



MEDICAL INSIGHT[®]

Asian-Pacific Aesthetic Market Study

October 2015

i. Methodology

This report represents the second 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

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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*[®], 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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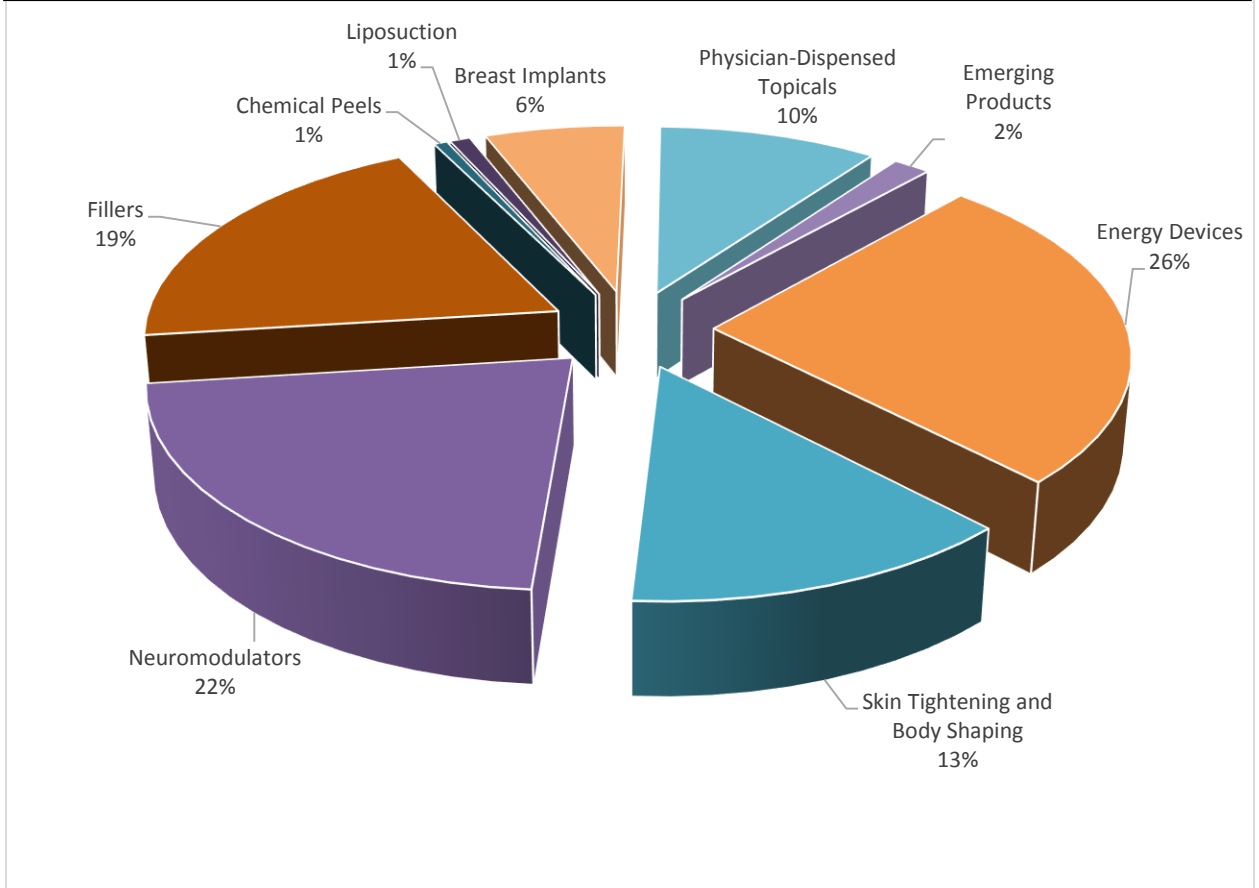
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Executive Summary

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

Total Asian sales of these aesthetic products and equipment reached \$982.7 million in 2014 and are expected to grow by 14.9% per year through 2019. In 2014, Asian sales of energy-based devices reached \$261.0 million and are expected to rise by 11.4% per year through 2019. At \$120.9 million in 2014, sales of body shaping/skin tightening devices are considerably lower, but annual growth is much higher at 19.8% as physicians increasingly embrace this technology. In 2014, Asian sales of neurotoxins reached \$221.3 million. Through 2019, annual growth will be strong at 12.3% per year as manufacturers continue to expand their distribution. Asian sales of dermal fillers reached \$195.1 million in 2014. Through 2019, annual growth of dermal fillers in Asia will be strong at 12.9% per year.

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



Source: Medical Insight, Inc.