat
  - Other Soft Tissue Fillers

### Laser Treatments
- Other Injectables
- Botulinum Toxin
- Tissue Fillers
- Hylauronic Acid
- Collagen
  - Other
  - Calcium Hydroxylapatite
  - All Others

### Implants
- Breast Implants
- Types of Breast Implants
- Producers
- Other Implants
- Lip
- Chin & Cheek
- Other

### Other Nonsurgical Cosmetic Treatment Demand

## Products

### General

### Equipment
- Lasers
  - Hair Removal
  - Dermal Resurfacing
  - Other
- Microdermabrators
- Consumables
- Liposuction Equipment

### Injectable
- Botulinum Toxin
- Tissue Fillers
- Hylauronic Acid
- Collagen
- Other

### Other
- Implants
- Breast Implants
- Types of Breast Implants
- Producers
- Other Implants
- Lip
- Chin & Cheek
- Other

### Wound Care Disposables
- Bandages & Dressings
- Wound Closures

### Other

## Raw Materials

### General

### Biological Materials
- Microbial Extracts
- Collagen

### Polymers
- Other

## Industry Structure

### General

### Market Share
- Industry Restructuring
- Competitive Strategies
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- Cooperative Agreements
- Marketing

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## US Industry Study with Forecasts for 2012 & 2017

**Cosmetic Surgery Products**

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## Products

### General

### Equipment
- Lasers
  - Hair Removal
  - Dermal Resurfacing
  - Other
- Microdermabrators
- Consumables
- Liposuction Equipment

### Injectable
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## Industry Structure

### General

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2. Biological Materials Demand in Cosmetic Surgery Products
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## Company Profiles
This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions
**Cardiac Implants**
The US cardiac implant industry is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., defibrillators, pacemakers, drug-eluting and other coronary stents, heart valves, vascular and related grafts, venous and arterial filters, ventricular-assist devices, implantable heart monitors), and market (e.g., hospitals, outpatient facilities, physicians’ offices). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

**Implantable Medical Devices**
US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and defibrillators. Bone cement, tissue and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the $27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

**Orthopedic Implants**
US orthopedic implant demand will grow 8.9% annually through 2012. Knees and hips will continue to claim most reconstructive joint replacements. New technologies and surgical techniques will boost demand for spinal implants. Orthobiologics will benefit from breakthroughs in biotechnology and nanotechnology. This study analyzes the $14.3 billion US orthopedic implant industry, with forecasts for 2012 and 2017 by product and market. It also evaluates company market share and profiles industry players.

**Drug Delivery Systems**
US demand for drug delivery systems will grow 10% annually through 2012. Oral types will remain the largest drug delivery category while parenteral, inhalation and implantable systems grow the fastest. Parenteral formulations will eventually surpass oral dosages as the largest product group. This study analyzes the $80.2 billion US drug delivery system industry, with forecasts for 2012 and 2017 by material, type and application. It also evaluates company market share and profiles leading industry players.

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