

# **PENETRATION OF AESTHETIC MEDICINE AND SURGERY IN INDIA**

Dissertation Submitted to



**The IIHMR University, Jaipur**

for the partial fulfillment for the award of  
the degree of Master of Business  
Administration (MBA)

in

Pharmaceutical Management

by

Mr. Shubham Gaikwad – 0271

Master of Business Administration (MBA) in  
Pharmaceutical Management 2020-2022

Under the Supervision and Guidance of

Dr. Sudhinder Singh Chowhan

2022

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Dr. Rahul Sawakhande

Business Head- Aakaar Medical Technologies Pvt. Ltd

2022

## DECLARATION BY STUDENT

I Shubham Gaikwad do here by solemnly affirms and declare that this dissertation topic “**Penetration of Aesthetic Medicine and Surgery in India**” is the bonafide record of my original research work. I declare that it has not been submitted to any other university or institution for a award of any degree or diploma. Information derived from a published or unpublished work of others has been duly acknowledged in the text.

(Signature)

Shubham Gaikwad

Date:

## **CERTIFICATE**

This is to certify that Shubham Gaikwad in partial fulfillment of the requirements for the award of the degree of MBA (Pharmaceutical Management) from the IIHMR University, Jaipur has successfully completed his internship at Aakaar Medical Technologies Pvt. Ltd during March 22, 2022 to June 21, 2022.

Place: Pune

Date:

21/06/2022

Preceptor/Head of the Organization

Name of the organization

## **CERTIFICATE**

This is to certify that dissertation titled “Penetration of Aesthetic Medicine and Surgery in India” is a record of the research work undertaken by Shubham Gaikwad in partial fulfillment of the requirements for the award of the degree of MBA (Pharmaceutical Management) from the IIHMR University, Jaipur under my guidance and supervision and his approach to the research study has been sincere, scientific, and analytical.

Faculty Guide

IIHMR University, Jaipur

Date

School Dean

IIHMR University, Jaipur

Date

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## Chapter 1

### Introduction

The history of beauty is as old as mankind itself – throughout the history, people have already trying to improve their attractiveness and enhance their beauty. The Egyptians have already been using salt, animal oil, sour milk and alabaster to aesthetically improve skin. The technical basis for many procedures like lipoplasty, breast augmentation, or rhinoplasty was initiated more than a hundred years ago and evolved to the modern standards of today. In this dissertation topic, we will compare awareness of Aesthetic medicine and surgery in India with other specialized countries for aesthetics like South Korea, Japan, Thailand, and Spain.

In India, the clinical stylish industry is enrolling quick development, generally across the metropolitan urban communities in a few conditions of the country. The central point driving this industry are the rising reception of new advances and the requirement for magnificence improvement methods. The other exceptionally significant variables incorporate the flood of rivalry, business, and venture from homegrown organizations and the worldwide players looking for an enormous client base. Since India is notable for its quickly developing medical services area, the interest for medication is turning out to be more specific with innovation. The clinical stylish gadgets industry is likewise expected to notice a flood by means of the deluge of thoughts and procedures from countless doctors and specialists. Be that as it may, the social disgrace, including a reluctance to take on clinical tasteful methods, limits the development of this market.

Indian history of aesthetics:

Indian aesthetics is a one of a kind philosophical and otherworldly perspective on workmanship, design and writing. In Indian style, a rasa means a fundamental mental state and is the prevailing close to home subject of a masterpiece or the essential inclination that is evoked in the individual that perspectives, peruses or hears such a work.

Albeit the idea of rasa is essential to many types of Indian craftsmanship including dance, music, melodic theatre, film and writing, the treatment, translation, utilization

and genuine execution of a specific rasa varies incredibly between various styles and schools of abhinaya, and the enormous territorial contrasts even inside one style.

The hypothesis of rasa is credited to Bharata, a savvy cleric who might have lived at some point between the first century bce and the third 100 years. It was created by the rhetorician and savant Abhinavagupta (c. 1000), who applied it to all assortments of theater and verse. The main human sentiments, as per Bharata, are amuse, giggling, distress, outrage, energy, dread, loathing, gallantry, and amazement, which may all be reworked in scrutinizing structure as the different rasas: sensual, funny, despicable, angry, chivalrous, horrendous, evil, wonderful, and quietistic. These rasas involve the parts of tasteful experience. The ability to taste rasa is a prize for merit in some past presence. The hypothesis of the rasas grows fundamentally with the Kashmiri aesthetician Āṇandavardhana's exemplary on poetics, the Dhvanyāloka which presents the 10th rasa, shānta-rasa as an explicitly strict sensation of harmony (śānta) which emerges from its bhāva, exhaustion of the joys of the world.

### **Literature review:**

Tapaswi H M – “Everyday Aesthetics in Indian Cultural Communities” in this paper, I observe that understanding native craftsmanship is conceivable utilizing speculations of ordinary feel instead of through other exceptional hypotheses of style. While not contending for a general perspective on style, this paper utilizes the thoughts of regular feel and magnificence to figure out craftsmanship in people and social settings in India.

Sangeeta thakurani – “Evolution of aesthetic surgery in India, current practice scenario, and anticipated post-COVID-19 changes: a survey-based analysis” The statement of COVID pandemic by the WHO can surely be viewed as a watershed period the world has seen in current times. All trivial enterprises and administrations have taken a secondary lounge including tasteful medication. Over the course of the past 10 years, India has seen a consistent development in clinical the travel industry attributable to worldwide principles of care and administrations at a somewhat unobtrusive expense. The accompanying review was directed to find out the ocean change that this pandemic has brought into tasteful specialists' training, patient administration, arranging and conference. This paper illuminates the excursion of Indian tasteful medical procedure

from its outset to its ongoing presence in the worldwide market as a setting of the review.

Keng Boon Harold Tan – “Aesthetic medicine: a health regulator's perspective” The act of tasteful medication has been imperceptibly controlled, even in additional profoundly evolved nations. The super administrative concern has all the earmarks of being the act of insignificantly intrusive stylish medical procedure by broad experts. Proficient deliberate self-regulation would likely not be powerful considering the exceptional idea of stylish medication vis-à-vis regular medication.

## Chapter 2

### OBJECTIVES

- To study the awareness of aesthetic medicine and surgery among Indians.
- To study the development of aesthetic procedures in India with comparing to other specialized countries.
- To study market trends for aesthetic products.

### MATERIAL AND METHODS

**STUDY DESIGN:** Descriptive study.

#### STUDY POPULATION

- **Inclusion criteria:** Derma doctors, Aesthetic practitioners, General physicians, and beauty salon (VLCC)
- **Exclusion criteria:** Doctors who are not performing aesthetic practice.
- **Study tools:** Interview schedules, questionnaire, and google search (Literature reviews)

**DURATION OF STUDY:** 3 months, i.e- 21-03-22 to 21-06-22.

**SAMPLE SIZE:** 80 Doctors and 20 healthcare professionals.

**SAMPLING TECHNIQUE:** Convenience sampling.

#### DATA COLLECTION PROCEDURE:

Primary data will be collected from various derma and aesthetic practitioners by taking their interviews and giving them a questionnaire to solve. Secondary data will be collected from various internet sources and google searches. After collecting primary and secondary data I will represent it in graphical or in diagram form for better conclusion and understanding.

**DATA ANALYSIS PLAN:**

For data analysis, I will be using google analytics to measure, analyze, and represent the data.

**ETHICAL CONSIDERATIONS:**

The respondents will be described the details of the study and verbal consent will be sought to take part in the study.

**IMPLICATIONS OF RESEARCH:**

This research will show us how much India is aware of aesthetic practice and how much penetration happens in India now. In this study we are also going to compare the technology and development of aesthetic procedures with other top developed countries, so, we will get a fair idea, of where India stands and how much development and new technology adoption is required to grow in the aesthetic market.

## **Chapter 3**

### **Result**

The study included total 80 doctors and 20 healthcare professionals which were evaluated on the basis on questioner's answers. The respondent included healthcare professionals, dermatologist, plastic surgeons, and cosmetologist doctors. And secondary data is collected from literature which were available on internet.

The data was collected through face-to-face interviews. In this study, I have learnt the awareness of aesthetic medicine and surgery among Indians, what are the new trends for aesthetic procedures followed by Indian population, and development of aesthetic procedures in India with comparing to other specialized countries.

### **Awareness of aesthetic medicine and surgery in India**

Awareness of aesthetic procedures in Indian population depends on various factors such as city where you live, literacy level of that person, how handy is that person with technology like usage social media, and interest in cosmetology.



**Figure 3.1:** City wise distribution of awareness for Aesthetic medicine and surgery's information

In this graph on X axis we can see cities and on Y axis we can see population in lakhs. This graph shows the awareness among people and how city or location is playing important role in increasing awareness. As we can see India's capital Delhi is top with compare to all cities in India. After Delhi, Mumbai is second largest city which has huge number of people who knows about aesthetic medicines and surgeries. Pune and Bangalore is third highest to know about aesthetic procedures. So, basically we can see the trend here, tier 1 city has more awareness than the tier 2 and 3 cities.

### **Covid-19 impact on aesthetic awareness and adoption in India**

Covid-19 was turning point for aesthetic market, in this era business of aesthetic market was going down but awareness for aesthetic procedure was increasing in post covid time.

While exploring the COVID-19 pandemic, Indians are progressively taking on surface level systems. Almost 65% of the respondents concur that facelift is the most sought-after facial tasteful methodology in India at the present time. The review uncovers that 37% of the respondents have noticed expanded interest for stylish systems since the beginning of the worldwide COVID-19 pandemic. 76% of the respondents credited this pattern to the craving to look great and exhibit an ideal life via online entertainment. Then again, 35% of respondents said that the COVID-19 incited lockdown and resulting telecommute has made individuals aware of how they look on screen. Terms like Zoom impact, Zoom blast, and Zoom Dysmorphia has entered their dictionary, causing them to select restorative methodology.

98% of the respondents expressed that while ladies matured between 35-50 years stay the top possibility for tasteful systems, there is a shift seen in the age bunch as additional ladies between the age bunch 25-35 years are venturing forward and showing interest in surface level medical procedures and stylish techniques. Then again, men are likewise progressively embracing corrective methodology in India. 79% of the respondents have seen a flood of men matured 35-50 years coming in for discussions and picking surgeries for a 'convenient solution' or 'tweakments,' as they become more cognizant about their appearance.

71% of the respondents feel that stylish technique is as yet an untouchable subject in India, in any case, the shame around the issue has begun to subside with good

discussions via web-based entertainment by big names and powerhouses sharing their encounters and stories.

Development of aesthetic procedures in India with comparing to other specialized countries.

As per a worldwide overview by the International Society of Esthetic Plastic Surgery (ISAPS), India positions fourth with 9,35,487 corrective methods directed somewhat recently. The medical procedures represent 4.3% of all methods recorded worldwide.

In the overview, US finished off the rundown with 18.6% of all methodology being performed there, trailed by Brazil with 10.7% and South Korea with 5.3%. Mexico positioned fifth, representing 4.2% of the absolute techniques performed around the world. Of the absolute techniques led in 2015, 4,20,454 or 4.4% were careful and 5,15,033 or 4.3% were non-careful.

Among the two kinds of restorative medical procedures, reconstructive medical procedures were more normal in India until 10 years prior. Reconstructive medical procedures are performed on patients with deformations and those engaged with medical procedures.

S Raja Sabapathy, director of the division of plastic medical procedure for hand, microsurgery and consumes at Canga Hospital in Coimbatore, featured the pattern. "Presently, the quantity of tasteful medical procedures being acted in India have expanded impressively. The justification for this can be credited to a development in the economy and mindfulness among individuals who seek to be more appealing. In the following twenty years, one can anticipate that the quantity of such medical procedures should increment by however much half in the quantity of these medical procedures is normal in the following twenty years.

The ISAPS review likewise showed that a greatest number of Total Body and Extremities Procedures across the world were completed in India. With 1,53,317 strategies, the nation contributes 36.5% of these medical procedures internationally. These strategies incorporate body lifts too.

Public secretary of the Indian Association of Esthetic Plastic Surgeon Ashish Davalbhakta brought up that hair relocate, rhinoplasty, liposuction and bosom expansion or decrease are the most sought after stylish medical procedures in the

country. "The disposable income of people in the age bracket of 35-45 years is increasing considerably and due to rising awareness, a number of people are opting for these surgeries to look better."

13.5% of patients who gets the procedure done in India are from the UK, UAE and US. "Foreigners also visit the country especially for medical tourism because these procedures are not covered under medical insurance plans in their respective countries."

As per the ISAPS overview, the kinds of methods that individuals are choosing vary across nations. While bosom increase stayed the top decision for individuals around the world, with 15.4% of every surgery, liposuction was one more sought-after strategy with 14.5% choosing it.

Eyelid medical procedure remained at number three with a 13.1% offer, while abdominoplasty, otherwise called a belly fold, was fourth at 7.9% followed by rhinoplasty, or nose reshaping, at 7.6%.

The fame of surgeries differed in each country with Brazil, US, Mexico, India and South Korea being top nations for the main five strategies. India stayed at fourth situation corresponding to this large number of surgeries.

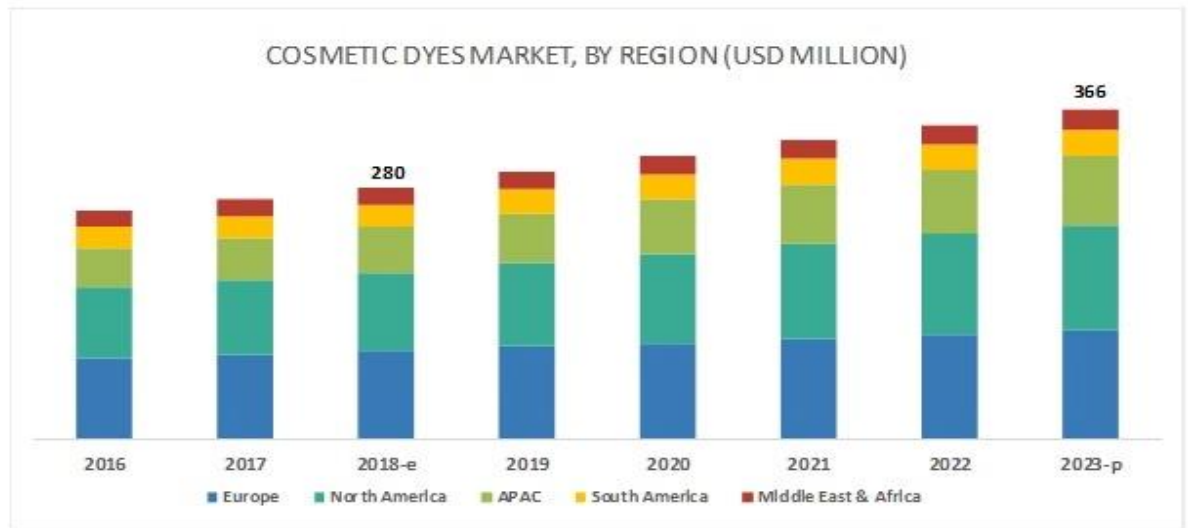
The study additionally noticed that the quantity of non-surgeries performed by plastic specialists stayed higher than surgeries, pondering both progression in surface level a medical procedure development and the attractiveness of more affordable therapies. Bosom increases done on ladies under 18 years old was at 2.6% of the overall 12.8%.

The survey showed a marked increase of over 1 million cosmetic and aesthetic procedures performed in 2015. "The world continues to find value in aesthetic plastic surgery as indicated by the growing number of procedures,"

Worldwide, Botulinum Toxin, or BOTOX, kept on administering among all kinds of people with a sum of over 4.6 million systems revealed. One more well known injectable, Hyaluronic Acid, expanded to 6.5% somewhere in the range of 2014 and 2015. Bosom expansion likewise ended up being the most widely recognized surgery among ladies with a 10.4% increment from 2014, while eyelid medical procedure is significantly more pervasive among men.

As per the review ladies went through in excess of 18 million careful and non-surgeries, making it 85.6% of the aggregate. Men, then again, had multiple million careful and non-surgery performed on them, representing 14.4 % of the aggregate.

The assessed number of plastic specialists in India, as per the report, is 2,150 making it 5.3% of the worldwide populace.



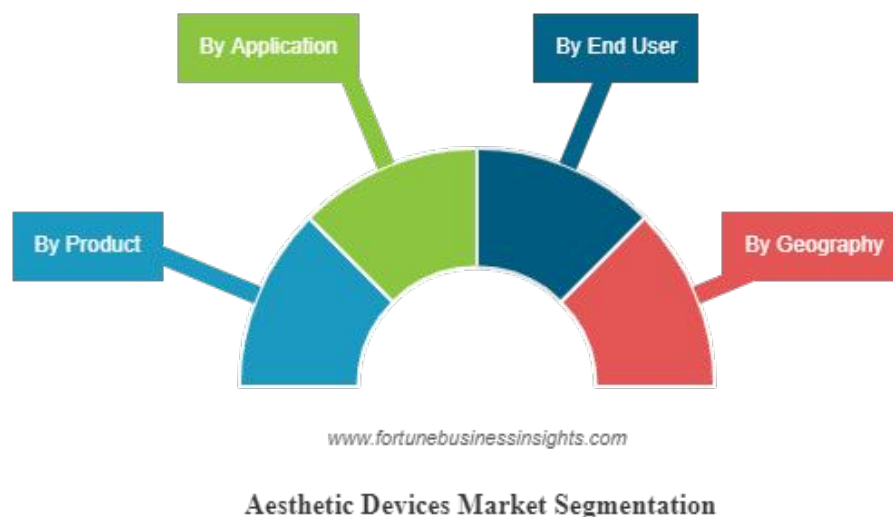
Source: Secondary Research, Primary Interviews, and MarketsandMarkets Analysis

**Figure 3.2:** Comparison of Cosmetic Dyes Market by Region (Worldwide)

As we can see in this graph, developed countries are having huge numbers of cosmetic market, developed countries like USA, Spain, South Korea and some European countries. But India plays an important role here, as India is a developing country so the cost of aesthetic procedure is low as compared to other developed countries. So, many foreigners do medical tourism i.e. they come here for aesthetic procedures.

We can also see the lowest number of aesthetic market is from the Middle East and Africa, after that South America comes on second last number.

## Market trends for aesthetic products



**Figure 3.3:** Overview of Aesthetic market trends for aesthetic products

| Segmentation     | Details                                                                                                                                                                                                                                        |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| “By Products”    | <ul style="list-style-type: none"> <li>• Aesthetic lasers and Energy Device.</li> <li>• Skin tightening agent and Body Contouring Devices</li> <li>• Aesthetic implants Products.</li> <li>• Facial aesthetic devices and products.</li> </ul> |
| “By Application” | <ul style="list-style-type: none"> <li>• Facial &amp; body contouring</li> <li>• Facial &amp; skin rejuvenations</li> <li>• Tattoo Removal devices</li> </ul>                                                                                  |

|                |                                                                                                                                                                                                                                                                                                                                                        |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                | <ul style="list-style-type: none"> <li>• Hair removal</li> <li>• Breast enhancement</li> <li>• Scar treatments</li> <li>• Reconstructive Surgery</li> <li>• Congenital Defect Repairs</li> </ul>                                                                                                                                                       |
| “By End user”  | <ul style="list-style-type: none"> <li>• Hospitals</li> <li>• Dermatology clinic</li> <li>• Cosmetic centers</li> <li>• Others</li> </ul>                                                                                                                                                                                                              |
| “By Geography” | <ul style="list-style-type: none"> <li>• USA and Canada</li> <li>• UK, Germany, France, Italy, Spain, Scandinavia, and Rest of Europe</li> <li>• japan, china, india, australia, southeast asia, and rest of asia pacific</li> <li>• brazil, mexico, and rest of latin america</li> <li>• south Africa, GCC, &amp; Middle East &amp; Africa</li> </ul> |

**Table 3.1:** Aesthetic market segmentation in terms of Products, Application, End users and Geography

This is how market is divided into four parts that is product, application, end users and geography.

### **TRENDS INFLUENCING THE GROWTH OF THE MEDICAL AESTHETICS MARKET:**

Adults are exceptionally aware of their actual appearance. This has brought about an upsurge in surface level a medical procedure interest, with Botox being perhaps of the most well-known activity. Because of the developing accentuation on actual excellence, the clinical feel business has filled in size. Patients are progressively picking restorative

tasks on account of the straightforwardness with which they might recuperate while remaining at home. Accordingly, during the lockdown, the market for stylish medication developed fundamentally.

In light of the rising commonness of weight and expanded mindfulness, liposuction, abdominoplasty, and gluteal inserts are sought after. During the projected period, arrangements, for example, photorejuvenation and body chiseling feel are supposed to areas of strength for see patterns. Besides, before very long, the send off of innovatively further developed merchandise, for example, painless body chiseling gadgets that utilization fat freezing innovation, is projected to create beneficial open doors for the Medical Esthetic market players.

Bosom inserts are turning out to be progressively well known in metropolitan regions all over the planet. The longing to accomplish a genuinely engaging picture, or a "VIP" thoroughly search in Western words, is the essential motivation behind why the quantity of bosom embed medical procedures has expanded in ongoing many years. Regardless of the risks of these strategies, the worldwide number of complete bosom inserts keeps on climbing many years. The clinical feel market is anticipated to create on account of this pattern.

Other optional reasons driving the development of the clinical feel market incorporate rising dispensable livelihoods, expanded information on tasteful claims to fame, and the presence of a critical number of corrective specialists in arising nations.

## **MEDICAL AESTHETICS MARKET SHARE ANALYSIS**

In view of type, the Dermal Fillers and Botulinum Toxin are supposed to be the biggest fragment in 2019 with 30% and 34% separately.

In light of the application, the Facial Injectable held the biggest piece of the pie in 2019 of around 64.18%. In view of district, North America is supposed to be the most worthwhile locale. A portion of the essential reasons driving the development of the tasteful medication market in this district are progressed medical care foundation, reception of restorative tasks, rising predominance of skin issues, and the presence of board-confirmed and proficient corrective specialists.

### **Recommendation for future research**

Multitude of research at present is directed towards understanding the how India is growing in terms of aesthetic market and how awareness is spreading by multiple social media platforms.

Longitudinal study designs and follow-up studies with a scope for understanding the future of aesthetic market and how it is booming every year in India and in World too.

Year 2023 will be a thrilling year for the aesthetic business in India, as we move past the pandemic and get our lives in the groove again. However, the business has a lot to make up for lost time with. Year 2020 saw a significant decrease popular because of the forced lockdown for a significant piece of the year. Request generally got in 2021 yet has still not arrived at pre-pandemic levels. We expect 2023 to be the time of recuperation and scaling new levels. Web-based entertainment is the go-to angle for all age bunches nowadays. Investing energy in virtual entertainment stages - share selfies and use channels to look more gorgeous is moving. This energizes their craving for makeover and change.

## **Conclusion**

This study shows how drastically India is changing in terms of Aesthetic market and how social media playing important role in this. We can conclude that in India entry level product for patient to enter in aesthetic treatment is chemical peelings product. Awareness of Aesthetic products and device in India is moderate, and it is mostly varying due to the location of that person and education of that person. We can see in this industry we call patient as a client because that person is not suffering from any severe issue which hampers he/her life or cause life threatening effect, so we called them client. So, basically in this industry those clients are educated enough to have good conversation with doctor. Most of the time client knows about treatment and most alternative treatment, which going to happen with them. But if we compare this with pharma industry most of the people don't know which treatment they are getting and how effective is that treatment.

If we saw the trends for aesthetic market, as of now India is importing aesthetic device and products from foreign countries, like South Korea, Spain, China, USA, UK and Japan. But India soon start its own manufacturing (made in India) products, because large number of people are starting their own manufacturing units in India, as of they are starting with basic daily care aesthetic products, and this number is increasing every year.

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