

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form & Corporate
Use License 7](#)

[About Freedonia,
Custom Research,
Related Studies, 8](#)



Cosmetic Surgery Products

US Industry Study with Forecasts for **2014 & 2019**

Study #2712 | December 2010 | \$4800 | 283 pages



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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	5
Demographic Trends	9
Consumer Spending Outlook.....	12
Physicians & Facility Trends	15
Spa Industry Outlook.....	18
Competitive Product Trends	21
Medical Product Market Outlook.....	25
Regulatory Issues.....	27
International Activity	32

COSMETIC PROCEDURES

General	37
Surgical.....	41
Reshaping.....	45
Implants.....	49
Breast Implants	51
Other Implants	52
Lifts & Tucks	55
Tummy Tucks	56
Facelifts	57
Breast Lifts	58
Forehead Lifts.....	59
Other Lifts	60
Liposuction	61
Other Surgical.....	64
Nonsurgical.....	67
Injections	70
Botulinum Toxin.....	72
Soft Tissue Fillers.....	75
Other Injections.....	82
Dermal Resurfacing.....	84
Laser Treatments.....	88
Laser Hair Removal.....	90
Laser Dermal Resurfacing.....	91
Other Laser Treatments.....	92
Other Nonsurgical.....	93

PRODUCTS

General	95
Injectables	99
Botulinum Toxin	101
Soft Tissue Fillers.....	103
Hyaluronic Acid.....	105
Collagen	108
Other Soft Tissue Fillers.....	111
Other Injectables	114
Equipment	117
Lasers	119
Hair Removal Lasers.....	122
Dermal Resurfacing Lasers	124
Other Lasers/Light-Based Systems	127
Microdermabrators.....	128
Liposuction Equipment.....	131
Other Equipment.....	134
Consumables	135
Implants.....	137
Breast Implants	139
Other Implants	143
Lip Implants.....	145
Chin & Cheek Implants.....	146
All Other Implants.....	148
Wound Care Disposables	148
Bandages & Dressings	150
Wound Closures.....	152
Other Wound Care Disposables.....	155
Other Cosmetic Surgery Products.....	157

RAW MATERIALS

General	159
Biological Materials.....	160
Microbial Extracts.....	161
Collagen	163
Other Biological Materials.....	165
Polymers.....	166
Other Raw Materials	169

INDUSTRY STRUCTURE

General	173
Market Share	175
Industry Restructuring	183
Competitive Strategies.....	185
Research & Development.....	188
Cooperative Agreements.....	191
Marketing	194

COMPANY PROFILES

Alcon Incorporated	197
Allergan Incorporated.....	198
Alma Lasers.....	202
Covidien plc	204
Cutera Incorporated	206
Cynosure Incorporated	209
Dectro International.....	213
DermaMed USA	215
Diamond International.....	217
Dynatronics Corporation.....	220
ExcellaDerm Corporation	222
Genesis Biosystems	224
Genzyme Corporation.....	227
Hoya Corporation	228
Implantech Associates.....	230
IRIDEX Corporation	232
Johnson & Johnson.....	235
Kinetic Concepts	240
Lumenis Limited	243
Med-Aesthetic Solutions.....	246
Medicis Pharmaceutical.....	248
Merz GmbH	251
Palomar Medical Technologies	253
Q-Med AB	256
Sanofi-Aventis	258
Smith & Nephew	260
Solstice Neurosciences.....	261
Solta Medical	262
Suneva Medical.....	264
Syneron Medical.....	266
3M Company	272
Other Companies Mentioned in Study .	274

List of Tables

EXECUTIVE SUMMARY

1 Summary Table 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators 9
 2 Population & Households 12
 3 Personal Consumption Expenditures 15
 4 Physicians & Facilities 18
 5 Spa Facilities by Type 21
 6 Medical Product & Equipment Demand 27

COSMETIC PROCEDURES

1 Cosmetic Procedures Demand by Type 40
 2 Surgical Cosmetic Procedures Demand by Type 44
 3 Cosmetic Reshaping Procedures Demand by Type 49
 4 Cosmetic Implant Procedures Demand by Type 50
 5 Cosmetic Lift & Tuck Procedures Demand by Type 56
 6 Liposuction Procedures Demand by Type 64
 7 Other Surgical Cosmetic Procedures Demand by Type 67
 8 Nonsurgical Cosmetic Procedures Demand by Type 69
 9 Cosmetic Injections Demand by Type 72
 10 Cosmetic Botulinum Toxin Injections Demand 74
 11 Cosmetic Soft Tissue Filler Injections Demand by Type 77
 12 Other Cosmetic Injections Demand by Type 84
 13 Cosmetic Dermal Resurfacing Treatment Demand by Type 88
 14 Cosmetic Laser Treatment Demand by Type 90
 15 Other Nonsurgical Cosmetic Procedures Demand 94

PRODUCTS

1 Cosmetic Surgery Product Demand by Type 98
 2 Cosmetic Injectables Demand by Type 101
 3 Cosmetic Botulinum Toxin Demand by Formulation 103
 4 Cosmetic Soft Tissue Filler Demand by Type 105
 5 Cosmetic Hyaluronic Acid Filler Demand by Formulation 108
 6 Cosmetic Collagen Filler Demand by Formulation 111
 7 Other Cosmetic Soft Tissue Filler Demand by Type 112
 8 Other Cosmetic Injectables Demand by Type 117
 9 Cosmetic Surgery Equipment Demand by Type 119
 10 Cosmetic Laser Demand by Procedure 122
 11 Microdermabrator Demand 130
 12 Liposuction Equipment Demand.. 133
 13 Other Cosmetic Surgery Equipment Demand by Type 135
 14 Cosmetic Surgery Consumables Demand 137
 15 Cosmetic Implant Demand by Type 139
 16 Cosmetic Breast Implant Demand by Type 142
 17 Other Cosmetic Implant Demand by Type 145
 18 Wound Care Disposables Demand in Cosmetic Surgery by Type 149
 19 Bandages & Dressings Demand in Cosmetic Surgery 152
 20 Wound Closures Demand in Cosmetic Surgery by Type 155
 21 Other Wound Care Disposables Demand in Cosmetic Surgery 156
 22 Other Cosmetic Surgery Product Demand 158

RAW MATERIALS

1 Raw Materials Demand in Cosmetic Surgery Products by Type 160
 2 Biological Materials Demand in Cosmetic Surgery Products..... 161
 3 Polymers Demand in Cosmetic Surgery Products..... 169
 4 Other Raw Materials Demand in Cosmetic Surgery Products..... 172

INDUSTRY STRUCTURE

1 US Cosmetic Surgery Product Sales by Company, 2009 174
 2 Selected Acquisitions & Divestitures 185
 3 Selected Cooperative Agreements 192

List of Charts

MARKET ENVIRONMENT

1 World Cosmetic Surgery Product Demand, 2009..... 36

COSMETIC PROCEDURES

1 Cosmetic Procedures Demand by Type, 1999-2019 41
 2 Surgical Cosmetic Procedures Demand by Type, 2009 45
 3 Nonsurgical Cosmetic Procedures Demand by Type, 1999-2019..... 70
 4 Cosmetic Soft Tissue Filler Injections Demand by Type, 1999-2019..... 78

PRODUCTS

1 Cosmetic Surgery Product Demand by Type, 1999-2019..... 99

INDUSTRY STRUCTURE

1 US Cosmetic Surgery Product Market Share by Company, 2009 176

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Cosmetic surgery is becoming increasingly anchored in everyday life as procedures such as facial injections to reduce signs of aging are no longer limited to the affluent or celebrities.

US demand to advance 7.4% yearly through 2014

US demand for cosmetic surgery products is expected to advance 7.4 percent annually to \$2.6 billion in 2014, based on a return to growth in cosmetic procedures following two weak recessionary years. Cosmetic surgery is becoming increasingly anchored in everyday life as some of the stigmas historically surrounding "going under the knife" dissipate. Procedures such as facial injections to reduce signs of aging are more mainstream and no longer limited to the affluent or celebrities. A growing trend in the performance of cosmetic procedures can be seen in the increasing number of men who are seeking cosmetic surgery to appear more youthful and vital in a hyper-competitive workforce. Facial injections will also be buoyed by their non-invasive nature, and by their lack of recovery time or obvious signs of surgery.

Injectables to remain largest, fastest growing types

Injectables will remain the largest and the fastest growing segment of cosmetic surgery products through 2014. Products such as BOTOX COSMETIC (Allergan) have been essentially synonymous with the procedures since their introduction, and will continue to lead growth going forward. The first direct competition to BOTOX emerged in 2009 with the Food and Drug Administration (FDA)'s approval of DYSPORT (Medicis Pharmaceutical), which will help to reshape the

US Cosmetic Surgery Product Demand, 2014 (\$2.6 billion)



Injectables
41%

Equipment
34%

Implants
19%

Wound Care Disposables 6%

injectables market. Additionally, fast growth in demand for newer product types -- such as calcium hydroxylapatite and polymethylmethacrylate microspheres -- will further add to gains.

Lasers, liposuction to pace equipment types

Demand for equipment for cosmetic surgery procedures suffered significantly during the recession as demand fell for invasive surgical procedures such as liposuction. Rising demand for laser-based procedures will help to improve equipment demand performance going forward, as will the 2010 introductions of the first non-invasive liposuction procedures, which will require all new equip-

ment for any providers wishing to offer these services.

Silicone breast implants among best prospects

Demand for implants will continue to see below average growth. However, disparate performance expectations for breast implants compared to other body and facial implants skew the larger picture; silicone breast implants will see rapid annual gains, while saline breast implants, and lip, chin and cheek implants will all see drops in demand. Silicone gel-filled breast implants, since being re-approved in 2006, have taken significant market share from saline-filled types due to their more natural look and feel.

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Sample Text, Table & Chart

COSMETIC PROCEDURES

Breast Implants -- Breast implants will continue to be the vast majority of cosmetic implant procedures, with demand expected to grow through 2014, valued at \$1.2 billion. This category includes women whose breasts have sagged after childbirth or weight loss. (If the breasts droop too much, a lift is performed. In addition to, or instead of, the lift, breast augmentation market has seen a recent period of robust growth, particularly in value terms. Late that year, the FDA's re-approval for silicone-based breast implants, having taken off the consumer market (other than for post-mastectomy reconstruction) in 1992 following concerns about leakage into the body, was then considered a potential carcinogen. However, following extensive safety testing, concerns that silicone was a carcinogen were allayed, and silicone was deemed to be a safe material for body implantation. In November 2006, Mentor (since acquired by Johnson & Johnson and now operating as Mentor Worldwide) and Medicis Pharmaceutical each received approval to put their silicone implants on the market. Between 1992 and 2006, the breast implant market was dominated by saline-filled types. Also during this period, the market saw the introduction and subsequent removal of "novelty" polypropylene string breast implants, which continue to grow after being surgically placed, occasionally requiring draining via syringe. These implants, which continue to be popular among niche adult entertainers, lost their FDA approval by the end of 2001.

The reintroduction of silicone implants has reshaped the market to the comfort and aesthetic advantages of silicone over saline; however, saline types remain considerably less costly and will continue to have a significant presence. New types of implants and procedures are undergoing research and development; the closest to market

51

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TABLE III-2

SURGICAL COSMETIC PROCEDURES DEMAND BY TYPE

Item	1999	2004	2009	2014	2019
Cosmetic Procedures (000)	6,000	7,000	8,000	9,000	10,000
% surgical	40	45	50	55	60
Surgical Cosmetic Procedures (000)	2,400	3,150	4,000	4,950	6,000
Reshaping	1,000	1,200	1,500	1,800	2,200
Implants	1,000	1,200	1,500	1,800	2,200
Lifts & Tucks	1,000	1,200	1,500	1,800	2,200
Liposuction	1,000	1,200	1,500	1,800	2,200
Other	1,000	1,200	1,500	1,800	2,200
\$/procedure	1,000	1,200	1,500	1,800	2,200
Surgical Cosmetic Procedures (mil \$)	2,400	3,150	4,000	4,950	6,000
Reshaping	1,000	1,200	1,500	1,800	2,200
Implants	1,000	1,200	1,500	1,800	2,200
Lifts & Tucks	1,000	1,200	1,500	1,800	2,200
Liposuction	1,000	1,200	1,500	1,800	2,200
Other	1,000	1,200	1,500	1,800	2,200

SAMPLE
TABLE

CHART VI-1

US COSMETIC SURGERY PRODUCT MARKET SHARE BY COMPANY (\$1.8 billion, 2009)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE IV-9
COSMETIC SURGERY EQUIPMENT DEMAND BY TYPE
 (million dollars)

Item	1999	2004	2009	2014	2019
Medical Facilities (000)	47	47	47	47	47
\$ equipment/facility					2,180
Cosmetic Surgery Equipment Demand					100
Lasers					100
Microdermabrators					80
Liposuction Equipment					55
Other Equipment					55
Consumables					50
% equipment					5
Cosmetic Surgery Product Demand					100

**SAMPLE
TABLE**

COMPANY PROFILES

Alma Lasers Limited

485 Half Day Road, Suite 100
 Buffalo Grove, IL 60089
 224-377-2000
<http://www.alma.com>

Annual Sales:
 Employment:

Key Products: ultrasound de-
 vices for aesth

**SAMPLE
PROFILE**

Alma Lasers Limited is a provider of laser, light-based, radio frequency and ultrasound devices for aesthetic and medical applications. The privately held company conducts development, production and sales operations at its headquarters site in Buffalo Grove, Illinois.

The Company is active in the cosmetic surgery products industry via the development, production and supply of laser, light-based, radio frequency and ultrasound systems for use in such non-invasive aesthetic procedures as hair removal, skin rejuvenation, fractional ablative skin resurfacing, lipolysis, the correction of pigmented and vascular lesions, leg vein treatments and acne treatments. Alma Lasers markets its laser systems under such brand names as HARMONY, ACCENT, ACCENT 980, SOPRANO, PIXELCO2 and PIXELCO2 OMNIFIT. For example, the HARMONY system is a versatile and expandable platform for the administration of aesthetic laser and light treatments. The system's modular design incorporates multiple cosmetic applications into one compact unit that uses interchangeable hand pieces. The HARMONY system can be used in more than 65 aesthetic and clinical procedures, including such proprietary procedures as LASER360 skin

“Demand for lasers, including other light-based systems (e.g., intense pulsed light systems), used in cosmetic procedures is projected to increase 8.2 percent annually to \$660 million in 2014. Gains will rebound from declines seen in 2008 and 2009. Lasers will benefit from positive demographic trends and greater consumer acceptance of non-invasive cosmetic procedures. Demand will also be positively impacted by a ...”
 --Section IV, pg. 119

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OTHER STUDIES

World Disposable Medical Supplies

Global demand for disposable medical supplies will increase 5.6% annually through 2014, with developed countries accounting for nearly three-fourths of the market. Wound management supplies will remain the top-selling group while diagnostic and laboratory disposables grow the fastest. This study analyzes the \$125 billion world disposable medical supply industry, with forecasts for 2014 and 2019 by product, world region and for 14 countries. It also evaluates company market share and profiles industry competitors.
 #2691December 2010 \$5900

Silicones

US demand for silicones is forecast to rise 5.3% annually through 2014. Consumer goods such as cosmetics and toiletries will remain a fast growing market, as will medical products. Silicone gels will be the fastest growing type, driven by robust growth in demand for gel encapsulants in LED and photovoltaic applications. This study analyzes the \$2.8 billion US silicone industry, with forecasts for 2014 and 2019 by product, market and application. It also evaluates company market share and profiles industry players.
 #2665 July 2010 \$4700

Nanotechnology in Health Care

US demand for nanosized medical products will grow 17.1% yearly through 2014. Cancer and central nervous system disorders will be the fastest growing applications. Nanomedicines will provide the best opportunities, while nanotech medical supplies and devices grow the fastest from a small base. This study analyzes the \$34.2 billion US nanotechnology medical product industry, with forecasts for 2014 and 2019 by product and application. It also evaluates company market share and profiles industry participants.
 #2622June 2010 \$4800

Implantable Medical Devices

US demand for implantable medical devices will increase 8.3% annually through 2014. Gains will be driven by the development of next generation devices based on new technologies and improved materials. Spinal implants, cardiac stents and orthobiologics will be among the fastest growing product categories. This study analyzes the \$33 billion US implantable medical device industry, with forecasts for 2014 and 2019 by procedure, material and type. It also evaluates company market share and profiles 36 industry competitors.
 #2595April 2010 \$4800

World Wound Management Products

Global wound management product demand will rise 4.6% yearly through 2013. Best growth prospects include tissue sealants, foam and alginate wound dressings, growth factors, bioengineered tissue substitutes and anti-adhesion agents. China will be the fastest growing market, while the US remains the largest. This study analyzes the global market for wound management products, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates company market share and profiles industry players.
 #2578 February 2010 \$5800

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