Cosmetic Surgery Products

US Industry Study with Forecasts for 2014 & 2019

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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 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 equipment 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.
Breast Implants -- Breast implants will continue to comprise the vast majority of cosmetic implant procedures, with demand rising 4.7 percent per year to 490,000 procedures in 2014, valued at $2.0 billion. Women whose breasts have sagged after childbirth or who have unevenly shaped breasts are candidates for breast implants. (If the breasts droop too much, a lifting procedure may be needed in addition to, or instead of, the augmentation.)

The reintroduction of silicone implants has reshaped the market due to the comfort and aesthetic advantages of silicone over saline filling; however, saline types remain considerably less costly and will retain a significant presence. New types of implants and procedures are undergoing research and development; the closest to market are cohesive...
Alma Lasers Limited
485 Half Day Road, Suite 100
Buffalo Grove, IL  60089
224-377-2000
http://www.alma lasers.com

Annual Sales:  $40 million (estimated)
Employment:  50 (estimated)
Key Products:  laser, light-based, radio frequency and ultrasound devices for aesthetic and medical applications

Alma Lasers is a developer, manufacturer and 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.

#2691 .................. December 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.

#2622 .................. June 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.

#2595 .................. April 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 alginates 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