

Saudi Arabia Aesthetic Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 85 pages | Mordor Intelligence

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Report description:

The Saudi Arabia aesthetic devices market is expected to register a CAGR of 6.7% over the forecast period.

The COVID-19 pandemic had a significant impact on the aesthetic devices market studied in Saudi Arabia. For instance, according to an article published by the Journal of Dermatology & Dermatologic Surgery in June 2022, the fear of transferring the infection to any home member is the main reason to avoid these cosmetic procedures in Saudi Arabia. Thus, the COVID-19 pandemic had a significant impact on the practice of cosmetic dermatology, eventually affecting the aesthetic devices market. However, as per the above source, generating well-structured safety guidelines to decrease the risk of unusual virus transmission in dermatology practice and creating financial incentives led to half of the participants (49.9%) showing interest in having cosmetic procedures 3 months after the COVID-19 pandemic is over. Therefore, the COVID-19 pandemic led to decreased demand for cosmetic procedures in the initial phase. However, the market is gradually stabilizing as COVID-19 cases are declining. Thus, an increase in cosmetic procedures is expected to have a significant impact on the Saudi Arabian aesthetic devices market over the forecast period.

The factors that are driving the market growth in the country include the rapidly increasing aging population, increasing obese population, increasing awareness regarding aesthetic procedures, and rising adoption of minimally invasive devices. For instance, according to the United Nations Population Fund report, in 2022, there are 4% of the total population belonged to the age group of 65 and above. Furthermore, according to the International Journal on Ageing in Developing Countries 2021, the older adult population in the Kingdom of Saudi Arabia will increase to 9.5% of the general population in 2035 and will reach more than 18% by 2050. Thus, with an increase in the aging population, the demand for aesthetic devices increases to rejuvenate their appearance, thereby driving the growth of the market.

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Additionally, cosmetic procedures are becoming more popular around the world, including in Saudi Arabia. For instance, according to the Ministry of Health 2021 report, there were 646 plastic surgeons available in the private as well as government sector in the Kingdom of Saudi Arabia. Furthermore, according to an article published by Bahrain Medical Bulletin in December 2022, the desire to have clear-looking, beautiful skin and a younger, appealing appearance were the most popular reasons given by patients seeking cosmetic treatments. Patients seeking laser treatment for pigmentation or erythema were mostly motivated by cosmetic concerns, such as the desire for clearer-looking skin that appeared more youthful and appealing, as well as the need to repair harm to their appearance. Those interested in treating brown spots or melasma and redness/spots and rosacea were driven to look good without makeup. The most prevalent reasons for liposuction, noninvasive fat removal, and cellulite treatment were cosmetic appearance and mental well-being. Thus, increasing awareness regarding aesthetic procedures is expected to drive market growth over the forecast period.

Thus, the studied market growth is attributed to the above-mentioned factors, such as the increasing aging population, increasing obese population, increasing awareness regarding aesthetic procedures, and rising adoption of minimally invasive devices, and the market is expected to grow significantly over the forecast period. However, concerns, the social stigma of these surgeries, and poor reimbursement scenarios have been restraining the market growth.

Saudi Arabia Aesthetic Devices Market Trends

Skin Resurfacing and Tightening Segment is Expected to Register Significant Growth Over the Forecast Period

Skin tightening is a non-surgical, minimally invasive process that uses an infrared light source to tighten skin by heating the collagen under the skin's surface, causing the skin to contract. It is used for the reduction of wrinkles, fine lines, and skin laxity. Skin tightening treatments for older age groups are designed to replenish lost essential proteins like collagen and elastin while reducing the visible signs of skin fatigue. Thus, an increase in the aging population is expected to drive segmental growth over the forecast period. For instance, according to the United Nations Population Fund report in October 2021, the proportion of older people aged 60 and above, both sexes, is expected to be 23.7% in 2050 in Saudi Arabia. Furthermore, according to United Nations data on World Population Prospects 2022, the projected population of older people in the country aged 60 and above in the year 2023 was 4.42 million, and it is estimated to reach 68.19 million by the year 2100. Thus, with an increase in the geriatric population, the demand for skin resurfacing and tightening increases, thereby driving the growth of the market.

Furthermore, with the increased life expectancy, there is a major increase in people asking for antiaging treatments, coupled with desiring flawless skin. For instance, according to an article published by the Journal of Family Medicine and Primary Care in January 2021, female patients and patients in the age group of 31 to 40 years are seeking skincare and antiaging therapy in Saudi Arabia. Thus, with the surge in antiaging treatment, the demand for skin resurfacing and tightening increases, thereby driving the growth of the market over the forecast period.

Thus, all the above factors, such as an increase in the aging population and increased life expectancy, are expected to contribute to the growth of this segment over the forecast period.

Hospitals Segment is Expected to Register Significant Growth Over the Forecast Period

The hospital segment is expected to have a significant market share due to an increase in the number of plastic surgeries performed in the hospital and the number of beds available for plastic surgery in Saudi Arabia. For instance, according to the Ministry of Health 2021 report, the total number of plastic surgeons in 2021 in Jeddah, the Holy Capital, Riyadh, Qaseem, Madinah, T'if, Eastern Al-Ahsa, and Aseer is 11, 27, 56, 10, 12, 16, 15, 10, and 12 respectively in different regions of the country. Thus, with an increase in the number of plastic surgeons in the hospitals in the Kingdom of Saudi Arabia, the demand for aesthetic devices increased, thereby driving market growth.

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Additionally, according to the above source, the total number of plastic surgical interventions at Ministry of Health hospitals by health region and hospital sections is 12,989 in Saudi Arabia in 2021, and the total number of plastic surgical interventions in 2021 at Armed Forces Medical Hospital was 2,130 and at National Guard Medical hospital was 3,818. Thus, with increased plastic surgical interventions, the demand for aesthetic device increase, leading to market growth.

Thus, the increase in the number of plastic surgeries performed in the hospital is expected to contribute to the growth of this segment over the forecast period.

Saudi Arabia Aesthetic Devices Industry Overview

The Saudi Arabia aesthetic devices market is consolidated in nature due to the presence of a few companies operating globally and regionally. The companies in the market include Abvie Inc (Allergan Plc), Lumenis Inc., Sisram Medical Ltd (Alma Lasers), Galderma SA, and Candela Medical, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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