2027

THE PROFESSIONAL BEAUTY & AESTHETIC INDUSTRY TREND REPORT

Six forces, nine trends and a changed client on the treatment bed. Every projection runs to 2030 and every figure carries its source and date.



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Independent research, insights and consulting for the professional hair, beauty and aesthetics industry across Australia and New Zealand. Publisher of the annual Trend Report, the What Salon Owners Want survey series and the half-yearly industry reports.

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DISCLAIMERS

Inside Industry is an independent research and consulting business.
All insights and commentary in this report are based on our own observation, research and analysis of industry trends, and are not influenced by or biased toward any client currently on our books.

Terminology throughout reflects the diversity of the professional beauty landscape. For clarity:
The term "salon" is used interchangeably to describe clinics, spas and hybrid environments.
The term "beauty" is used as a broad industry umbrella encompassing aesthetics, skincare, wellness, lashes, brows and associated service categories.
The term "therapist" is used interchangeably with clinician, dermal therapist or specialist, depending on context and scope of practice.
The term "client" is used interchangeably with patient, guest and customer, and is written without reference to gender throughout.

Where this report refers to prescription medicines, including weight-loss medications and cosmetic injectables, it does so for industry context only. Nothing in it constitutes medical, financial, legal or regulatory advice, or encourages any practitioner to act outside their scope of practice or any business to advertise a prescription-only medicine. Market figures are quoted from named sources with their date; where credible estimates disagree we say so rather than choosing the larger one.

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HOW TO USE

This report is written to be used. The 2026 edition was built into planning sessions, board papers, education calendars and product briefs across the industry, and this edition is structured the same way so it can do the same job:

Strategic Planning and Annual Budgeting
Board and Leadership Meetings
Leadership and Field-Team Training
Marketing Campaign and Content Planning
Product Development and Launches
Events, Sponsorships and Partnerships
Investor or Stakeholder Presentations

Each trend runs across three pages so it can be lifted out on its own, and every projection runs to 2030 so this edition reads directly against the 2026 edition, which we have marked on the scorecard page.

EXECUTIVE SUMMARY

THE CLIENT IN 2027 IS NOT WHO THEY WERE IN 2025

The 2026 edition described an industry at the intersection of science, wellness and personalisation. Twelve months on, the more useful observation is that the client has changed, and that most of what changed them arrived from outside the industry. More than a million Australians were dispensed a GLP-1 weight-loss medicine in the year to May 2026. The language clients use about themselves has moved, measurably, from fixing toward enhancing. They research actives by name, ask a chatbot before a friend, and are more likely than ever to be a new face in the treatment room.

Around them, regeneration has four years left to run to its 2030 projections, AI has moved from the skin scanner to the front desk, three regulators are moving in the same direction at once, and the room, the hands and the person who remembers your name are being repriced upward.

The Takeaway

The market is holding flat. Around A$12.5 billion is still being spent and it is being redistributed toward wellness, longevity, product, membership and experience, and toward the operators who learned to talk fluently about a changed client. This report is our call on where it goes in 2027 and beyond.

DATA SOURCES

Inside Industry is an independent research and consulting business.
All data, insights and commentary within this report are drawn from named, dated sources and from our own research across the professional beauty, aesthetics and wellness sectors in Australia and New Zealand. No findings have been influenced by, or written in collaboration with, any client or partner brand.

Primary research: the Inside Industry Consultation Program (2024–2026); the What Salon Owners Want survey series; Google Trends Australia and Keyword Planner pulls, July 2025 to July 2026.

Australian industry and health data: IQVIA (June 2026), UNSW Medicines Intelligence (BJCP, July 2026), University of Melbourne via MJA InSight+ (August 2026), IBISWorld (July 2026), Chinese Medicine Board of Australia (2025/26), Ahpra, TGA and NSW Health (2025–26).

Company reporting and market research: Galderma, InMode, Sisram, SharkNinja, Everlab (2026); Grand View Research, Global Market Insights, The Business Research Company, Fortune Business Insights, Mordor Intelligence, Persistence Market Research (2026 editions); Global Wellness Institute (Nov 2025); McKinsey; Allergan Aesthetics and Galderma patient research (labelled as vendor-commissioned).

Consumer and cultural data: Reddit People's Beauty Index, Gallup, Edelman, Canva, Klaviyo, BCG/WWD, Spate via Glossy, RealSelf, Zenoti, SparkToro (2026). Each figure is cited where it appears, with its source and date.

BEFORE WE CALL 2027, WE MARK 2026

THE 2026 SCORECARD

Every trend report you read this year is written by somebody selling something, ours included. The only way to judge whose forecasting is worth listening to is to check what they said last time.

NO.	THE 2026 CALL	WHAT HAPPENED	VERDICT
01	REGENERATIVE INJECTABLES	Galderma injectable aesthetics +13.2% across nine months of 2026; skin boosters tracked at 13.1% CAGR to 2033; Australian PDRN searches +490%.	● LANDED · CARRIED
02	THE LONGEVITY MINDSET	Became a venue. Everlab raised A$65m in June 2026; a 50-location longevity-centre deal for Australia followed in September.	● LANDED · CARRIED
03	AI & AR PERSONALISATION	Stopped being a differentiator and became the baseline; AI in beauty US$5.3bn (2026) → US$10.86bn (2030).	● LANDED · CARRIED
04	WELLNESS TOOLS	Red light devices US$587.5m (2026) → US$1.13bn (2033); Shark Beauty became the number one US facial-device brand within eleven months.	● LANDED · CARRIED
05	THE HAIR REGROWTH BOOM	Hair restoration US$9.9bn (2026) → US$18.7bn (2030), now with a second engine in GLP-1-related shedding.	● LONGER RUNWAY
06	RF MICRONEEDLING	Plateaued at equipment level. InMode flat in Q2 2026, capital equipment down 3%. Demoted to evidence inside Trend 08.	● PLATEAUED
07–08	LYMPHATIC · PARASYMPATHETIC	Folded into Force 03 and Trend 06, and into Force 06, where the evidence now sits.	○ FOLDED IN
09	MICROALGAE & MARINE BIOTECH	Professional-channel traction did not follow.	○ DROPPED

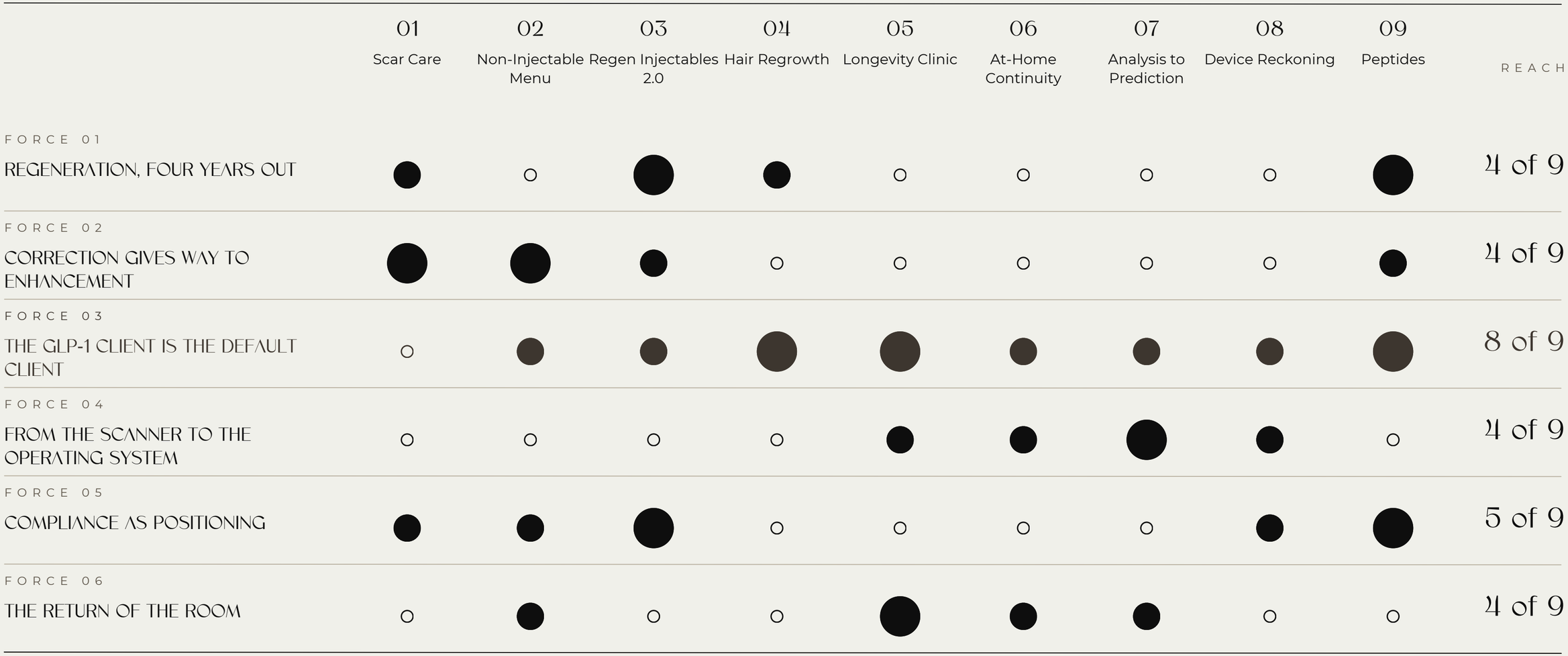
THE ONE WE MISSED

GLP-1. Nothing in the professional channel called it, and it has done more than any other force to change the client on the treatment bed.
It is Macro Force 03 of this edition.

SIX FORCES · NINE TRENDS

HOW THE FORCES FEED THE TRENDS

A force is a pressure that keeps applying to 2030 whether anyone acts on it or not. A trend is a nameable response to that pressure that a clinic, brand or distributor can act on in 2027. Read down a column to see what is driving a trend; read across a row to see how far a force reaches.



GLP-1 IS THE MOST SATURATED AND CONSISTENT FORCE IN THE REPORT, PRESENT IN EIGHT OF THE NINE TRENDS, WHICH IS WHY IT IS THE ONLY FORCE WITH A CHAPTER OF ITS OWN.

01

MACRO FORCES

KEY FORCES SHAPING 2027

The six macro forces defining the professional beauty and aesthetics landscape. A trend happens to you and then stops; a force keeps applying pressure to 2030.

01 REGENERATION, FOUR YEARS OUT

The 2026 call held. Galderma's injectable aesthetics grew 13.2% across nine months of 2026, skin boosters track at 13.1% CAGR to 2033 (Grand View Research, June 2026) and Australian PDRN searches rose 490%. Fillers and biostimulators slowed to 4.8% in Q3, the first sign of a boom normalising into a category, and every by-2030 projection now has twelve months less runway.

By 2030: "regenerative" becomes a menu category, with exosomes and polynucleotides regulated as the biologicals they are.

02 CORRECTION GIVES WAY TO ENHANCEMENT

Reddit's People's Beauty Index (Aug 2026) found enhancement language up 220% and correction language down 32% year on year. Allergan's global study (Mar 2026, vendor-commissioned) found 74% prefer results that are hard to notice. RealSelf saw Botox interest down 12% while Sculptra rose 25%, which reads as clients diversifying their treatments.

By 2030: the consult script built on "concerns" reads as dated, and clinics find Ahpra's rules and their clients' instincts pushed the same way.

03 A MEDICATED BODY ON THE TREATMENT BED

More than one million Australians were dispensed a GLP-1 weight-loss medicine in the year to May 2026, almost all privately, three in four of them women (IQVIA, June 2026). The GLP-1 client is now a standing feature of practice, like the client on the pill or Roaccutane.

By 2030: the GLP-1 question is on every consultation form in the country. Full chapter follows.

KEY FORCES SHAPING 2027 CONT.

04 FROM THE SCANNER TO THE OPERATING SYSTEM

AI moved from the consult room to the front desk. Zenoti launched a six-agent AI workforce (Sept 2025), Fresha an AI Concierge to 140,000 businesses (May 2026), Phorest Front Desk AI (June 2026). Three in four US beauty shoppers have researched with an LLM and a quarter call AI their primary source (BCG/WWD, 2026). The counterweight: 78% prefer human-made advertising and 70% can spot AI content (Canva, May 2026, incl. Australia).

By 2030: the machine takes the booking and the first draft; the client asks an agent which clinic to choose; the human parts stay unmistakably human.

05 COMPLIANCE AS POSITIONING

Ahpra's cosmetic guidelines (in force 2 Sept 2025) require real-time consultations and ban influencer testimonials; the first registration cancellation followed in Jan 2026. The TGA names cosmetic procedures a compliance priority for 2026–27 and treats paid, organic and "educational" content alike as advertising. NSW's Medicines, Poisons and Therapeutic Goods Act commences 5 Nov 2026: ARTG-listed substances only, prescriber personally reviews every patient.

By 2030: every change has pushed the industry from advertised treatment selling toward consultative programs, which is where the money was heading anyway.

06 THE RETURN OF THE ROOM

Experiential spend +10.5% and above pre-pandemic (PQ Media); 84% of consumer marketers increasing event spend (EventTrack); live experiences the only discretionary category US consumers plan to spend more on (Horizon Media, June 2026). Edelman 2026: people trust neighbours (64%) over national government (53%). Authority now flows from proximity and peers.

By 2030: the salon is understood as the highest-frequency touchpoint in a client's health ecosystem, and the room of twelve clients has replaced the launch night.

1,000,000+

Australians dispensed a GLP-1 medicine in the year to May 2026 — around one adult in twenty, growing at roughly 60% a year, almost entirely private-pay. IQVIA white paper, June 2026.

THE GLP-1 CLIENT IS THE DEFAULT CLIENT

THE 2027 CALL

The weight-loss-medication question sits on every consultation form in Australia, and the GLP-1 client is planned for as the default client rather than treated as a niche.

FORCE 03 — THE GLP-1 CLIENT IS THE DEFAULT CLIENT

~60%

1m+ Australians dispensed a GLP-1 obesity medicine, MAT May 2026;
~60% four-year CAGR; private-pay (IQVIA, June 2026).

SIGNAL / OBSERVATION

The 2026 edition did not call GLP-1. Nothing in the professional channel did, and the force that has done more than any other to change the client in front of the therapist arrived through GPs, telehealth prescribers and pharmacy counters. IQVIA's June 2026 white paper puts the number of Australians dispensed a GLP-1 obesity medicine in the year to May 2026 at more than one million, around 5% of adults, growing at roughly 60% a year and almost entirely private-pay. Three in four users of the two leading brands are women, and 7.8 million Australians meet the eligibility criteria (University of Melbourne, Aug 2026).

MARKET CONTEXT

61%

61% midface volume loss, 50% laxity, 35% new wrinkles; 60% get their GLP-1 from a provider who also offers aesthetics, up from 49% (Allergan Aesthetics, Jan–Mar 2026, vendor-commissioned).

~60%

63% of GLP-1 patients seeking facial treatment were not existing aesthetics clients; ~60% report lower overall aesthetics spend (McKinsey, Dec 2024, n=174).

76%

GLP-1 therapy associated with 76% higher odds of telogen effluvium and 64% higher odds of androgenetic alopecia at 12 months, 547,993 matched pairs; observational (EADV 2025).

WHY IT MATTERS

This is a change in the baseline client. An "Ozempic face" package breaches TGA advertising rules, frames a medical decision as a cosmetic problem and treats a permanent change as a wave.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

PUT IT ON THE FORM.

ask about weight-loss medication alongside Roaccutane, HRT and antidepressants, neutrally and of everyone.

LEARN THE PATTERN BEHIND THE PRODUCT.

train the whole team to recognise what rapid metabolic weight loss does to skin, face, body and hair, and never advise on the medication.

REBUILD THE LANGUAGE.

describe this client as changing. Skin quality, firmness, density and recovery, never "anti-ageing".

POSITION INSIDE THE BUDGET.

series-based programs framed as protecting an investment already being made.

DO NOT NAME THE DRUG.

an "Ozempic facial" is a TGA breach regardless of intent.

02 FOR BRANDS

REFORMULATE THE BRIEF.

barrier repair during rapid change, firming across face and body, nutrient-supported scalp care, without naming any medication.

EDUCATE THE FLOOR.

a short, compliant module on metabolic weight loss and the skin is the most valuable thing a brand can give stockists in 2027.

BRIDGE TO NUTRITION CAREFULLY.

through listed-medicine or practitioner-only partners.

03 FOR EDUCATORS & DISTRIBUTORS

ADD IT TO THE CURRICULUM NOW.

at the level of recognition and consultation rather than pharmacology.

TEACH SCOPE AND COMPLIANCE TOGETHER.

recognise, ask, support, refer; never advise or advertise.

GIVE THE INDUSTRY ITS OWN DATA.

survey your network on GLP-1 prevalence and presentation and own the most quoted number of 2027.

REPOSITION HAIR REGROWTH.

the post-weight-loss client with new shedding is the highest-intent regrowth client in the market.

GRANULAR LEVEL 01 — 09

THE 9 KEY TRENDS FOR 2027

01 SCAR CARE BECOMES A CATEGORY

02 THE NON-INJECTABLE MENU

03 REGENERATIVE INJECTABLES 2.0

04 THE HAIR REGROWTH BOOM, SECOND ENGINE

05 THE LONGEVITY CLINIC ARRIVES

06 AT-HOME CONTINUITY

07 FROM ANALYSIS TO PREDICTION

08 THE DEVICE RECKONING

09 PEPTIDES, FROM SERUM TO SYRINGE





SCAR CARE BECOMES A CATEGORY

CATEGORY	Treatment Modalities | Business Models | Marketing & Culture | Regulation & Compliance
TIME HORIZON	Next (2027–2029)
CONFIDENCE	Medium–High

THE 2027 CALL

NAMED SCAR PROGRAMS APPEAR ON AUSTRALIAN CLINIC MENUS FOR THE FIRST TIME, AND THE CLINIC THAT LISTS ONE IS THE ONLY ONE IN ITS POSTCODE DOING SO.

US$2.85bn

Global scar treatment market US$2.85bn (2025) → US$6.45bn (2033), 10.6% CAGR; Asia Pacific 39.9% of revenue (Grand View Research, Dec 2025).

SIGNAL / OBSERVATION

Scar care is separating from wound care on one side and general skincare on the other into a category of its own, driven by a change in what people want from it. The older framing was medical and corrective; the emerging one is cosmetic and elective, improving the appearance of a scar the person has no shame about carrying, which is Force 02 arriving in a specific part of the body. In Australia, scar treatment exists almost entirely as a surgical service or a device add-on on a clinic's acne page. We could not find a single retail clinic group offering a named, priced, course-based scar program. That absence is the finding.

MARKET CONTEXT

+25%

Scar removal interest +25% quarter on quarter, Q1 2026 (RealSelf, Apr 2026).

1 in 3

One in three people live with a scar; one in three with a visible scar report anxiety or depression connected to it (Scar Free Foundation, UK, 2025).

0

No named scar program found at any major Australian retail clinic chain (Inside Industry desk review, Oct 2026).

WHY IT MATTERS

The professional angle is the appointment. Scar care sits on modalities clinics already own with idle capacity: fractional laser, RF microneedling, needling, peels, LED. A clinic needs to name it, price it as a course and market to clients it is not speaking to: post-surgical, caesarean, acne, and, with clinical partnership, burns and self-harm scarring.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

NAME IT AND BUILD IT AS A COURSE.

consultation, four to six mapped sessions across modalities you already own, measured results with consistent photography.

WIDEN THE CLIENT PICTURE.

write for the post-caesarean, post-surgical and post-acne client separately; they search differently and sit in different emotional registers.

GET THE LANGUAGE RIGHT FIRST.

appearance, texture, tone and confidence are cosmetic; healing, repair and treating are therapeutic.

PARTNER WHERE THE TERRITORY IS CLINICAL.

burns, self-harm and anything raw go to a surgeon, dermatologist or psychologist, who then refer back.

02 FOR BRANDS

PROTOCOL FIRST, PRODUCT SECOND.

hand stockists a complete scar protocol with sequencing, intervals, pre- and post-care and a claims guide.

BUILD THE HOME-CARE BRIDGE.

silicone, barrier repair and pigment management between sessions, packaged into the program before the pharmacy captures it.

RESIST THE MEDICAL PULL.

the opportunity is cosmetic and elective.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH SCAR PHYSIOLOGY AND SCAR LANGUAGE TOGETHER.

scar types, maturation, contraindications, the cosmetic line.

PRODUCE THE AUSTRALIAN EVIDENCE.

a Google Trends AU pull or a network survey would be the only local number in the category.

FIND THE PRACTITIONER VOICE.

one clinic with real course value and completion data will be quoted for a year.



THE NON-INJECTABLE MENU

CATEGORY	Treatment Modalities | Consumer & Client Behaviour | Regulation & Compliance | Business Models
TIME HORIZON	Next (2027–2029)
CONFIDENCE	Medium

THE 2027 CALL

THE TWO-PATHWAY MENU, ONE FOR THE CLIENT WHO INJECTS AND ONE FOR THE CLIENT WHO NEVER WILL, MOVES FROM POINT OF DIFFERENCE TO STANDARD IN THE AESTHETIC CLINIC.

+248%

Cosmetic acupuncture searches +248%, two years to mid-2025 (NYT, 7 Aug 2025); notox TikTok views +223%, year to Jan 2025 (Trendalytics via NYT).

SIGNAL / OBSERVATION

Rejection of injectables is growing alongside injectables themselves, and the demand it creates is being absorbed by non-injectable modalities with their own language, practitioners and search behaviour. Cosmetic acupuncture is the named beneficiary; "notox" and barefaced beauty are the vocabulary. Google searches for cosmetic acupuncture rose 248% in the two years to mid-2025 (New York Times, Aug 2025) and TikTok views of notox content 223% in the year to Jan 2025 (Trendalytics), and both are still circulating a year on, which makes this durable. Meanwhile Galderma's injectable business grew 13.2% across nine months of 2026, so both populations are growing at once.

MARKET CONTEXT

−12%

Botox pageviews −12% in Q1 2026 while Sculptra +25%, microneedling +9% (RealSelf, Apr 2026).

74%

74% prefer hard-to-notice results; 71% worry about looking overdone (Allergan Aesthetics, 12,000+ consumers, Mar 2026, vendor-commissioned).

+1.0%

4,945 registered Chinese medicine practitioners in Australia, +1.0% (Chinese Medicine Board of Australia, 2025/26).

WHY IT MATTERS

In Australia the non-injectable demand leaks almost entirely outside the aesthetic clinic, to acupuncturists, facialists and the wellness end of the spa market. A clinic with a treatment room and no appetite for needles has a clear opportunity, and no professional brand has yet claimed the results-driven non-injectable protocol.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

WRITE THE SECOND MENU.

a named pathway for the client who will not be injected, with sculpting and microcurrent facials, LED, needling, peels, lymphatic work and an acupuncture partnership.

BRING THE ACUPUNCTURIST IN RATHER THAN SENDING THE CLIENT OUT.

a registered practitioner renting a room two days a week, advertised within Ahpra's rules for both parties.

CHANGE THE CONSULTATION OPENER.

ask every new client where they sit on injectables before recommending anything.

LEAD THE MARKETING WITH THE RESULT.

"needle-free" as a virtue reads as judgement to the other half of your clients.

02 FOR BRANDS

OWN THE NON-INJECTABLE PROTOCOL.

nobody in the Australian professional channel has.

SEPARATE THE EDUCATION CALENDAR.

one stream for injectors, one for the therapist who never will be, which is where most of the channel sits.

WATCH THE COMPETITOR MEDIA BRANDS AND TRACE THEIR FIGURES TO SOURCE BEFORE QUOTING ANY OF THEM.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH THE TWO-POPULATION MARKET SO FIELD TEAMS CAN RECOGNISE WHICH CLIENT A CLINIC SERVES.

BUILD REFERRAL LITERACY.

the scope line and how a room-rental or referral arrangement may be advertised.

FIND THE AUSTRALIAN NUMBER.

a Trends pull or a survey question on where clients sit on injectables would be the first local evidence anyone has.



REGENERATIVE INJECTABLES 2.0

CATEGORY	Treatment Modalities | Regulation & Compliance | Education & Workforce | Business Models
TIME HORIZON	Next (2027–2029)
CONFIDENCE	High

THE 2027 CALL

THE REGENERATIVE MENU SPLITS ON REGISTRATION: ARTG-LISTED POLYNUCLEOTIDES AND BOOSTERS GROW, GREY-MARKET EXOSOMES ARE SQUEEZED OUT AFTER NSW'S NOVEMBER 2026 COMMENCEMENT.

US$2,174m

Galderma injectable aesthetics 9M 2026 US$2,174m, +13.2% cc; Q3 fillers & biostimulators +4.8%, neuromodulators +24.1% (Galderma, 22 Oct 2026).

SIGNAL / OBSERVATION

The strongest call of 2026 overshot. Galderma's injectable aesthetics reached US$1.437bn in H1 2026, up 12.1%, and US$2.174bn across nine months, up 13.2%, with Sculptra in double-digit growth everywhere. Skin boosters now track at US$1.7bn (2026) to US$4.1bn (2033) with Asia Pacific fastest in the world. Australian PDRN searches rose 490% and exosomes 183% in the year to July 2026, and Rejuran is on the Australian market as an ARTG-included Class III device. Two things changed: fillers and biostimulators slowed to 4.8% in Q3, a boom settling into a category, and the regulators have arrived. No exosome product holds full TGA, FDA or EMA approval, the FDA has issued a run of warning letters, and the TGA fined a nurse in May 2026 for importing unapproved biostimulator syringes.

MARKET CONTEXT

US$1.7bn

Skin boosters US$1.7bn (2026) → US$4.1bn (2033), 13.1% CAGR; APAC 14.8% (Grand View Research, June 2026).

US$174m

Polynucleotide injectables US$174m (2026) → US$574m (2035), 14.8% CAGR (Global Market Insights, Oct 2026).

+490%

Australian searches, year to July 2026: PDRN +490%, copper peptides +344%, exosomes +183% (Google Trends AU, Inside Industry).

WHY IT MATTERS

The category has four years rather than five to reach its 2030 projections, and the client arrives having searched the active by name. Ingredient fluency is now a front-of-house skill.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

AUDIT THE FRIDGE NOW.

every injectable and post-needling topical traceable to an ARTG entry or a compliant prescribing pathway, or out.

MAKE INGREDIENT FLUENCY A HIRING CRITERION.

PDRN, exosomes and biostimulators explained in sixty seconds without notes.

SELL IT AS A PROGRAM.

three-to-six-month review programs with defined sequencing and intervals.

TIGHTEN THE LANGUAGE.

skin quality, hydration, radiance and density; no brand names in public advertising, no therapeutic claims.

02 FOR BRANDS

REGISTRATION IS THE MOAT.

ARTG-included product with the documentation stockists can show an inspector now outranks a more exciting product that is not.

PUBLISH THE EVIDENCE.

case data, consistent before-and-after protocols and Australian clinical presentations.

LEAD EDUCATION WITH THE ACTIVE.

meet the client where they are and stay on the right side of the advertising rules.

03 FOR EDUCATORS & DISTRIBUTORS

RUN COMPLIANCE AND CLINICAL TRAINING TOGETHER.

why polynucleotides work and why an unregistered vial is a liability, in one module.

BUILD THE MULTIDISCIPLINARY PATHWAY.

prescriber, injector, dermal therapist and client education as one framework.

PREPARE FOR THE BIOLOGICALS CONVERSATION.

exosomes will be regulated as biologicals; think through the range before the TGA publishes its position.



THE HAIR REGROWTH BOOM, SECOND ENGINE

CATEGORY	Treatment Modalities | Devices & Hardware | Ingredients & Formulations | Business Models
TIME HORIZON	Next (2027–2029)
CONFIDENCE	High

THE 2027 CALL

THE SCALP PROGRAM BECOMES THE MOST RELIABLE RECURRING-REVENUE LINE A CLINIC CAN BUILD, WITH THE POST-WEIGHT-LOSS CLIENT ITS HIGHEST-INTENT ENTRANT.

US$9.9bn

Hair restoration US$9.9bn (2026) → US$18.7bn (2030), 16.6% CAGR; APAC 17.1% (Grand View Research, updated July 2026).

SIGNAL / OBSERVATION

The 2026 call held, on a longer runway than the earliest forecasts suggested. Grand View Research has hair restoration (procedures and in-clinic therapies) at US$9.9bn in 2026 reaching US$18.7bn by 2030, with the products side tracked separately at US$3.14bn heading for US$4.69bn by 2032 (Mordor, Oct 2026). Australia kept pace: Bouf sold more than A$500,000 in its first week in May 2025 and entered the UK in February 2026; Gro Clinics has grown to six locations and 15,000+ clients; DermapenWorld launched EXO-GROW into the professional channel. The new development is Force 03. The largest real-world study to date, almost 548,000 GLP-1 users matched against controls, found 76% higher odds of telogen effluvium and 64% higher odds of androgenetic alopecia at twelve months. The clinic is about to see a great deal of shedding the client does not connect to anything.

MARKET CONTEXT

A$500,000+

Bouf: A$500,000+ first-week sales, May 2025; UK launch Feb 2026 (Sharecafe; Beauty News Daily).

+76%

GLP-1 therapy: aOR 1.76 telogen effluvium, 1.64 androgenetic alopecia at 12 months, 547,993 matched pairs; observational (Akiska et al., EADV 2025).

WHY IT MATTERS

Hair regrowth remains the ideal series-based, both-genders, low-equipment program. The GLP-1 connection changes the consultation rather than the treatment: the highest-intent regrowth client in 2027 has lost fifteen kilos in a year and started to shed, and does not know why.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

BUILD THE SCALP PROGRAM FIRST.

consultation, six-to-eight-treatment course, quarterly maintenance and home care actually sold. Both genders, measurable change, no new device.

ADD THE WEIGHT-CHANGE QUESTION TO THE SCALP CONSULT.

phrased as clinical due diligence; explain the pattern, never advise on the medication.

PHOTOGRAPH PROPERLY.

consistent lighting, angles and timelines make the program honest and produce its marketing.

KEEP THE LANGUAGE COSMETIC.

density, strength, vitality, fullness.

02 FOR BRANDS

BUILD FOR THE SHEDDING CLIENT.

nutrient-supported scalp care and gentle stimulation for shedding that is metabolic rather than hormonal, a brief almost nobody has written.

PAIR WITH NUTRITION CAREFULLY.

through listed-medicine or practitioner-only partners.

SAMPLE AND SUBSCRIBE.

thirty-day kits and subscriptions for a category where the client must stay the course for months.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH TRICHOLOGY FOUNDATIONS TO BEAUTY PROFESSIONALS.

scalp mapping, shedding patterns, contraindications, safe claims.

TRAIN THE WEIGHT-CHANGE CONVERSATION.

the single highest-value question in the category this year.

PROVIDE THE BUSINESS TOOLS.

ROI calculators, menu templates and photography SOPs.



THE LONGEVITY CLINIC ARRIVES

CATEGORY	Consumer & Client Behaviour | Business Models | Treatment Modalities | Education & Workforce
TIME HORIZON	Now → Future (2027–2030)
CONFIDENCE	High

THE 2027 CALL

THE FIRST AUSTRALIAN LONGEVITY CENTRES OPEN AND BECOME THE SALON'S NEWEST COMPETITOR FOR THE CLIENT'S ATTENTION, AND ITS CLEAREST REFERRAL PARTNER.

A$65m

Everlab: A$65m Series A, June 2026; 20,000+ patients; programs A$1,199–A$2,999 (Everlab; Forbes Australia, 17 June 2026).

SIGNAL / OBSERVATION

The 2026 edition called longevity as a language change. Within twelve months it became a purchasing behaviour and then a venue. Everlab, founded in Melbourne in 2023, raised an oversubscribed A$65m Series A in June 2026 at a valuation reported near A$500m, and reports 20,000+ patients, 180 clinicians and 1,850+ partner locations across Australia and New Zealand, with programs from A$1,199 to A$2,999. In September 2026 a 50-location Australian deal for the Ultimate Longevity Center concept was announced, first site Double Bay, early 2027. Spate's April 2026 data had peptide therapy searches up 281% on Google and 459% on TikTok, with GLP-1 among the leading co-searches: the longevity client and the GLP-1 client are often the same person.

MARKET CONTEXT

+281%

Peptide therapy searches +281% Google, +459% TikTok, +412% Instagram; co-searched NAD +601%, GLP-1 +177% (Spate via Glossy, Apr 2026).

US$6.8tn

Global wellness economy US$6.8tn (2024) → US$9.8tn (2029); personalised medicine and prevention US$767bn, +9.3% a year (GWI, Nov 2025).

WHY IT MATTERS

The longevity clinic is the new competitor for the client's attention and the clearest model for where professional beauty can go. Everlab is built on measuring someone regularly and telling them what changed. Salons already do that, every four to six weeks, with trained hands on the skin, at a frequency no GP, dietitian or longevity centre can match. The difference is that the longevity clinic charges for the measurement and writes it down.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

CHARGE FOR THE MEASUREMENT.

a baseline skin, scalp and body record at the first visit and a quarterly review against it, the structure that turns a treatment into a program.

BECOME AN ARM OF THE ECOSYSTEM.

referral relationships with a longevity clinic, a preventative GP or a dietitian that run in both directions.

INTRODUCE LONGEVITY PROGRAMS WITHOUT THE JARGON.

barrier optimisation, red and near-infrared light, recovery support; replace "anti-ageing" with resilience, performance and recovery.

STAY INSIDE SCOPE.

supplements, IVs and biomarker interpretation belong to partners.

02 FOR BRANDS

MOVE FROM CLAIMING TO PROVING.

protocols with measurable markers, clinical partnerships and education that teaches the science rather than borrowing its words.

BUILD FOR THE INTERSECTION.

the longevity client and the GLP-1 client overlap heavily.

PARTNER ACROSS DISCIPLINES.

co-education with nutrition, sleep and functional-medicine partners.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH THE HEALTH-ECOSYSTEM MODEL.

why the four-to-six-weekly touchpoint is the most valuable asset in the client's network.

ADD MEASUREMENT LITERACY.

inflammation, oxidative stress, recovery physiology and how to read wearable data ethically.

CURATE THE PARTNERSHIPS BETWEEN CLINIC NETWORKS AND THE LONGEVITY PROVIDERS NOW SCALING ACROSS AUSTRALIA.



AT-HOME CONTINUITY

CATEGORY	Devices & Hardware | Business Models | Treatment Modalities | Marketing & Culture
TIME HORIZON	Next → Future (2027–2030)
CONFIDENCE	High

THE 2027 CALL

THE DEVICE AT HOME STOPS BEING THE SALON'S COMPETITOR AND BECOMES ITS CONTINUITY TOOL, PRESCRIBED BETWEEN TREATMENTS AND SOLD AS PART OF THE PROGRAM.

US$26.15bn

Skin-care devices US$26.15bn (2026) → US$76.03bn (2035), 12.6% CAGR; at-home US$14.55bn (2025), 13.8% CAGR (Global Market Insights, Sept 2026).

SIGNAL / OBSERVATION

Wellness tools tracked, and the evidence behind them strengthened. Global Market Insights puts the skin-care devices market at US$26.15bn in 2026 heading for US$76bn by 2035, with the at-home segment growing faster than the salon segment at 13.8% against 10.3%. Red light devices alone track at US$587.5m to US$1.13bn by 2033 (Grand View Research, June 2026). The surprise of the year was a vacuum-cleaner company: Shark Beauty was named the number one skincare facial-device brand in the US by dollar sales within eleven months of launch (Circana, Jan–Aug 2025) and its CryoGlow mask reached Australian mass retail in March 2026. At-home devices are now a consumer electronics category with consumer electronics budgets.

MARKET CONTEXT

US$587.5m

Red light therapy devices US$587.5m (2026) → US$1,133m (2033), 9.8% CAGR (Grand View Research, June 2026).

US$303.6m

LED face masks US$303.6m (2026) → US$679m (2034) (Fortune Business Insights, Oct 2026).

#1

Shark Beauty #1 US facial-device brand by dollar sales, Jan–Aug 2025 (Circana via SharkNinja).

WHY IT MATTERS

Clients want continuity: to hold the result at home. Devices in the treatment journey lift engagement, retention and recurring revenue, and help the best clinics reach 20%+ retail share against an industry average of 6–7%. The professional channel's remaining edge is the trained person who says which device, how often, for which skin, and whether it is working.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

BUILD THE TIERED DEVICE LADDER.

an entry tool, a mid-priced LED or microcurrent device and a premium home system, each tied to a protocol the client has had in clinic.

USE THE SAME DEVICE IN CLINIC AND AT HOME.

continuity is the sale.

DEMONSTRATE, THEN FOLLOW UP.

correct use shown in the appointment, a QR tutorial or ritual card, a check-in next visit.

MAKE IT A MEMBERSHIP INCLUSION.

one device a quarter in premium tiers, consumables as recurring add-ons.

02 FOR BRANDS

DESIGN FOR THE BATHROOM BENCH.

the competitor now has industrial design budgets.

WIN ON THE PROTOCOL.

training, ritual cards and consumables that make the clinic the better place to buy.

STAY COMPLIANT ON CLAIMS.

comfort, radiance, tone, the appearance of firmness; offer warranties, care guides and take-back programs.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH SAFE INTEGRATION.

contraindications, cleaning, frequency and interaction with in-clinic treatments.

POSITION TOOLS AS CONTINUATION PIECES.

never as replacements for hands-on care.

TRACK ATTACH RATE.

return rate and consumable repurchase cadence rather than unit sales.



FROM ANALYSIS TO PREDICTION

CATEGORY	Software & Data | Marketing & Culture | Education & Workforce | Consumer & Client Behaviour
TIME HORIZON	Next → Future (2027–2030)
CONFIDENCE	High

THE 2027 CALL

THE CLIENT ARRIVES HAVING ASKED AN AI FIRST, AND THE CONSULTATION MOVES FROM DIAGNOSING TODAY'S SKIN TO FORECASTING NEXT YEAR'S.

US$5.3bn

AI in beauty & cosmetics US$5.3bn (2026) → US$10.86bn (2030), 19.6% CAGR (The Business Research Company, 2026).

SIGNAL / OBSERVATION

AI and AR personalisation landed structurally, which is a slightly boring way of saying it stopped being interesting: AI skin analysis is no longer a differentiator but the baseline. The interesting part moved in two directions. Toward prediction, arriving early: L'Oréal's June 2026 partnership with OpenAI covers microbiome research, agent-based selling and try-on inside ChatGPT; Estée Lauder switches on agentic commerce from October 2026. And toward the client's own research: three in four US beauty shoppers have used an LLM to research beauty, wellness or longevity and a quarter call AI their primary source (BCG/WWD, 2026), while in Australia PDRN, copper peptides, exosomes and astaxanthin all grew triple digits in search, every one an ingredient searched by name.

MARKET CONTEXT

3 in 4

3 in 4 US beauty shoppers recently used an LLM for beauty research; 25% call AI their primary source (BCG/WWD, 5,000 shoppers, 2026).

68%

68% of US Google searches ended with no click, Jan–Apr 2026 (SparkToro/Similarweb).

+490%

Australian searches, year to July 2026: PDRN +490%, copper peptides +344%, exosomes +183%, astaxanthin +169%, azelaic acid +119%.

WHY IT MATTERS

The 2027 client has done their research with a machine and expects the clinic to know more than the machine told them; mechanism education is a front-of-house skill. They also find the clinic differently: 68% of US Google searches now end without a click, and a growing share ask an assistant which clinic to choose. The clinic's front page is what the machine says about it.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

ASK THE MACHINE ABOUT YOURSELF.

have the AI assistant your clients use recommend a clinic in your suburb for the treatment you most want to sell. What it says, or fails to say, is your new front page.

KEEP THE PROGRESS RECORD.

AI analysis at every review, paired with the therapist's own assessment, is the data the forecast runs on.

MAKE THE TEAM FLUENT IN MECHANISMS.

explain an active out loud, in plain language, to someone who half-read about it at 2am.

BE TRANSPARENT ABOUT THE TOOL AND KEEP CLIENT IMAGERY INSIDE THE AUSTRALIAN PRIVACY ACT.

02 FOR BRANDS

BE FINDABLE BY THE AGENT.

if a client's assistant cannot describe your product and where to buy it, the product does not exist to that client.

BUILD EDUCATION AROUND THE ACTIVE, ARRIVING AT THE PRODUCT SECOND.

PUBLISH THE AGGREGATE.

aggregated, anonymised scan data across stockists is thought leadership nobody else has.

03 FOR EDUCATORS & DISTRIBUTORS

ADD AI LITERACY TO EVERY CURRICULUM.

what the tools measure, their limits, privacy and ethics.

PROVIDE DEMO ACCOUNTS SO PRACTITIONERS ARRIVE IN CLINIC ALREADY FLUENT.

TEACH THE NEW CONSULTATION.

the client with a position, the forecast rather than the diagnosis, and the program sold against it.



THE DEVICE RECKONING

CATEGORY	Devices & Hardware | Business Models | Treatment Modalities | Education & Workforce
TIME HORIZON	Next (2027–2029)
CONFIDENCE	High

THE 2027 CALL

A BUYER'S MARKET FOR CAPITAL EQUIPMENT: FEWER PLATFORMS SOLD, HARDER QUESTIONS ASKED ABOUT WHO SERVICES THEM IN 2030, AND PROGRAMS PROVEN BEFORE PURCHASE.

US$370.5m

InMode FY2025 US$370.5m, −6%; ~2,100 platforms (−100); ASP −9%; consumables 22% of revenue (Q4 2025 call, Feb 2026).

SIGNAL / OBSERVATION

The 2026 edition called RF microneedling as accelerating. It held true for the client and missed at the level of the clinic buying the machine, and the gap between those two is this trend. InMode, maker of Morpheus8, reported 2025 revenue of US$370.5m, down 6%, with around a hundred fewer platforms sold and average prices down 9%. Q2 2026 was exactly flat at US$95.6m, capital equipment down 3% and consumables up 13%, gross margin down five points. Preliminary Q3 is lower again, and a takeover bid from the chief executive's own group expired without agreement. Cutera went through Chapter 11 in 2025 and emerged private, and Venus Concept delisted in February 2026. The consumer has not gone anywhere, with RealSelf showing energy-device interest surging in Q1 2026. Clinics have stopped buying the machines.

MARKET CONTEXT

US$95.6m

InMode Q2 2026 US$95.6m flat; capital equipment −3%, consumables +13%; gross margin 75% vs 80%; prelim Q3 US$91.8–92.0m (Aug and Oct 2026).

US$400m+

Cutera Chapter 11, Mar–May 2025, US$400m+ debt converted to equity; Venus Concept delisted from Nasdaq, Feb 2026.

+3.6%

Sisram (Alma) H1 2026 revenue +3.6%, growth from injectables (+54%) not devices (Aug 2026).

WHY IT MATTERS

InMode's own explanation is the most useful commentary available: higher rates, softer demand, patients choosing cheaper treatments and a five-year leasing model only starting to ease. For an Australian clinic in a flat A$12.5bn market with rising competitor counts and product costs 10–25% higher than three years ago, a six-figure finance agreement is a difficult trade.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

BUILD THE PROGRAM BEFORE YOU BUY THE PLATFORM.

prove the demand with real bookings on a treatment you already do well, and let the device follow.

NEGOTIATE ON USAGE.

consumable-led, rental and usage-based models are where the manufacturers' own revenue is heading.

CHECK WHO WILL BE THERE IN 2030.

service, consumables and software are a five-year dependency on the company behind the platform.

SWEAT THE ASSET YOU OWN.

audit utilisation per device before adding anything.

02 FOR BRANDS

LEAD WITH CONSUMABLES AND TRAINING.

reliable tips, post-care topicals, protocol libraries and certification outlast the next platform launch.

OFFER THE PROOF-OF-DEMAND PATH.

trial, rental and pay-per-treatment arrangements will win the deals outright sales no longer can.

BUILD THE COMBINATION PROTOCOLS SO THE DEVICE SELLS AS PART OF A PROGRAM.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH ROI AND UTILISATION TRACKING.

break-even and program economics rather than features and benefits.

USE THE DEVICES EDITION.

What Salon Owners Want maps the eight stages of the device purchase; know which stage the clinic is at.

PREPARE CLINICS FOR THE LONG TAIL.

complication management and operator consistency matter more as the installed fleet ages.



PEPTIDES, FROM SERUM TO SYRINGE

CATEGORY	Ingredients & Formulations | Treatment Modalities | Regulation & Compliance | Consumer & Client Behaviour
TIME HORIZON	Next → Future (2027–2030)
CONFIDENCE	Medium–High

THE 2027 CALL

PEPTIDES MOVE FROM INGREDIENT CLAIM TO CATEGORY, WITH GHK-CU THE PROFESSIONAL ENTRY POINT AND THE TGA LINE BETWEEN TOPICAL AND INJECTABLE THE DEFINING BOUNDARY.

US$3.9bn

Peptide skincare US$3.9bn (2026) → US$7.5bn (2033), 9.8% CAGR
(Persistence Market Research, Sept 2026).

SIGNAL / OBSERVATION

Peptides are where longevity medicine, regenerative aesthetics and skincare collide, and it is happening in the client's vocabulary first. Australian searches for copper peptides grew 344% in the year to July 2026; peptide therapy searches rose 281% on Google and 459% on TikTok with GLP-1 among the leading co-searches (Spate, Apr 2026), because semaglutide and tirzepatide are themselves peptides. The GHK-Cu launch wave is coming from below: contract manufacturer Moes Group opened a private-label GHK-Cu line in June 2026 and said demand was high enough to limit new partners; TheraCopper and ProGlow Labs launched GHK-Cu ranges in October, and Hello Skin's 1% GHK-Cu serum sits on Australian pharmacy shelves at around A$90, while NIOD and The Ordinary remain the references. On the injectable side, Australian online clinics have supplied compounded BPC-157, CJC-1295 and TB-500 under the compounding exemption, at A$1,000+ for a few weeks' supply, and in July 2026 the TGA escalated enforcement.

MARKET CONTEXT

+344%

Copper peptides +344% in Australian search, year to July 2026 (Google Trends AU, Inside Industry).

3 launches

Moes Group private-label GHK-Cu line, 6 June 2026; TheraCopper and ProGlow Labs GHK-Cu launches, Oct 2026 (company releases).

July 2026

TGA escalated enforcement on unapproved peptides, 20 July 2026 (Medical Republic; Sydney Law School, Aug 2026).

WHY IT MATTERS

There are two peptide lanes and only one is open to this industry. Topical peptides are legitimate, growing near 10% a year and searched by name. Injectable compounded peptides are prescription medicine, outside every practitioner's scope here, and under active enforcement.

IMPLICATIONS & ACTIONS

01 FOR CLINICS & SALONS

KNOW THE TWO LANES AND SAY SO.

a one-page team explainer on topical cosmetic peptides versus prescription injectables, and a clear, non-judgemental answer for the client.

LEAD THE TOPICAL CONVERSATION.

copper, signal and post-procedure peptides in the program, explained in the consult, with home care that keeps the result going.

ASK ABOUT PEPTIDE USE.

add peptide use to the medical-history question beside weight-loss medication.

REFER THE INJECTABLE QUESTION TO A PRESCRIBER; NEVER BE THE PLACE THAT SOURCED THE PEN.

02 FOR BRANDS

OWN PEPTIDE LITERACY.

teach what each peptide class does, in plain language, and become the reference point for a client learning from TikTok.

FORMULATE FOR THE STACKED CLIENT ON A GLP-1.

a longevity protocol and a copper-peptide serum, without naming any medication.

KEEP CLAIMS COSMETIC.

firmness, smoothness, radiance; never "healing" or "repair" as therapeutic outcomes.

03 FOR EDUCATORS & DISTRIBUTORS

TEACH THE PEPTIDE CLASSES.

carrier, signal, enzyme-inhibitor and neurotransmitter-inhibitor peptides and what the evidence supports.

TEACH THE REGULATORY LINE WITH IT.

the TGA's July 2026 position, the compounding exemption and its limits, the scope boundary.

WATCH THE APPROVALS PIPELINE.

approved peptide therapeutics will reshape the injectable lane within four years.

THE 9 KEY TRENDS FOR 2027

01 SCAR CARE BECOMES A CATEGORY

02 THE NON-INJECTABLE MENU

03 REGENERATIVE INJECTABLES 2.0

04 THE HAIR REGROWTH BOOM, SECOND ENGINE

05 THE LONGEVITY CLINIC ARRIVES

06 AT-HOME CONTINUITY

07 FROM ANALYSIS TO PREDICTION

08 THE DEVICE RECKONING

09 PEPTIDES, FROM SERUM TO SYRINGE



WHAT'S NEXT?

The professional beauty and aesthetics landscape is being reshaped by forces that did not originate inside it, and the client on the treatment bed in 2027 is not the client this industry was built to serve: more likely on a medication that has changed their face and body, more likely to want enhancement than correction, more likely to have asked a machine before a friend, and more likely to be new to the business.

This report captures the evidence. The next step is turning them into decisions that fit your brand, your clients and your growth objectives. For some that means a product brief for a client nobody has formulated for yet; for others a rebuilt education calendar, field model or treatment menu; for a clinic, one question on a consultation form and one program built properly.

If you are ready to move from observation to execution, book a 60-minute Strategic Session with Tamara Reid to map how these trends align with your commercial and creative priorities for 2027, the events and partnerships that deserve a place in your calendar, and a plan for budget allocation and measurable outcomes, with the data in this report underneath every recommendation.



INSIDE INDUSTRY

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