



2nd Edition

Professional Aesthetics: U.S. Market Analysis and Opportunities

Published June 2018

Base Year: 2017

Regional Coverage: United States

Consumers spent a record-breaking \$15 billion on surgical and non-surgical aesthetic services in 2016, an 11% increase over the prior year, according to the American Society for Aesthetic Plastic Surgery. Augmenting our highly successful reporting on the professional skin care products and at-home beauty devices markets, our coverage will focus on nonsurgical approaches that medical doctors, aestheticians, and other professionals employ to address skin care concerns from fine lines and wrinkles to hyperpigmentation. These approaches include the use of aesthetic lasers and light therapy, dermal fillers, microdermabrasion, and injectibles.

This Report Helps Subscribers Address Questions Such as:

- What's new in laser and light device technology for the skin care market?
- Is there an opportunity to pair topical skin care products with these devices?
- What does the market for nonsurgical procedures look like, and where is growth coming from?
- Which skin care concerns are driving the market?
- What applications can be leveraged for the at-home market?



Report Contents*

Introduction

Market Overview

This presentation-style report section provides an overview of key market data and trends, including:

- Description of the technology that differentiates each device/treatment (Table 1) and the skin care concerns (Table 2) that each addresses
- Trends in device technology
- Total market size and growth for aesthetic devices and injectibles for 2017
- Distribution of devices by aesthetic practitioner type (i.e., medical aesthetician, plastic surgeon, dermatologist)
- Outlook

Company Profiles

Detailed profiles are provided for the leading marketers of aesthetic devices and products as shown in Table 3. The following information is provided:

- Parent company overview
- Brand/products description
- Sales for 2016 and 2017
- Key skin care concern that product addresses
- Trade and consumer marketing and promotional activities
- Professional distribution
- Outlook

Table 1: Device and Treatments Covered

Device/treatment	Examples
Injectable treatments	Botulinum
	Dermal fillers
Intense pulsed light	
Laser treatments	Ablative lasers
	Fractional lasers
	Nonablative lasers
Micro needling	
Photodynamic therapy	
Radiofrequency	
Skin resurfacing treatments	Chemical peels
	Dermabrasion
	Microdermabrasion
Ultrasound	

Table 2: Skin Care Concerns

Acne elimination
Facial firming/body toning
Fine lines/wrinkle treatment
Hair removal
Hyperpigmentation

Table 3: Aesthetic Companies Profiled

Allergan	HydraFacial
Alma Lasers	Lumenis
Cutera	Merz Aesthetics
Cynosure	Solta Medical
Galderma	Syneron

Scope

Kline is uniquely qualified in our ability to leverage the skills and synergies of our Professional Skin Care and At-home Beauty Devices reports into this new related market. The report examines how professionals such as doctors and aestheticians address the most prevalent skin care concerns through the use of lasers and energy devices, injectibles and dermabrasion, or a combination of methods. We identify which devices are most commonly used to address the skin care concerns below:

- Acne elimination
- Facial firming/body toning
- Fine lines/wrinkle treatment
- Hair removal
- Hyperpigmentation

Key Benefits

This report enables subscribers to pinpoint opportunities by analyzing the dynamics in one of the most important markets of the beauty industry today—lasers and energy devices and injectibles for aesthetic skin care use. Specifically, this report assists subscribers by:

- Providing insights on new technologies and expected future trends
- Identifying opportunities that may be appropriate for product marketers
- Explaining key skin care concerns that professionals address and the different approaches that can be selected for treatment
- Offering perspective on the leading players and the smaller, up and coming ones
- Pinpointing potential acquisition candidates future partnerships/alliances



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

A FULL SPECTRUM OF SERVICES



North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277