

A close-up portrait of a woman with dark hair, looking slightly to the left. She has bright red lipstick and is resting her chin on her hand. The background is a vibrant blue with a shimmering, textured effect. The text 'MEDICAL INSIGHT' is overlaid in a light blue, sans-serif font at the top.

MEDICAL INSIGHT®

## Asian-Pacific Aesthetic Market Study

November 2016

## i. Methodology

This report represents the third edition of Medical Insight, Inc.'s Asian Aesthetic Market report. It examines the leading aesthetic procedures in the Asia-Pacific region overall, as well as the top six countries. Sales estimates take into account recent technology, product, company, regulatory and other developments, as well as an in-depth analysis of the competitive positions of key players.

This report was compiled from a wide variety of public and proprietary sources. Information was cross-checked against other data, using Medical Insight's proprietary forecasting models, and synthesized into both qualitative and quantitative analyses and projections.

Public sources that were utilized include:

- articles in trade publications, medical journals and regulatory documents;
- articles in consumer magazines and newspapers;
- company news releases, website information, patent documents, regulatory data, marketing materials and financial filings;
- information from trade associations

Proprietary sources that were utilized include:

- Medical Insight's extensive databases of industry and product information;
- Medical Insight's physician survey data;
- industry analyst reports;
- exclusive, detailed interviews with company executives, researchers, sales representatives, physicians, patients, consultants and other industry experts

## ii. Disclaimer

Information in this study has been obtained by Medical Insight, Inc. from sources believed to be reliable. While Medical Insight believes the data provided herein to be accurate, no expressed or implied guarantees regarding accuracy or adequacy are made. Product and corporate data can change very quickly and without notice and Medical Insight continually updates its research products. Due to this, certain figures in Medical Insight reports may differ from corresponding figures in earlier reports, even if those reports were issued relatively recently. Furthermore, current economic conditions are contributing to a highly volatile market, in which actual results often diverge significantly from estimates developed by manufacturers, analysts and others, resulting in a revision of projections. Therefore, while Medical Insight will provide an explanation of figures in any of its reports, only the most recent reports contain Medical Insight's latest estimates.

This study is not intended as a substitute for proper due diligence. Although an attempt has been made to provide thorough coverage of the subject matter of this report, no guarantees regarding completeness or thoroughness are made. Medical Insight is not responsible for any errors, omissions, or results obtained from use of information provided herein.

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Michael Moretti has served as a medical industry analyst and strategic advisor for more than 20 years. As an industry consultant, Mr. Moretti specializes in strategic business development projects and high-growth, emerging market segments. He provides custom reports and confidential market studies for a variety of clients, including global medical and pharmaceutical companies.

In 1993, Mr. Moretti founded Medical Insight, Inc., the leader in focused aesthetic market research offering comprehensive data on procedure volume and growth, revenue forecasts and new product introductions. Under Mr. Moretti's leadership, Medical Insight publishes global market studies and forecasts for major industry sectors such as facial injectables, cosmeceuticals, body shaping procedures, skin rejuvenation technologies and home-use aesthetic products. Medical Insight also sponsors executive business forums to address scientific developments and market trends for the investment community.

Mr. Moretti is the founder of *Aesthetic TV*<sup>®</sup>, the first and only one-stop online resource for current, reliable information about cosmetic and anti-aging treatments. *Aesthetic TV* offers expert advice for consumers via interviews with the top physicians in the field, and unprecedented access to the latest beauty-enhancing procedures and products created specifically to help people look and feel their absolute best.

Mr. Moretti is also founder and publisher of *THE Aesthetic Guide*<sup>®</sup> – a digital and print publication from Medical Insight featuring in-depth reports on new products, procedures and trends, reaching over 70,000 physicians, industry executives and investment analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European market and the Asian markets.

In 2007, Mr. Moretti debuted *THE Aesthetic Show*<sup>™</sup>, the first multidisciplinary annual business to business trade show that brings thousands of the highest profile physicians and medical professionals together in Las Vegas to learn about the newest aesthetic procedures, products and technologies in a dynamic, interactive, educational format. For more information please visit: [www.miinews.com](http://www.miinews.com).

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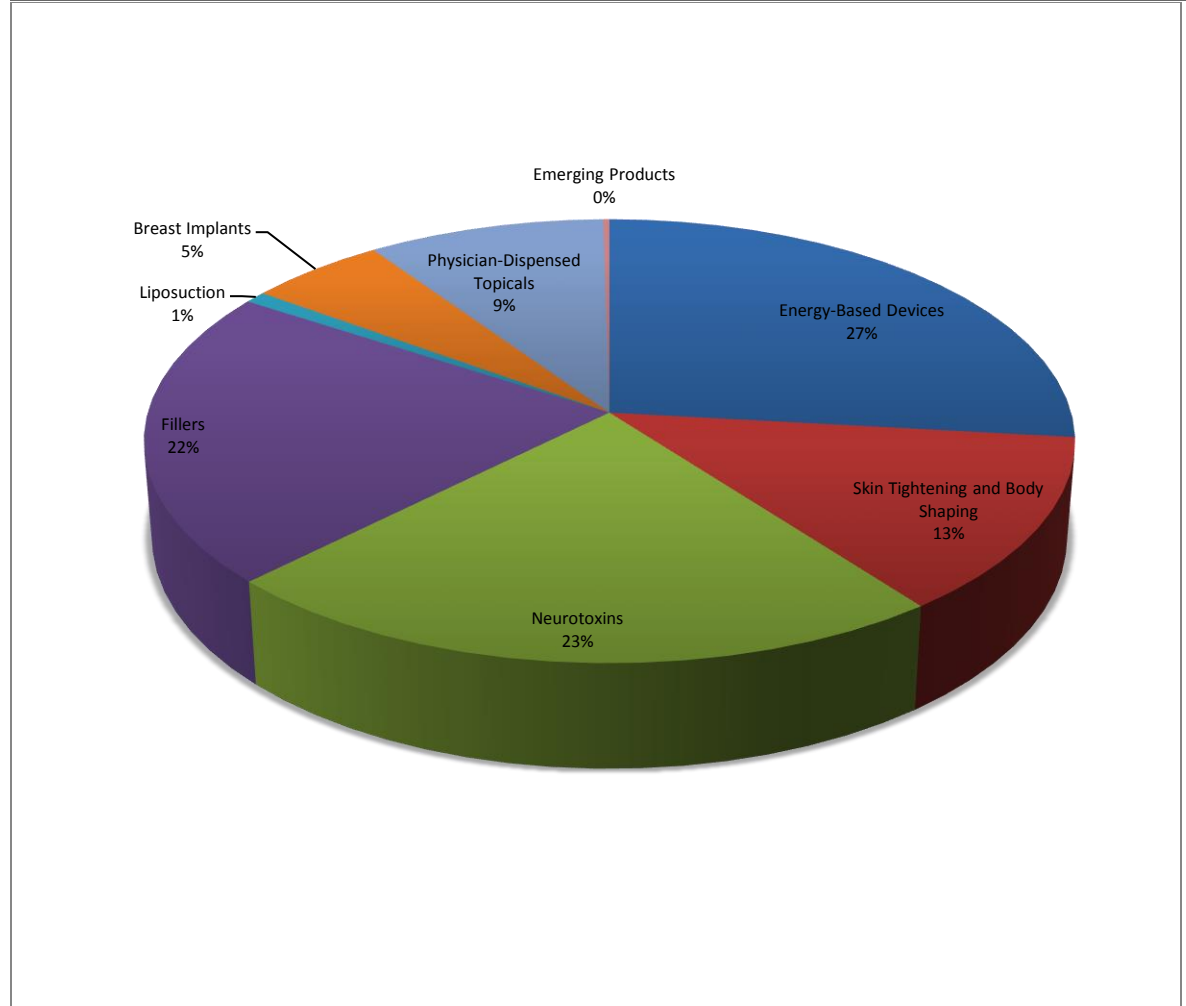
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<b>Section</b>	<b>Executive Summary</b>
<b>1</b>	

With strong economies and continued growth, the Asian aesthetic markets represent a major opportunity for global manufacturers.

Total Asian sales of all aesthetic products and equipment reached \$1.2 billion in 2015 and are expected to increase by 12.2% per year through 2020. In 2015, Asian sales of energy-based devices totalled \$326 million and are expected to rise by 7.3% per year through 2020. At \$57 million in 2015, sales of body shaping/skin tightening devices are considerably lower, but the expected CAGR is estimated to be much higher at 20.3% as physicians increasingly embrace these technologies and the Asia-Pacific (APAC) region sees more product launches. In 2015, Asian sales of neurotoxins reached \$279 million and through 2020, annual growth will be strong at 12.9% per year as manufacturers continue to expand their distribution. Sales of dermal fillers reached \$263 million in 2015 and are anticipated to rise by 9.6% per year through 2020.

**Figure 1**  
**Share of Total Asian Aesthetic Market by Procedure Type**  
**2015**



Source: Medical Insight, Inc.