

# BE CEUTICALS

Anti-Ageing treatments in  
Emerging market  
one example ?



INNOVATE YOUR SKIN

*Conthey-Sion, PhytoArk, Oct-15th 2*

*Advanced Aesthetics Resea*



# AESTHETIC MEDECINE

## **1) OUR CONCEPTION OF ANTI-AGING MARKET**

***A MAJOR TREND IN TREATING AGEING SIGNS***

REFILL, TREAT, REJUVENATE THE SKIN

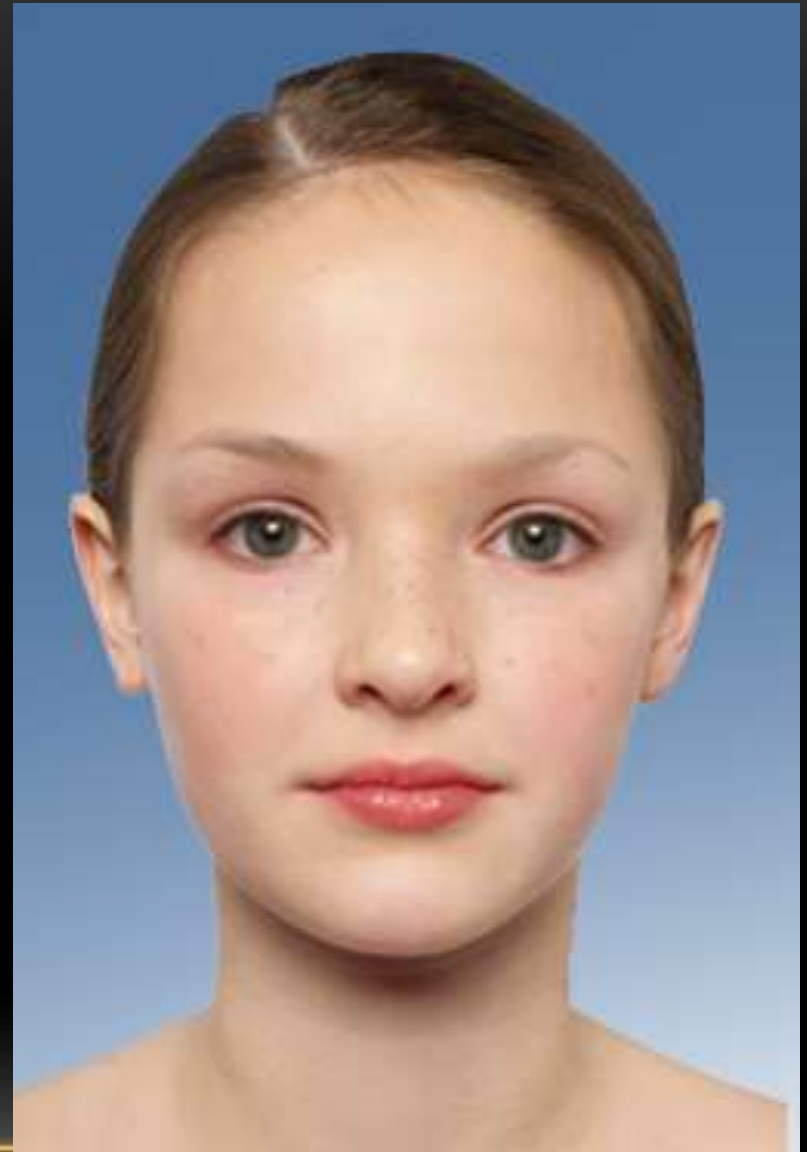
*A MAJOR TREND IN TREATING AGING SIGNS*

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# Facial Aging

Common signs of facial aging:

- Thinning of dermis
- Greater visibility of bony landmarks
- Hollowing of the cheeks
- Descent of facial fat pads and deepening of nasolabial folds
- Thinning of lips
- Descent of the corners of the mouth
- Ptosis of nasal tip
- Decreased support of the lower third of face



# INTERVENTIONS (1)

## Procedure

- Botox injection*
- Hyaluronic acid (Hylaform, Restylane) (TF)*
- Laser hair removal
- Microdermabrasion*
- IPL laser treatment (FR)*
- Chemical peel*
- Laser skin resurfacing*
- Sclerotherapy
- Noninvasive tightening (FR)*
- Laser treatment of leg veins
- Fraxel (FR)*
- Calcium hydroxylapatite (Radiesse/Radiance) (TF)*
- Collagen (TF)*
- Autologous fat (TF)*
- Injection lipolysis
- Poly-L-Lactic Acid (Sculptra) (TF)*
- Dermabrasion*
- Polymethyl Methacrylate (Artecoll, Artefill) (TF)*

## No. procedures

- 2,775,176
- 1,448,716
- 1,412,657
- 829,658
- 647,707
- 575,080
- 509,901
- 471,639
- 258,235
- 182,093
- 167,351
- 119,397
- 63,769
- 44,547
- 36,056
- 34,972
- 32,968
- 12,075

Note: FR = facial rejuvenation, TF = tissue filler

From American Society for Aesthetic Plastic Surgery,

## Total Nonsurgical Procedures

9,621,999





# AESTHETIC MEDECINE

## 2) MARKET AND POSITIONNING IN ANTI AGING

*A MAJOR TREND IN TREATING AGEING SIGNS*

INNOVATE YOUR SKIN



## BOTOX GENERATION

## WHO IS DOING IT?

### 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

## WHO IS DOING IT?

### **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.



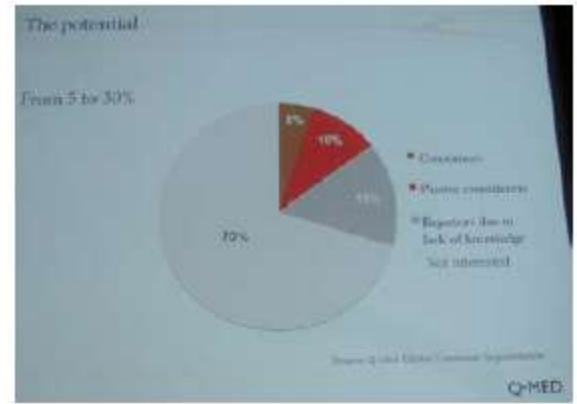
## BOTOX GENERATION

## WHO IS DOING IT?

**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

## PROCEDURES

## Statistics – US market

### **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).

## PROCEDURES

### Preventive topicals

**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.



**DERMA**  
SHOPPE

Renew • Replenish • Rejuvenate

## PROCEDURES

## Preventive topicals

### **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

## Preventive topicals

### 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.



# AESTHETIC MEDECINE

**3) BE CEUTICALS PRODUCTS – STRATEGY – MARKET – COMPETITORS**

***OUR STRATEGY IN FILLERS AND COSMECEUTICALS***

- INTRODUCING OUR NEWEST H.A. FILLERS AS MOST INNOVATIVE / SAFEST VOLUMIZING HA FILLERS LINE.
- CLAIMING SWISS MADE TECHNOLOGY.
- CAPITALISING ON THE FASTEST GROWING ANTI-AGEING TECHNIQUE USED IN AESTHETIC DERMATOLOGY COMBINED TO BOTOX.
- **IN PARTICULAR, COMMUNICATING ON :**
  - **THE SAFEST & PUREST H.A. MONOPHASIC DENSIFIED CROSS LINKED**
  - **(one ) THE MOST EFFICIENT IN VOLUMIZING H.A. FILLERS WITH H.C. 25MG**
  - **THE LONGEST EFFECT OVER 12 MONTHS (M.P. + 25MG)**

ESTABLISH THE BRAND STATEMENT:  
« **ADVANCED AESTHETICS RESEARCH** »



# STRATEGY DEVELOPMENT PRODUCT

RX.HA.25mg  
HYALURONIC ACID  
CROSS LINKED MONOPHASIC SODIUM HYALURONATE  
ultra deep

## AREAS TO INJECT

Face and delicate areas

- Face
- Neck
- Decollete
- Back of hands



## RESULTS

Natural and visible



- Radiance
- Hydration
- Firmness
- Tonus and elasticity
- Treatment of fine wrinkles



# HA FILLERS MARKET COMPETITORS

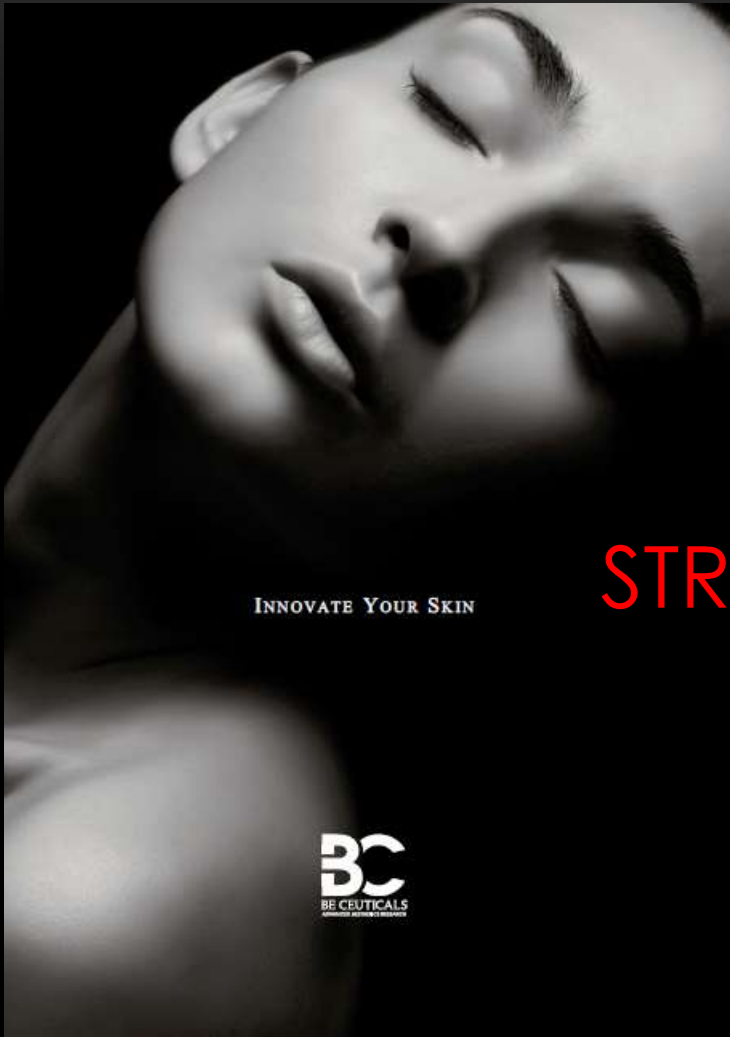
## THE MARKET



**MODELE B-C RX-HA 25mg/ml  
Ultra Deep**







INNOVATE YOUR SKIN



# STRATEGY COSMECEUTICALS



# STRATEGIC DEVELOPMENT FOCUSES



# STRATEGIC DEVELOPMENT FOCUSES

- **REAFFIRM THE COSMETIC RANGE'S UNIQUE POSITIONING:**

"THE FIRST THERAPEUTIC COSMETIC COMPLEMENT TO HA INJECTIONS DEDICATED TO AESTHETIC MEDICINE"

« REJUVENATION IN A BOTTLE!

- **CAPITALISE ON ALL THE TECHNIQUES USED IN AESTHETIC MEDICINE**
- **IN PARTICULAR, PREEMPT THE TECHNIQUE OF HYALURONIC ACID INJECTIONS, WHICH IS CURRENTLY THE MOST PROMISING.**

# STRATEGIC DEVELOPMENT FOCUSES

## - REDEFINE THE BRAND STATEMENT:

- REPLACE "COSMESOTHERAPIE" WITH A TERM THAT IS CLOSER TO THE IDEA OF "MEDI-COSMETICS" BETWEEN COSMETICS AND AESTHETIC MEDICINE
- MOST CONCENTRATED PRODUCTS THAT PENETRATE DEEPER
- FASTER, MORE VISIBLE, MORE POWERFUL EFFECTS VS. TRADITIONAL COSMETICS



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# STRATEGIC DEVELOPMENT FOCUSES

L.AA.15%  
L.ASCORBIC ACID  
PURE PREMIUM VITAMIN C

HA.5%  
HYALURONIC ACID  
PEPTIDES

L.AA.25%  
L.ASCORBIC ACID  
PURE PREMIUM VITAMIN C



L.AA.5%  
L.ASCORBIC ACID  
PURE PREMIUM VITAMIN C

CERAMIDES 1%  
CERAMIDES + RETINOL



THANK YOU VERY MUCH

Advanced Aesthetics Research

