

## **EMERGENTSKY RUSSIA AESTHETIC MEDICINE MARKET REPORT JUNE 2014**

### **2013 Russia Aesthetic Medicine Market Report Overview and Objectives**

Emergentsky's 2013 Russia Aesthetics Medicine Market Report examines the Russian market for aesthetic treatments including aesthetic plastic surgery and the most popular non-surgical aesthetic procedures such as facial line correction with BT/DF injections and biorevitalisation, skin and hair removal laser treatments, rejuvenation and lifting treatments

The key objective is to provide a comprehensive analysis of the current status of aesthetic treatments market in Russia in terms of the growth and size of its main segments, local market structure and key players.

The report results are based on research conducted by the Russian team of EmergentSky in 2014 that included

- In-depth review of all local market reports and data available
- In-depth interviews with market experts and aesthetic product distributors such as Russian Association of Cosmetologists, National Alliance of Dermatologists and Cosmetologists, Beauty industry analysts, National association of Mesotherapy, distributors of aesthetic products and medical devices like dermafillers and lasers
- Survey among a sample of plastic surgery and aesthetic medicine clinics and practitioners (both top most renowned and smaller less popular) in Moscow, St Petersburg, Nizhnij Novograd, Vladivostok, Ural, Samara, Tver and Krasnodar

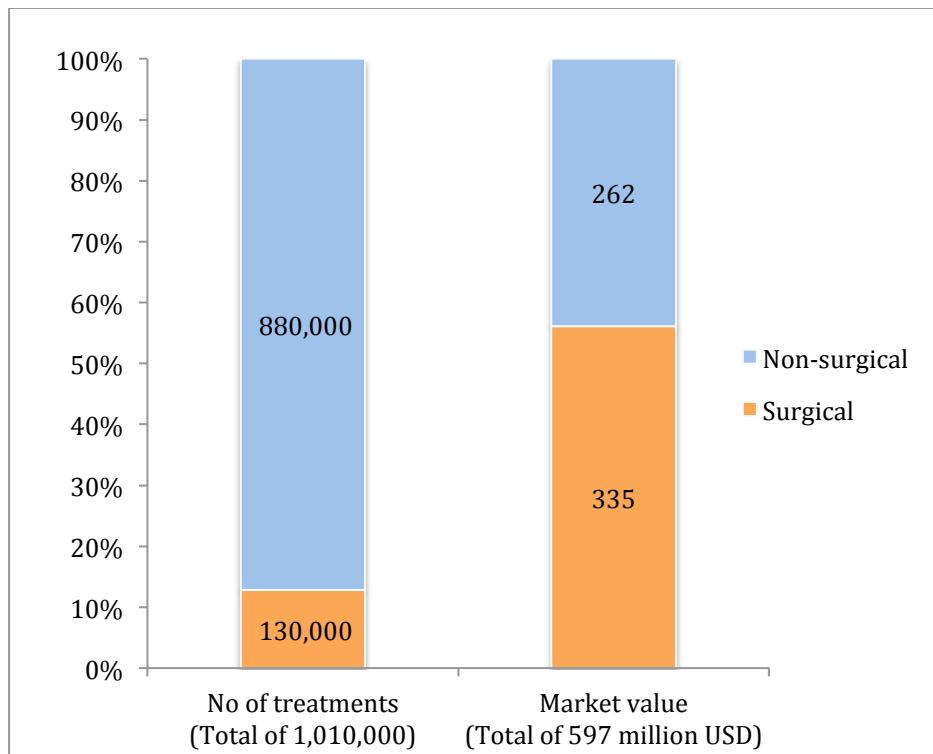
### **2013 Russia Aesthetic Medicine Market Report Summary Overview of the Russian Aesthetic Treatment Market in 2013**

The Russian market of aesthetics has historically been difficult to quantify due to a lack of official bodies to regulate the market and, therefore, accurate statistics.

In 2010, Russia was ranked 14th in the worldwide aesthetic medicine market by the International Society of Aesthetic Plastic Surgery (ISAPS)

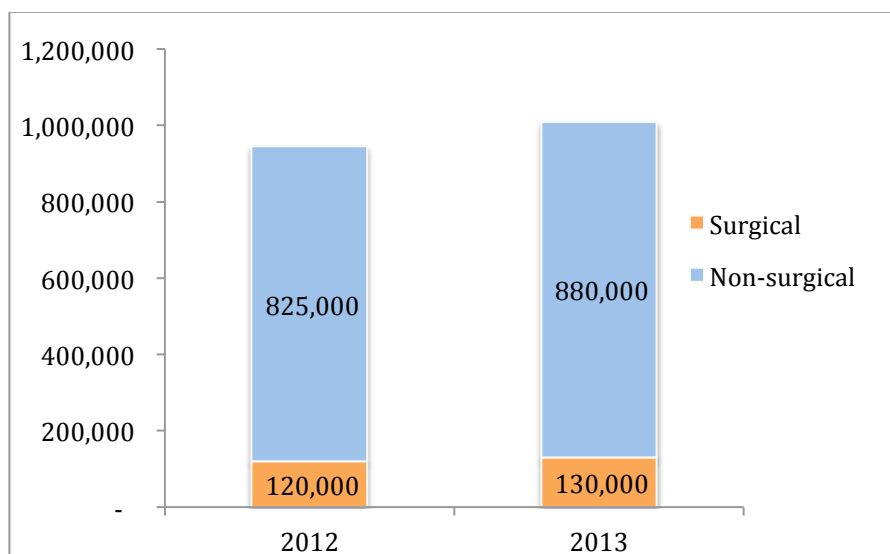
Based on EmergentSky's study conducted in 2014, the total Russian market for aesthetic surgical and non-surgical treatments in 2013 was estimated at nearly 600 million USD with over a million of aesthetic treatments performed. While 880 thousand of aesthetic treatments were non-invasive and 130 thousand plastic surgeries were performed, the plastic surgery market accounted for over 55% of the overall Russian aesthetic market value (335 million USD) and the non-surgical was valued at 260 million USD.

*Table 1 – Market Data at a Glance: Aesthetic treatments in 2013 (number of treatments and value in million USD)*

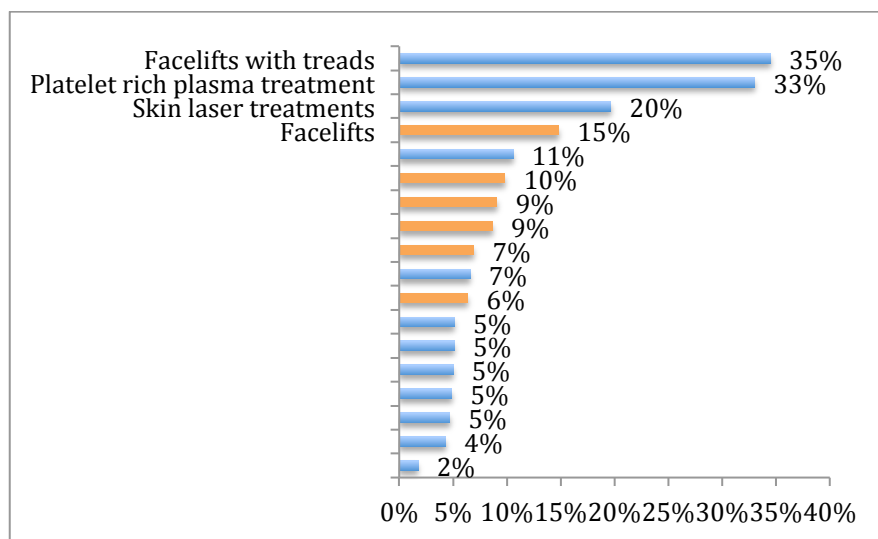


The overall market growth in 2013 was 7%, lower than previous years double-digit growth, with plastic surgical procedures growing at over 8% and non-invasive aesthetic treatments at over 6%. Facelifts and eyelid procedures were growing the fastest among plastic surgeries, while facelifts with threads, PRP and skin laser treatments among non-invasive procedures

*Table 2 – Aesthetic market growth 2012-2013*



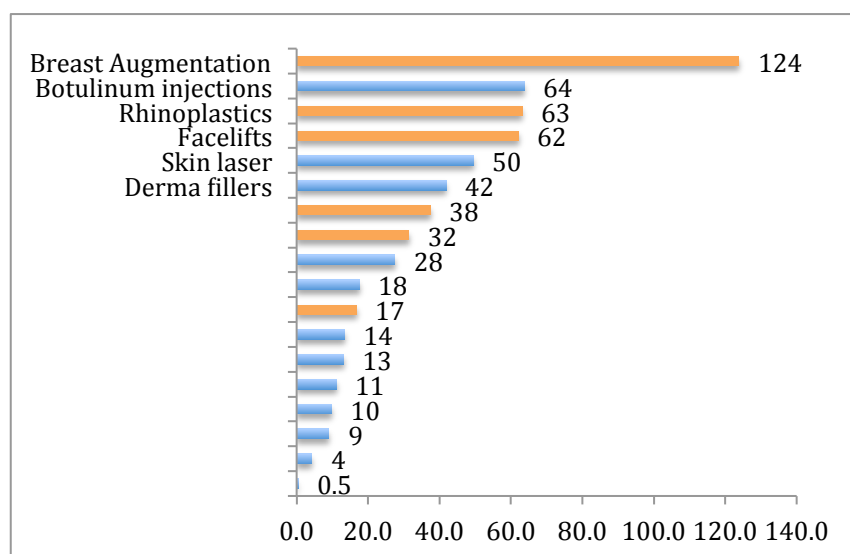
*Table 3 – Examples of aesthetic market treatment growth 2012-2013*



Out of 130 thousand plastic surgeries performed in Russia in 2013, the most popular surgeries remain breast augmentation, eyelid surgery and nose reshaping. Among 880,000 non-invasive treatments, the top treatments performed by physicians are facial line corrections treatments (with botulinum injections, mesotherapies, derma fillers and biorevitalisation), skin laser resurfacing and permanent hair laser removal.

In terms of market value, the highest contributors to revenues of aesthetic clinics and practitioners are breast augmentation, nose reshaping and facelifts among plastic surgeries and botulinum injections, skin laser treatments and derma fillers among non-surgical aesthetic treatments

*Table 4 – Aesthetic treatment market value in 2013 (in million USD)*



The future growth of aesthetics surgical and non-surgical market is mainly driven by the growth of regions, facilitated by increasing number of qualified physicians, currency exchange rate and the influx of the well-established players to the region.

While the market is expanding fast, there is a shortage of qualified surgeons and physicians that are able to offer high quality standards. As a result, professions in the field plastic surgery and the cosmetology are changing and evolving and changing in terms of training and certifications. Furthermore, the universe of facilities is ranging from beauty salons to specialized clinics and individual practices have been historically hard to quantify with the changing regulation amendments and the regional growth. EmergentSky's report provides among others an overview of the aesthetic practicing physician and facilities (surgical and non-surgical) universe in Russia including type and estimated number of physicians/ facilities performing aesthetic surgical and non-surgical treatments

### About EmergentSky Consulting Services

EmergentSky is a boutique strategy consulting and research services provider with expertise in Emerging Markets. We provide support to companies seeking to participate, invest and accelerate business growth in the most dynamic economies and growth sectors in developing markets. With track record of 60+ projects in Emerging Markets, **EmergentSky** consulting team is specialized in dealing with developing-country environments, related challenges and business dynamics.

**EmergentSky** capabilities and resource networks cover emerging markets like: CEE / SEE countries; Russia & Ukraine, CIS, Asia (India & China) and South America (Brazil)

We have worked extensively in the pharmaceutical industry segment including multiple consulting projects in aesthetics segment for leading industry players. Some of our recent and relevant projects include

- **Eastern Europe market sizing and potential evaluation for an aesthetic medicine company** (Poland, Russia, Ukraine, Czech Rep, Romania, Hungary, Bulgaria, Turkey and the Baltic countries)
- Understanding and benchmarking **of competitors' strategy and operational set-up in Eastern Europe, India and China** for a **US medical device manufacturer**
- Assessment of **Russian market expansion** opportunity and commercial due-diligence of an Ukrainian pharmaceutical CNS manufacturer

**For more information on the EmergentSky's 2013 Russia Aesthetic Market Report contact:**

**ANNA TEPLIAKOVA**  
MANAGING PARTNER  
PHONE: +44 7796 00 59 20  
E-MAIL: [ATEPLIAKOVA@EMERGENTSKY.COM](mailto:ATEPLIAKOVA@EMERGENTSKY.COM)

**DANILO POLYAKH**  
SENIOR PROJECT ANALYST  
PHONE: +7 926 229 6344  
E-MAIL: [DPOULYAKH@EMERGENTSKY.COM](mailto:DPOULYAKH@EMERGENTSKY.COM)

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