INTRODUCTION

✓ Aesthetic Medicine Market
A presentation on what cosmetic brands should know about the aesthetic medicine market.
Who’s doing it?
What are the growing procedures?
**Speaker: Emmanuelle Bassmann – In-Trend Ltd**
Managing Director – [www.in-trend-ltd.com](http://www.in-trend-ltd.com)
25 minutes

✓ Case Study: Filorga
A real case example with Filorga - a pioneer laboratory in skin aging (mesotherapy, dermal fillers and peels, cosmetics, etc) which brought mesotherapy into cosmetics.
**Speaker: Bérengère Boucly – Filorga Marketing Director**
[www.filorga.com](http://www.filorga.com)
25 minutes
WHO IS DOING COSMETIC MEDICINE?
The market is dominated by women
More than 90% are women.
In the US around 7% of patients are men.

Age group 25-70's with a median around 50's
The age group is widening with increasing numbers of patients in their mid twenties and at the other end of the spectrum in their 70’s, but the majority are in their 40’s and 50’s.

Younger patients
Dr Amy Wechsler in NYC sees increasing numbers of 20 to 30 year olds and her average patient is 35. “I think part of it is that it is being marketed to them and they hear about it earlier in life. And part of it is that they are working so hard and burning the candle at both ends for so long that they are starting to see signs of stress and aging on their skin earlier. Plus the younger women are still tanning and smoking, so that is also hurting them. And they hear that they can undo it, so they still tan and smoke and then come in for anti-aging.”
• Libby, a 30-year-old writer, has been having Retin-A, peels and microdermabrasion since she was 23.
• Jennifer, a 29-year-old architect, has been having preventive Botox twice a year for two years.
BOTOX GENERATION

Younger patients approve of cosmetic surgery
Men and women aged 18-24 have the highest approval rating for cosmetic surgery. According to a February 2008 report of 1,000 teens and young adults aged 18+, 69% are in favor of cosmetic surgery. Men and women aged 65+ have the lowest approval rating of cosmetic surgery at 41%.

Study commissioned by ASAPS

Baby Boomer ++
60 will become the new 40 and 80 the new 60. Baby boomers who regularly treat their skin will continue to do so and aren’t afraid to have cosmetic procedures even later in life according to many US dermatologists.

Secretary to CEO
Visiting a doctor’s office is not the preserve of the rich, but is more prevalent in the corporate world as people strive to stay younger looking in the workplace. Women and men alike going through big life changes such as divorce feel that they can increase their confidence by improving their appearance.
5-10% of the US population has had cosmetic treatment

Only 5% of women use HA dermal fillers
At IMCAS 2011, Q-Med (one of the global leaders in dermal fillers) revealed statistics on the size of the dermal fillers market. 5% of women use HA dermal fillers → 95% of women do not respond to them. 10% are passive considerers
15% refuse to use them due to lack of knowledge
70% are not interested at all

→ Q-Med is now targeting “the cream consumers”
PROCEDURES

Landscape of the US Aesthetic Medicine Market
Statistics
Corrective Procedures
Preventive Procedures
Market is growing outside doctor’s offices

**DOCTORS OFFICES**
- US: 18,000 dermatologists & plastic surgeons
- Cosmetic dermatology + Plastic surgery
- Facial rejuvenation (Injectables + peels + mesotherapy)
- More invasive body contouring (lipo)
- Skin tightening procedures (lasers & facelift)
- Cosmeceuticals & Rx

**MEDICAL SPAS**
- US: 2,500
- Aesthetic Enhancement /Wellness / Prevention / Anti-Aging
- Medical-grade cosmetic enhancements
- Botox & injectable fillers
- Microdermabrasion
- Laser skin treatments
- Cosmeceuticals & Rx

**SPAS**
- US: 20,600
- Day spas & Resorts
- Cosmeceuticals & Rx
- Peels
- Microdermabrasion
- Laser skin treatments: LLLT (LED)
The Botox Generation is into non-invasive procedures
Surgical procedures represent 18% of the total
Non-surgical make up 82% of the total
Plastic surgery was down 20% in 2010
Source ASAPS

Top 5 procedures
Botox – 30% (2.5 million procedures)
Fillers – 15% (1.3 million procedures)
Laser hair removal – 15% (1.3 million procedures)
Microdermabrasion – 7% (621,943 procedures)
Chemical peels – 6% (529,285 procedures)
Source ASAPS

Skincare maintenance programs are on the rise
Most dermatologists and plastic surgeons put their patients on a skincare regimen.
80% of patients will follow an at-home skincare maintenance program.
Procedures do not stand alone and require maintenance.
“Without proper care the skin will wind up right back where you started.”
Dr. Mary Lupo, US.
According to a practice survey from Medical Insight Inc (California) in April 2010 the third most popular treatment is topicals (prescription-only HQ, retinol etc).
“I am a big proponent of maintenance of skin through home skin care, sun protection, chemical peels and microdermabrasion to help skin look its best, with improved luminosity, clarity, and texture,” Dr. Bansal, UK.

Doctor’s goal is that every patient does both

Preventive procedures are as important as corrective procedures
Botox was first FDA-approved in 2002 and has been used since the 1990’s.
Botox is loved by over 95% of patients. It has a high level of efficacy and most wrinkles on the upper third of the face can be at least 80% eradicated. Botox takes 4-7 days to kick-in.
It is most commonly injected in the glabellar lines but also the forehead and crow’s feet.
Botox should be started early - it does not work if you start it too late as mimic lines will have turned into static wrinkles.
Repeat every 4 months.

Not everybody is ready for Botox
P&G British poll of 20,000 women: Would you consider having, or have you had, any of the following anti-aging treatments?
67% would choose anti-aging facials
43% microdermabrasion
27% facial peels
25% laser re-surfacing
24% cosmetic surgery
21% Botox - the least popular score

“As a plastic surgeon, in my view Botox is unrivalled at reducing wrinkles, particularly for expression lines on the forehead. But real women count Botox less and less important, considering modern treatments like lasers softer and more cutting edge” adds consultant Plastic Surgeon Nick Percival
The first volume dermal fillers were collagen. The first HA dermal filler with Restylane was introduced in 1996. It is the most popular procedure to fight loss of volume. They are most commonly injected into the cheek area and nasolabial folds. HA-based dermal fillers such as Restylane and Juvederm are the most commonly used. HA dermal fillers are also very popular among users. Most people who try it come back, with money being the main barrier if not.

There is also another category of more permanent volumiser products such as Sculptra (poly-L-lactic acid) and Radiesse (calcium hydroxylapatite) which work by increasing skin thickness by stimulating the body to produce new collagen.

→ A growing category = Skin Revitalization HA Injections

A growing trend in HA dermal injection is the injection of non-stabilized HA (lighter gel) in the upper dermis to create a glowing complexion. Q-Restylane Vital and Restylane Vital Light from Q-Med are two leading skinboosters products on the market. By replenishing hyaluronic acid under the skin, it restores hydrobalance and improve the structure and elasticity of the skin.
PROCEDURES

Botox and Fillers = star combination
Liquid Lift
75% of patients will get a combination of Botox for the upper face and fillers for the lower – Botox for the wrinkles that move and fillers for the static wrinkles that are more about volume loss.

Anti-aging facials combined with multi-procedures
Doctors and medical spa alike are offering packages.

The Facial Revolution at EF Medispa in London: combines RF (radio-frequency), hydrating facial, chemical peel, injectables and an at-home regimen.
Lasers and light devices are the third most popular corrective procedure

Lasers treat:
- Surface of the skin: pigmentation, texture & skin tone
- Wrinkles

Lasers and light devices (IPL, RF and Ultrasound) stimulate collagen growth and improve skin texture and tone.

IPL is the most commonly used laser to remove sun spots and melasma as well as red discoloration (rosacea).

Fractional lasers are the most commonly used for wrinkles and skin tightening with the formation of new collagen.

➔ One of the growing trend is low energy lasers with fewer side effects and less downtime but they require more than one session.
99% of cosmetic dermatologists and plastic surgeons give recommendations for over-the-counter products as well as physician-dispensed products.

**Skincare and topicals are the number one maintenance procedure**

“85% of my clients coming to see me for lines, wrinkles and hyperpigmentation are put on a cosmeceuticals regimen program” Dr. Zoe Draelos, US.

**A written prescription**

“Every cosmetic patient goes home with an individual skincare plan developed by me and in writing. This includes what exactly to use in the morning, evening, make-up, sun protection recommendations etc.” Dr. Stefanie Williams, UK.

**Doctors sell more and more products**

Average rate of purchasing products in doctor’s office is around 20-30%.

Doctors even sell directly from their own websites: [www.eudeloboutique.com](http://www.eudeloboutique.com) is Dr. Stefanie Williams’ own retail website.
Cosmeceuticals to maintain cosmetic procedures
“Doctors are repeating to their patients that a good cosmeceutical regime is absolutely key” Dr. Jennifer Linden, US. Without good skincare the effects of Botox and fillers are lost.

Goals of Prescribed skincare
• Improve tolerability of retinoids
• Hydrate
• Repair the epidermal barrier
• Anti-inflammatory action
• Brighten skin color
• Reduce redness

Cell protection am and cell turnover pm
Dr. Sadick, renowned NYC dermatologist who published a book on cosmeceuticals, put all his patients on the following regimen:
  x Cell protection in the morning with hydrating and protecting agents (antioxidants and sun blockers).
  x Cell turnover at night with turnover agents, cell stimulants and anti-inflammatory agents depending on their particular skin problem.
PROcedures

Cosmeceuticals VS Procedures

✓ Cosmeceuticals vs HA dermal fillers (bio-revitalization)
   Work to fight dehydration wrinkles
   Cosmeceuticals = topical filler to reduce appearance of fine lines and wrinkles.
   CosMedical Nutra Fill NMF Booster

✓ Cosmeceuticals vs 4% HQ Prescription cream
   Work to address hyperpigmentation
   Clinique is pitching its new product against the universal prescription treatment 4% HQ for treating sun spots. After six weeks, the results on evening out a blotchy skin tone were shown to be exactly the same.
   Clinique Even Better Clinical Dark Spot Corrector

⇒ Cosmeceuticals will replace some procedures in the future
   “Microdermabrasion is not crucial. Chemical peels might help, but if you want to choose just one, definitely daily cosmeceuticals rather than a one-off chemical peel” Dr. Stefanie Williams, UK.
Physician-dispensed brands in both
the UK & US

Filorga
PH Advantage
Glymed Plus
Skinceuticals
Neutrogena Clinical
IS Clinical
Kinerase
GoodSkin Labs
Strivectin
Dr. Nick Lowe
Dermaquest
DDF
NIA24
Cosmedix
SkinMedica
GoodSkin Labs
Jason Beckett
Clinique Medical
DermaCeutic
Olay Professional
La Roche-Posay
Avène
Glytone
**PROCEDURES**

**IPL is a popular maintenance procedure**
IPL is the most common laser used in many doctor’s offices as it’s a global rejuvenator. It is an excellent entrance light source treatment both to reverse type one photoaging and to simulate collagen production. It helps pigmentation, redness, dischromia, flushing blood vessels, open pores and fine lines. 5 or 6 treatment sessions are needed for pigmentation and one or two treatments a year are needed for fine wrinkles.
People over 60 are often less concerned with sun damage because they were heavy sun worshippers. Younger generations know more about sun damage and photo damage. Young people are more interested in this regime.

**Peels and microdermabrasion are also top maintenance procedures**
Resurfacing the skin with both peels and microdermabrasion can produce a myriad of improvements. Depending on strength the treatments are preventive as well as corrective.
Blended chemical peels (a combination of different peeling agents and skin lightening ingredients) treat many patients who suffer from more than one skin condition and are one of the best procedures to give dewy, glowing skin with improved clarity and luminosity.
Hydro-dermabrasion = the hottest microdermabrasion at the moment
Doctor’s offices and medispas are investing in hydra-dermabrasion machines (HydraFacial or JetPeel). It’s the newest advance in non-laser skin resurfacing and has a big advancement on microdermabrasion and chemical peels alone as not only resurface the skin but bathes the skin with hydrating and a cocktail of anti-aging actives. Many package treatments will finish the treatment with LED light.

www.hydrafacial.com/
PROCEDURES

Skin needling is a growing maintenance treatment, especially in Europe and Asia.
It prevents aging, stimulates collagen production and improves overall skin quality.

LLLT (with LED) is another growing treatment.
Commonly used to treat mild photoaging, mild wrinkles, scarring, acne, general skin inflammation and to promote wound healing and is a technology which is coming to the home.

LLLT & Skin rejuvenation:
Improve photoaging: brown and red discoloration
Improve texture of the skin and pores
Improve fine lines and wrinkles.
Improve complexion
Carboxytherapy is also a growing preventive treatment

Carboxytherapy is the administration (injection) of carbon dioxide CO2 gas for therapeutic reasons. It is injected just under the surface of the skin to treat the following conditions:

• Dark circles & lifting eyelid
• Facial rejuvenation
• Décolleté & fine lines

It’s a very versatile treatment to stimulate your own cells. It reduces fluid build-up between cells, stimulates collagen production and boosts circulation – improving skin tone and elasticity.
CONCLUSION

✓ Small low level procedures are the future on Aesthetic Medicine  The new trend is to start gradually at a younger age with low level procedures such as light chemical peels, microdermabrasion and low laser such as IPL to avoid spending more money later on procedures.

✓ Explosion of At-Home Regimen

In-office aggressive treatments have started to be challenged by at-home treatments with low daily-dose energy. These treatments have fewer side effects, minimize recovery times, and can deliver safer and better results in the long term.
In-Trend Ltd

In-Trend Ltd is an ultra-specialized trend and innovation consulting agency. Its expertise is with anti-aging in cosmetics, aesthetic medicine and anti-aging medicine in Europe and North America.

Anti-Aging Conferences:
We attend and report back from more than 10 worldwide conferences and symposiums on anti-aging medicine and aesthetic medicine each year.

Syndicated Report & Customized report available in 2011
2010-2013 Aesthetic Medicine Worldwide Report
Anti-Aging Skincare Report
Anti-Aging Makeup Report
Medical Spa & Spa Trend Report

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FILO ORGA

Beauty of the future
Major player for anti-ageing injections
- French laboratory founded in 1978
- Pioneer in anti-ageing injectable solutions
- Manufactures anti-ageing injectable medical devices
- For the greatest specialists of aesthetic medicine and surgery

Our position on the market
- A development axis historically based on innovation and advanced research on cutaneous ageing.
- Leader on the mesotherapy market
- A major player of medical anti-ageing
- New actor on the anti-ageing dermo-cosmetics market since 2007
COMPLETE ANTI-AGEING THERAPY
A unique know-how

DERMAL FILLER

MESOTHERAPY

PEELS
AESTHETIC MEDICINE

A MAJOR TREND IN TREATING AGEING SIGNS
AESTHETIC MEDICINE
in doctors' office

Peels

Light

Injections

Laser
<table>
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<tr>
<th><strong>DERMAL FILLERS</strong></th>
<th><strong>MESOTHERAPY</strong></th>
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<tr>
<td>Mechanical correction</td>
<td>Biological action</td>
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<tr>
<td>Correct visible signs</td>
<td>Correction and prevention of ageing signs</td>
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<tr>
<td>Resorbable</td>
<td>Act globally on skin quality</td>
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<td></td>
<td>Long-term results on skin capital</td>
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ORIGINS OF MESOTHERAPY
A French discovery

Medical technique invented by Dr Pistor in 1952
« Inject few at the right place »

> 1964: creation of the 1st French society of mesotherapy
> 1976: 1st international mesotherapy congress
> 1981: mesotherapy and sport medicine
> 1989: 1st university diploma of mesotherapy
> 2003: 5 university diplomas in France
INTERNATIONAL expansion

Top 5
> France
> Spain
> Italy
> Russia
> China
PRINCIPLES
of anti-ageing mesotherapy

Multiple micro-injections of an active solution

Objectives
Skin rejuvenation through injection of revitalizing solution

Restructuration of the cutaneous tissue thanks to the biological stimulation of the fibroblasts

Target: dermis
PRECISE QUANTITY OF ANTI-AGEING ACTIVE INGREDIENTS,

FORMULA MADE TO IMPROVE THE DIFFERENT BIOCHEMICAL REACTIONS OF THE ECM.

YALURONIC ACID

ESSENTIAL REVITALIZING FAMILIES:

12 VITAMINS to stimulate the vital functions of cells.
23 AMINOS ACIDS to improve the proteinic synthesis
6 COENZYMS to improve the cutaneous metabolism.
5 NUCLEIC BASIS to reinforce the cellular communication
4 MINERALS to make up for ionic deficiencies of ECM
1 ANTI-OXIDANT to fight against the free-radicals
INNOVATION
At the core of development

NCTF

■ 1st mesotherapy polyrevitalizing solution
■ CE mark (2006)
■ 1st ready-to-use kit, for more safety
■ More than 1,5 millions patients
AREAS TO INJECT
Face and delicate areas

• Face
• Neck
• Decollete
• Back of hands
PROTOCOLES
Cumulative and progressive

5-session treatment for long-term results
RESULTS
Natural and visible

Radiance
Hydration
Firmness
Tonus and elasticity
Treatment of fine wrinkles
CLINICAL RESULTS
In vitro and in vivo

**IN VITRO**
- Fibroblasts stimulation: +147%
- Anti-free radical protection: +90%
- Collagenic redensification: +256%
- Slowdown of tissular rigidification: +366%

**IN VIVO**
- Attenuation of wrinkles and fine lines: +72%
- Skin tonicity reinforcement: 103%
- Radiance improvement: 144%
- Hydration improvement: 132%

*Tests obtained with 5-session treatments*
OTHER INDICATIONS

Body

> Cellulite

> Alopecia
### FUTURE OF MESOTHERAPY

Imagine...

<table>
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<tr>
<th><strong>Product</strong></th>
<th><strong>Injection technique</strong></th>
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<tr>
<td>Target stem cells</td>
<td>Injection without needle</td>
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<tr>
<td>Inject stem cells</td>
<td>Pen injector</td>
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<tr>
<td>Time-release active ingredients</td>
<td>New devices</td>
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COSMESOTHERAPIE

The first French line of dermo-cosmetics directly issued from AESTHETIC MEDICINE
2007 : COSMESOTHERAPIE

ASSOCIATING THE STRENGTHS OF 2 UNIVERSES

ULTRA-PERFORMING CARES FOR EVERYONE
To make available to the public the performance of anti-ageing treatments usually reserved for few fortunates, regular attendants of the aesthetic medicine doctors’ offices.
To offer to everybody the technicity and the performance of medical anti-ageing treatments.

ASSOCIATION OF THE STRENGTHS OF 2 UNIVERSES :

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<th>COSMETOLOGY</th>
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<td>EFFICIENCY</td>
<td>PLEASURE AND SIMPLICITY OF USE</td>
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<td>ULTRA-PERFORMING INGREDIENTS</td>
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LABORATOIRES FILORGA PARIS
INNOVATION by FILORGA:
Mesotherapy without needles
INJECTION-LIKE DIFFUSION
CHRONOSPHERES
VECTOR OF THE MESOTHERAPY WITHOUT NEEDLES

MICROSCOPIC VECTOR WITH PROGRESSIVE LIBERATION
Exclusif : result from a patented discovery by the French CNRS

MICROSCOPIC-SIZE SPHERES (0,1 µm )
Ease the ingredients’ penetration and enable a diffusion like diffusion

MULTI-LAYERS SPHERES
(SEVERAL HUNDRED LAYERS)
For a progressive release of the ingredients
CHRONOSPHERES OF NCTF
THE RED THREAD OF THE LINE

All the products of the Cosmésothérapie contain progressive release chronospheres which include:

- **NCTF**
  Poly-revitalizing cocktail of 55 ingredients, certified copy of the formula used in mesotherapy
- and **HYALURONIC ACID**
  1 high molecular weight hyaluronic acid
  Identical to the one injected in medical aesthetic treatments

SAME FORMULATION, SAME CONCENTRATION.
TARGETED RANGE

Ultra-performing
COSMESOTHERAPIE

15 REFERENCES – A TARGETED RANGE
BEST SELLERS

24H SKIN CARE
SKINCARE

INSPIRED BY AESTHETIC MEDICINE

DERMAL FILLER
Hyaluronic acid to fill wrinkles

DERMAL WRINKLE PLASTER
Microspheres of dehydrated hyaluronic acid

LABORATOIRES
FILORGA
PARIS
SKINCARE
INSPIRED BY AESTHETIC MEDICINE

GLYKOPEEL
Dermatological peel
Glycolic acid peel in 4 steps

MESO-PEEL
Home peel
Cocktail of 6 fruit acids in 3 steps
5 sessions / one per week
SKINCARE

INSPIRED BY AESTHETIC MEDICINE

**NCTF**
Medical anti-ageing mesotherapy solution
5 sessions spaced out by 15 days

**MESOTHERAPIST**
Home mesotherapy
Association of micro-needles and a sterile solution of NCTF
3-week treatment
MESOTHERAPIST – Cellular stimulation program
POST PROCEDURE
SKINCARE - INTERVENTIONAL

NEOCICA
Post peel, laser, injections

MESO-WHITE
Flash depigmenting