

Global Aesthetic Procedures Market Analysis: 2024 Trends and Opportunities

1.0 Introduction: The State of the Global Aesthetics Market

This report provides a detailed examination of the global aesthetic procedure landscape in 2024, identifying key market trends, significant growth opportunities, and distinct regional dynamics. The global appetite for aesthetic enhancement continues to evolve, driven by technological innovation, shifting demographic preferences, and increasing cultural acceptance. To provide the most accurate and credible insights, this analysis is grounded exclusively in the comprehensive data from the 2024 ISAPS International Survey on Aesthetic/Cosmetic Procedures, produced by the International Society of Aesthetic Plastic Surgery (ISAPS), a leading global authority in the field.

The credibility of this report's findings is rooted in the robust methodology of the ISAPS survey. The research compiled data from 2,975 board-certified plastic surgeons worldwide. This substantial sample size represents an estimated 98% of the globally recognized total of 58,500 plastic surgeons, making it one of the most comprehensive datasets available for industry analysis. The following sections will provide a high-level overview of the market before delving into specific procedural, demographic, and geographic trends.

2.0 Global Market Overview: A Tale of Two Modalities

To strategically navigate the aesthetics industry, it is essential to understand both the overall market size and the distinct growth trajectories of its two primary categories: surgical and non-surgical procedures. The 2024 data reveals a significant divergence between these modalities, signaling a fundamental shift in consumer behavior and market momentum.

In 2024, the total volume of aesthetic procedures performed worldwide by plastic surgeons was substantial, with non-surgical treatments outnumbering surgical interventions. The top-line figures are as follows:

- **Total Surgical Procedures:** 17,415,678
- **Total Non-Surgical Procedures:** 20,535,686

Analysis of year-over-year growth trends from 2023 to 2024 reveals a clear and defining market narrative. The volume of surgical procedures experienced a modest contraction, decreasing by **3.9%**. In stark contrast, non-surgical procedures demonstrated robust growth, with volumes increasing by **6.3%**. This divergence is a primary market trend, demonstrating a strategic and accelerating shift in consumer preference towards minimally invasive treatments that offer effective results with less downtime and lower risk. This macro shift is further evidenced by specific procedural growth patterns and demographic preferences for lower-downtime solutions, which will be explored in subsequent sections.

3.0 Analysis of Top Performed Procedures

3.1 Leading Surgical Procedures: A Shifting Landscape

While the overall surgical market saw a slight decline, evaluating the most popular individual procedures reveals a dynamic landscape with significant shifts in demand. This analysis highlights which interventions are commanding the most patient interest and which are facing headwinds. In 2024, Eyelid Surgery has emerged as the most performed surgical procedure globally, unseating former leaders.

The table below details the top five surgical procedures performed worldwide.

Rank	Procedure	Total Number (2024)	Percentage Change from 2023
1	Eyelid Surgery	2,115,360	+13.4%
2	Liposuction	2,087,189	-12.6%
3	Breast Augmentation	1,658,615	-17.5%
4	Scar Revision	1,156,446	N/A
5	Rhinoplasty	1,083,631	-9.8%

The ascent of **Eyelid Surgery** to the top position, bolstered by strong 13.4% growth, signals a definitive market shift toward facial rejuvenation. The steep -17.5% drop in **Breast Augmentation**, once the perennial market leader, is a profound market indicator. It reflects a potential global shift in aesthetic ideals away from overt augmentation and towards more natural body contours, a trend that aligns with the simultaneous decline in **Liposuction** (-12.6%). The appearance of **Scar Revision** as a new entrant in the top five indicates a growing area of patient interest that warrants further attention.

Strategic Implications: The data indicates a clear pivot in consumer demand within the surgical sector. Companies should moderate their focus on traditional body augmentation and contouring and instead prioritize innovation and marketing in facial surgery and restorative procedures. The decline in legacy procedures like breast augmentation signals a mature market segment, whereas growth in facial and revision surgeries represents emerging opportunities.

3.2 Leading Non-Surgical Procedures: Highlighting Growth Hotspots

The non-surgical segment represents the primary growth engine for the aesthetics market. Pinpointing the specific treatments experiencing the highest demand is crucial for identifying key areas of opportunity. While injectables remain foundational, the most exceptional growth is occurring in skin rejuvenation and tightening categories.

The table below details the top five non-surgical procedures performed worldwide.

Rank	Procedure	Total Number (2024)	Percentage Change from 2023
1	Botulinum Toxin	7,887,955	-17.4%
2	Hyaluronic Acid	6,338,184	+5.2%
3	Hair Removal	1,487,130	-12.9%
4	Non-Surgical Skin Tightening	1,239,306	+38.9%
5	Chemical Peel	820,225	+33.3%

This significant contraction in **Botulinum Toxin** (-17.4%), the market's leading procedure, warrants deep investigation. It may signal not only increased competition from new neuromodulators but also a broader market pivot from 'wrinkle freezing' to holistic 'skin quality' improvement—a hypothesis supported by the meteoric rise of **Non-Surgical Skin Tightening** (+38.9%) and **Chemical Peels** (+33.3%). It could also indicate price sensitivity in a maturing market or a statistical normalization after post-pandemic highs. Meanwhile, the healthy growth in **Hyaluronic Acid** fillers (+5.2%) confirms their foundational role in aesthetic medicine.

Strategic Implications: These trends demand a strategic re-evaluation for manufacturers and providers. Prioritizing R&D and marketing for energy-based devices and combination therapies focused on skin quality is now more critical than simply launching another injectable filler. The explosive growth in skin tightening and peels indicates a powerful consumer demand for treatments that improve texture, tone, and laxity, representing the most fertile ground for investment and market expansion.

4.0 Key Demographic Drivers Shaping the Market

4.1 Gender-Based Procedure Trends

Analyzing procedure data through the lens of gender is essential for understanding market segmentation and developing targeted growth strategies. While women continue to represent the vast majority of aesthetic patients, the preferences and growth within the male segment are increasingly influential. The data shows distinct preferences in both surgical and non-surgical treatments between genders.

Top Procedures for Women	Top Procedures for Men
Top 5 Surgical Procedures	Top 5 Surgical Procedures
<ul style="list-style-type: none"> ● Liposuction (1,792,323) ● Eyelid Surgery (1,625,597) ● Breast Augmentation (1,611,758) ● Abdominoplasty (945,636) ● Scar Revision (836,458) 	<ul style="list-style-type: none"> ● Eyelid Surgery (489,763) ● Gynecomastia (383,656) ● Scar Revision (319,987) ● Liposuction (294,866) ● Rhinoplasty (287,398)

Top 5 Non-Surgical Procedures	Top 5 Non-Surgical Procedures
<ul style="list-style-type: none"> ● Botulinum Toxin (6,622,473) ● Hyaluronic Acid (5,458,666) ● Hair Removal(1,224,695) ● Non-Surgical Skin Tightening (1,046,361) ● Chemical Peel (662,200) 	<ul style="list-style-type: none"> ● Botulinum Toxin (1,265,482) ● Hyaluronic Acid (879,517) ● Hair Removal (262,435) ● Non-Surgical Skin Tightening (192,946) ● Full Field Ablative (159,474)

Analysis reveals clear distinctions. For surgery, body contouring procedures like **Liposuction** and breast procedures dominate female preferences. For men, the top surgical procedures are focused on the face and chest, with **Eyelid Surgery** and **Gynecomastia** (male breast reduction) leading the list. In the non-surgical realm, **Botulinum Toxin** and **Hyaluronic Acid** are number one and two for both genders, respectively. However, the appearance of **Full Field Ablative** resurfacing treatments in the men's top five highlights a specific interest in more intensive skin rejuvenation among the male demographic.

Strategic Implications: A bifurcated marketing strategy is non-negotiable. The male aesthetic market requires distinct messaging and treatment packaging focused on facial refinement, chest contouring, and higher-intensity skin treatments. The female market remains anchored in body procedures but is also driving growth in non-surgical skin quality solutions. A one-size-fits-all approach to marketing will fail to capture the nuances of these separate and evolving consumer journeys.

4.2 Age-Related Market Segmentation

Patient age is a powerful determinant of procedure choice, and analyzing this data reveals distinct lifecycle-based market opportunities from initial cosmetic interventions to age-related maintenance and rejuvenation. The 2024 data shows how preferences shift across generations, while also highlighting the remarkable dominance of one particular treatment category.

The most common cosmetic procedure for each age group is detailed below:

- **17 years or younger:** Rhinoplasty (45,512 procedures)
- **18–34 years old:** Botulinum Toxin (1,798,454 procedures)
- **35–50 years old:** Botulinum Toxin (3,715,227 procedures)
- **51–64 years old:** Botulinum Toxin (1,861,557 procedures)
- **65 years or older:** Botulinum Toxin (473,277 procedures)

These findings are highly significant. For the youngest demographic, surgical intervention to alter facial structure (**Rhinoplasty**) is most common. However, across every adult age group,

Botulinum Toxin is the number one procedure. This demonstrates the treatment's role as the cornerstone of the modern aesthetics market, serving as both an entry-point for younger patients engaged in "prejuvenation" and a long-term maintenance staple for older demographics.

Strategic Implications: The dominance of Botulinum Toxin confirms that the patient journey in aesthetics is built around injectables. This treatment is the primary tool for both patient acquisition and long-term retention. Business strategies must be designed to capture patients at their initial entry point with neuromodulators and then expand the relationship over their lifetime by introducing complementary treatments like fillers, energy-based devices, and surgery as their needs evolve.

5.0 Regional Market Analysis: A Global Industry with Local Tastes

5.1 Market Leadership and Concentration

The global aesthetics market, while expansive, is concentrated in several key countries that lead in both the volume of procedures performed and the number of practicing surgeons. Understanding these hubs is critical to grasping the overall structure of the industry. The 2024 data solidifies the leadership positions of the United States and Brazil as the two undisputed powerhouses.

The following countries are global leaders across key metrics:

- **Most Plastic Surgeons:** US (7,752 surgeons)
- **Most Surgical Procedures:** Brazil (2,354,513 procedures)
- **Most Non-Surgical Procedures:** US (4,165,645 procedures)

When combining surgical and non-surgical procedures, the United States leads the world in total volume, followed by Brazil. The table below ranks the top 10 countries by the total number of all aesthetic procedures performed in 2024.

Rank	Location	Total Procedures (2024)
1	US	6,165,173

2	Brazil	3,123,758
3	Japan	1,631,600
4	Italy	1,371,220
5	Germany	1,303,528
6	Mexico	1,294,946
7	India	1,288,840
8	Turkiye	1,110,306
9	France	912,940
10	Chinese Taipei	658,320

5.2 Regional Preferences in Surgical and Non-Surgical Procedures

While global trends provide a broad overview, consumer preferences for specific aesthetic procedures vary significantly by region. These local tastes reveal distinct market characteristics and cultural nuances, creating specialized centers of excellence for certain treatments around the world.

Key Regional Specializations in Surgical Procedures:

- **Liposuction:** The **US** is the global leader, performing 342,751 procedures.
- **Breast Augmentation:** **Brazil** stands out as the top country for this procedure with 232,593 operations.

- **Eyelid Surgery:** **Brazil** leads in total volume (231,293), with **Japan** also representing a major market (140,000).
- **Rhinoplasty:** **Brazil** performs the most procedures globally (102,653).
- **Face & Head Procedures:** As a broad category, **Brazil** is the top market, with 910,879 total procedures.
- **Body & Extremities Procedures:** The **US** dominates this category with 893,952 procedures.

Key Regional Strengths in Non-Surgical Procedures:

- **Injectables (Botulinum Toxin & Hyaluronic Acid):** The **US** is the undisputed leader, accounting for a remarkable 22.7% of all global Botulinum Toxin procedures and 19.4% of all Hyaluronic Acid procedures.
- **Facial Rejuvenation & Skin Tightening:** The **US** also leads this category, performing 28.7% of all Non-Surgical Skin Tightening treatments worldwide.
- **Hair Removal:** **India** emerges as the clear global leader in Hair Removal procedures, with a total of 208,880 treatments.

The regional data paints a picture of two distinct market superpowers: the US, a volume-driven market specializing in injectables and body contouring, and Brazil, a surgically-focused hub renowned for its expertise in complex facial and breast procedures. This suggests that market entry strategies must be highly localized, as a "one-size-fits-all" approach is destined to fail.

Strategic Implications: Global companies must adopt a portfolio approach to regional market strategy. Success in the US requires a business model optimized for high-volume non-surgical procedures and specific body surgeries. In contrast, penetrating the Brazilian market necessitates a focus on surgical excellence, particularly in facial aesthetics. For emerging markets like India, opportunities in specific niches like hair removal can provide a powerful entry point.

6.0 The Growing Influence of Medical Tourism

Medical tourism is a significant and influential factor in the global aesthetics market. This trend creates specialized international hubs where a high percentage of patients travel from other countries, seeking specific expertise, lower costs, or greater accessibility. This patient flow reshapes local market dynamics and establishes key international corridors for aesthetic care.

The table below identifies key destination countries where foreign patients constitute a significant portion of the total patient base.

Country	Average % of Foreign Patients	Top 3 Patient Origin Countries
Tunisia	44.0%	France, Algeria, Libya
UAE	38.1%	UK, Saudi Arabia, Lebanon
Colombia	30.0%	US, Spain, Canada
Turkiye	29.6%	Germany, UK, US
Mexico	23.4%	US, Canada, Colombia
Thailand	20.1%	Australia, China, Cambodia

These travel corridors are not arbitrary; they directly reflect the regional specializations identified earlier. US patients travel to **Colombia** and **Mexico** seeking high-quality, lower-cost surgical expertise, particularly for body procedures, while European patients from countries like **Germany** and the **UK** flock to [Turkiye for its renowned rhinoplasty](#) and hair transplant services. North African and Middle Eastern hubs like **Tunisia** and the **UAE** have established themselves as powerful regional destinations, drawing patients from Europe and neighboring Arab nations. This globalization of patient demand is a defining feature of the modern market.

7.0 Conclusion and Strategic Outlook

This analysis of the 2024 global aesthetics market reveals an industry at an inflection point. The clear divergence between a contracting surgical sector and a robustly growing non-surgical sector signals a fundamental and likely permanent shift in consumer preference toward minimally invasive solutions. While established surgical procedures remain a cornerstone of the market, the most dynamic opportunities and innovations are concentrated in non-surgical technologies, particularly those related to skin quality and rejuvenation.

The key market dynamics identified in this report can be summarized as follows:

- **The Shift to Non-Invasive:** The core market narrative is the 6.3% growth in non-surgical procedures, contrasted with a 3.9% decline in surgical procedures. This highlights a clear consumer preference for less invasive treatments with minimal downtime.
- **Key Growth Opportunities:** While injectables command the largest volume, the fastest-growing market segments are **Non-Surgical Skin Tightening (+38.9%)** and **Chemical Peels (+33.3%)**, indicating immense demand for treatments that improve skin quality and address laxity.
- **Evolving Demographics:** The men's market continues to be a crucial segment with distinct procedural preferences, particularly in facial and chest surgery. Across all adult age groups, the dominance of Botulinum Toxin underscores the central role of injectables in both patient acquisition and long-term retention.
- **Global Hubs and Regional Tastes:** The **US** and **Brazil** remain the epicenters of the global market. However, success requires acknowledging distinct regional procedure preferences, such as the US leadership in body contouring and injectables versus Brazil's strength in facial and breast surgery.

Looking forward, the future of the aesthetic market will be defined by a technological arms race in non-invasive skin rejuvenation, a demographic broadening that increasingly includes male patients, and a sophisticated global patient base that travels across borders to seek out specialized, best-in-class care.