MEDICAL INSIGHT®

THE Global Aesthetic Market Study: Version XV

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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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i. Methodology

The Global Aesthetic Market XV (GAM XV) represents the fifteenth edition in Medical Insight, Inc.'s Global Aesthetic Market series. 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, specifically covering medical aesthetic products and equipment; products and equipment designed for therapeutic usage, even when they are produced by leading aesthetic companies, are not included. Therefore, new devices for instance, such as the treatment of onychomycosis are excluded.

Public sources that were utilized for this report include:

- articles in trade publications and medical journals;
- articles in consumer magazines and newspapers;
- company news releases, website information, 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;
- recent Medical Insight survey data;
- industry analyst reports;
- exclusive interviews with company executives, researchers, sales representatives, physicians, patients, consultants and other industry experts

Additionally, feedback from Medical Insight product information is continually built back into research products so that reports are updated with the most recent industry and market information on an ongoing basis.

ii. New in May 2017

GAM XV offers an in-depth analysis of the competitive positions of key players in all segments with details obtained from recent interviews.

In addition to the latest industry news and updated market forecasts, which take into account recent technology, product, company, regulatory and other developments, GAM XV also contains:

- Extension of sales forecasts from 2016 to 2021;
- comparison of current forecasts to GAM XIV forecasts and discussion of changes;
- links to online videos for selected technologies and treatments;
- analysis of political, economic and other factors impacting the aesthetic market, particularly in the U.S. and Europe

Section 1

Executive Summary

In 2016, total sales of professional aesthetic products covered in this report, including disposable components, exceeded $8.4 billion. Through 2021, they will expand by 10.5% per year to $13.9 billion. This is lower than the compound annual growth (CAGR) of 11.0% predicted in GAM XIV, released in early 2016 as forecasts were adjusted to reflect the ongoing global economic instability, and previously forecasts for Emerging Technologies were included, which proved too uncertain to predict over the forecast period. Growth will be driven by significant double digit increases in the non-invasive feminine rejuvenation, body shaping / skin tightening segment along with continued expansion of neurotoxins and dermal fillers. The energy-based devices and physician-dispensed topicals markets will also experience reasonable annual gains of 5.8% and 8.3%, respectively, as demand for these products results in increased sales.

In 2016, total global procedure volume reached 57 million treatments with a CAGR of 6.3% anticipated through 2021. Procedure volume growth will be greatest in feminine rejuvenation, followed by body shaping / skin tightening, neurotoxin and dermal filler sectors. In 2016, total global procedure fees were about $26 billion, with compound annual growth predicted of 5.7% through 2021. Procedure fee growth will be greatest in the feminine rejuvenation segment, followed by body shaping / skin tightening, neurotoxin and dermal filler sectors. On a global basis, procedure fees will grow most strongly in Asia.

The aesthetic market was notable in 2016 and early 2017 for the continuing consolidation of leading companies which was exemplified by the three major publically traded energy-based device companies, which were all acquired. Most notable was the acquisition of ZELTIQ Aesthetics by Allergan for $2.5 billion, along with Hologic acquiring Cynosure, and APAX Partners in a definitive agreement to acquire Syneron, with only Cutera remaining.

Allergan's acquisition strategy also included the regenerative medicine company LifeCell for $2.9 billion. LifeCell manufactures ALLODERM® and STRATTICE™ tissue matrices commonly used in breast reconstruction and abdominal wall surgeries. To make way for this new addition, Allergan divested Seri Surgical Matrix, a silk-based tissue matrix, to Sofregen Medical.

Smaller acquisitions have included scar products with Silimed acquiring BioCorneum+ to expand their range of products for plastic surgeons.

The feminine rejuvenation / women's intimate health market is the fastest growing segment with brands such as Geneveve from Viveve, Inc., MonaLisa Touch from DEKA / Cynosure and ThermiVa from Thermi, an Almirall Company. The acquisition of Cynosure by Hologic was partly based on this expansion into energy-based non-invasive women's health, which complements the existing business of Hologic.

The aesthetic market also saw several new product launches, mainly in the U.S. In the dermal filler market Allergan expanded their range of longer acting dermal fillers based on their proprietary "Vycross technology" into the U.S., with the approval and launch of Juvéderm Volbella XC for lip augmentation and the treatment of perioral lines, which provides up to 12 months of effect, along with Juvéderm Vollure XC for the treatment of moderate to severe wrinkles and folds that provides up to 18 months of effect. Galderma also introduced two new fillers, Restylane Refyne and Defyne, to the U.S. market for the treatment of moderate to severe facial wrinkles and folds and for the treatment of moderate to severe, deep facial wrinkles and folds, respectively. These scientifically-advanced gels are manufactured with XpresHAn Technology and both products have been shown to maintain effectiveness for the treatment of laugh lines for up to 12 months.

Along with these various successes have been challenges, as exhibited with the breast implant market where Silimed (distributed by Sientra in the U.S.) has successfully reintroduced its implants back to the market after resolving its manufacturing issues. Silimed has however decided to source implants from a U.S. manufacturer in the future, which is being actively disputed by Silimed. The breast implant market has also seen the introduction of new implants into the U.S. market by Allergan.

The highly anticipated launch of Kybella for the treatment of submental fat by Allergan saw first year sales of $52.5 million, but quarter to quarter sales have been somewhat flat from the initial launch, even with heavy DTC promotion. Allergan acquired Kythera in 2015 for approximately $2.1 billion.

Figure 6-8
Worldwide Procedure Volume for Dermal Fillers by Region, 2016 – 2021
May 2017