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PRESS RELEASE • IMCAS 2026 MARKET ANALYSIS

AESTHETIC MEDICINE: THE END OF TABOOS

A CONSTANTLY EVOLVING MARKET, DRIVEN BY NEW USES, NEW PATIENTS AND NEW MEDICAL FRONTIERS

Long perceived as confidential, aesthetic medicine has now establishing itself as a health and well-being sector fully integrated into contemporary lifestyles. Spectacular rejuvenation of patient profiles, explosion of male demand, emergence of post-weight loss services linked to new anti-obesity treatments (Ozempic®, Wegovy®): the global market confirms a profound structural transformation, supported by strong growth and unprecedented social acceptance.

Valued at 18 billion euros in 2025, the global market for aesthetic surgery, medicine and dermatology could reach 23.4 billion euros by 2030, representing a 30% increase, according to joint analyses by IMCAS, Boston Consulting Group (BCG) and Cetas Healthcare Intelligence.

A RESILIENT GLOBAL MARKET: A SLOWDOWN IN THE WEST AND SUSTAINED GROWTH IN ASIA

In an uncertain economic and geopolitical context, aesthetic medicine demonstrates remarkable resilience, with growth perspectives relying more on the solidity of demand and the expansion of the patient base than on pricing levers. The market is expected to maintain an average trajectory of +5% per year until 2030, while facing increased competitive pressure, particularly in the botulinum toxin and hyaluronic acid filler segments.

Over the past year, the global market showed different progression according to regions. In Europe and the United States, during the year 2025, activity in value recorded a slight decline estimated at -1 to -2%, while Asia-Pacific continued its growth at a more moderate pace than in past years (+5.5%), as did the Middle East (+2%) and Latin America (+4%). Despite this complex economic and geopolitical context, the market demonstrates solid resistance.

This evolution marks a turning point: aesthetic medicine is no longer an elitist market but an increasingly standardized, structured and competitive medical services sector.

GEOGRAPHIES: AMERICAN LEADERSHIP, ASIAN ACCELERATION, EUROPE UNDER CONSTRAINTS

UNITED STATES: A DOMINANT MARKET AT AN ADVANCED STAGE OF DEVELOPMENT

The United States maintains its leading position with approximately 45% of the global market and particularly dominates the botulinum toxin segment (56% of global demand). According to 2024 ISAPS data published in June 2025 on operations performed by plastic surgeons, the United States thus accounts for the largest number of non-surgical aesthetic procedures in the world.

However, this historical growth in the United States is expected to slow progressively, reaching approximately 5% per year in the 2025-2030 projection. The rapid rise of MedSpas and the arrival of new patient profiles are accompanied by increased pressure on prices, with new players positioned on more accessible offers.

EUROPE: MODERATE GROWTH AND STRICTER REGULATORY FRAMEWORK

Europe is expected to show a stable progression of approximately 4% per year (2025-2030 projection), driven mainly by skin boosters and biostimulators. The market is nevertheless hindered by regulations restricting communication to healthcare professionals and patients, particularly on toxins, unlike Anglo-Saxon models, thus limiting their development compared to regions more open on these topics. The new regulation relative to CE marking also contributes to slowing down the market entry of new devices.

ASIA-PACIFIC: THE GLOBAL GROWTH ENGINE

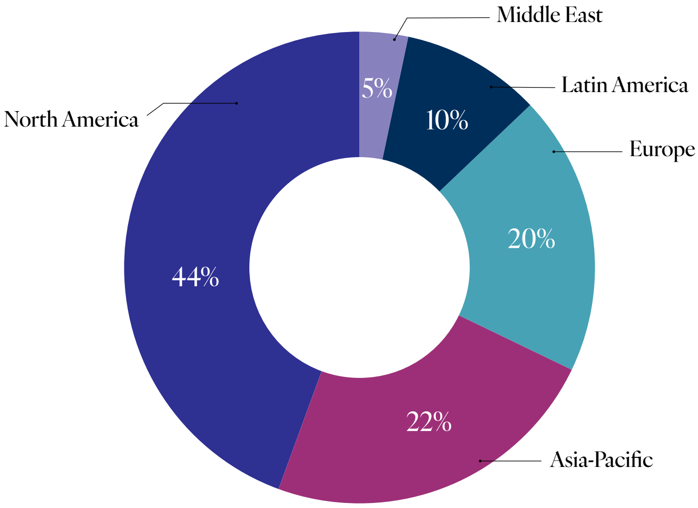
Asia-Pacific shows the most sustained growth in the global market, with a projected average annual progression around 7% (2025-2030). China stands out as the main engine of this expansion, with growth close to 10% per year. The rapid adoption of new technologies and innovative treatments supports this dynamic, despite intensifying local competition, regulation and the increasing use of white-label offers within clinics.

Other markets in the Asia-Pacific zone also show strong vitality: South Korea, a pioneer in aesthetic trends; Japan with its mature and sophisticated market; Australia which bridges Western standards and Asian markets, asserting itself as the “premium safety” reference destination for regional patients; as well as Taiwan and Thailand, which position themselves as regional hubs for aesthetic medicine.

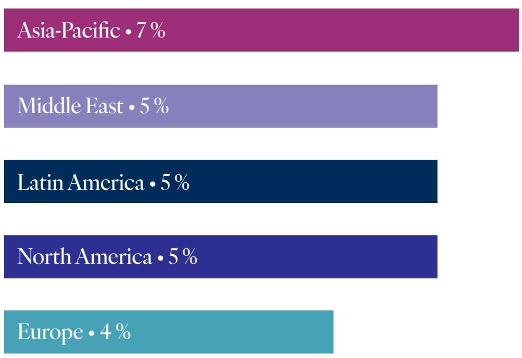
MIDDLE EAST AND LATIN AMERICA: RAPIDLY STRUCTURING MARKETS

Still modest in volume, these regions show average projected growth levels of 5% per year, nonetheless with strong disparities by country (the United Arab Emirates, for example, have a predicted growth between 7 and 9% per year until 2030). Demographic dynamics, demand from expatriates and the development of MedSpas are all factors stimulating activity in these regions in a competitive environment marked by the arrival of low-cost Asian manufacturers, particularly for medical devices.

Geographical distribution of the market in 2025



Predicted annual growth by region (2025–2030)



MARKET SEGMENTS: INJECTABLES REMAIN CENTRAL, MEDICAL COSMETICS ACCELERATE

Injectables - including botulinum toxins, hyaluronic acid fillers and biostimulators - currently concentrate more than 50% of the global aesthetic medicine market, representing 9.6 billion euros in 2025. The segment's dynamic (+5% growth per year planned from 2025 to 2030) remains mainly driven by the growth in demand for treatments, in a context of persistent pressure on prices, with contrasting growth trajectories according to product categories.

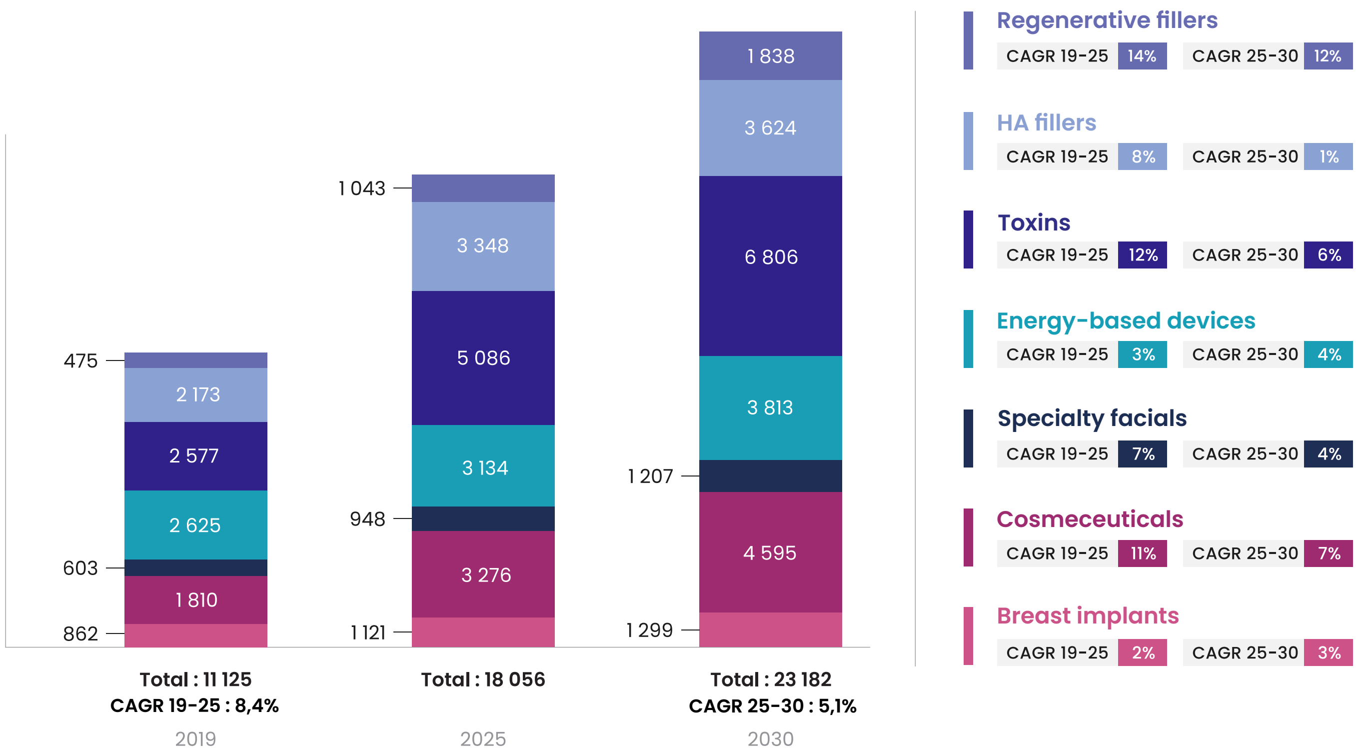
Furthermore, beyond the injectable segment, combination therapies are progressively imposing themselves as a new standard of care, particularly among the youngest patients. This evolution is reflected by a high level of satisfaction, as 77% of patients report a positive experience, thus reinforcing the sustainable adoption of these multimodal protocols.

Professional active cosmetics constitute one of the most dynamic segments, with an annual growth of +7%, supported by major beauty groups. Its relative weight in the total market is expected to increase from 18 to 20% by 2030.

Energy-based devices such as radiofrequency (RF) devices, ultrasound-based devices (incuding HIFU) and light-based devices (IPL) represent 17% of the market, with a more moderate growth at 4% per year expected from 2025 to 2030.

Conversely, invasive surgery, notably breast implants, still shows the lowest progression, reflecting a growing preference for less invasive and more natural solutions.

HISTORICAL AND PROJECTED ACTIVITY OF GLOBAL MANUFACTURERS BY TREATMENT TYPE In millions of euros



THE END OF TABOOS: A DEEPLY RENEWED AND EXPANDED PATIENT BASE

YOUNGER PATIENTS, PREVENTION-ORIENTED

Gen Z and Millennials are accessing aesthetic medicine much earlier than previous generations. According to Arcane Research, the average age of patients in France fell from 48 to 42 between 2018 and 2024.

Driven by social networks, aesthetic treatments have moved from a taboo subject to a visible and assumed practice. Their approach privileges prevention and subtlety, with a tendency to prefer "natural" results (requested by 75% of consumers according to BCG) as well as progressive and combined treatments.

A STRONGLY ACCELERATING MALE DEMAND

According to ISAPS, between 2018 and 2024, the number of surgical interventions performed on men increased by 95%, while non-invasive aesthetic treatments progressed by 116%. For comparison, these increases amount to 59% and 55% respectively among women. This dynamic, particularly pronounced in the Middle East and Latin America, testifies to a profound transformation of social norms and an increasing acceptance of aesthetic care by men, who however still represent only 16% of all procedures.

GLP-1: A NEW GROWTH LEVER FOR AESTHETIC MEDICINE

The rise of GLP-1 type anti-obesity treatments (Ozempic®, Wegovy®, Zepbound®) constitutes one of the major developments of the last two years. In the United States, according to NewBeauty, 40% of patients on GLP-1 are new entrants who have never used aesthetic medicine, and 60% of clinics now offer specific services related to the post-weight loss effects of GLP-1.

These treatments generate increased demand for skin tightening, facial volume restoration and body contouring treatments. The first signals are appearing in Europe, opening the way to new synergies between pharmacology, aesthetics and well-being.

LONGEVITY AND PERSONALIZATION: TOWARDS AN INTEGRATED AND CUSTOM MADE PATIENT EXPERIENCE

According to data from Boston Consulting Group, the boundaries between aesthetics, global health and longevity are blurring: 72% of patients wish to access these services within the same establishment and 76% expect a personalized care plan, while only 52% of practitioners offer it today.

Professionals integrating digital tools and AI-assisted analysis are transforming the patient experience and optimizing their consultation processes, confirming the key role of technology in the sector's evolution.

INNOVATION AND CONSOLIDATION: AN INDUSTRY IN RECOMPOSITION

The year 2025 confirms a double dynamic: acceleration of product innovation and market consolidation. Launches of new toxins and fillers are multiplying, while major beauty groups are strengthening their presence in medical aesthetics. This growing convergence between cosmetics, aesthetic medicine and pharmacology raises questions about future vertical integrations, notably around GLP-1 treatments and global care offers.

NEWS AMONG INJECTABLES

Galderma, leader in the injectable market with Allergan Aesthetics, has launched its new liquid botulinum toxin Relfydess® in Europe, resulting from its own research. At the same time, the toxin Letybo®, developed by the Korean manufacturer Hugel, was launched in the United States, after obtaining regulatory authorizations in China and Europe.

In 2025, Croma-Pharma obtained approval in the American market for a first product in its Saypha® hyaluronic acid gel range. This product will be marketed in the United States by Waldencast.

Finally, SYMATESE, in partnership with Evolus, launched two hyaluronic acid products in the United States last April, developed from the proprietary COLD-X TECHNOLOGY by SYMATESE®. The complete range will be launched after Imcas in Europe, followed by Brazil and then China.

A SUSTAINABLE STRUCTURAL TRANSFORMATION

"Driven by very active research and development, the emergence of new patient profiles and a wave of innovative product launches, companies continue to support the sector's growth," emphasizes Laurent Brones, Director of Corporate Communication & Alliances at Symatese.
L'Oréal's recent announcement, increasing its stake in Galderma from 10 to 20%, clearly illustrates the market's attractiveness. It follows the strategic investment initiated in 2024 and testifies to the ambition to sustainably strengthen their partnership with Galderma. L'Oréal also acquired Medik8 in June 2025.

The year 2025 was also marked by the acquisition of Revance Therapeutics by Crown Laboratories, the new entity keeping the Revance name, as well as by the takeover of Novaestiq by Waldencast with the acquisition of the American rights to the Saypha® injectable hyaluronic acid gel portfolio.

These developments are part of an accelerated consolidation dynamic, marked by the entry of new players - in particular premium beauty groups and investment funds - attracted by the sector's long-term structural growth prospects.

The aesthetic market is thus entering a phase of strategic convergence, characterized by the progressive blurring of boundaries between medical dermatology, aesthetic medicine, cosmetics and skin care. This dynamic favors the emergence of integrated ecosystems combining medical acts, products, well-being and longevity solutions, with structuring effects on the value chain. In parallel, the rise of GLP-1 based weight loss treatments is increasingly closely linked with traditional aesthetic protocols, leading to a recomposition of adjacent segments and opening new opportunities for growth, revenue diversification and market consolidation.

ABOUT IMCAS

Launched in 1998, the IMCAS World Congress is the leading global annual meeting for physicians and professionals in dermatology, plastic surgery and aesthetic treatments. This congress, which has become one of the most important medical congresses in France, welcomes more than 20,000 participants from all over the world for three days of exchanges on scientific and medical innovation, led by the world's leading experts.

METHODOLOGY

The data presented in this release are based on cross-analyses from IMCAS, Boston Consulting Group (BCG) and Cetas Healthcare Intelligence. They are supplemented occasionally and where mentioned by ISAPS statistics as well as studies from Arcane Research and NewBeauty.

Scope: global market for dermatology, surgery and aesthetic medicine. 2025 data and 2025-2030 projections. Percentages are approximations.

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