



MEDICAL INSIGHT[®]

Home-Use Devices Market Study

March 2016

i. Methodology

The Home-Use Devices Mini-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;
- industry analyst reports;
- exclusive interviews with and feedback from company executives, researchers, sales representatives, physicians, patients, consultants and other industry experts

ii. New in March 2016

This report represents the twelfth edition of Medical Insight, Inc.'s Home-Use Device mini-report series. Like its predecessor, which was issued in April 2015, this report contains the latest industry news and updated market forecasts, which 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 selling to both core and non-core aesthetic practices.

In addition to updated qualitative and quantitative product, manufacturer and market information, this report also includes expanded sales estimates from 2014 - 2019 to 2015 - 2020, additional product manufacturers and new videos about home-use devices from *Aesthetic TV*[®].

iii. 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. Because of 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*, 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 75,000 physicians, industry executives and investment analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European and 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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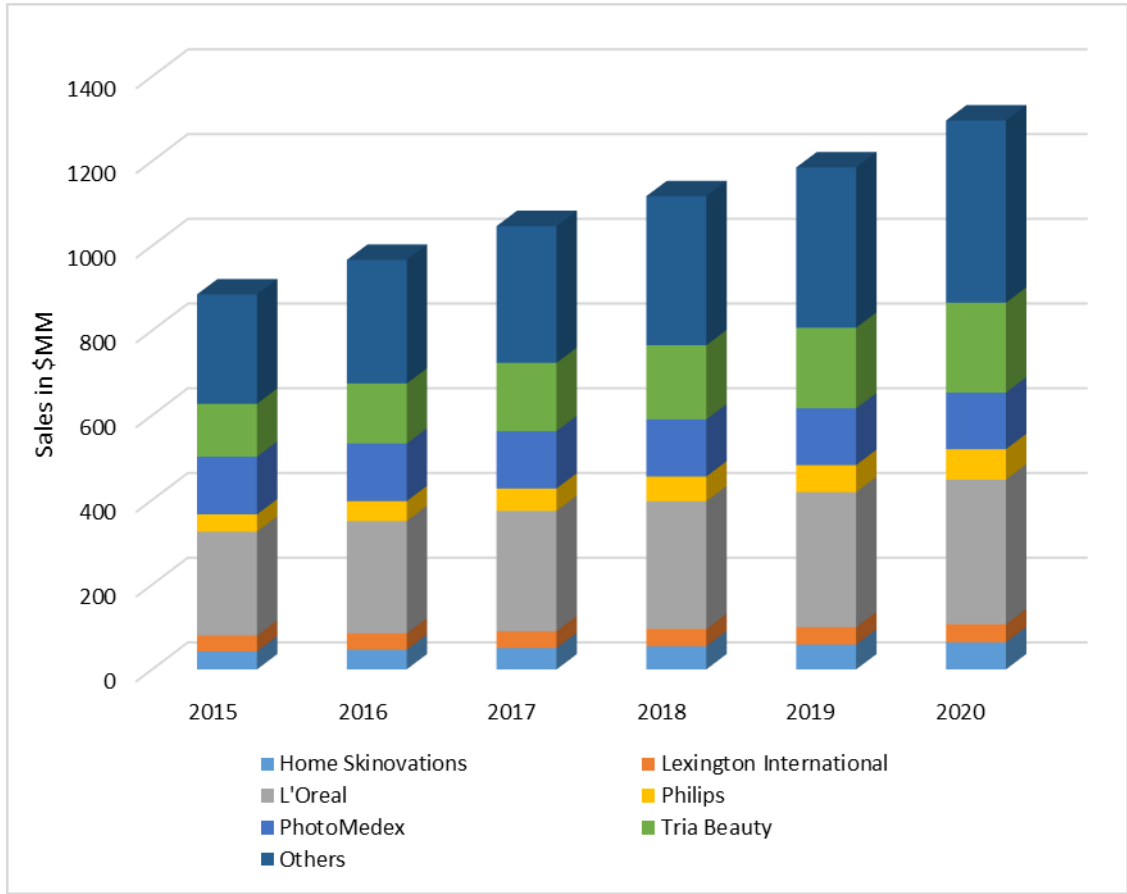
Section	Executive Summary
1	

Advanced home-use devices have become an established segment of the aesthetic industry with continued gains expected over the next five years. In 2015, total retail sales of home-use devices and disposables reached over \$1 billion. Total sales are expected to rise by 9.7% per year to more than \$1.6 billion in 2020. L’Oreal and PhotoMedex will dominate the market due to their combination of high platform sales as well as strong disposables sales. It should be noted that these estimates reflect total retail dollars spent on home-use aesthetic devices, NOT revenues earned by manufacturers.

Retail sales of home-use devices, excluding disposables, are expected to rise by 7.9% per year, on average, from about \$885 million in 2015 to almost \$1.3 billion in 2020. This is lower than the annual growth of 8.5% predicted in the April 2015 edition of this report. Similarly, total retail sales of disposables for home-use devices are expected to rise by 17.5% per year to reach \$388 million. L’Oréal and PhotoMedex are expected to remain leading suppliers due to their strong marketing and very high installed bases.

On a regional basis, sales growth will be greatest in Asia, at 12.9% per year, followed by Latin America with 12.3% annual growth, North America with 8.4% and Europe with 5.3% annual gains. North America will continue to benefit from strong consumer interest in medical aesthetics and Asia’s gains will be maintained by continued overall economic expansion. Nonetheless, greater growth will be constrained by price cutting and discounts. Europe’s ongoing financial crisis will keep consumers apprehensive about investing in pricey at-home aesthetic equipment.

Figure 2
Worldwide Aesthetic Home-Use Device Retail Sales by Company, 2015 – 2020



Note: Estimates reflect total retail dollars spent on home-use aesthetic devices and **NOT** revenues earned by manufacturers.