

MEDICAL INSIGHT[®]

A person is shown from the chest up, wearing a futuristic, glowing blue and purple head-mounted display (HMD) that covers their eyes. The HMD has a glowing, abstract pattern of light and particles. The person is holding a glowing, multi-colored sphere (green, yellow, and blue) in their hands. The background is plain white.

Emerging Technologies

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M.I.I Disclaimer

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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*[®], 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*[®] – 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*[™], 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.

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i. Methodology

This is the fourth edition of Medical Insight's Emerging Technologies Mini Report. It was compiled from a wide variety of public and proprietary sources. Information was cross-checked against other data and synthesized into qualitative 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, marketing materials and financial filings
- information from trade associations

Proprietary sources that were utilized include:

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

ii. New in September 2015

This mini report represents the fifth edition of Medical Insight, Inc.'s Emerging Technologies mini-report series. Like its predecessor, which was issued in September 2014, this report contains the latest industry news, which takes into account recent technology, product, company, regulatory and other developments, as well as an in-depth analysis of the competitive positions of key players selling to both core and non-core aesthetic practices.

In addition to updated manufacturer and market information, this report also includes new manufacturer profiles for a variety of high potential, emerging technologies, some of which have been developed in Asia. It also includes several new categories such as imaging systems and vaginal rejuvenation, as well as video links for selected technologies. It should be noted that not all new products are covered, as Emerging Technologies focuses on innovative approaches that offer significant improvements over prior technologies. Additionally, emerging technologies in markets that Medical Insight covers in other reports, such as dermal fillers, are addressed more completely in those reports.

Section	Executive Summary
1	

With rising consumer demand and awareness of medical technologies, the aesthetic industry continues to experience an influx of innovation. This includes products and devices that address conditions previously not adequately treated such as:

- alopecia (hair loss)
- transdermal delivery of injectables, particularly for wrinkle reduction
- autologous stem cell products for skin rejuvenation and wrinkle reduction
- lipolysis of localized fat deposits
- treatment of hyperhidrosis (excessive sweating)
- device-based alternatives to toxins for wrinkle reduction
- scar therapy
- imaging
- vaginal rejuvenation

Developers are also introducing novel technologies in established market segments covered by other Medical Insight reports such as body shaping / skin tightening and skin rejuvenation.

Since many of these products are developmental and represent very different applications, this report does not provide sales estimates or procedure volumes. Instead, it offers profiles of the most interesting emerging products by application. Companies were selected based upon the innovativeness of their technology and likelihood of commercial success; however, due to the very large number of early stage aesthetic technologies, lack of inclusion in this group does not necessarily imply a lack of confidence in the developer or their approach.