



**M.I.I**

# 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. The interested reader is encouraged to contact manufacturers directly.

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.

Any use which a reader makes of this report or any reliance on or decisions to be made based on it are the sole responsibility of such reader. Medical Insight accepts no responsibility for damages, if any, suffered by any reader as a result of decisions or actions taken based on this study.

Medical Insight, Inc. reserves all rights to this copyrighted document. This study is protected by U.S. Copyright Law; Copyright 2009 Medical Insight, Inc. Unauthorized reproduction is strictly forbidden by law. This report may not be reproduced in part or in whole without written consent of a duly authorized officer of Medical Insight. Multiple copies of this report can be obtained at a nominal cost by contacting the publisher.

Medical Insight, Inc.  
120 Vantis, Suite 470  
Aliso Viejo, CA 92656 USA  
+1 (949) 830-5409 telephone  
+1 (949) 830-8944 facsimile  
Email: [mmoretti@miinews.com](mailto:mmoretti@miinews.com)

# M.I.I Professional Biography

Michael Moretti  
Editor and Publisher  
Medical Insight, Inc.

Michael Moretti has served as a medical industry analyst and strategic advisor for more than 20 years. In 1993, Mr. Moretti founded Medical Insight, Inc., the leader in focused aesthetic market research offering comprehensive data on procedure volume/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, and body shaping procedures, skin rejuvenation technologies and home-use aesthetic products. Medical Insight also sponsors executive business forums throughout the year to address scientific developments and market trends for the investment community.

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.

Mr. Moretti is also publisher and editor of *THE Aesthetic Guide* – a bi-monthly publication of Medical Insight featuring in-depth reports on new products, procedures and trends, reaching 50,000 physicians, industry and analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European market and the Primary Care audience.

In 2007, Mr. Moretti debuted THE Aesthetic Show, the first multidisciplinary annual medical meeting designed to bring together new aesthetic procedures, products and technologies in a dynamic interactive educational format. For more information visit [www.aestheticshow.com](http://www.aestheticshow.com) and [www.miinews.com](http://www.miinews.com)

#### Contact Information:

Michael Moretti  
Medical Insight, Inc.  
120 Vantis, Suite 470  
Aliso Viejo, CA 92656 USA  
+1 (949) 830-5409 telephone  
+1 (949) 830-8944 facsimile  
Email: [mmoretti@miinews.com](mailto:mmoretti@miinews.com)  
Or visit the Medical Insight website at: [www.miinews.com](http://www.miinews.com)

# M.I.I Table of Contents

<b>Disclaimer</b>		<b>2</b>
<b>Professional Biography</b>		<b>3</b>
<b>Table of Contents</b>		<b>4</b>
<b>Table of Exhibits</b>		<b>14</b>
<b>Executive Summary</b>		<b>25</b>
<b>2.0</b>	<b>Background</b>	<b>26</b>
2.1	The Aging Process	26
	2.1.1 <i>Free Radical Theory</i>	26
	2.1.2 <i>Inflammation</i>	27
2.2	Consumer Demand	29
<b>3.0</b>	<b>Light-Based Devices and Treatments</b>	<b>30</b>
3.1	Overview of Conditions and Treatments	30
	3.1.1 <i>Light-Based Epilation</i>	31
	3.1.2 <i>Skin Rejuvenation</i>	32
	3.1.3 <i>Tattoo and Pigmented Lesion Removal</i>	33
	3.1.4 <i>Acne Reduction</i>	35
	3.1.5 <i>Treatment of Vascular Lesions</i>	36
	3.1.6 <i>Photodynamic Therapy (PDT)</i>	36
	3.1.7 <i>Light-Emitting Diodes (LEDs)</i>	37
3.2	Competitive Advantage	38
	3.2.1 <i>Light-Based Epilation</i>	38
	3.2.2 <i>Skin Rejuvenation</i>	40
	3.2.3 <i>Tattoo and Pigmented Lesion Removal</i>	42
	3.2.4 <i>Acne Reduction</i>	42
	3.2.5 <i>Treatment of Vascular Lesions</i>	44
	3.2.6 <i>Enabling Technologies</i>	47
	3.2.6.1 <i>Photopneumatic Technology</i>	47
	3.2.6.2 <i>Photodynamic Therapy (PDT)</i>	47

3.3	Device Descriptions and Results	48
3.3.1	<i>Light-Based Epilation</i>	49
3.3.1.1	<i>Ruby Lasers</i>	52
3.3.1.2	<i>Alexandrite Lasers</i>	53
3.3.1.3	<i>Diode Lasers</i>	53
3.3.1.4	<i>Nd:YAG Lasers</i>	54
3.3.1.5	<i>Pulsed Light Devices</i>	54
3.3.1.6	<i>Light Heat Energy (LHE)</i>	54
3.3.1.7	<i>Electro-Optical Synergy</i>	55
3.3.1.8	<i>Photopneumatic</i>	55
3.3.2	<i>Skin Rejuvenation</i>	57
3.3.2.1	<i>Ablative Skin Rejuvenation</i>	59
3.3.2.2	<i>Non-Ablative Skin Rejuvenation</i>	60
3.3.2.2.1	<i>Light BioScience</i>	61
3.3.2.2.2	<i>Photo Therapeutics</i>	62
3.3.2.3	<i>Wrinkle Reduction</i>	63
3.3.2.4	<i>Fractional Skin Rejuvenation</i>	63
3.3.2.4.1	<i>Alma Lasers</i>	68
3.3.2.4.2	<i>Cynosure</i>	69
3.3.2.4.3	<i>Danish Dermatologic Development</i>	70
3.3.2.4.4	<i>Deka</i>	71
3.3.2.4.5	<i>Lumenis</i>	71
3.3.2.4.6	<i>Palomar</i>	72
3.3.2.4.7	<i>Reliant</i>	73
3.3.2.4.8	<i>Sciton</i>	76
3.3.2.4.9	<i>Syneron</i>	77
3.3.2.5	<i>Photopneumatic Skin Rejuvenation</i>	78
3.3.3	<i>Tattoo and Pigmented Lesion Removal</i>	79
3.3.4	<i>Acne Reduction</i>	81
3.3.4.1	<i>Bacteria Fighting Approach</i>	82
3.3.4.1.1	<i>Laser and Pulsed Light- Devices</i>	82
3.3.4.2	<i>Cessation of Oil Production Approach</i>	83

	3.3.5	<i>Treatment of Vascular Lesions</i>	<b>84</b>
3.4	Technology Trends		<b>87</b>
	3.4.1	<i>Home-Use Devices</i>	<b>87</b>
	3.4.1.1	<i>Aesthera</i>	<b>87</b>
	3.4.1.2	<i>Candela</i>	<b>89</b>
	3.4.1.3	<i>Light BioScience</i>	<b>90</b>
	3.4.1.4	<i>Palomar</i>	<b>90</b>
	3.4.1.5	<i>Photo Therapeutics</i>	<b>91</b>
	3.4.1.6	<i>Radiance</i>	<b>92</b>
	3.4.1.7	<i>Reliant</i>	<b>93</b>
	3.4.1.8	<i>Syneron</i>	<b>94</b>
	3.4.1.9	<i>Xthetix</i>	<b>94</b>
3.5	Equipment Sales Estimates 2007 to 2012		<b>95</b>
	3.5.1	<i>Platforms</i>	<b>96</b>
	3.5.2	<i>Disposables Sales Estimates 2007 – 2012</i>	<b>109</b>
3.6	Treatment Volume Estimates 2007 to 2012		<b>119</b>
3.7	Competitive Analysis and Market Share		<b>127</b>
	3.7.1	<i>Alma Lasers</i>	<b>130</b>
	3.7.2	<i>Candela</i>	<b>132</b>
	3.7.3	<i>Cutera</i>	<b>133</b>
	3.7.4	<i>Cynosure</i>	<b>134</b>
	3.7.5	<i>DUSA</i>	<b>135</b>
	3.7.6	<i>HOYA ConBio</i>	<b>136</b>
	3.7.7	<i>IRIDEX</i>	<b>137</b>
	3.7.8	<i>Lumenis</i>	<b>137</b>
	3.7.9	<i>Palomar</i>	<b>138</b>
	3.7.10	<i>Radiance</i>	<b>140</b>
	3.7.11	<i>Reliant</i>	<b>140</b>
	3.7.12	<i>Syneron</i>	<b>141</b>
<b>4.0</b>	<b>Skin Tightening</b>		<b>143</b>
	4.1	Overview of Condition and Treatment	<b>143</b>
	4.2	Competitive Advantage	<b>143</b>

4.3	Device Descriptions and Results		145
	4.3.1	<i>Alma Lasers</i>	146
	4.3.2	<i>Candela</i>	147
	4.3.3	<i>Cutera</i>	148
	4.3.4	<i>Cynosure</i>	149
	4.3.5	<i>Grupo Body Esthetic Laboratories</i>	150
	4.3.6	<i>HOYA ConBio</i>	150
	4.3.7	<i>Lumenis</i>	151
	4.3.8	<i>Palomar</i>	152
	4.3.9	<i>Pollogen</i>	153
	4.3.10	<i>Sciton</i>	153
	4.3.11	<i>Syneron</i>	154
	4.3.12	<i>Solta Medical</i>	155
	4.3.13	<i>Thermamedic</i>	157
	4.3.14	<i>Ulthera</i>	158
4.4	New Technologies		160
4.5	Product Sales Estimates 2007 to 2012		161
	4.5.1	<i>Disposable Sales Estimates 2007 to 2012</i>	172
4.6	Treatment Volume Estimates 2007 to 2012		182
4.7	Competitive Analysis and Market Share		186
<b>5.0</b>	<b>Emerging Skin Rejuvenation</b>		<b>188</b>
5.1	Overview of Condition and Treatment		188
5.2	Competitive Advantage		189
5.3	Device Descriptions and Results		190
	5.3.1	<i>Plasma Energy</i>	191
		5.3.1.1 <i>Enlyten</i>	191
		5.3.1.2 <i>Rhytec</i>	192
	5.3.2	<i>Oxygen Therapy</i>	194
	5.3.3	<i>Microcurrent</i>	195
		5.3.3.1 <i>Myotonology</i>	196
		5.3.3.2 <i>Pangerminal Systems</i>	196
	5.3.4	<i>Ultrasound/E-Stim</i>	197

		5.3.4.1	<i>Aesthetic Technologies</i>	<b>198</b>	
		5.3.5	<i>Lymphatic Drainage</i>	<b>198</b>	
	5.4	New Technologies		<b>199</b>	
	5.5	Product Sales Estimates 2007 to 2012		<b>200</b>	
	5.6	Treatment Volume Estimates 2007 to 2012		<b>211</b>	
	5.7	Competitive Analysis and Market Share		<b>215</b>	
<b>6.0</b>	<b>BOTOX and Other Neuromodulators</b>			<b>217</b>	
	6.1	Overview of Conditions and Treatments		<b>217</b>	
	6.2	Competitive Advantage		<b>219</b>	
	6.3	Product Descriptions and Results		<b>222</b>	
		6.3.1	<i>BTX-A</i>	<b>223</b>	
			6.3.1.1	<i>Allergan</i>	<b>225</b>
			6.3.1.2	<i>Beaufour Ipsen</i>	<b>226</b>
			6.3.1.3	<i>Medicis</i>	<b>228</b>
			6.3.1.4	<i>Medy-Tox</i>	<b>228</b>
			6.3.1.5	<i>Mentor</i>	<b>229</b>
			6.3.1.6	<i>Merz</i>	<b>230</b>
			6.3.1.7	<i>Q-Med</i>	<b>231</b>
			6.3.1.8	<i>Prollenium</i>	<b>232</b>
		6.3.2	<i>BTX-B</i>	<b>232</b>	
			6.3.2.1	<i>Solstice Neurosciences</i>	<b>232</b>
	6.4	New Technologies		<b>234</b>	
		6.4.1	<i>BOTOX Knock-Offs</i>	<b>235</b>	
	6.5	Product Sales Estimates 2007 to 2012		<b>236</b>	
	6.6	Treatment Volume Estimates 2007 to 2012		<b>247</b>	
	6.7	Competitive Analysis and Market Share		<b>251</b>	
<b>7.0</b>	<b>Dermal Fillers</b>			<b>253</b>	
	7.1	Overview of Conditions and Treatments		<b>253</b>	
	7.2	Competitive Advantage		<b>254</b>	
	7.3	Product Descriptions and Results		<b>256</b>	
		7.3.1	<i>Animal Collagen</i>	<b>260</b>	
			7.3.1.1	<i>Allergan</i>	<b>260</b>

	7.3.1.2	<i>ColBar / Johnson &amp; Johnson</i>	260
7.3.2	<i>Human Collagen</i>		261
	7.3.2.1	<i>Allergan</i>	261
	7.3.2.2	<i>Fascia Biosystems</i>	262
7.3.3	<i>Patient-Derived Materials</i>		262
	7.3.3.1	<i>Isolagen</i>	262
7.3.4	<i>Hyaluronic Acid</i>		266
	7.3.4.1	<i>Allergan</i>	264
	7.3.4.2	<i>Anika Therapeutics</i>	265
	7.3.4.3	<i>Anteis</i>	265
	7.3.4.4	<i>Contura</i>	266
	7.3.4.5	<i>L.E.A. Derm</i>	266
	7.3.4.6	<i>Medicis</i>	266
	7.3.4.7	<i>Mentor</i>	267
	7.3.4.8	<i>Merz</i>	268
	7.3.4.9	<i>Q-Med</i>	268
	7.3.4.10	<i>Rofil</i>	270
	7.3.4.11	<i>Teoxane</i>	270
7.3.5	<i>Silicone-Based Products</i>		270
7.3.6	<i>Synthetic Calcium Hydroxylapatite</i>		271
	7.3.6.1	<i>BioForm</i>	271
7.3.7	<i>Lactic and Polylactic Acid</i>		272
	7.3.7.1	<i>Dermik Labs</i>	272
7.3.8	<i>PMMA</i>		274
	7.3.8.1	<i>Artes Medical</i>	274
7.4	New Technologies		276
7.5	Product Sales Estimates 2007 to 2012		277
7.6	Treatment Volume Estimates 2007 to 2012		288
7.7	Competitive Analysis and Market Share		292
<b>8.0</b>	<b>Microdermabrasion and Chemical Peels</b>		<b>294</b>
8.1	Overview of Condition and Treatment		294
	8.1.1	<i>Microdermabrasion</i>	295

	8.1.2	<i>Chemical Peels</i>	<b>296</b>
8.2	Competitive Advantage		<b>297</b>
8.3	Device Descriptions and Results		<b>299</b>
	8.3.1	<i>Microdermabrasion</i>	<b>299</b>
		8.3.1.1 <i>Aesthetic Technologies</i>	<b>301</b>
		8.3.1.2 <i>Vibraderm</i>	<b>302</b>
	8.3.2	<i>Chemical Peels</i>	<b>303</b>
		8.3.2.1 <i>exCel Cosmeceuticals</i>	<b>307</b>
		8.3.2.2 <i>SkinMedica</i>	<b>308</b>
		8.3.2.3 <i>La-Roche Posay</i>	<b>308</b>
		8.3.2.4 <i>Obagi</i>	<b>309</b>
8.4	New Technologies		<b>310</b>
8.5	Product Sales Estimates 2007 to 2012		<b>311</b>
	8.5.1	<i>Microdermabrasion</i>	<b>311</b>
	8.5.2	<i>Chemical Peels</i>	<b>318</b>
8.6	Treatment Volume Estimates 2007 to 2012		<b>325</b>
	8.6.1	<i>Microdermabrasion</i>	<b>325</b>
	8.6.2	<i>Chemical Peels</i>	<b>329</b>
8.7	Competitive Analysis and Market Share		<b>333</b>
	8.7.1	<i>Microdermabrasion</i>	<b>333</b>
	8.7.2	<i>Chemical Peels</i>	<b>335</b>
<b>9.0</b>	<b>Body Shaping</b>		<b>337</b>
9.1	Overview of Conditions and Treatments		<b>337</b>
9.2	Competitive Advantage		<b>338</b>
9.3	Product Descriptions and Results		<b>343</b>
	9.3.1	<i>Liposuction</i>	<b>343</b>
		9.3.1.1 <i>Byron Medical</i>	<b>344</b>
		9.3.1.2 <i>Erchonia</i>	<b>344</b>
		9.3.1.3 <i>MicroAire</i>	<b>345</b>
		9.3.1.4 <i>Wells Johnson</i>	<b>345</b>
	9.3.2	<i>LipoSelection</i>	<b>346</b>
	9.3.3	<i>Photonic Energy</i>	<b>346</b>

	9.3.3.1	<i>CoolTouch</i>	<b>348</b>
	9.3.3.2	<i>Cutera</i>	<b>348</b>
	9.3.3.3	<i>Cynosure</i>	<b>349</b>
	9.3.3.4	<i>DEKA</i>	<b>351</b>
	9.3.3.5	<i>DermaMed</i>	<b>351</b>
	9.3.3.6	<i>Elemé</i>	<b>351</b>
	9.3.3.7	<i>Osyris/ MedSurge</i>	<b>352</b>
	9.3.3.8	<i>Palomar</i>	<b>353</b>
	9.3.3.9	<i>Sciton</i>	<b>353</b>
	9.3.3.10	<i>Silhouet-Tone</i>	<b>354</b>
	9.3.3.11	<i>Zeltiq Aesthetics</i>	<b>354</b>
9.3.4	<i>Mechanical</i>		<b>355</b>
	9.3.4.1	<i>Dynatronics</i>	<b>356</b>
	9.3.4.2	<i>LPG</i>	<b>356</b>
9.3.5	<i>Mesotherapy</i>		<b>357</b>
	9.3.5.1	<i>Transdermal Mesotherapy</i>	<b>359</b>
		9.3.5.1.1 <i>DermaWave</i>	<b>360</b>
		9.3.5.1.2 <i>Mattioli Engineering</i>	<b>360</b>
	9.3.5.2	<i>Mesotherapy Using E-Stim</i>	<b>361</b>
		9.3.5.2.1 <i>Dragonfly</i>	<b>361</b>
9.3.6	<i>Radiofrequency</i>		<b>362</b>
	9.3.6.1	<i>Alma Lasers</i>	<b>363</b>
	9.3.6.2	<i>Enlyten Medical Technologies</i>	<b>365</b>
	9.3.6.3	<i>Lumenis</i>	<b>365</b>
	9.3.6.4	<i>Syneron</i>	<b>365</b>
	9.3.6.5	<i>Solta Medical</i>	<b>367</b>
	9.3.6.6	<i>Thermamedic</i>	<b>368</b>
9.3.7	LEDs		<b>368</b>
9.3.8	External Ultrasonic Energy		<b>368</b>
	9.3.8.1	General Project	<b>370</b>
	9.3.8.2	LipoSonix	<b>371</b>
	9.3.8.3	Medixsysteme France	<b>372</b>

	9.3.8.4	Sybaritic	372
	9.3.8.5	UltraShape	373
9.4	New Technologies		375
9.5	Product Sales Estimates 2007 to 2012		376
	9.5.1	<i>Liposuction</i>	376
	9.5.2	Body Shaping Devices	387
	9.5.2.1	<i>Platform Sales 2007 to 2012</i>	387
	9.5.2.2	<i>Disposables Sales 2007 to 2012</i>	398
9.6	Procedure Volume		409
	9.6.1	Liposuction	409
	9.6.2	Body Shaping	413
9.7	Competitive Analysis and Market Share		417
	9.7.1	Liposuction	417
	9.7.2	Body Shaping	419
<b>10.0</b>	<b>Breast Implants</b>		<b>421</b>
	10.1	Overview of Conditions and Treatments	421
	10.2	Competitive Advantage	422
	10.3	Product Descriptions and Results	423
	10.3.1	<i>Saline Implants</i>	424
	10.3.2	<i>Silicone Implants</i>	424
	10.4	New Products	426
	10.5	Product Sales Estimates 2007 to 2012	427
	10.6	Procedure Volume	438
	10.7	Competitive Analysis and Market Share	442
	10.7.1	<i>Allergan</i>	444
	10.7.2	<i>Mentor</i>	444
<b>11.0</b>	<b>Physician Dispensed Cosmeceuticals</b>		<b>446</b>
	11.1	Overview of Conditions and Treatments	446
	11.2	Competitive Advantage	448
	11.3	Product Descriptions and Results	450
	11.3.1	Ingredients	450
	11.3.2	Vitamin A and Retinoids	451

	11.3.3	Vitamin C	452
	11.3.4	Vitamin E	454
	11.3.5	Alpha Lipoic Acid	454
	11.3.6	Coenzyme Q10	455
	11.3.7	Cytokinin and Zeatin	456
	11.3.8	Alpha Hydroxy Acids	457
	11.3.9	Beta Hydroxy Acids	458
	11.3.10	Peptides	458
	11.3.11	DMAE	459
	11.3.12	Idebenone	460
	11.3.13	Argirelene	461
	11.3.14	Creatine	461
	11.3.15	Aminophylline	461
	11.3.16	Botulinum Toxin	462
	11.3.17	Ceramides	462
	11.3.18	Growth Factors	463
11.4	New Products		464
	11.4.1	Eyelash Products	464
	11.4.2	Sun Care	466
	11.4.3	Product Safety	468
11.5	Product Sales Estimates 2007 to 2012		470
11.6	Competitive Analysis and Market Share		481
	11.6.1	Allergan	483
	11.6.2	La-Roche Posay	484
	11.6.3	Obagi	484
	11.6.4	SkinCeuticals	486
	11.6.5	SkinMedica	486
	11.6.6	Valeant	488
<b>12.0</b>	<b>Total Market</b>		<b>490</b>
	12.1	<i>Total Market</i>	490
	12.2	<i>Disposables</i>	501
	12.3	<i>Market Share</i>	512

<b>I</b>	<b>Treatment Comparison</b>	<b>515</b>
	I.I Safety vs. Efficacy	<b>515</b>
	I.II Treatment Compatibility	<b>518</b>
	I.III Non-Physician Performed Treatments	<b>520</b>
<b>II</b>	<b>Company Listings</b>	<b>522</b>

**M.I.I.**

# Table Of Exhibits

Exhibit 2.1: Mechanism of Action of Aesthetic Treatments	28
Exhibit 3.1: Average Electrolysis Treatment Times	38
Exhibit 3.2: Top Light-Based Hair Removal Devices	50
Exhibit 3.3: Top Skin Rejuvenation Devices	57
Exhibit 3.4: Leading Fractional Skin Rejuvenation Devices	65
Figure 3.1: Comparative Safety and Efficacy of Skin Rejuvenation Technologies	66
Exhibit 3.5: Fractional Skin Rejuvenation Device Characteristics	67
Exhibit 3.6: Top Tattoo and Pigmented Lesion Removal Devices	79
Exhibit 3.7: Top Light-Based Acne Reduction Devices	81
Exhibit 3.8: Top Light-Based Vascular Lesion Removal Devices	85
Exhibit 3.9: Development Initiatives for Light-Based Home Use Devices	88
Exhibit 3.10: Worldwide Projected Dollar Sales for Top Manufacturers of Light-Based Device Platforms, 2007 to 2012	96
Figure 3-2: Worldwide Dollar Growth for Leading Providers of Light-Based Device Platforms	97
Exhibit 3.11: North American Projected Dollar Sales for Top Manufacturers of Light-Based Device Platforms, 2007 to 2012	98
Figure 3-3: North American dollar Growth for Leading Providers of Light-Based Device Platforms	99
Exhibit 3.12: European Projected Dollar Sales for Top Manufacturers of Light-Based Device Platforms, 2007 to 2012	100
Figure 3-4: European Dollar Growth for Leading Providers of Light-Based Device Platforms	101
Exhibit 3.13 Asian Projected Dollar Sales for Top Manufacturers of Light-Based Device Platforms, 2007 to 2012	102
Figure 3-5: Asian Dollar Growth for Leading Providers of Light-Based Device Platforms	103
Exhibit 3.14: Latin American Projected Dollar Sales for Top Manufacturers of Light-Based Device Platforms, 2007 to 2012	104
Figure 3-6: Latin American Dollar Growth for Leading Providers of Light-Based Device Platforms	105
Figure 3-7: Dollar Sales of Light-Based Device Platforms by Region	106
Exhibit 3.15: Worldwide Projected Dollar Sales for Light-Based Device Platforms by Application, 2007 to 2012	107
Figure 3-8: Dollar Sales of Light-Based Device Platforms by Application	108
Exhibit 3.16: Worldwide Projected Dollar Sales for Top Manufacturers of Light-Based Device Disposables, 2007 to 2012	110
Figure 3-9: Worldwide Dollar Sales of Light-Based Device Disposables	110
Exhibit 3.17: North American Projected Dollar Sales for Top Manufacturers of Light-Based Device Disposables, 2007 to 2012	111

Figure 3-10: North American Dollar Sales of Light-Based Device Disposables	<b>112</b>
Exhibit 3.18: European Projected Dollar Sales for Top Manufacturers of Light-Based Device Disposables, 2007 to 2012	<b>113</b>
Figure 3-11: European Dollar Sales of Light-Based Device Disposables	<b>114</b>
Exhibit 3.19: Asian Projected Dollar Sales for Top Manufacturers of Light-Based Device Disposables, 2007 to 2012	<b>115</b>
Figure 3-12: Asian Dollar Sales of Light-Based Device Disposables	<b>116</b>
Exhibit 3.20: Latin American Projected Dollar Sales for Top Manufacturers of Light-Based Device Disposables, 2007 to 2012	<b>117</b>
Figure 3-13: Latin American Dollar Sales of Light-Based Device Disposables	<b>117</b>
Figure 3-14: Dollar Sales of Light-Based Device Disposables by Region	<b>118</b>
Exhibit 3.21: Worldwide Procedure Volume for Light-Based Aesthetic Treatments, 2007 to 2012	<b>119</b>
Figure 3-15: Worldwide Procedure Fees for Light-Based Aesthetic Treatments	<b>120</b>
Figure 3-16: Worldwide Procedure Volume for Light-Based Aesthetic Treatments, by Region	<b>121</b>
Figure 3-17: Worldwide Procedure Fees for Light-Based Aesthetic Treatments, by Region	<b>122</b>
Exhibit 3.22: Worldwide Procedure Volume for Light-Based Aesthetic Treatments by Application, 2007 to 2012	<b>123</b>
Figure 3-18: Worldwide Procedure Volume for Light-Based Aesthetic Treatments by Application	<b>124</b>
Exhibit 3.23: Worldwide Procedure Fees for Light-Based Aesthetic Treatments by Application, 2007 to 2012	<b>125</b>
Figure 3-19: Worldwide Procedure Fees for Light-Based Aesthetic Treatments by Application	<b>126</b>
Exhibit 3.24: Market Shares of Leading Manufacturers of Light-Based Aesthetic Equipment, 2007 to 2012	<b>127</b>
Exhibit 3.25: Worldwide Sales for Leading Manufacturers of Light-Based Aesthetic Equipment by Region, 2007	<b>128</b>
Figure 3-20: Market Shares for Leading Manufacturers of Light-Based Aesthetic Equipment	<b>129</b>
Exhibit 4.1: Leading Skin Tightening Devices	<b>145</b>
Exhibit 4.2: Worldwide Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Platforms, 2007 to 2012	<b>161</b>
Figure 4-1: Worldwide Sales Growth of Skin Tightening Platforms	<b>162</b>
Exhibit 4.3: North American Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Platforms, 2007 to 2012	<b>163</b>
Figure 4-2: North American Sales Growth of Skin Tightening Platforms	<b>164</b>
Exhibit 4.4: European Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Platforms, 2007 to 2012	<b>165</b>
Figure 4-3: European Sales Growth of Skin Tightening Platforms	<b>166</b>
Exhibit 4.5: Asian Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Platforms, 2007 to 2012	<b>167</b>
Figure 4-4: Asian Sales Growth of Skin Tightening Platforms	<b>168</b>
Exhibit 4.6: Latin American Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Platforms, 2007 to 2012	<b>169</b>
Figure 4-5: Latin American Sales Growth of Skin Tightening Platforms	<b>170</b>
Figure 4-6: Dollar Sales of Skin Tightening Device Platforms by Region	<b>171</b>

Exhibit 4.7: Worldwide Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Disposables, 2007 to 2012	<b>172</b>
Figure 4-7: Worldwide Dollar Sales of Skin Tightening Device Disposables	<b>173</b>
Exhibit 4.8: North American Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Disposables, 2007 to 2012	<b>174</b>
Figure 4-8: North American Dollar Sales of Skin Tightening Device Disposables	<b>175</b>
Exhibit 4.9: European Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Disposables, 2007 to 2012	<b>176</b>
Figure 4-9: European Dollar Sales of Skin Tightening Device Disposables	<b>177</b>
Exhibit 4.10: Asian Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Disposables, 2007 to 2012	<b>178</b>
Figure 4-10: Asian Dollar Sales of Skin Tightening Device Disposables	<b>179</b>
Exhibit 4.11: Latin American Projected Dollar Sales for Top Manufacturers of Skin Tightening Device Disposables, 2007 to 2012	<b>180</b>
Figure 4-11: Latin American Dollar Sales of Skin Tightening Device Disposables	<b>181</b>
Figure 4-12: Dollar Sales of Skin Tightening Device Disposables by Region	<b>182</b>
Exhibit 4.12: Worldwide Procedure Volume for Skin Tightening, 2007 to 2012	<b>183</b>
Figure 4-13: Worldwide Procedure Fees for Skin Tightening	<b>183</b>
Figure 4-14: Worldwide Procedure Volume for Skin Tightening, by Region	<b>184</b>
Figure 4-15: Worldwide Procedure Fees for Skin Tightening by Region	<b>185</b>
Exhibit 4.13: Worldwide Market Shares of Skin Tightening Platforms and Disposables, 2007 to 2012	<b>186</b>
Figure 4-16: Change in Market Shares of Skin Tightening Platforms	<b>187</b>
Exhibit 5.1: Top Emerging Skin Rejuvenation Devices, May 2008	<b>190</b>
Exhibit 5.2: Emerging Skin Rejuvenation Technology Adoption, May 2008	<b>191</b>
Exhibit 5.3: Worldwide Projected Dollar Sales for Top Manufacturers of Emerging Skin Rejuvenation Device Platforms, 2007 to 2012	<b>200</b>
Figure 5-1: Worldwide Sales Growth of Emerging Skin Rejuvenation Device Platforms	<b>201</b>
Exhibit 5.4: North American Projected Dollar Sales for Top Manufacturers of Emerging Skin Rejuvenation Device Platforms, 2007 to 2012	<b>202</b>
Figure 5-2: North American Sales Growth of Emerging Skin Rejuvenation Device Platforms, 2007 – 2012	<b>203</b>
Exhibit 5.5: European Projected Dollar Sales for Top Manufacturers of Emerging Skin Rejuvenation Device Platforms, 2007 to 2012	<b>205</b>
Figure 5-3: European Sales Growth of Emerging Skin Rejuvenation Device Platforms	<b>205</b>
Exhibit 5.6: Asian Projected Dollar Sales for Top Manufacturers of Emerging Skin Rejuvenation Device Platforms, 2007 to 2012	<b>206</b>
Figure 5-4: Asian Sales Growth of Emerging Skin Rejuvenation Device Platforms	<b>207</b>
Exhibit 5.7: Latin American Projected Dollar Sales for Top Manufacturers of Emerging Skin Rejuvenation Device Platforms, 2007 to 2012	<b>208</b>
Figure 5-5: Latin American Sales Growth of Emerging Skin Rejuvenation Device Platforms	<b>209</b>
Figure 5-6: Dollar Sales of Emerging Skin Rejuvenation Device Platforms, by Region	<b>210</b>
Exhibit 5.9: Worldwide Procedure Volume for Emerging Skin Rejuvenation, 2007 to 2012	<b>211</b>
Figure 5-8: Worldwide Procedure Fees for Emerging Skin Rejuvenation Treatments	<b>212</b>
Figure 5-9: Worldwide Procedure Volume for Emerging Skin Rejuvenation Procedures by Region	<b>213</b>

Figure 5-10: Worldwide Procedure Fees for Emerging Skin Rejuvenation Procedures by Region	<b>214</b>
Exhibit 5.10: Worldwide Market Shares of Emerging Skin Rejuvenation Platforms and Disposables, 2007 to 2012	<b>215</b>
Figure 5-11: Change in Market Shares of Emerging Skin Rejuvenation Platforms	<b>216</b>
Exhibit 6.1: Leading Neuromodulators, May 2008	<b>222</b>
Exhibit 6.2: Worldwide Projected Dollar Sales for Leading Neuromodulators, 2007 to 2012	<b>236</b>
Figure 6-1: Worldwide Sales Growth of Neuromodulators	<b>237</b>
Exhibit 6.3: North American Projected Dollar Sales for Leading Neuromodulators, 2007 to 2012	<b>238</b>
Figure 6-2: North American Sales Growth of Neuromodulators	<b>239</b>
Exhibit 6.4: European Projected Dollar Sales for Leading Neuromodulators, 2007 to 2012	<b>240</b>
Figure 6-3: European Sales Growth of Neuromodulators	<b>241</b>
Exhibit 6.5: Asian Projected Dollar Sales for Leading Neuromodulators, 2007 to 2012	<b>242</b>
Figure 6-4: Asian Sales Growth of Neuromodulators	<b>243</b>
Exhibit 6.6: Latin American Projected Dollar Sales for Leading Neuromodulators, 2007 to 2012	<b>244</b>
Figure 6-5: Latin American Sales Growth of Neuromodulators	<b>245</b>
Figure 6-6: Dollar Sales Growth of Neuromodulators by Region	<b>246</b>
Exhibit 6.7: Worldwide Procedure Volume for Neuromodulators, 2007 to 2012	<b>247</b>
Figure 6-7: Worldwide Procedure Fees for Neuromodulators	<b>248</b>
Figure 6-8: Worldwide Procedure Volume for Neuromodulators by Region	<b>249</b>
Figure 6-9: Worldwide Procedure Fees for Neuromodulators by Region	<b>250</b>
Exhibit 6.8: Worldwide Market Shares of Top Botulinum Toxin Suppliers, 2007 to 2012	<b>251</b>
Figure 6-10: Change in Market Shares of Top Neuromodulator Suppliers	<b>252</b>
Exhibit 7.1: Top Injectable Dermal Fillers, December 2008	<b>256</b>
Figure 7-1: Change in U.S. Usage of Filler Materials	<b>258</b>
Exhibit 7.2: Advantages and Disadvantages of Leading Dermal Filler Technology, December 2008	<b>259</b>
Exhibit 7.3: Projected Worldwide Dollar Sales of Dermal Fillers for Top Suppliers, 2007 to 2012	<b>277</b>
Figure 7-2: Worldwide Sales Growth of Dermal Fillers	<b>278</b>
Exhibit 7.4: Projected North American Dollar Sales of Dermal Fillers for Top Suppliers, 2007 to 2012	<b>279</b>
Figure 7-3: North American Sales Growth of Dermal Fillers	<b>280</b>
Exhibit 7.5: Projected European Dollar Sales of Dermal Fillers for Top Suppliers, 2007 to 2012	<b>281</b>
Figure 7-4: European Sales Growth of Dermal Fillers	<b>282</b>
Exhibit 7.6: Projected Asian Dollar Sales of Dermal Fillers for Top Suppliers, 2007 to 2012	<b>283</b>
Figure 7-5: Asian Sales Growth of Dermal Fillers	<b>284</b>
Exhibit 7.7: Projected Latin American Dollar Sales of Dermal Fillers for Top Suppliers, 2007 to 2012	<b>285</b>
Figure 7-6: Latin American Sales Growth of Dermal Fillers	<b>286</b>

Figure 7-7: Dollar Sales of Dermal Fillers by Region	<b>287</b>
Exhibit 7.8: Worldwide Procedure Volume for Dermal Fillers, 2007 to 2012	<b>288</b>
Figure 7-8: Worldwide Procedure Fees for Dermal Fillers	<b>289</b>
Figure 7-9: Worldwide Procedure Volume for Dermal Fillers by Region	<b>290</b>
Figure 7-10: Worldwide Procedure Fees for Dermal Fillers by Region	<b>291</b>
Exhibit 7.9: Market Shares of Top Dermal Filler Suppliers, 2007 to 2012	<b>292</b>
Figure7-11: Change in Market Shares of Top Dermal Filler Suppliers	<b>293</b>
Exhibit 8.1: Typical Customized Combination Treatment Packages	<b>295</b>
Exhibit 8.2: Cost of Microdermabrasion & Chemical Peels Compared with Other Technologies	<b>297</b>
Exhibit 8.3: Top Microdermabrasion Devices	<b>299</b>
Exhibit 8.4: Top Chemical Peel Suppliers	<b>303</b>
Exhibit 8.5: Projected Worldwide Dollar sales for Leading Microdermabrasion Manufacturers, 2007 – 2012	<b>311</b>
Figure 8-1: Worldwide Sales Growth of Microdermabrasion Equipment	<b>312</b>
Exhibit 8.6: Projected North American Dollar Sales for Leading Microdermabrasion Manufacturers, 2007 – 2012	<b>313</b>
Exhibit 8.7: Projected European Dollar Sales for Leading Microdermabrasion Manufacturers, 2007 – 2012	<b>314</b>
Exhibit 8.8: Projected Latin American Dollar Sales for Leading Microdermabrasion Manufacturers, 2007 to 2012	<b>316</b>
Figure 8-2: Dollar Sales of Microdermabrasion systems by Region	<b>317</b>
Exhibit 8.9: Projected Worldwide Dollar Sales for Top Suppliers of Chemical Peels, 2007 – 2012	<b>318</b>
Figure 8-3: Worldwide Sales Growth of Chemical Peels	<b>319</b>
Exhibit 8.10: Projected North American Dollar Sales for Top Suppliers of Chemical Peels, 2007 to 2012	<b>320</b>
Exhibit 8.11: Projected European Dollar Sales for Top Suppliers of Chemical Peels, 2007 – 2012	<b>321</b>
Exhibit 8.12: Projected Asian Dollar Sales for Top Suppliers of Chemical Peels, 2007 to 2012	<b>322</b>
Exhibit 8.13: Projected Latin American Dollar Sales for Top Suppliers of Chemical Peels, 2007 – 2012	<b>323</b>
Figure 8-4: Dollar Sales of Chemical Peels by Region	<b>324</b>
Exhibit 8.14: Worldwide Procedure Volume for Microdermabrasion, 2007 – 2012	<b>325</b>
Figure 8-5: Worldwide Procedure Fees for Microdermabrasion	<b>326</b>
Figure 8-6: Worldwide Procedure Volume for Microdermabrasion by Region	<b>327</b>
Figure 8-7: Worldwide Procedure Fees for Microdermabrasion by Region	<b>328</b>
Exhibit 8.15: Worldwide Procedure Volume for Chemical Peels, 2007 – 2012	<b>329</b>
Figure 8-8: Worldwide Procedure Fees for Chemical Peels	<b>330</b>
Figure 8-9: Worldwide Procedure Volume for Chemical Peels by Region	<b>331</b>
Figure 8-10: Worldwide Procedure Fees for Chemical Peels, by Region	<b>332</b>
Exhibit 8.16: Worldwide Market Shares of Leading Microdermabrasion Players, 2007 – 2012	<b>333</b>
Figure 8-11: Change in Global Market Shares of Leading Microdermabrasion Equipment Manufacturers	<b>334</b>
Exhibit 8.17: Worldwide Market Shares of Leading Chemical Peel Suppliers, 2007 –	<b>335</b>

2012	
Figure 8-12: Change in Global Market Shares of Leading Chemical Peel Suppliers	<b>336</b>
Exhibit 9.1: Comparison of Body Shaping Technologies by Order of Introduction	<b>339</b>
Figure 9-1: Risk vs. Results for Leading Body Shaping Technologies	<b>341</b>
Exhibit 9.2: Advantages and Disadvantages of Body Shaping Technologies	<b>342</b>
Exhibit 9.3: Leading Suppliers of Liposuction Equipment	<b>343</b>
Exhibit 9.4: Leading Photonic Devices for Body Shaping and Cellulite Tx	<b>347</b>
Exhibit 9.5: Leading Endodermology Devices	<b>356</b>
Exhibit 9.6: Leading Mesotherapy-Type Body Shaping Devices	<b>359</b>
Exhibit 9.7: Top RF Body Shaping Devices	<b>364</b>
Exhibit 9.8: Leading Ultrasound Body Shaping Devices	<b>370</b>
Exhibit 9.9: Projected Worldwide Dollar Sales for Leading Suppliers of Liposuction Equipment, 2007 – 2012	<b>376</b>
Figure 9-2: Worldwide Sales Growth of liposuction Equipment	<b>377</b>
Exhibit 9.10: Projected North American Dollar Sales for Leading Suppliers of Liposuction Equipment, 2007 – 2012	<b>378</b>
Figure 9-3: North American Sales Growth of liposuction Equipment	<b>379</b>
Exhibit 9.11: Projected European Dollar Sales for Leading Suppliers of Liposuction Equipment, 2007 – 2012	<b>380</b>
Figure 9-4: European Sales Growth of Liposuction Equipment	<b>381</b>
Exhibit 9.12: Projected Asian Dollar Sales for Leading Suppliers of Liposuction Equipment, 2007 – 2012	<b>382</b>
Figure 9-5: Asian Growth of Liposuction Equipment	<b>383</b>
Exhibit 9.13: Projected Latin American Dollar Sales for Leading Suppliers of Liposuction Equipment, 2007 – 2012	<b>384</b>
Figure 9-6: Latin American Sales Growth of Liposuction Equipment	<b>385</b>
Figure 9-7: Dollar Sales Growth of Liposuction Equipment by Region	<b>386</b>
Exhibit 9.14: Projected Worldwide Dollar Sales for Leading Body Shaping Device Manufacturers: Platforms, 2007 – 2012	<b>387</b>
Figure 9-8: Worldwide Sales Growth of Body Shaping Equipment	<b>388</b>
Exhibit 9.15: Projected North American Dollar Sales for Leading Body Shaping Device Manufacturers: Platforms, 2007 – 2012	<b>389</b>
Figure 9-9: North American Sales Growth of Body Shaping Equipment, Platforms	<b>390</b>
Exhibit 9.16: Projected European Dollar Sales for Leading Body Shaping Device Manufacturers: Platforms, 2007 – 2012	<b>391</b>
Figure 9-10: European Sales Growth of Body Shaping Equipment: Platforms	<b>392</b>
Exhibit 9.17: Projected Asian Dollar Sales for Leading Body Shaping Device Manufacturers: Platforms, 2007 – 2012	<b>393</b>
Figure 9-11: Asian Sales Growth of Body Shaping Equipment: Platforms	<b>394</b>
Exhibit 9.18: Projected Latin American Dollar Sales for Leading Body Shaping Device Manufacturers: Platforms, 2007 – 2012	<b>395</b>
Figure 9-12: Latin American Sales Growth of Body Shaping Equipment: Platforms	<b>396</b>
Figure 9-13: Dollar Sales Growth of Body Shaping Device Platforms, by Region	<b>397</b>
Exhibit 9.19: Projected worldwide Dollar Sales for Leading Body Shaping Device Manufacturers: Disposables, 2007 – 2012	<b>398</b>
Figure 9-14: Worldwide Sales Growth of Body Shaping Equipment: Disposables	<b>399</b>
Exhibit 9.20: Projected North American Dollar Sales for Leading Body Shaping	<b>400</b>

Device Manufacturers: Disposables, 2007 – 2012	
Figure 9-15: North American Sales Growth of Body Shaping Equipment: Disposables	<b>401</b>
Exhibit 9.21: Projected European Dollar Sales for Leading Body Shaping Device Manufacturers: Disposables, 2007 – 2012	<b>402</b>
Figure 9-16: European Sales Growth of Body Shaping Equipment: Disposables	<b>403</b>
Exhibit 9.22: Projected Asian Dollar Sales for Leading Body Shaping Device Manufacturers: Disposables, 2007 – 2012	<b>404</b>
Figure 9-17: Asian Sales Growth of Body Shaping Equipment: Disposables	<b>405</b>
Exhibit 9.23: Projected Latin American Dollar Sales for Leading Body Shaping Device Manufacturers: Disposables, 2007 – 2012	<b>406</b>
Figure 9-18: Latin American Sales Growth of Body Shaping Equipment: Disposables	<b>407</b>
Figure 9-19: Dollar Sales Growth of Body Shaping Device Disposables by Region	<b>408</b>
Exhibit 9.24: Worldwide Procedure Volume for Liposuction, 2007 – 2012	<b>409</b>
Figure 9-20: Worldwide Procedure Fees for Liposuction	<b>410</b>
Figure 9-21: Worldwide Procedure Volume for Liposuction, by Region	<b>411</b>
Figure 9-22: Worldwide Procedure Fees for Liposuction by Region	<b>412</b>
Exhibit 9.25: Worldwide Procedure Volume for Body Shaping, 2007 – 2012	<b>413</b>
Figure 9-23: Worldwide Procedure Fees for Body Shaping	<b>414</b>
Figure 9-24: Worldwide Procedure Volume for Body Shaping by Region	<b>415</b>
Figure 9-25: Worldwide Procedure Fees for Body shaping by Region	<b>416</b>
Exhibit 9.26: Worldwide Market Shares for Leading Manufacturers of Liposuction Equipment, 2007 – 2012	<b>417</b>
Figure 9-26: Change in Market Shares of Leading Manufacturers of Liposuction Equipment	<b>418</b>
Exhibit 9.27: Worldwide Market Shares for Leading Manufacturers of Body Shaping Equipment, 2007 – 2012	<b>419</b>
Figure 9-27: Change in Market Shares of Leading Manufacturers of Body Shaping Equipment	<b>420</b>
Exhibit 10.1: Leading Breast Implant Products	<b>423</b>
Exhibit 10.2: Worldwide Projected Dollar Sales for Leading Manufacturers of Breast Implants, 2007 – 2012	<b>427</b>
Figure 10-1: Worldwide Sales Growth of Breast Implants	<b>428</b>
Exhibit 10.3: North American Projected Dollar Sales for Leading Manufacturers of Breast Implants, 2007 – 2012	<b>429</b>
Figure 10-2: North American Sales Growth of Breast Implants	<b>430</b>
Exhibit 10.4: European Projected Dollar sales for Leading Manufacturers of Breast Implants, 2007 – 2012	<b>431</b>
Figure 10-3: European Sales Growth of Breast Implants	<b>432</b>
Exhibit 10.5: Asian Projected Dollar Sales for Leading Manufacturers of Breast Implants, 2007 – 2012	<b>433</b>
Figure 10-4: Asian Sales Growth of Breast Implants	<b>434</b>
Exhibit 10.6: Latin American Projected Dollar Sales for Leading Manufacturers of Breast Implants, 2007 – 2012	<b>435</b>
Figure 10-5: Latin American Sales Growth of Breast Implants	<b>436</b>
Figure 10-6: Dollar Sales of Breast Implants by Region	<b>437</b>
Exhibit 10.7: Worldwide Procedure Volume for Breast Implants, 2007 – 2012	<b>438</b>
Figure 10-7: Worldwide Procedure Fees for Breast Implants	<b>439</b>

Figure 10-8: Worldwide Procedure Volume for Breast Implants, by Region	<b>440</b>
Figure 10-9: Worldwide Procedure Fees for Breast Implants, by Region	<b>441</b>
Exhibit 10.8: Worldwide Market Shares of Top Breast Implant Manufacturers 2007 – 2012	<b>442</b>
Figure 10-10: Change in Market Shares of Top Breast Implant Manufacturers	<b>443</b>
Exhibit 11.1: Top Cosmeceutical Ingredients	<b>451</b>
Exhibit 11.2: Projected Worldwide Sales of Physician-Dispensed Cosmeceuticals for Top Suppliers, 2007 – 2012	<b>470</b>
Figure 11-1: Projected Worldwide Sales Growth of Physician-Dispensed Cosmeceuticals for Top Suppliers	<b>471</b>
Exhibit 11.3: Projected North American Sales of Physician-Dispensed Cosmeceuticals for Top Suppliers, 2007 – 2012	<b>472</b>
Figure 11-2: Projected North American Sales Growth of Physician-Dispensed cosmeceuticals for Top Suppliers	<b>473</b>
Exhibit 11.4: Projected European Sales of Physician-Dispensed Cosmeceuticals for Top Suppliers, 2007 – 2012	<b>474</b>
Figure 11-3: Projected European Sales Growth of Physician-Dispensed Cosmeceuticals for Top Suppliers	<b>475</b>
Exhibit 11.5: Projected Asian Sales of Physician-Dispensed Cosmeceuticals for Top Suppliers, 2007 – 2012	<b>476</b>
Figure 11-4: Projected Asian Sales Growth of Physician-Dispensed Cosmeceuticals for Top Suppliers	<b>477</b>
Exhibit 11.6: Projected Latin American Sales of Physician-Dispensed Cosmeceuticals for Top Suppliers, 2007 – 2012	<b>478</b>
Figure 11-5: Projected Latin American Sales Growth of Physician-Dispensed Cosmeceuticals for Top Suppliers	<b>479</b>
Figure 11-6: Dollar Growth of Physician-Dispensed Cosmeceuticals for Top Suppliers by Region	<b>480</b>
Exhibit 11.7: Worldwide Market Shares of Leading Manufacturers of Physician-Dispensed Cosmeceuticals, 2007 – 2012	<b>481</b>
Figure 11-7: Change in Global Market Shares of Leading Manufacturers of Physician-Dispensed Cosmeceuticals	<b>482</b>
Exhibit 12.1: Total Worldwide Sales of Aesthetic Products, 2007-2012	<b>490</b>
Figure 12-1: Worldwide Aesthetic Product Sales by Market Segment	<b>491</b>
Exhibit 12.2: Total North American Sales of Aesthetic Products, 2007 – 2012	<b>492</b>
Figure 12-2: North American Aesthetic Product Sales by Market Segment	<b>493</b>
Exhibit 12.3: Total European Sales of Aesthetic Products, 2007 – 2012	<b>494</b>
Figure 12-3: European Aesthetic Product Sales by Market Segment	<b>495</b>
Exhibit 12.4: Total Asian Sales of Aesthetic Products, 2007-2012	<b>496</b>
Figure 12-4: Asian Aesthetic Product Sales by Market Segment	<b>497</b>
Exhibit 12.5: Total Latin American Sales of Aesthetic Products, 2007-2012	<b>498</b>
Figure 12-5: Latin American Aesthetic Product Sales by Market Segment	<b>499</b>
Exhibit 12.6: Equipment Requiring Disposable Components	<b>500</b>
Figure 12-6: Worldwide Aesthetic Product Sales by Region	<b>501</b>
Exhibit 12.7: Worldwide Projected Sales of Disposables, 2007-2012	<b>502</b>
Figure 12-7: Worldwide aesthetic Disposables Sales by Market Segment	<b>503</b>
Exhibit 12.8: North American Projected Sales of Disposables, 2007 – 2012	<b>504</b>

Figure 12-8: North American Aesthetic Disposables Sales by Market Segment	<b>505</b>
Exhibit 12.9: European Projected Sales of Disposables, 2007 – 2012	<b>506</b>
Figure 12-9: European Aesthetic Disposables Sales by Market Segment	<b>507</b>
Exhibit 12.10: Asian Projected Sales of Disposables, 2007 – 2012	<b>508</b>
Figure 12-10: Asian Aesthetic Disposables Sales by Market Segment	<b>509</b>
Exhibit 12.11: Latin American Projected Sales of Disposables, 2007 – 2012	<b>510</b>
Figure 12-11: Latin American Aesthetic Disposables Sales by Market Segment	<b>511</b>
Exhibit 12.12: Total Sales of Major Market Manufacturers, 2007 – 2012	<b>512</b>
Figure 12-12: Change in Market Shares of Major Aesthetic Manufacturers	<b>513</b>
Exhibit 12.13: Market Shares of Major Market Manufacturers, 2007, 2012	<b>514</b>
Exhibit I.I: Facial Rejuvenation Treatment Comparison	<b>516</b>
Figure I.I: Results vs. Risk for Facial Treatments	<b>517</b>
Exhibit I.II: Physician vs. Non-Physician Usage of Aesthetic Procedures	<b>521</b>

## i. Methodology

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 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;
- 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.

<b>Section</b>	<b>Executive Summary</b>
<b>1</b>	

In 2008, total sales of aesthetic products covered in this report are estimated to exceed \$5 billion. Through 2012, they will expand by 11.7% per year to \$8.2 billion. This is lower than the compound annual growth of 16.8% (exclusive of liposuction equipment and breast implants) predicted in May 2007 and the revised 13.0% growth predicted in May 2008. The lower growth forecast in January 2009 reflects rising competition coupled with a dip in consumer demand, which is resulting in delayed expansion among aesthetic physicians.

Through 2012, the body shaping, neuromodulator and filler segments will experience the greatest annual worldwide growth, at 21.0%, 16.0% and 14.7%, respectively. Gains will be fueled by ongoing new product introductions with greater capabilities than prior products.

In 2008, sales of aesthetic device disposables are estimated at \$87.5 million. Over the next several years, sales are expected to rise strongly by 30.8% per year to reach \$274.4 million in 2012. The greatest growth will occur in the body shaping segment, in which disposable sales are expected to rise by 68.8% per year from a low \$14.8 million base in 2008. Several manufacturers offer body shaping devices that require disposables and sales remain strong due to physicians' interest in offering their patients a novel, highly efficacious treatment.

In 2008, the leading 20 companies profiled in this report accounted for total aesthetic product sales of about \$3.3 billion, representing more than 65% of the overall market. Although their sales will rise by 9.2% per year to about \$5.1 billion in 2012, this growth will lag the market and be overshadowed by gains from smaller competitors so that the share controlled by the Top 20 in 2012 declines to about 62%. Allergan (Irvine, Calif.) led the market in 2007 by a wide margin, with 25.0% share. This strong position was mainly due to the company's solid positioning in the large neuromodulator, dermal filler and breast implant segments. Allergan was followed at a distance by Mentor (Santa Barbara, Calif.) with 6.8% through 2012; Allergan's position is expected to rise to 28.8% on the company's continued expansion in several market segments, while Mentor decreases to 6.2%.