

South Korea Aesthetic Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

South Korea Aesthetic Devices Market Analysis

The South Korea Aesthetic Devices Market size is estimated at USD 515.15 million in 2025, and is expected to reach USD 818.71 million by 2030, at a CAGR of 9.71% during the forecast period (2025-2030).

This growth trajectory reflects the convergence of medical-tourism demand, rapid device innovation, and rising cultural acceptance of preventive aesthetics. Overseas patient arrivals reached a record 1.17 million in 2025, lifting procedure volumes and encouraging clinics to upgrade to premium technologies that shorten downtime and enhance outcomes. Energy-based platforms continue to lead capital expenditure because Korean manufacturers integrate hardware engineering with AI-driven software that personalizes treatment parameters at the point of care. Obesity-related demand for non-invasive body-contouring is expanding procedure menus, while home-use devices capture a growing share of discretionary beauty spending as consumers seek convenient upkeep between clinic visits. Competitive intensity remains high as domestic mid-caps challenge multinational incumbents and simultaneously pursue export growth, helped by Korea's reputation for quality and the government's sustained promotion of medical tourism corridors.

South Korea Aesthetic Devices Market Trends and Insights

Rise in Medical Tourism

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South Korea welcomed 1.17 million foreign patients in 2025, driven mainly by Thai and Japanese visitors who now outnumber the once-dominant Chinese clientele. Foreign patients spend an average of KRW 4.4 million (USD 3.15 billion) per plastic-surgery session, well above domestic price points, which supports a premium hardware refresh cycle among Gangnam clinics that cluster 55% of the nation's aesthetic outlets.

Over the past decade, 2.76 million overseas patients generated roughly KRW 3 trillion (USD 2.17 billion) in medical receipts, creating spillover demand for upgraded lasers, HIFU systems, and RF platforms that promise shorter recovery times. Clinics competing for inbound clientele deploy bundled treatment packages and multilingual after-care, accelerating device utilization rates. Government sponsorship of streamlined visa pathways and duty-free recovery hotels further cements Seoul's status as a regional hub and sustains device purchases well beyond the initial tourism surge.

Technological Advancements in Energy-Based Systems

Domestic manufacturers invest roughly 12% of annual revenue into R&D, yielding a steady pipeline of differentiated platforms such as Lutronic's dual-monopolar RF system that signed 100 local contracts within five months of debut. Integrated AI modules analyze patient skin impedance, calculate energy dosage, and guide pulse sequences in real time, boosting efficacy while cutting adverse events. Classys posted record sales of KRW 141.8 billion (USD 102.2 million) in 2024, underpinned by ULTRAFORMER III and VOLNEWMER, and retained 55% domestic HIFU share. Intellectual-property depth extends across wavelengths, cooling algorithms, and ergonomic handpieces, creating entry barriers for latecomers and reinforcing Korea's export appeal. Hospital-originated start-ups gain fast feedback from physician developers, shortening product-to-market cycles and sustaining the South Korea aesthetic devices market momentum.

Social-Image Stigma among Older Demographics

Traditional perceptions equate cosmetic procedures with vanity, dampening demand among consumers over 60, especially in rural counties where community ties are tighter and clinic presence is sparse. Some older family members discourage younger relatives from undergoing treatments, indirectly curbing uptake in multi-generational households. The stigma gradually eases as success stories circulate, but its lingering effect slows penetration rates outside metropolitan hubs and tempers the ultimate ceiling for the South Korea aesthetic devices market.

Other drivers and restraints analyzed in the detailed report include:

Increasing Obesity-Linked Demand for Body Contouring / Cultural Acceptance of Preventive Aesthetics / Poor Third-Party Reimbursement for Elective Care /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Energy-based systems delivered 37.94% of 2024 revenue, underscoring their role as the technology backbone of the South Korea aesthetic devices market. The segment benefits from hybrid platforms that blend HIFU, RF, and fractional lasers in single consoles, allowing clinics to treat diverse indications without adding extra rooms or staff. Continuous software upgrades extend hardware lifecycles, lowering total ownership cost and encouraging premium purchases.

Conversely, botulinum toxin injectables are charting a 12.72% CAGR to 2030, propelled by expanded indications such as masseter slimming and preventive micro-dosing. Hugel's Letybo secured FDA, EMA, and NMPA clearances, giving domestic brands a global footprint and reinforcing export revenues. Dermal fillers, threads, and resurfacing tips add incremental consumable sales, creating

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an annuity stream that supports capital expenditure cycles.

The South Korea Aesthetic Devices Market Report is Segmented by Type of Device (Energy-Based Aesthetic Device, Non-Energy-Based Aesthetic Device), Application (Skin Resurfacing & Tightening, Body Contouring & Cellulite Reduction, Facial Aesthetic Procedures, Hair Removal, and More), and End User (Hospitals, Aesthetic & Dermatology Clinics, Home-Use Settings). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Abbvie / Alma Lasers / Bausch Health / Galderma / Cynosure / Johnson & Johnson (Mentor) / Lumenis / Sanuwave Health / Sciton / Candela Medical / Classys / Lutronic / Medytox / Hugel / Daewoong Pharm (Nabota) / Huons Biopharma (Liztox) / Cutera / Merz Pharma / Solta Medical / CoreMedic / Jeisys Medical /

Additional Benefits:

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

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