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# Cosmetic Surgery Products

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US Industry Study with Forecasts for **2012 & 2017**

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Study #2389 | September 2008 | \$4600 | 261 pages

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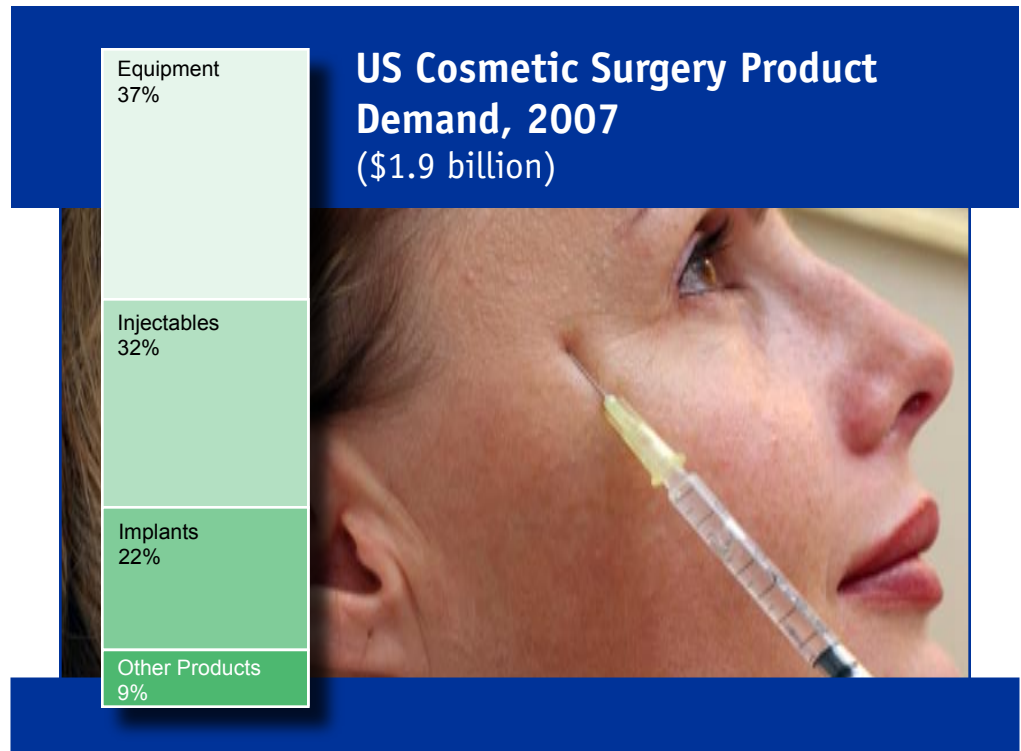
*Due to increasingly busy lifestyles, less invasive cosmetic surgery procedures that require little or no recovery time will experience the best growth, except where there are no alternatives.*

## US demand to grow 8.4% annually through 2012

Demand for cosmetic surgery products in the United States is forecast to increase 8.4 percent per year to \$2.9 billion in 2012, as cosmetic surgery procedures exceed 18 million at the end of the period. America's obsession with a youthful appearance is longstanding, and 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 provide opportunities for the cosmetic surgery industry. Due to increasingly busy lifestyles, less invasive cosmetic surgery procedures (such as injections and laser dermal resurfacing) that require little or no recovery time will experience the best growth. However, demand for surgical products will continue to be strong in some areas, such as implants, where there are no significant alternatives.

## Implants, injectables to be fastest growing types

Implants and injectables will register the fastest growth over the forecast period. Implants will continue to benefit from the return of silicone-filled breast implants in late 2006, after a 14 year hiatus from the mass market. Despite their higher cost, silicone-filled implants are often preferred over saline counterparts due to 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 cohesive 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 non-invasive products to provide quick wrinkle reduction without recovery time. Further propelling gains is the FDA approval of new injectables -- such as calcium hydroxylapatite and polymethylmethacrylate microspheres -- that provide long-lasting results.

## Equipment to benefit from out of pocket payment

The large equipment category will grow 5.5 percent per year to \$935 million in 2012. Demand will benefit as more practitioners realize that cosmetic procedures are usually out of pocket expenses, negating the need to deal with insurance companies for payment. The development of easier-to-use and safer equipment will also provide gains in other end-users such as spas. Among equipment types, laser and other light-based systems will continue to achieve steady growth, led by those that address skin rejuvenation, tattoo removal and cellulite reduction.

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## Sample Text, Table & Chart

### PRODUCTS

#### Tissue Fillers

Demand for tissue fillers is expected to rise primarily by FDA approval of hyaluronic acid products. Advertising as competitive clients. Newly approved products require pre-screening and more immediate and thorough review of tissue fillers.

Tissue fillers are composed of bovine collagen, collagen, compositions of synthetic polymers or microspheres suspended in collagen solutions, hyaluronic acid, silicone oil, and calcium hydroxylapatite. Tissue fillers are commonly used to plump up facial lines, depressions and wrinkles, and are generally applied to the lower two-thirds of the face. Tissue fillers are also commonly used in lip augmentation procedures, providing fuller and plumper lips.

Among the tissue fillers, hyaluronic acid and other, newly FDA approved, products are projected to achieve the most rapid gains, especially as more individuals are convinced of the performance advantages hyaluronic acid has over other injectable materials. In addition, market penetration of hyaluronic acid will expand as many new products are poised to gain FDA approval over the next several years. Newer tissue fillers will achieve rapid gains, arising from a small 2007 base, due to greater product availability and expanded marketing campaigns. In addition, many of these newer tissue fillers feature longer lasting effects than established fillers, providing value for individuals looking for more "bang for their buck".

Historically, collagen products dominated the tissue filler market. Collagen's market position dramatically changed when hyaluronic acid

TABLE IV-20

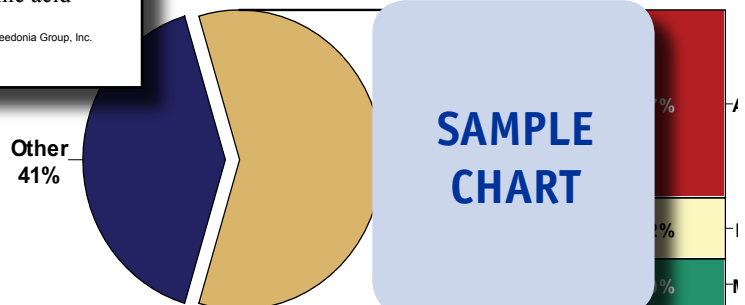
### WOUND CLOSURES DEMAND IN COSMETIC SURGERY (million dollars)

Item	1997	2002	2007	2012	2017
Total Wound Closures Demand	180	240	340	440	540
% used in cosmetic surgery	33.3	30.7	29.6	29.7	30.6
Surgical Cosmetic Procedures (000)	160	190	260	340	420
\$ wound care/procedure	60	101	135	185	245
Wound Closures Demand					
Sutures					
Tissue Adhesives & Sealants					
Other					
% wound closures	33.3	30.7	29.6	29.7	30.6
Total Cosmetic Wound Care	60	101	135	185	245

SAMPLE  
TABLE

CHART VI-1

### US COSMETIC SURGERY PRODUCT MARKET SHARE BY COMPANY, 2007 (\$1.9 billion)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE III-2**  
**SURGICAL COSMETIC PROCEDURES DEMAND BY TYPE**  
 (million dollars)

Item	1997	2002	2007	2012	2017
Total Cosmetic Procedures (000)	3114	7836	12960	18170	24050
% surgical	39.2	23.2	17.5	16.2	15.6
Surgical Cosmetic Procedures (000)	1228	1817	2267	2946	3760
\$/procedure	25.5	43.1	55.5	62.7	66.6
Surgical Cosmetic Procedures Demand	31.4	78.4	126.7	184.6	249.6
Reshaping	1.0	1.5	1.8	2.2	2.6
Lifts & Tucks	1.0	1.5	1.8	2.2	2.6
Implants	1.0	1.5	1.8	2.2	2.6
Liposuction	1.0	1.5	1.8	2.2	2.6
Other	1.0	1.5	1.8	2.2	2.6

**SAMPLE  
TABLE**

### COMPANY PROFILES

#### Candela Corporation

530 Boston Post Road  
 Wayland, MA 01778  
 508-358-7400  
<http://www.candelalaser.com>

Revenue  
 US Revenue  
 Research  
 Employment  
 (FY 2007)

**SAMPLE  
PROFILE**

Key Product  
 Application  
 Cosmetic surgery ap-

Candela is a leading marketer of advanced aesthetic laser and light-based systems. The Company's products are used to perform a range of aesthetic and cosmetic procedures, and to treat a number of related medical conditions. In addition, the Company provides product-related services. Candela's products are sold primarily to plastic and cosmetic surgeons, dermatologists, and other medical practitioners.

The Company's laser systems and other products, which had revenues of \$113 million in FY 2007, can be used for hair and tattoo removal, rosacea and acne treatment, the treatment of vascular and pigmented lesions, scar and stretch mark removal, wrinkle reduction, and acne and psoriasis treatment applications, among others. Specific laser systems from Candela encompass ALEXLAZR, VBEAM, SMOOTH-BEAM, GENTLELASE and GENTLEYAG varieties.

**Operations** - ALEXLAZR Q-switched, solid-state alexandrite lasers feature a fiber optic delivery system that produces an even beam

"The number of cosmetic injections administered is expected to advance 6.4 percent per year to 8.2 million in 2012, valued at \$4.3 billion. Advances will result from FDA approval for cosmetic purposes of new and longer-lasting injectable products, and an aging populace ready to embrace treatments for wrinkled and sagging skin."

--Section III, pg. 58

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**OTHER STUDIES**

**Cosmeceuticals**

This study analyzes the US cosmeceutical industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 by cosmeceutical type (e.g., skin care, hair care, botulinum toxin-based, tissue fillers, lip care, tooth whiteners), and chemical (e.g., antioxidants, sunscreens, acids, enzymes, proteins, botanicals, finasteride). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2413 ..... 10/2008..... \$4700

**Cardiac Implants**

US demand for cardiac implants will grow 8.8% yearly through 2012, rebounding from a slowdown caused by product recalls and safety controversies. Pacemakers will remain the top-selling group, with gains led by CRT devices. Stents and accessories will be the fastest growing segment, driven by improved designs with reduced risk of complications. This study analyzes the \$10.7 billion US cardiac implant industry, with forecasts for 2012 and 2017 by type and indication. It also evaluates market share and profiles industry players.

#2398 ..... 09/2008..... \$4500

**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.

#2372 ..... 07/2008..... \$4500

**Dental Products & Materials**

US demand for dental products will rise 4.5% per year through 2012, aided by favorable population trends and continued interest in cosmetic dentistry. More concern about overall good health will provide added opportunities for mouthwash/dental rinses, sealants, fluoride treatments and other products. This study analyzes the US dental product and material industry, with forecasts for 2012 and 2017 by product and raw material. It also evaluates company market share and profiles leading industry competitors.

#2313 ..... 03/2008..... \$4500

**Pet Health: Products & Services**

Total US spending on pet health products and services will grow 7.1% yearly through 2011. Services such as veterinary care, lab testing and pet insurance will outpace products. Dietary supplements will be the fastest growing product as pet owners look for ways to improve the health and lengthen the lifespans of their companion animals. The study analyzes the \$21 billion US pet health industry, with forecasts for 2011 and 2016 by type, condition and animal. It also evaluates market share and profiles major providers.

#2289 ..... 02/2008..... \$4500

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