

# 医疗美容面临的问题

Problems faced by medical cosmetology

——全球健康治理的挑战

Challenges in global health governance

高建华 Gao Jianhua    廖农 Liao Nong



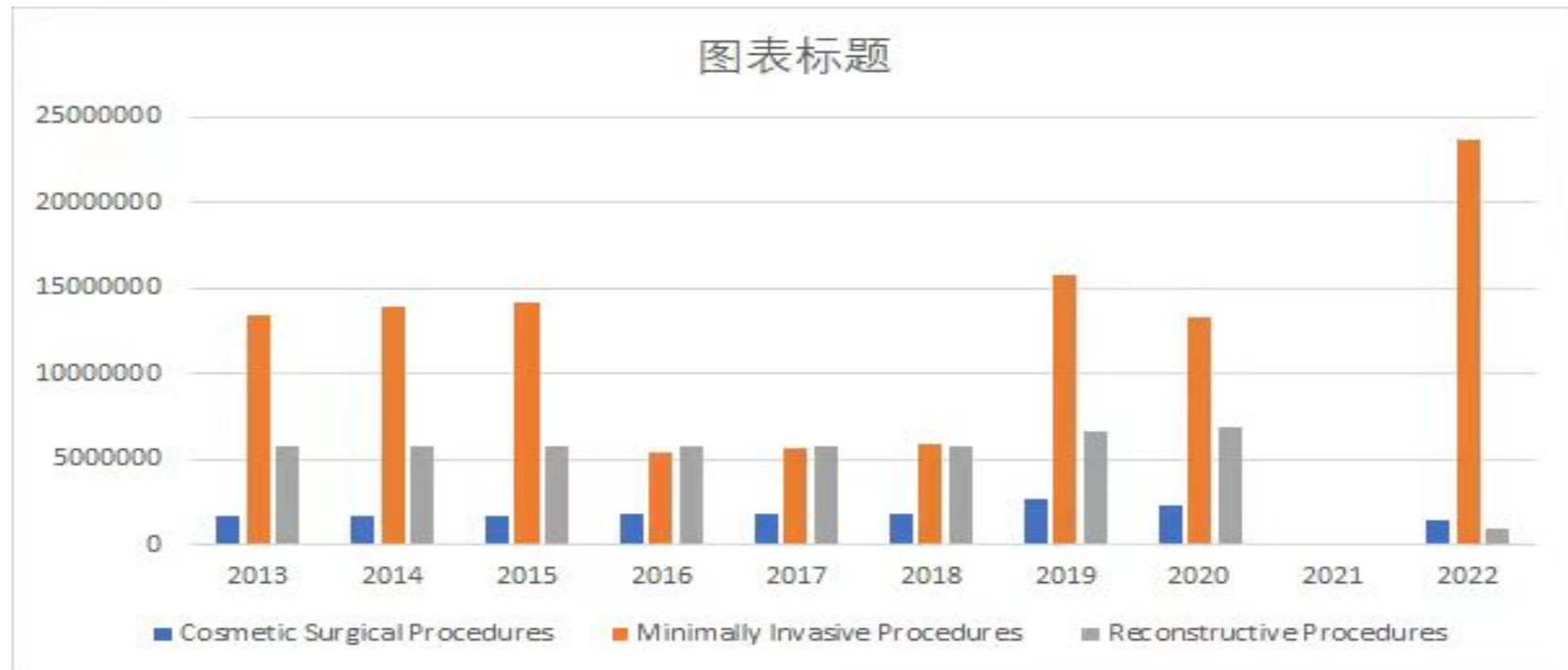
- Plastic surgery from ancient times to modern times, into the 21st century, has undergone earth-shaking changes. 整形外科从远古到现代，进入21世纪，起了翻天覆地的变化。
- From trauma repair, plastic surgery and reconstruction to medical cosmetology, the focus has shifted. 从创伤修复、整形、再造到医疗美容，重心发生转移。
- In the past, the focus was on the treatment of malformations, disabilities and other diseases, which was a timely supply; 以前重点是治疗畸形、残缺等疾病，是雪中送炭；
- Today, the focus is on normal people who want to change their appearance or body shape, and the pursuit of perfection through medical means is the icing on the cake. 当今重点是希望改变容颜或体型的正常人群，通过医疗手段追求完美，可谓锦上添花。

# 中美医疗美容发展趋势 Development trend of Chinese and American medical cosmetology

- 美国近10年统计数据显示美容手术及微创手术的增长速度远远超过整形修复手术 According to the statistics published by the American Society of Plastic Surgeons

In the United States, statistics in the past 10 years show that the growth rate of aesthetic surgery and minimally invasive surgery is much higher than that of plastic repair surgery

- 其中微创手术（非手术类）增幅显著 Among them, minimally invasive surgery (non-surgical) increased significantly



## 中美医疗美容发展趋势 Development trend of Chinese and American medical cosmetology

- 中国美容手术及微创手术则以每年20%左右的速度递增. In China, aesthetic and minimally invasive surgery is increasing at a rate of about 20% per year.  
中国非手术类医美市场规模增幅在30%左右. China's non-surgical medical beauty market has increased by about 30%

### 2017-2025年中国医疗美容市场规模

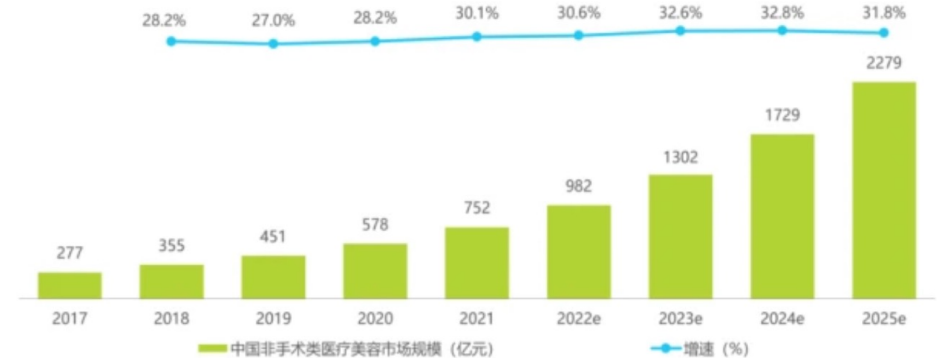


来源: 艾瑞研究院根据国家统计局, 上市公司年报, 专家访谈自主研究及绘制。

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### 2017-2025年中国非手术类医疗美容市场规模



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## 中美医疗美容发展趋势 Development trend of Chinese and American medical cosmetology

- 2022年美国美容学会报导非手术项目的激增促进了美容手术的整体增长 非手术手术增长了23%，2022年美国美容手术总数增长了14%。The American Society for Aesthetic Plastic Surgery reported that the significant increase in non-surgical procedures in 2022 has propelled the overall growth of cosmetic surgery. Non-surgical procedures saw a growth of 23%, while the total number of cosmetic surgeries in 2022 increased by 14%.

	2022 Procedure Count	% of Non-Surgical Revenue
<b>Top Non-Surgical Procedures - Total</b>		
Neurotoxins	3,945,282	39%
Skin Treatment (Chemical Peels, Hydrofacials, etc)	1,047,794	24%
Dermal Fillers	649,176	14%
Body Contouring	400,180	13%
Hair Removal	398,772	2%

	2022 Procedure Count	2021 Procedure Count	% Change vs. 2021	2022 Revenue	2021 Revenue	% Change vs. 2021
Fillers	649,176	574,772	13%	\$454,535,796	\$441,674,728	3%
Toxins	3,945,282	3,191,782	24%	\$1,286,005,600	\$1,185,175,398	9%
<b>TOTAL</b>	<b>4,594,458</b>	<b>3,766,554</b>	<b>22%</b>	<b>\$1,740,541,396</b>	<b>\$1,626,850,126</b>	<b>7%</b>

## 中美医疗美容发展趋势 Development trend of Chinese and American medical cosmetology

- 中国医疗美容非手术类项目激光类第一，注射类第二（其中肉毒素第一，玻尿酸第二）。
- In non-surgical medical aesthetics projects in China, laser treatments rank first, followed by injectables (with botulinum toxin ranking first and hyaluronic acid second).

### 光电类仍是轻医美第一大品类，注射类项目逐年提升

新氧数据显示，2022年光电类项目GMV占比44%，连续4年占比最高，其中光子嫩肤项目是最受欢迎的项目，也是下单最多的项目。注射类GMV占比逐年提升，2022年为41%，已和光电类不相伯仲，除皱瘦脸是主要消费项目。



数据来源：新氧数据研究院《2022年新氧医美行业白皮书》

## 中美医疗美容发展趋势 Development trend of Chinese and American medical cosmetology

- 肉毒杆菌毒素注射和真皮填充剂的使用已被报道为世界范围内最需要和最有效的非手术美容治疗 The use of botulinum toxin injections and dermal fillers has been reported as the most requested and effective non-surgical cosmetic treatment worldwide.
- 肉毒杆菌毒素是2020年全球最流行的非手术美容方法。 Botulinum toxin was the most popular non-surgical cosmetic procedure globally in 2020.
- 根据美国整形外科学会公布的统计数据，透明质酸(HA)填充剂是第二大最受欢迎的非手术美容方法。这已经持续了很多年了 According to the statistics published by the American Society of Plastic Surgeons, hyaluronic acid (HA) fillers were the second most popular non-surgical cosmetic procedures. This has been consistent for many years.

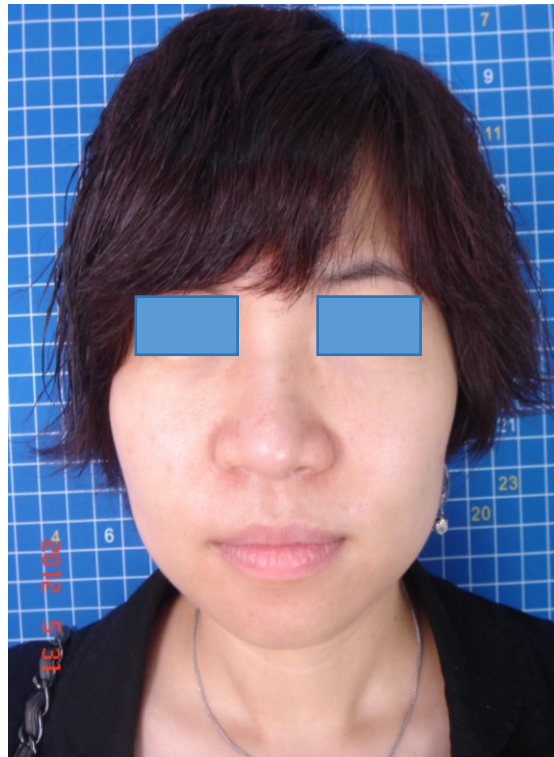
### 2022 Minimally Invasive Procedures

COSMETIC MINIMALLY INVASIVE PROCEDURES	2022	Pre-Pandemic (2019)	% CHANGE 2022 vs 2019
Neuromodulator injection (Botox <sup>®</sup> , Dysport <sup>®</sup> , Xeomin <sup>®</sup> , Jeuveau <sup>®</sup> )	8,736,591	5,043,057	73%
Lip augmentation (with injectable materials)†	1,378,631	*	*
Non-invasive fat reduction (e.g., Coolsculpting <sup>®</sup> , Liposonix <sup>®</sup> , Emsculpt <sup>®</sup> , Vanquish <sup>®</sup> , Zerona <sup>®</sup> , Kybella <sup>®</sup> )	682,932	386,557	77%
Non-surgical skin tightening (e.g., Pelleve <sup>®</sup> , Thermage <sup>®</sup> , Ulthera <sup>®</sup> )	408,970	334,351	22%
Sclerotherapy	491,330	319,895	54%
Skin Resurfacing (e.g., Dermabrasion, Chemical peel, Lasers-Ablative/Non-ablative, Microdermabrasion)†	3,322,292	*	*
Skin Treatment (Combination Lasers) (e.g., Laser hair removal, IPL treatment, Laser Tattoo Removal, Laser treatment of leg veins)†	2,915,199	*	*
HA Fillers (e.g., Juvederm Ultra <sup>®</sup> , Ultra Plus <sup>®</sup> , Voluma <sup>®</sup> , Volbella <sup>®</sup> , Vollure <sup>®</sup> , Restylane Lyft <sup>®</sup> , Restylane Silk <sup>®</sup> , Belotero <sup>®</sup> , Bolvella <sup>®</sup> , Restylane <sup>®</sup> )	4,883,419	2,878,201	70%
Non HA Fillers (e.g., Radiesse <sup>®</sup> , Sculptra <sup>®</sup> , Bellafill <sup>®</sup> , Renuva <sup>®</sup> )†	852,905	*	*
<b>TOTAL COSMETIC MINIMALLY-INVASIVE PROCEDURES</b>	<b>23,672,269</b>	<b>*</b>	<b>*</b>

\* Data unavailable in prior year.

皮肤填充剂Dermal filler玻尿酸隆颏（尖下巴）Hyaluronic acid chin enhancement

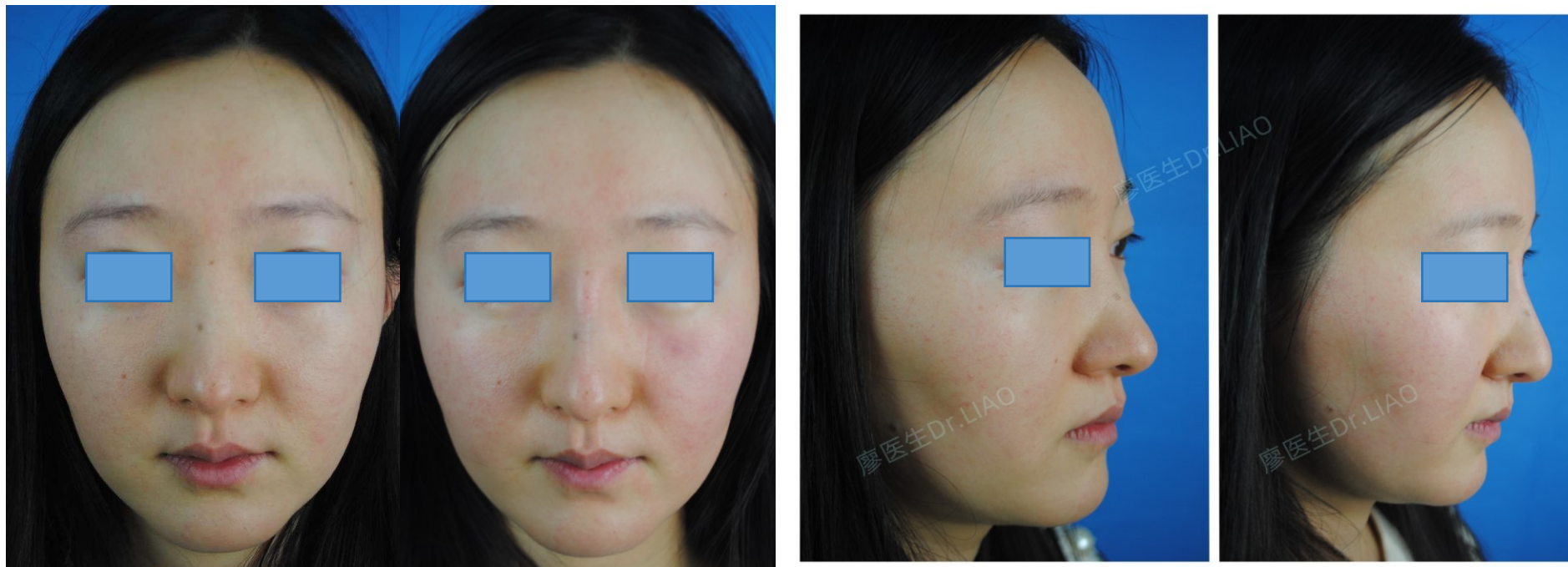
这张幻灯片中的图像描述了使用透明质酸增强下巴清晰度的前后变化 The images in this slideshow depict the before-and-after transformation achieved by using hyaluronic acid to enhance chin definition





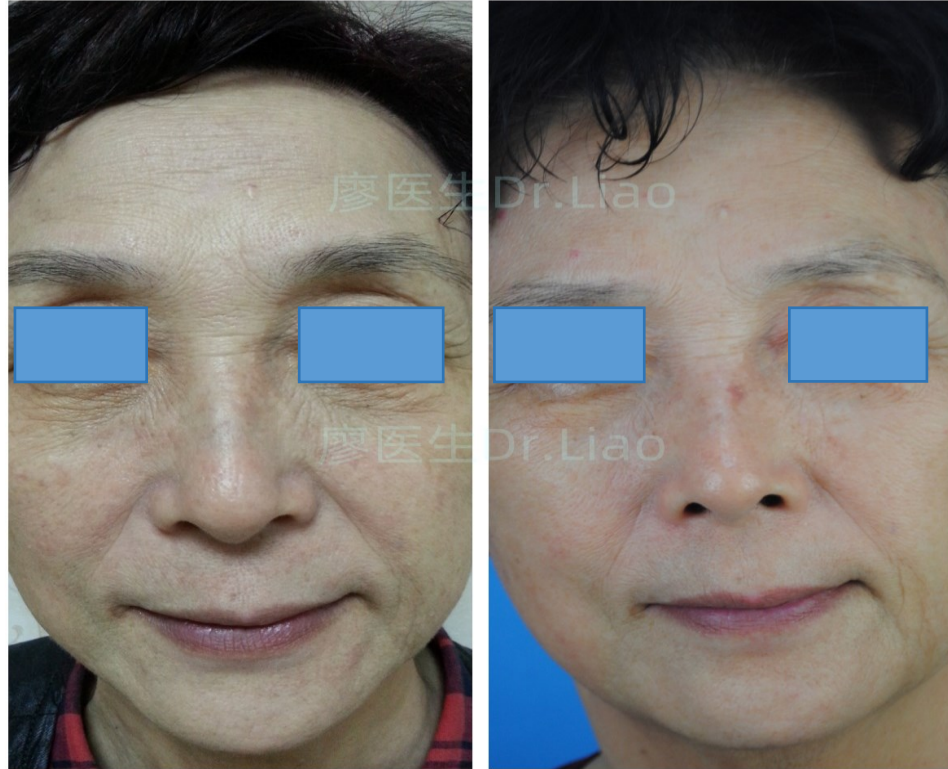
## 皮肤填充剂Dermal filler

- 玻尿酸改善鼻轮廓Hyaluronic acid improves nasal contour

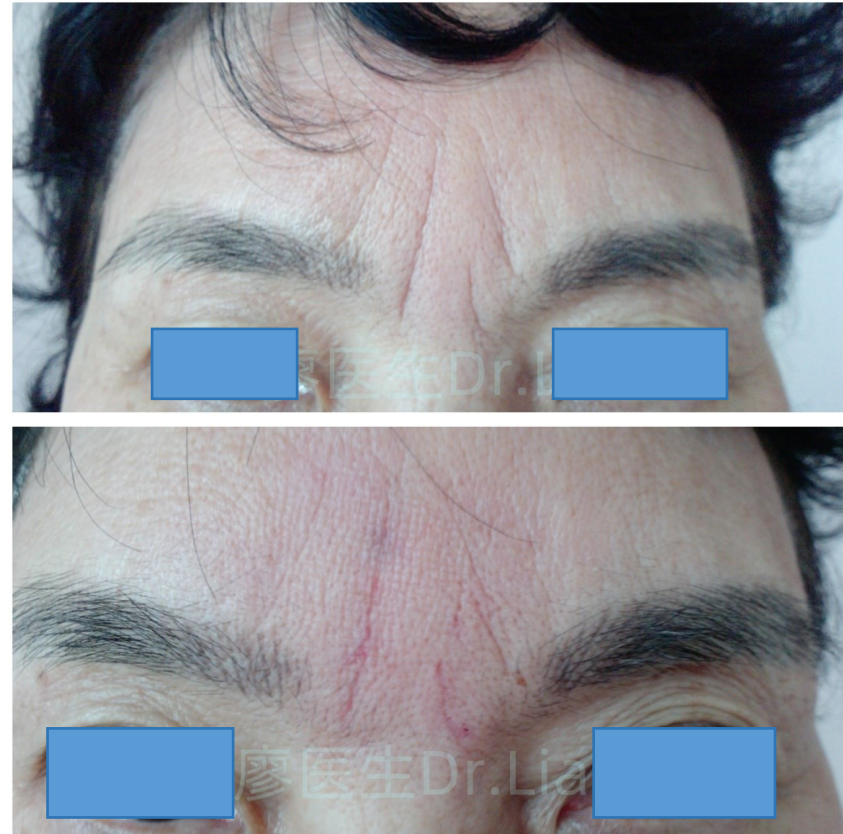


## 皮肤填充剂Dermal filler

玻尿酸填充+激光治疗 (4年) Hyaluronic acid filling + Laser Therapy (4 years)



玻尿酸填充+肉毒素除皱Hyaluronic acid filling + Botox wrinkle removal



## 皮肤填充剂Dermal filler

早期用玻尿酸，后脂肪填充 Early use of hyaluronic acid, followed by fat filling.全脸 (Full face)



早期用玻尿酸，后脂肪填充 Early use of hyaluronic acid, followed by fat filling.全脸 (Full face)



## 皮肤填充剂Dermal filler

- Non-surgical programs bring pleasure, confidence and satisfaction to beauty seekers.

非手术类项目给求美者带来愉悦、自信和满足。

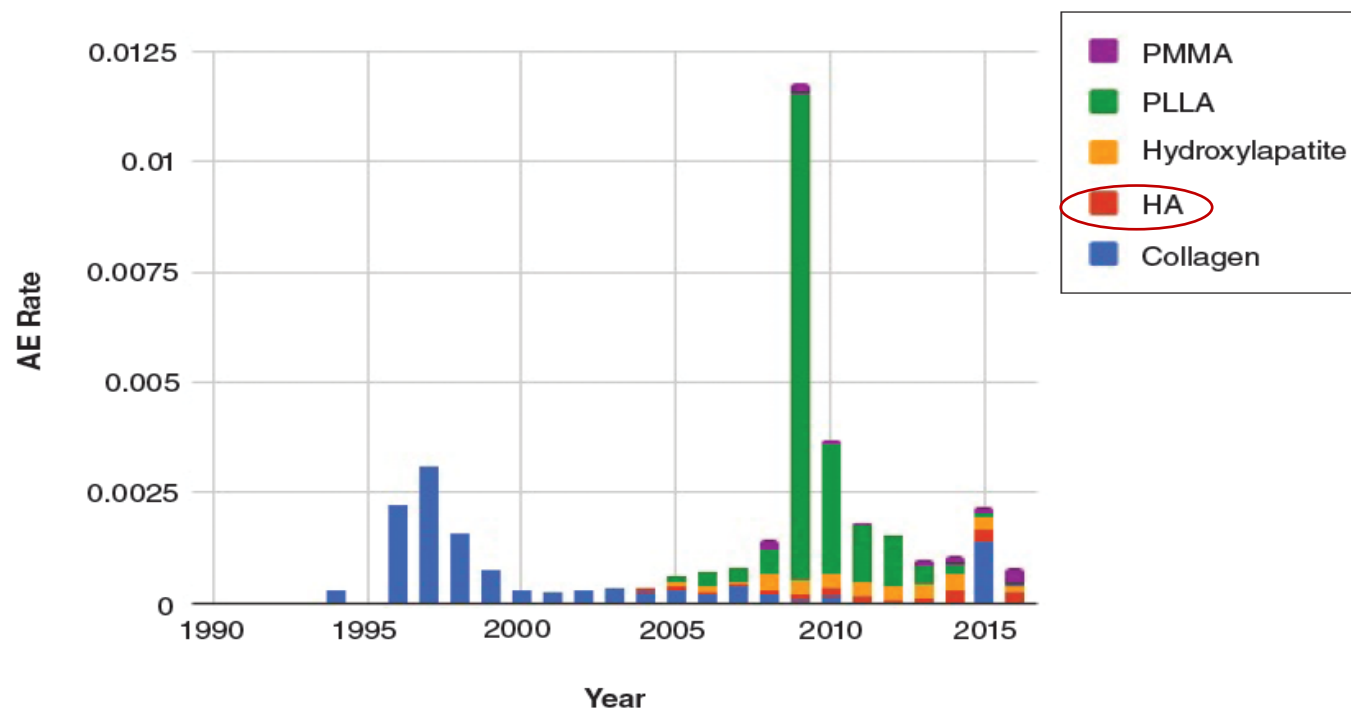
- However, its rapid development also has some bad problems, although the proportion is very low, but also to the industry has brought trouble. 但其快速发展也出现了一些不良问题，尽管占比很低，但也给行业带来困扰。
- Limited to time, only issues related to the application of fillers are discussed. 限于时间，只讨论填充剂应用的相关问题。
- Although most dermal fillers have a high safety profile, **adverse events** and/or **complications** may occur. 尽管大多数皮肤填充剂安全性高，但仍可能发生不良事件和/或并发症。
- Injection-related **sequelae** and **side effects** are usually rare, mild, short-lived, and self-limiting. 注射相关的后遗症和副作用通常是罕见的、轻微的、短暂的和自限性的。
- However, devastating and life-changing complications such as intravascular occlusion, skin necrosis, permanent visual impairment and stroke have also been reported. 然而，毁灭性和改变生活的并发症，如血管内闭塞，皮肤坏死，永久性视力损害和中风等也被报导。
- **Overtreatment** increases the risk of complications, changes in appearance, loss of natural beauty, and secondary psychological disorders often occur. 而过度治疗增加了并发症的风险以及容颜改变失去自然美，继发心理病症也时有发生。

透明质酸填充剂AE的发生率极低，且可用透明质酸酶干预  
Hyaluronic acid fillers have a very low incidence of AE and can be interfered with hyaluronidase

- HA自2000年代初首次获批以来，与HA填充剂相关AEs的比率一直很低。
- HA填充剂AEs的发生率**极低**，范围为**0.01%-0.04%** (The range is 0.01%-0.04% (1-4例次AEs/10,000过程))。
- HA填充剂能够被透明质酸酶溶解，与其他成分类型的填充剂相比，可降低AE的发生。

Individual filler AE rates also were analyzed. Hyaluronic acid fillers were associated with an extremely low rate of AEs, ranging from 1 to 4 AEs per 10,000 procedures

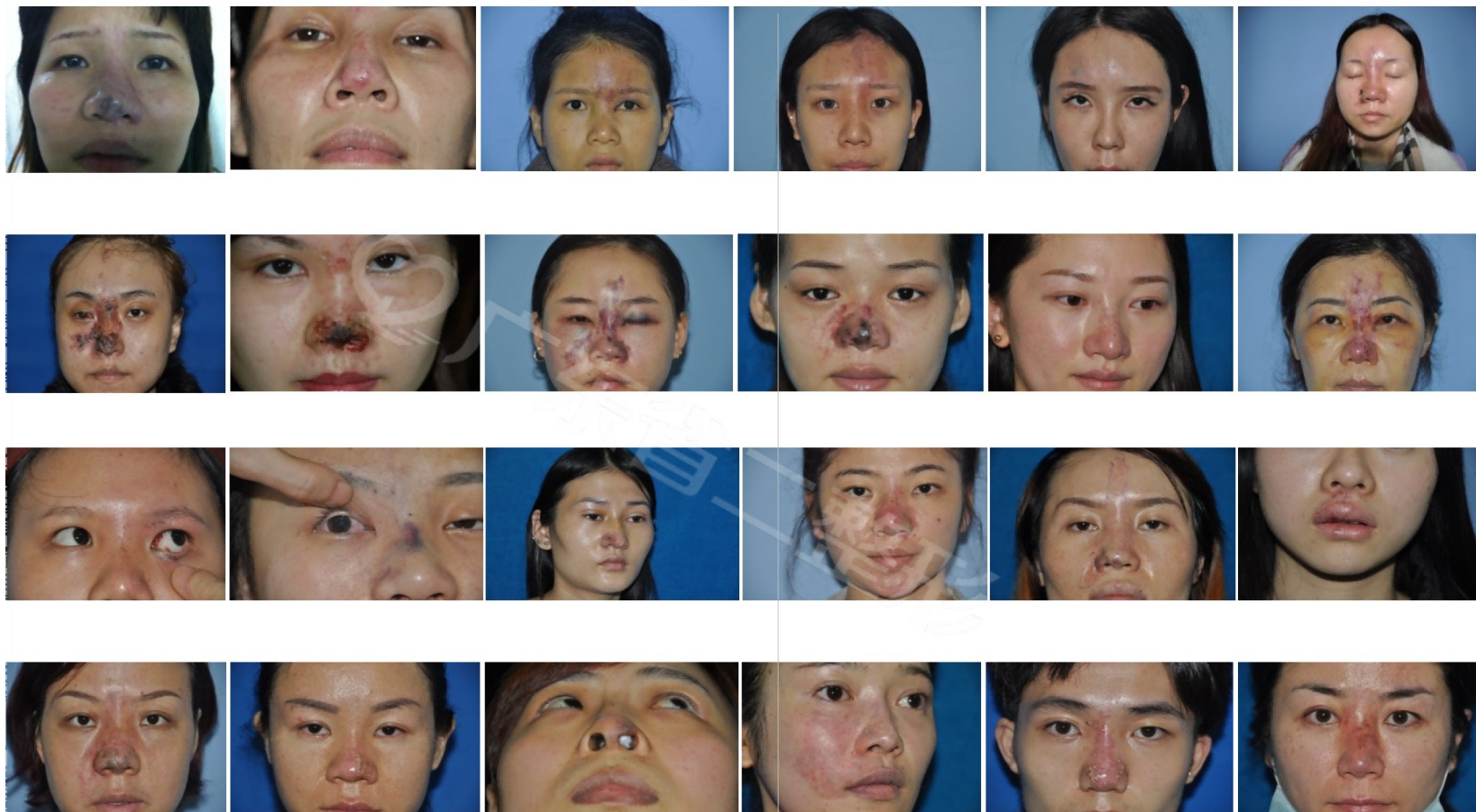
The incidence of AEs in HA filler is extremely low  
HA填充剂中ae的发生率极低



PMMA: 聚甲基丙烯酸甲酯, 俗称  
PLLA: 聚-L-乳酸  
HA: Hyaluronic acid, 透明质酸

## 填充剂注射不良问题 Poor injection of filler

- HA注射导致并发症的后果严重 --- 皮肤坏死 失明 脑栓塞 HA injection leads to serious complications - skin necrosis blindness cerebral embolism



## 填充剂注射不良问题 Poor injection of filler

- 过度治疗：过度治疗指的是为了获得经济利益而向患者提供过多或不必要的医疗美容程序做法的。Overtreatment refers to the practice of providing excessive or unnecessary medical aesthetic procedures to patients, often for financial gain.
- 如果说并发症、后遗症、不良事件和副作用与医生的治疗水平相关，过度治疗则是非技术性的因素更多。If complications, sequelae, adverse events, and side effects are related to the doctor's level of treatment, overtreatment is more related to non-technical factors.



## 填充剂注射不良问题 Poor injection of filler

The main reasons for the problem are as follows: 造成问题的原因主要有:

1. Beauty seekers rely too much on physical appearance to improve self-confidence, and expect to change their appearance through medical beauty to get better opportunities in the workplace or mate selection. 求美者过度依赖颜值提升自信心, 期望通过医美改变容颜在职场或择偶选择上得到更好的机会。
2. The beauty of the aesthetic deviation, follow the trend to create "Internet red face". 求美者审美偏差, 跟风制造“网红脸”。
3. The single success of the beauty seeker leads to the addiction of medical beauty, and the more projects are done, the more they can't stop. 求美者单次成功引发医美成瘾, 项目越做越多, 欲罢不能。
4. Some doctors, out of interest considerations, exaggerate the effect of beauty seekers or respond to the requirements of beauty seekers. 部分医师出于利益考虑, 对求美者夸大效果或对求美者有求必应。
5. Lack of regulation: The beauty industry in the United States is not as heavily regulated as other medical fields. This can lead to inadequate oversight and accountability, making it easier for unethical providers to engage in overtreatment. 缺乏监管: 中美美容业不像其他医疗领域那样受到严格监管。这可能导致监督和问责制的不足, 使不道德的提供者更容易从事过度治疗。
6. Driven by interests, "black medical beauty" is rampant, especially serious complications are mostly caused by non-medical doctors. 利益驱使, “黑医美”泛滥, 尤其严重并发症绝大部分由非医美医师操作导致。



# 解决问题对策 Problem solving strategy

How to solve these problems is a challenge for doctors and beauty seekers. 如何解决这些问题，是对医师与求美者的挑战。

1. Professional physicians can prevent and reduce these problems through a comprehensive understanding of the relevant anatomy, pharmacology and physiology, and the use of correct injection techniques. At the same time, it is necessary to fully understand all potential consequences, be prepared to use existing prevention techniques and provide appropriate remedial treatment. New practitioners should be trained and qualified before they can carry out medical cosmetology work.

专业医师通过对相关解剖学、药理学和生理学的全面了解，并使用正确的注射技术，可以预防和减少这些问题。同时必须完全了解所有潜在的后果，准备利用现有的预防技术并提供适当的补救治疗。对新从业医师进行培训，取得资格后方可开展医疗美容工作。

2. The state has formulated policies and systems to strengthen supervision of the medical beauty industry. After 2017, "black medical beauty" has been curtailed, and the medical beauty industry has gradually become standardized, transparent and standardized.

国家制定政策和制度，加强监管医疗美容行业，2017年后“黑医美”受到遏制，医美行业逐步走向规范化、透明化，标准化。

3. Comply with aesthetic principles, personalized design. Even more important in the context of aesthetic personalization is a strong increase in confidence that comes from feeling that you are presenting your true best self to the world.

遵从审美原则，个性化设计。美学个性化语境中更重要的是自信的强烈提升，而这自信源于你感到正向世界呈现真实的最好的自己。

4. Education for the United States, to establish a good psychological quality, the United States not only in the appearance of the external beauty, but also need to both internal and external repair, enhance the overall quality of the individual.

教育求美者，建立良好的心理素质，美不光在容颜的外在美，还需内外兼修，提升个人的整体素养。

5. Doctors and beauty seekers must adhere to the principle of moderation, too much is counterproductive.

医师与求美者必须共同遵循适度的原则，过度必定适得其反。



- THANK YOU ALL!