MARKET RESEARCH FUTURE®

GLOBAL DERMAL FILLERS MARKET RESEARCH REPORT

Forecast to 2025

At Market Research Future (MRFR), we enable our customers to unravel the complexity of various industries through our Cooked Research Reports (CRR), Half-Cooked Research Reports (HCRR), Raw Research Reports (3R), Continuous-Feed Research (CFR), and Market Research & Consulting Services.

The MRFR team has the supreme objective to provide optimal quality market research and intelligence services to clients. Our market research studies, by products, services, technologies, applications, end users, and market players for global, regional, and country-level market segments, enable our clients to see more, know more, and do more, and help answer all their most important questions.

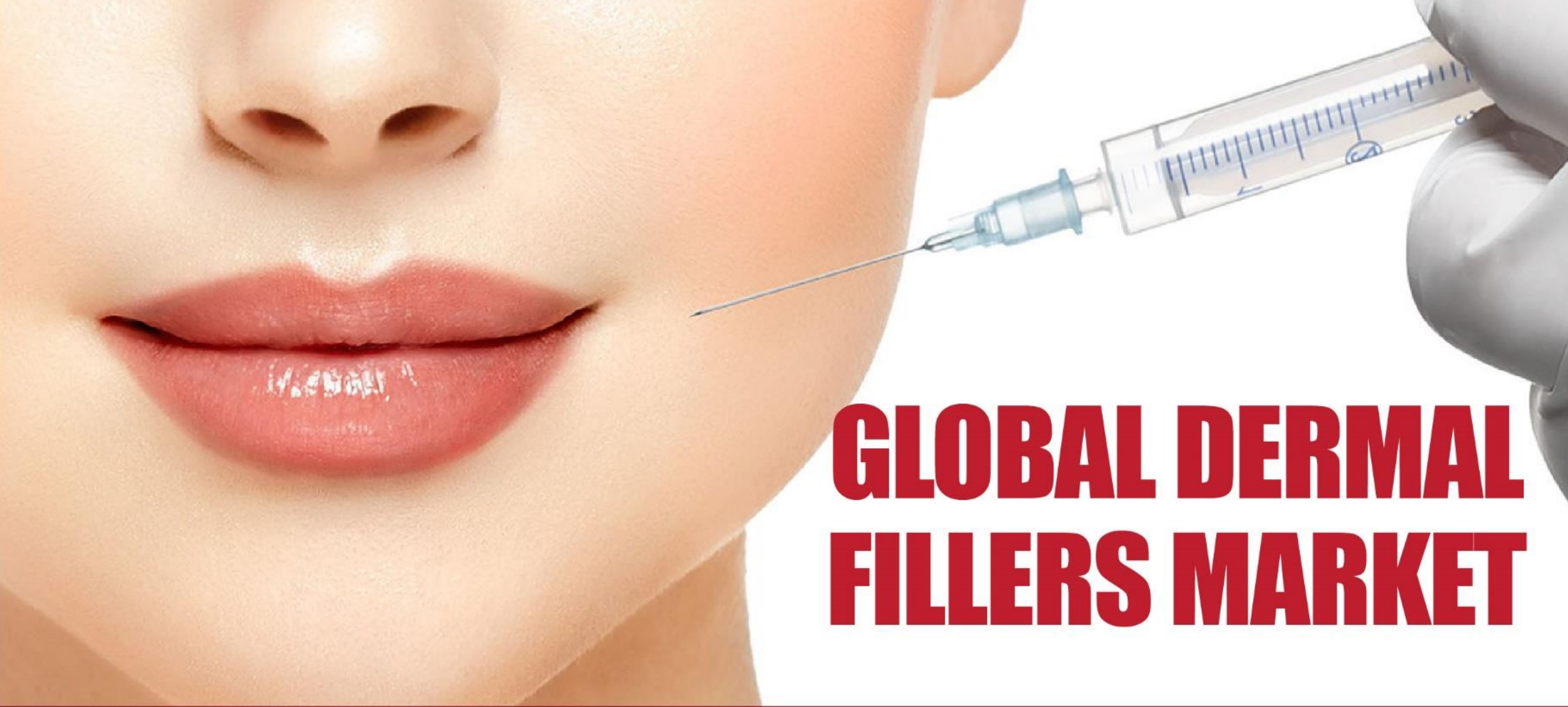
In order to stay updated with the latest technologies and work process in the industry, MRFR often plans and conducts meetings with industry experts and industrial visits for its research analysts.

For more information kindly visit our website www.marketresearchfuture.com or contact us at info@marketresearchfuture.com

TABLE OF CONTENTS

LIST OF TABLES

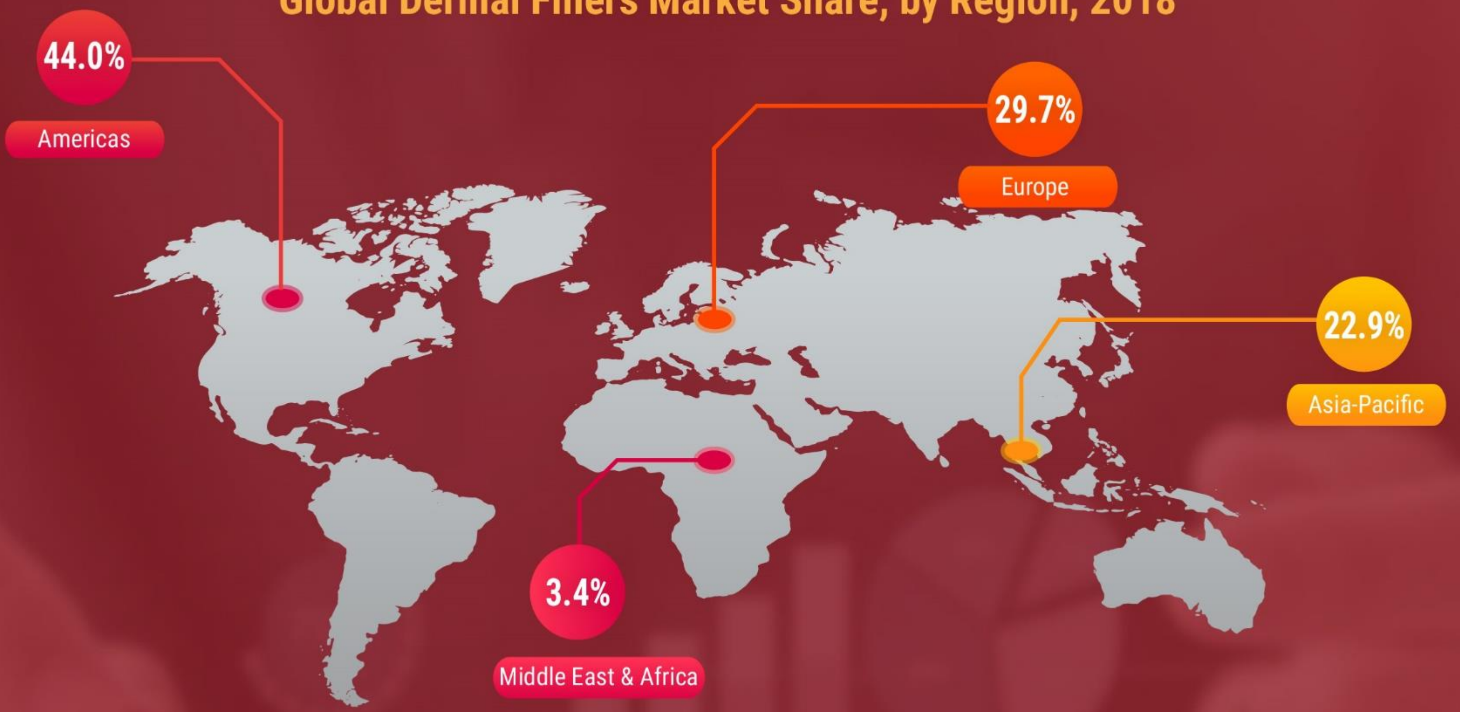
LIST OF FIGURES



GLOBAL DERMAL FILLERS MARKET

The global dermal fillers market was valued at USD 2,909.80 million in 2018 and is expected to reach USD 6,899.16 million in 2025 with a compound annual growth rate (CAGR) of 13.2% during the forecast period 2019–2025.

Global Dermal Fillers Market Share, by Region, 2018



DRIVERS:

- Growing Demand for Facial Aesthetics Globally
- Increasing Number of Aesthetic Procedures Performed by Plastic Surgeons
- Cost-Effective Alternative to Cosmetic Surgeries

RESTRAINTS:

- Side-Effects Associated with Dermal Fillers
- Black Market of Dermal Fillers and Effects of Unregistered Practitioners

KEY PLAYERS:

Allergan

GALDERMA

MERZ

1 EXECUTIVE SUMMARY

1.1 OVERVIEW

Dermal fillers are minimally invasive procedures used as anti-aging solutions to reduce facial lines and restore firmness. These are soft tissue fillers injected into the skin to resolve skin-related problems such as scars, wrinkles, and smoothens the skin using various dermal fillers such as hyaluronic acid, polymers and particles, and collagen.

Key factors that drive the dermal fillers market are the rising preference for non-invasive aesthetic procedures, an increasing number of plastic surgeons performing aesthetic procedures, and cost-effective alternatives to cosmetic surgeries. Also, the increase in per capita disposable income boosts the growth of the global dermal fillers market. However, factors such as side-effects associated with dermal fillers and the black market of dermal fillers and effects of unregistered practitioners hamper the market growth. The increasing number of clinical trial studies and rising demand for minimally invasive procedures act as an opportunity for the market.

1.1.1 MARKET SYPNOSIS

MARKET SIZE
- 2018: USD 2,909.80 million
- 2025: USD 6,899.16 million

CAGR (2019–2025)
- 13.2%

KEY GEOGRAPHIES
- Americas: 43.97%
- Europe: 29.72%
- Asia-Pacific: 22.91%
- Middle East & Africa: 3.41%

KEY MARKET DRIVERS
- Growing Demand for Facial Aesthetics Globally
- Increasing Number of Plastic Surgeons Performing Aesthetic Procedures
- Cost-Effective Alternative to Cosmetic Surgeries

KEY MARKET OPPORTUNITIES
- Increasing Number of Clinical Trial Studies
- Rising Demand for Minimally Invasive Procedures

KEY VENDORS
- Allergan
- Galderma Laboratories, L.P.
- Merz Pharma
- Sinclair Pharma

Source: MRFR Analysis

2 MARKET INTRODUCTION

2.1 SCOPE OF THE STUDY

The scope of the global dermal fillers market study includes market size analysis and a detailed analysis of the manufacturer's products and strategies. The market has been segmented based on type, brand, application, and region.

2.2 RESEARCH OBJECTIVE

- To provide a comprehensive analysis of the global dermal fillers market and its sub-segments, thereby providing a detailed structure of the industry
- To provide detailed insights into factors driving and restraining the growth of the global dermal fillers market
- To estimate the market size of the global dermal fillers market where 2016 to 2017 would be the historic period, 2018 shall be the base year, and 2019 to 2025 will be the forecast period for the study
- To provide country-wise market value analysis for various segments of the global dermal fillers market
- To provide strategic profiling of key companies (manufacturers and distributors) present across the globe and comprehensively analyze their competitiveness/competitive landscape in this market
- To provide a distribution chain analysis/value chain for the global dermal fillers market

2.3 LIST OF ASSUMPTIONS

TABLE 1 LIST OF ASSUMPTIONS

Parameter	Assumption & Limitations
Currency Value	All forecasts have been made with the revenue and value calculated under the standard assumption that the value of the globally accepted currency, the US dollar, remains constant over the next five years.
Exchange Rates and Currency Conversion	For the conversion of various currencies to USD, the average historical exchange rates have been used according to the year specified. For all historical and current exchange rates required for calculations and currency conversions, the OANDA website has been used in this research study.
Niche Market Segments	For niche market segments where accurate data of the respective timeline was not available, the data were calculated using trend line analysis. In some instances, where mathematical and statistical models could not be applied to arrive at the number, a generalization of specifically related trends to that particular market has been made.
Qualitative Analysis	The qualitative analysis is arrived at from the quantitative data based on the understanding of the market and its trends by the team of experts involved in making this report.
Average Selling Prices (ASP)	The ASP, wherever applicable, was calculated using all kinds of suitable statistical and mathematical methods and considering external qualitative factors affecting the price. All the calculations are interconnected based on the finalized ASPs.

Source: MRFR Analysis

FIGURE 1 GLOBAL DERMAL FILLERS MARKET STRUCTURE

BY TYPE

- Hyaluronic Acid
- Polymers & Particles
- Calcium Hydroxylapatite
- Collagen

BY BRAND

- Juvederm
- Radiesse
- Restylane
- Others

BY APPLICATION

- Facial Line Correction Treatment
- Face-Lift
- Lip Treatments
- Others

BY REGION

- Americas
- Europe
- Asia-Pacific
- Middle East & Africa

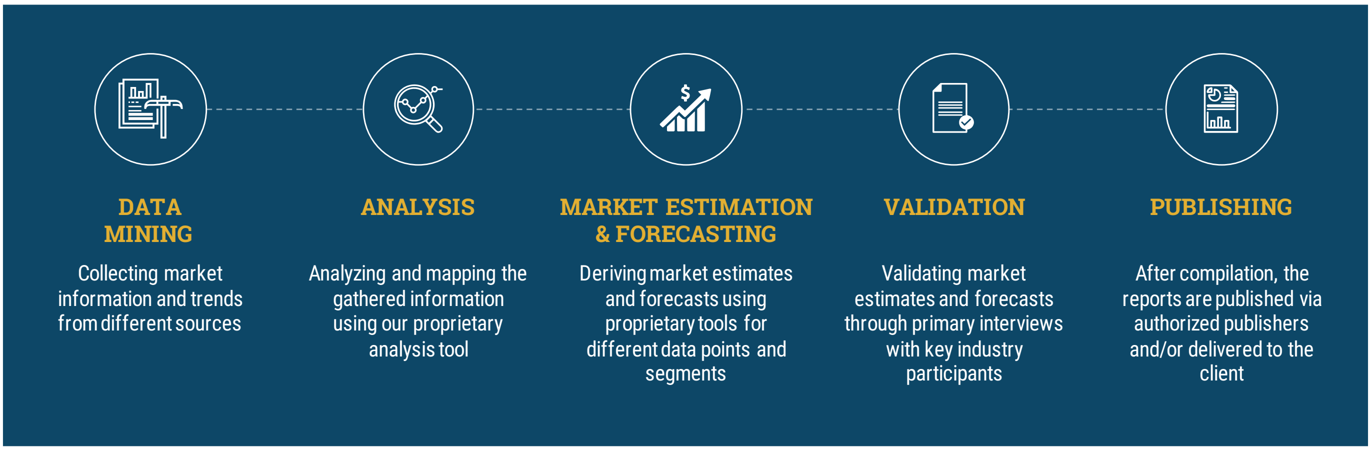
Source: MRFR Analysis

3 RESEARCH METHODOLOGY

3.1 OVERVIEW

The research starts with the extensive procurement process of data/information and statistics from company annual reports, government websites, statistic agencies, and paid databases. This information creates a base for the study. This information also helps to define the scope and to narrow down the area for study for the market. This raw information is processed and analyzed to extract crisp data points which currently affect or are likely to affect the industry over the forecast period. After analyzing the information, a proprietary statistical tool is used for market estimation & forecast, which generates the quantitative figures/sizes of the market/sub-segments in the current scenario as well as for over the forecast period.

After estimating the market sizes & estimates, numbers are verified with the industry participants and key opinion leaders. The wide network of industry participants performs a value addition in the research and verify the numbers & estimates of the study. In the last stage of the research process, a final report is prepared, which is then published on different websites as well as distributed through various channels. Below figure contains the different stages of the whole research performed to produce the report.



3.2 DATA MINING

Data mining is one of the extensive stages of our research process. It involves the procurement of market data and related information through different verified & credible sources. This step helps to obtain the raw information about components in the industry and their deployment, the monetary process for different end-uses, the pool of market participants & the nature of the industry, and the scope of the study. The data mining stage comprises both primary as well as secondary sources of information.

3.3 SECONDARY RESEARCH

In the secondary research process, various sources are used to identify and gather industry trends and information for the research process. We at MRFR have access to some of the most diversified and extensive paid databases, which give us the most accurate data/information on market sizes, components, and pricing. Mentioned below is a detailed list of sources that have been used for this study. Please note that this list is not limited to the names as mentioned; we also access other data sources depending on the need.

Market Sizing & Revenue	Qualitative Information & Trends
Company Websites	• White Papers • Magazines • Company Websites • Annual Reports • Press Releases • Investor Presentations • Paid Databases • Authenticated Directories • Independent Studies • Internal Audit Reports & Archives • Government and Regulatory Published Material • National Center for Biotechnology Information • European Federation of Pharmaceuticals Industries and Associations • The American Academy of Facial Esthetic • Australasian Academy of Dento-Facial Aesthetics • THE AMERICAN BOARD OF COSMETIC SURGERY • American Society of Plastic Surgeons • International Academy of Facial Aesthetics • ILDS
Annual Reports	
Investor Presentations	
Authenticated Directories	
Hoover's, Factiva, Bloomberg	

3.4 PRIMARY RESEARCH

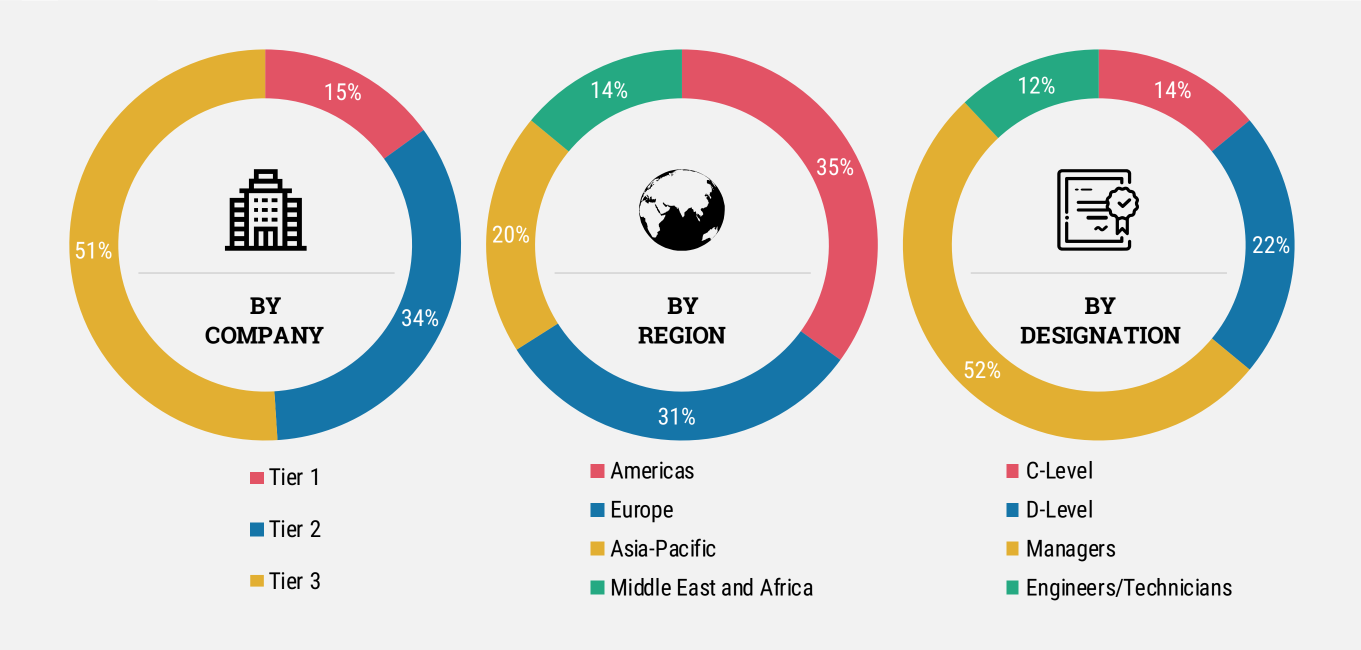
In the primary research process, in-depth primary interviews are conducted with the CXOs to understand the market share, customer base, pricing strategies, and other necessary information. Besides, in-depth primary interviews are conducted with the CXOs of companies, and others to validate the supply-side information. Moreover, various key industry participants from both the supply and demand side are interviewed to obtain qualitative and quantitative information on the market. In-depth interviews with key primary respondents, including industry professionals, subject matter experts (SMEs), industry consultants, and C-level executives of major companies, are conducted to obtain critical qualitative and quantitative information pertaining to the market, as well as to assess the prospects for market growth during the forecast period. Detailed information on these primary respondents is mentioned below.

Primary Source	**Service Side Subject Matter Experts, Top Management, and CXOs**
	Technical Persons of Organizations Operating in the Market
	Marketing and Business Development Managers, VPs, and Marketing Directors
	Various Partner Consultants from the Demand and Supply Sides

3.4.1 PRIMARY INTERVIEWS AND INFORMATION GATHERING PROCESS

Respondents	**Data Points Received**
Manufacturer and Distributors	• Market Size • Top of the Mind Key Market Players • Direct Competitors • Company Market Shares • Growth Rate (%) • Market Trends and Prominent Market Drivers • Major Products • Product Cost • Commercial Availability • Regional Scenario (America, Europe, Asia-Pacific, Middle East & Africa) • Data Protection Policies and Other Regulatory Norms • Upcoming products
End Users	• Adoption of New Technology • Acceptance Ratio • Cost of Dermal Fillers • Commonly Used Dermal Fillers

3.4.2 BREAKDOWN OF PRIMARY RESPONDENTS



3.5 FORECASTING TECHNIQUES

We at MRFR follow an extensive process for arriving at market estimations, which involves the use of multiple forecasting techniques, as mentioned below.

Forecasting Techniques	Description
Qualitative and Quantitative Analysis	A combination of qualitative approach, i.e., primary interviews with industry experts to understand the interviewees' opinions and judgments, more commonly known as the Delphi method, and quantitative analysis to forecast future data based on historical and current data.
Weighted Average Approach	Via this approach, future data is calculated based on the mean of the past data under the assumption that some factors affecting the market in the past will continue to have a similar impact in the future.
Drift Method	This approach is used to vary the forecast, which increases or decreases in market factor over time, depending on various parameters affecting the change in the trends of the market.
Time Series Methods	The integration of several time series methods such as moving average, moving weighted average, linear prediction, and trend estimation is applied while determining the year-on-year growth rate and the compound annual growth rate of the market being studied.
Causal/Econometric Forecasting Methods	Various economic factors such as inflation rate, fiscal policies, changes in government regulations, taxes, labor costs, and interest rates are taken into consideration while determining the

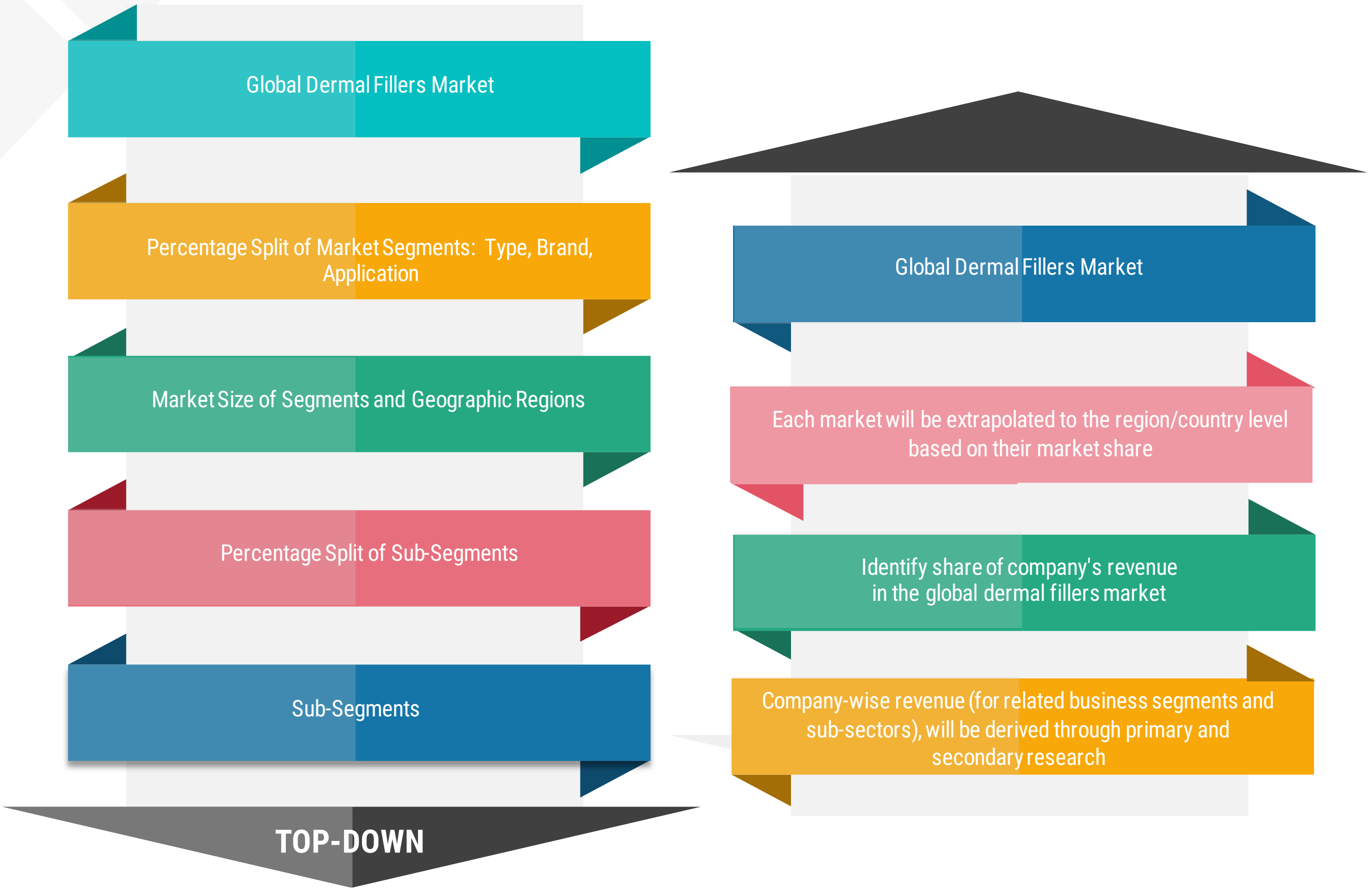
	current market size and predicting the future market growth rate.
Judgmental Methods	This involves the collection of intuitive judgment, opinions, and probability estimates from industry experts in the case of new or upcoming markets/technologies for which no prior data is available.
Regression Analysis	This type of statistical modeling is carried out for predicting and forecasting dependent and independent variables that will directly or indirectly impact the market.
Probabilistic Forecasting	This forecasting method is carried out to assign a probability to every possible outcome ranging from the least optimistic to highly optimistic, which helps in gauging the market under stable conditions.
PESTLE Analysis	Political, economic, social, technological, legal, and environmental factors are taken into consideration while deriving the fluctuations in the growth rate of the market.
Porter's Five Forces Analysis	By understanding the supplier-side and demand-side factors, the current market scenario can be estimated, and future market scenarios predicted, which aid in deriving the growth rate of the market.

3.6 RESEARCH METHODOLOGY FOR MARKET SIZE ESTIMATION

Understanding and penetrating the market in terms of valuation is a crucial task in the process of business research. This again becomes significantly important while investing and choosing business opportunities. In this regard, we at MRFR performs two ways market sizing approach simultaneously, namely top-down and bottom-up approaches. In this step, we place different data points, numeric attributes, information, and industry trends at an appropriate space to deduce the estimates & forecast values over the coming years. We use different mathematical models to estimate the market sizes of different economies and segments. Each of which is further summed up to define the total market.

We at MRFR own a proprietary statistical tool for market estimations which helps us to comprehend market size estimates & forecasts for different markets and industries.

FIGURE 2 BOTTOM-UP AND TOP-DOWN APPROACHES



Source: MRFR Analysis

3.6.1 BOTTOM-UP APPROACH

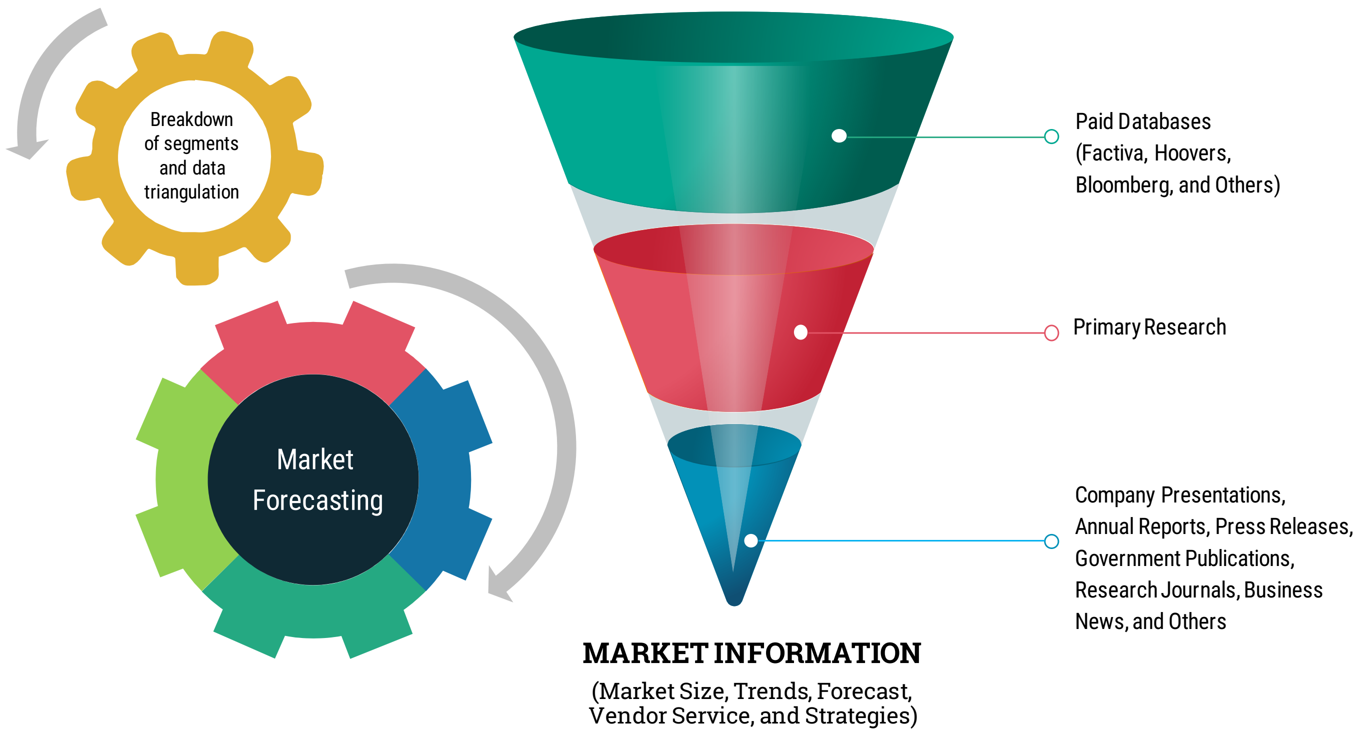
In the bottom-up approach, the revenue of key companies and their shares in the market are assessed to deduce the market size. More than 80% of key players operating in the global dermal fillers market are studied. The segmental revenue of each player is analyzed, and the size for the global dermal fillers market is extracted from the segmental/product/service revenue with the help of secondary and primary research. The extracted size for the market is then validated with industry experts and partner consultants. This derived market size contributes to around 75% to 80% of the total global market share in terms of revenue for the dermal fillers market. Using the data triangulation method, the overall global market size is estimated.

3.6.2 TOP-DOWN APPROACH

The overall market size is then used in the top-down procedure to estimate the size of the other sub-markets with the help of percentage splits of the market segments from secondary and primary research. The demand-side analysis is conducted, in which the expenditure of significant industry players in each region is studied. The end-users considered in the scope of this research study contributes around 70% of the total spent in the dermal fillers market.

The countries considered in the scope of the dermal fillers market are the US, Canada, the UK, Germany, France, Italy, Spain, China, Japan, South Korea, India, Singapore, Malaysia, Indonesia, South Africa, and others.

The figure below depicts the process of market estimation using independent tools employed by our analysts to arrive at the sizing of the market.



Source: MRFR Analysis

As a part of the market engineering, both top-down and bottom-up approaches are utilized along with data triangulation models to derive and verify the market sizes and forecast over the coming years.

3.7 DATA TRIANGULATION

After arriving at the overall market sizes, the total market is divided into several segments and sub-segments. Again, the market breakdown and data triangulation procedures are implemented, wherever applicable, to complete the overall market engineering process and gather the exact statistics for all segments and sub-segments. The data is triangulated by studying various factors and trends from the demand and supply sides. Along with this, the market size is validated using the top-down and bottom-up approaches.

3.8 VALIDATION

Validation is the most crucial stage of the report making the process. Validation via an intricately designed feedback process helps us finalize the sizing estimates and forecast for the final collation. Extensive primary research is performed to verify the information. This includes telephonic and personal interviews, e-mails, feedback forms, questionnaires, and polling options/answers with a group of relevant industry participants. Validation helps to duly check the authenticity of the key industry trends, market dynamics, company market share, different business models, and conclusions.

4 MARKET DYNAMICS

4.1 OVERVIEW

Dermal fillers can be defined as soft tissue fillers injected into the skin for the restoration of smooth appearance and the reduction of wrinkles and other signs of the aging process. The rapidly expanding range of dermal filler products and their increased benefits is fueling the preference rates of dermal fillers among medical professionals as well as patients. The growing demand for facial aesthetics, increasing inclination towards the use of dermal fillers, a rise in the number of plastic surgeons performing cosmetic surgeries, and the decreased procedural cost of dermal fillers in comparison to the cosmetic surgeries are driving the dermal fillers market globally. However, the side-effects associated with such facial injectables, coupled with the increasing black market for dermal fillers is likely to curb the growth of the dermal fillers market. Nevertheless, the rise in the number of clinical trial studies for increasing efficiency rates of dermal fillers will create lucrative opportunities for the growth of the market during the assessment period.

FIGURE 3 MARKET DYNAMICS: ANALYSIS OF THE GLOBAL DERMAL FILLERS MARKET

Source: MRFR Analysis

4.2 DRIVERS

4.2.1 GROWING DEMAND FOR FACIAL AESTHETICS GLOBALLY

Globally, the demand for facial aesthetic treatments, products, and services is growing at a rapid pace. The growing number of medical aesthetic facilities providing aesthetic services is boosting the growth of the market. Such facilities have made these procedures more accessible and have helped in the rise of the popularity of these practices. According to the International Society of Aesthetic Plastic Surgery (ISAPS), in 2018, the number of non-surgical cosmetic procedures involving hyaluronic acid was 3,729,833 globally. The cost-effective dermal filler therapy provided by some countries such as China and India are driving the dermal fillers market growth in the region.

TABLE 2 NUMBER OF NON-SURGICAL PROCEDURES PERFORMED GLOBALLY INVOLVING HYALURONIC ACID

Gender	No. of Procedures (2018)	No. of Procedures (2017)
Women	3,382,281	2,954,389
Men	347,552	343,877

Source: International Society of Aesthetic Plastic Surgery (ISAPS), Company Websites, Investor Presentations, and MRFR Analysis

The above chart shows the number of procedures involving the use of hyaluronic acid in 2018 and 2017. Females constitute almost ninety percent of the total procedures. This attributes to the increasing inclination of the female population towards the use of dermal fillers. Also, the number of procedures, as seen in the table, has increased from the years 2018 to 2017. The growing awareness about the benefits of the fillers and the need for maintaining youthful structure push the sales of facial injectables. This results in the growing demand for the dermal fillers.

Furthermore, there is a huge demand for dermal fillers in developing regions such as Asia, especially from countries such as Japan, China, and South Korea, which command a major portion of the global dermal fillers market and are likely to remain the largest national markets in the region. The South Korean market is expected to be growing at a significant pace. This is determined by the full acceptance of cosmetic procedures, strong media influence, and low average selling prices, making these products widely affordable. South Korea is also a significant destination for cosmetic tourism, which also boosts the growth of the dermal fillers market in this country.

4.2.2 INCREASING NUMBER OF AESTHETIC PROCEDURES PERFORMED BY PLASTIC SURGEONS

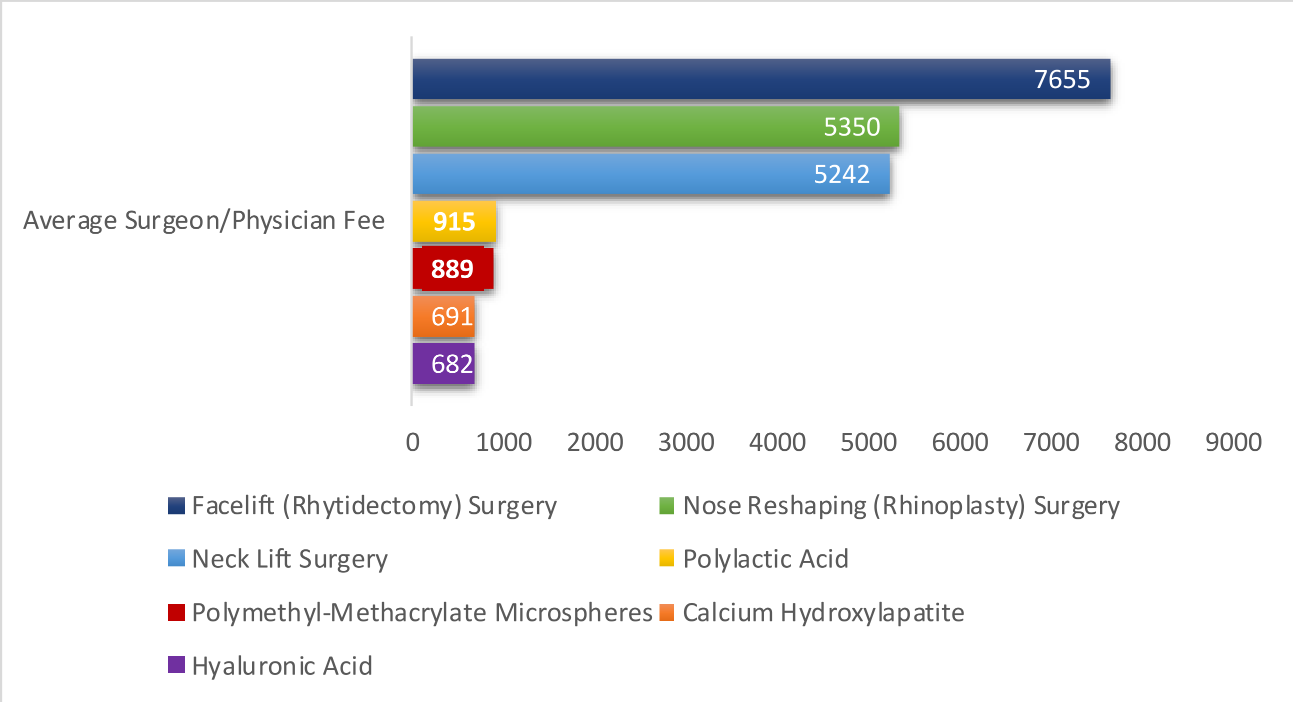
An increasing trend of plastic surgeons performing aesthetic non-surgical procedures has been observed in the past few years. Developed countries have more advanced knowledge and uptake about the newer products and technologies, in comparison to other under-developed regions. Nevertheless, developing countries and few countries in underdeveloped regions are also inclining towards the use of dermal fillers over surgical procedures. An increased number of plastic surgeons preferring aesthetic procedures is favoring this scenario. For instance, in 2018, worldwide, plastic surgeons performed approximately 12.6 million non-surgical procedures in comparison to 10.6 million surgery-based procedures. In Columbia, 87% of the plastic surgeons performed procedures involving the use of hyaluronic acid fillers. Such numbers elucidate an impression that the rising preference towards dermal fillers and the use of other aesthetic procedures will contribute heavily to the growth of the dermal fillers market during the assessment period.

4.2.3 COST-EFFECTIVE ALTERNATIVE TO COSMETIC SURGERIES

Dermal fillers can treat wrinkles, fill in scars, reverse aging, and restore facial contours. The growing awareness about the benefits of dermal fillers has increased usage rates among the people in various countries. In the past, models and celebrities preferred surgeries as there were limited reliable options available in the market. With the launch of different dermal fillers, the market has expanded its target audience to the middle-class people.

In comparison to cosmetic surgeries, dermal fillers prove to be more reliable, affordable, and cost-effective. The below chart depicts the average surgeon fee for various dermal filler procedures and cosmetic surgeries, such as rhytidectomy, rhinoplasty, and neck lift surgery in the US for 2018. The fees of dermal fillers are quite low when compared to surgery, thus, increasing the preferability rates of dermal fillers. This factor is likely to contribute substantially to the increase of the dermal fillers market growth.

FIGURE 4 COMPARISON BETWEEN FEES INCURRED BY PHYSICIANS FOR DERMAL FILLERS AND SURGERY IN THE US (2018)



Source: American Society of Plastic Surgeons, International Society of Aesthetic Plastic Surgery (ISAPS), Company Websites, and MRFR Analysis

FIGURE 5 DRIVERS IMPACT ANALYSIS

DRIVERS	2015–2016	2017–2018	2019–2025
	IMPACT		
Growing Demand for Facial Aesthetics Globally	MEDIUM	HIGH	HIGH
Increasing Number of Plastic Surgeons Performing Aesthetic Procedures	LOW	MEDIUM	HIGH
Cost-Effective Alternative to Cosmetic Surgeries	LOW	MEDIUM	HIGH

HIGH MEDIUM LOW

Source: MRFR Analysis

4.2.4 RESTRAINTS

4.2.5 SIDE-EFFECTS ASSOCIATED WITH DERMAL FILLERS

One of the most common factors restraining the growth of the global dermal fillers market is the associated side-effects of dermal fillers. The Food and Drug Administration (FDA) has issued several notices to social healthcare suppliers and the general population about genuine complications that can occur if dermal fillers are unintentionally infused into blood vessels of the face. The inconveniences could incorporate vision hindrance, visual deficiency, stroke, and damage or necrosis of the skin and hidden facial structures. A paper released in 2018 by the Australasian Journal of Plastic and Reconstructive Surgery, stated that nearly 200 people suffered blindness after receiving dermal fillers across the globe in the year 2017. Caution should be taken to guarantee appropriate placement of the filler material, and patients must be educated about potential adverse impacts and how to perceive side-effects of approaching genuine complications.

Furthermore, with every medical procedure, there is a degree of risk associated with the use of facial injectables or dermal fillers. These adverse events may be injection-related, technique-related, or rarely may be owing to localized exposure to hyaluronic acid itself or potential residual purification solvents. Thus, complications during these procedures can prove to be a restraining factor for the global dermal fillers market.

4.2.6 BLACK MARKET OF DERMAL FILLERS AND EFFECTS OF UNREGISTERED PRACTITIONERS

As the dermal fillers market has grown in popularity, the black market for dermal fillers is gaining awareness globally. According to a survey, it was found that Asia accounted for the largest dermal filler black market, wherein many illegal drugs are entering the market, which is resulting in many side-effects. As a result of these side-effects, patients are thinking twice about undergoing injectable facial procedures, thus restraining the growth of this market.

As per the Australasian Academy of Facial Plastic Surgery (AAFPS), in Australia, an estimated 1.5 million doses of dermal fillers are administered each year. The rapid increase in the use of such products makes it almost impossible to figure out the difference between the original product and products from the black market, which results in the horrific effects of these products. For instance, in 2018, Four Corners, Australia's leading Investigative journalism program, revealed that an Australian woman suffered permanent blindness after having a dermal filler injected into her face by a nurse at a clinic with no doctor physically present. Thus, with the growing number of such cases, the products from the black market will prove to be a major restraining factor in the global dermal fillers market.

FIGURE 6 RESTRAINTS IMPACT ANALYSIS

RESTRAINTS	2015–2016	2017–2018	2019–2025
	IMPACT		
Side-Effects Associated with Dermal Fillers	Medium	Medium	High
Black Market of Dermal Fillers and Effects of Unregistered Practitioners	Medium	High	High

HIGH | MEDIUM | LOW

Source: MRFR Analysis

4.3 OPPORTUNITIES

4.3.1 INCREASING NUMBER OF CLINICAL TRIAL STUDIES

With the cutting-edge technology employed by major players, coupled with the increasing innovation and research in the field of aesthetics, a lot of new entrants, as well as established players, are focusing on product differentiation and incorporation of innovation in their present dermal filler portfolio. Major companies are increasing their research and development in the aesthetics field and are focused on getting new products in the dermal fillers market in the coming years. For instance, in October 2019, Galderma, a global skin health company, announced the initiation of seven new clinical trials, including neurotoxin and dermal filler candidates. The company initiated clinical studies to support potential new aesthetic indications, including a tear trough indication for Restylane and a facial wrinkle indication for Sculptra. The company currently has enrolled more than 6,000 patients across approximately 80 clinical trial sites, with a total of 17 clinical studies underway. Such strategies are going to deduce heavy demand for the current dermal fillers in the market and promise to create lucrative opportunities for the growth of the global market in the coming years.

Galderma continues to support female clinical trial investigators and has doubled the number of female clinical investigators in company-sponsored trials since 2014. As in 2019, women clinical investigators hold approximately 50 percent of Galderma's clinical investigator roles. Such strategies aid in increasing the target audience and potential customers of the company, which will surely drive the dermal fillers market growth in the near future.

4.3.2 RISING DEMAND FOR MINIMALLY INVASIVE PROCEDURES

For many years, the global population was majorly focusing on minimally invasive procedures to treat a variety of medical and aesthetic imperfections such as scars, wrinkles, skin discolorations, unwanted spots, excess fat, and spider veins, amongst others. Increasing awareness about the benefits of dermal fillers, in comparison to surgical procedures, is leading to its widespread acceptance among the population of all age groups.

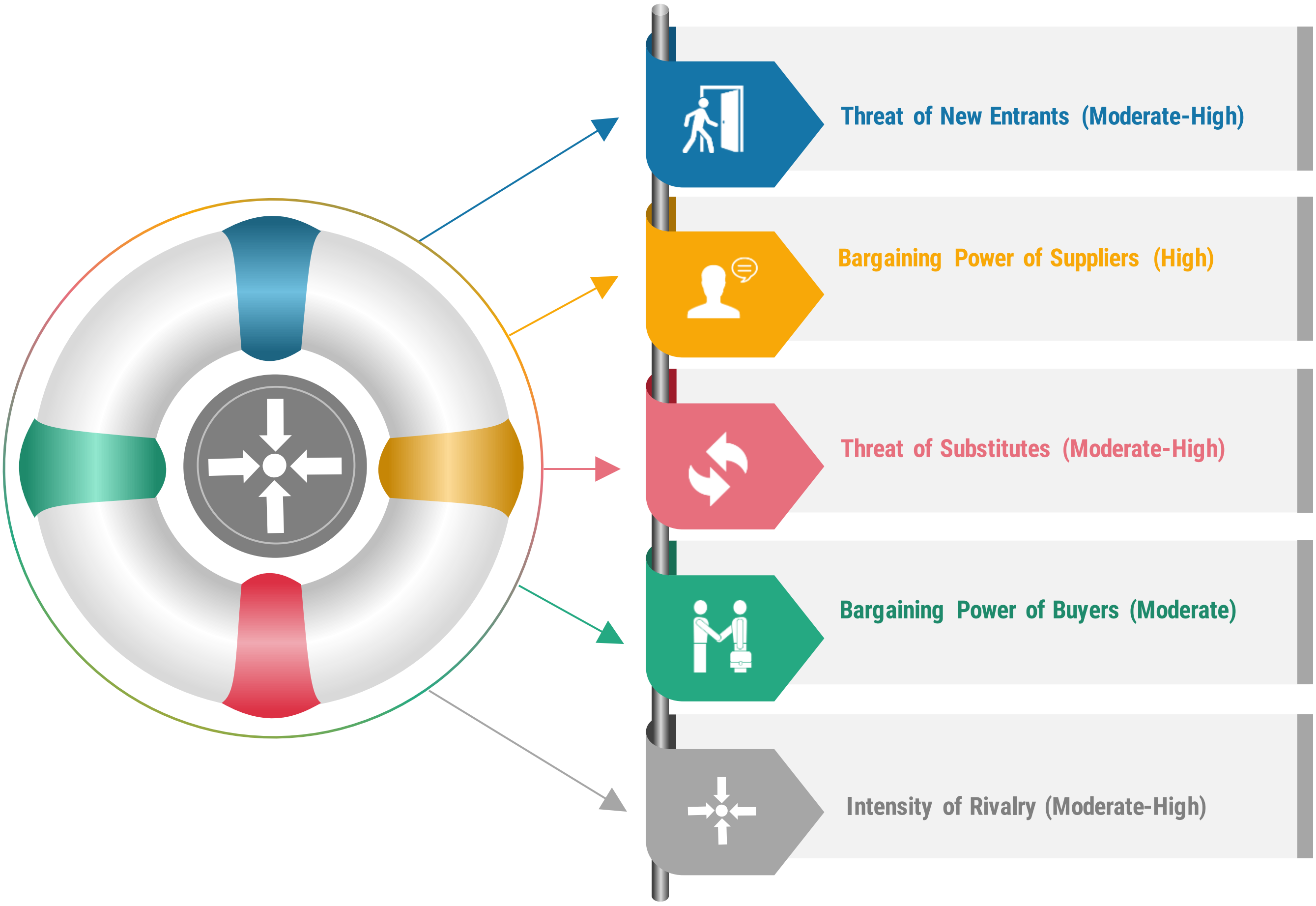
As indicated by the World Population Report, every year, around 83 million individuals are reaching the age group of more than 60 years. The changing interest patterns for less painful treatments by customers is likely to expand the interest for aesthetic procedures over the forecasted time frame. The American Society of Plastic Surgeons (ASPS) stated that 2.52 million cosmetic minimally invasive procedures were performed with soft tissue fillers in the US in 2018. The more extensive cluster of dermal filler choices given by different manufacturers is likely to fuel the development of the global dermal fillers market.

5 MARKET FACTOR ANALYSIS

5.1 PORTERS FIVE FORCES

Michael Porter's five forces analysis gives a framework that models the dermal fillers market, which is influenced by five forces in the market. This is a useful tool for chief executives of the company to understand the current position of the company in the market as well as to get an overall idea of the competitive scenario in the market. The components of each of the forces and the degree of impact of each component in the context of the dermal fillers market have been broken down and analyzed below.

TABLE 3 PORTER'S FIVE FORCES ANALYSIS: GLOBAL DERMAL FILLERS MARKET



Source: MRFR Analysis

5.1.1 THREAT OF NEW ENTRANTS

The threat of new entrants is moderate to high in the global dermal fillers market. Any manufacturing company trying to enter the market is required to accept or abide by the mandatory regulatory standards. The dermal fillers market is also characterized by a reasonable degree of brand loyalty, where establishing a brand name is difficult for newcomers. However, the cost involved in R&D is comparatively high, which does not comfort the new entrants to enter the market easily. Recently, due to different cases related to horrific adverse events of dermal fillers, regulatory authorities have made approvals stricter and started scrutinized checks for every product with more detail. Thus, the threat of new entrants remains moderate to high.

5.1.2 BARGAINING POWER OF SUPPLIERS

The suppliers in the global dermal fillers market are the developers and manufacturers of facial injectable products or dermal fillers. There is a large number of suppliers in the global dermal fillers market, thus leading to a high amount of bargaining power in the market. The switching cost of these suppliers is also high as suppliers tend to enter into long term associations with cosmetic professionals. However, developing countries in the Asia-Pacific region consist of a large number of suppliers that offer these injectable facial products at a reasonable rate. This leads to the high bargaining power of suppliers, and the profit potential of the global dermal fillers market is increased.

5.1.3 THREAT OF SUBSTITUTES

The threat of substitutes in the global dermal fillers market is moderate to high. Buyer propensity to substitute is also a factor that should be given importance. The emerging trend of usage of botulinum toxin can hamper the growth of the market. There have been various cases where botulinum toxin has proved to be a better option. As per the Plastic Surgery Statistics Report published in 2018 by the American Society of Plastic Surgeons, the number of cosmetic minimally-invasive procedures involving the use of botulinum toxin type A was 7.43 million in 2018, whereas the processes involving the use of soft tissue fillers were 2.67 million in 2018 in the US. Thus, the threat of substitutes tends to be moderate to high.

5.1.4 BARGAINING POWER OF BUYERS

The bargaining power of buyers is moderate in the global dermal fillers market. The market has a large number of buyers comprising of various end users. The buyers of dermal fillers are moderately inclined towards dermal fillers manufacturers. Moreover, buyers can exert moderate pressure on the manufacturers to provide high-quality products and services. Hence, with the high level of products and services provided by the dermal fillers' manufacturers, the bargaining power of suppliers tends to be moderate.

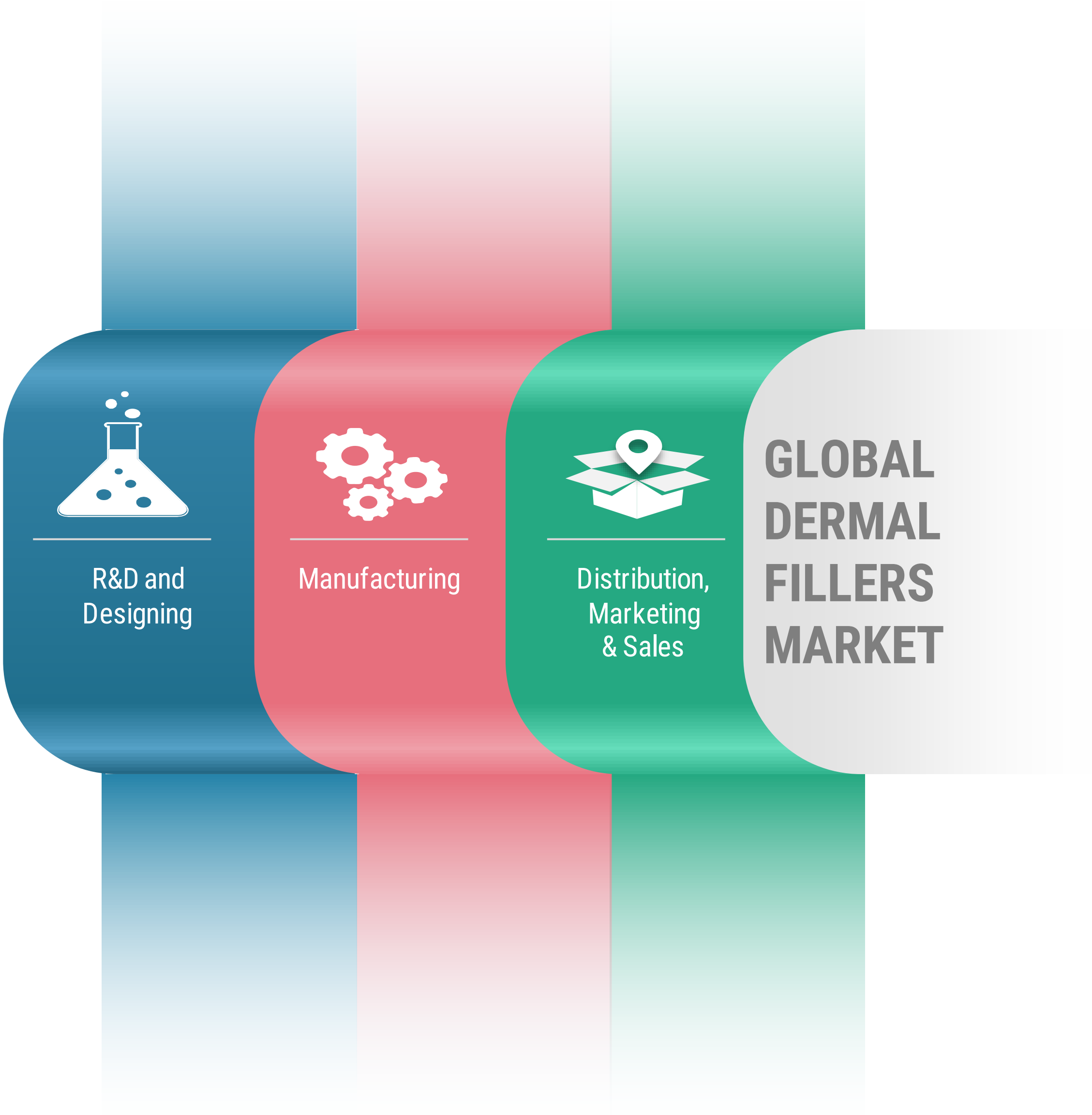
5.1.5 INTENSITY OF RIVALRY

The degree of competition in the global dermal fillers market is moderate to high. The reserved degree of product differentiation among existing players increases the intensity of rivalry in the market. Aesthetic and skincare companies are trying to develop less expensive products to make these products more affordable in developing markets. To overcome the competition, players are engaged in developing a process to lower their manufacturing costs. Moreover, the players are also developing advanced products for differentiating their brand from their competitors.

5.2 VALUE CHAIN ANALYSIS

The dermal fillers industry plays an important role in the medical cosmetics industry and generates extensive and multiple effects on the development of the parent industry. The value chain analysis for the dermal fillers industry comprises of five major components, which start with the research and development and designing, manufacturing, distribution, marketing and sales, and post-sales monitoring.

FIGURE 7 VALUE CHAIN: GLOBAL DERMAL FILLERS MARKET



Source: MRFR Analysis

5.2.1 RESEARCH AND DEVELOPMENT

Research and development of dermal fillers take an extended period that ranges more than ten years and requires vast speculation. Proceeding to market launch, new products experience a long and complicated arrangement of steps, including efficiency and safety, application for examination, and approvals of medication applications by regulatory authorities. After the product approval, the specific dermal fillers move into the manufacturing stage.

5.2.2 MANUFACTURING PROCESS OF AESTHETIC PRODUCTS

A number of steps are involved in the production of dermal fillers, from the initial research and development phase to gaining regulatory approval, which allows the product to be sold in a market. The specific steps and requirements will differ between the types of dermal fillers, manufacturers, and different countries involved. Product development and research for dermal fillers can be lengthy and costly, so it is important to outsource to an accomplished partner who can address the difficulties included in the research and development of dermal fillers.

5.2.3 MARKETING AND DISTRIBUTION

Marketing and distribution are a vital part of any organization. In the dermal fillers market value chain analysis, marketing and distribution consist of intermediaries, direct selling, and suppliers. Appropriate dosages for the different types of the procedure will provide an advantage and convenience in the last step of the quality chain. This progression can likewise include some of the additional activities, including checking for potential interactions, providing advice, and processing reimbursement claims, each of which is expected to guarantee the patient gets the full advantage and value from the aesthetics they receive for the treatment. Sales play a very crucial process in any organization. To sell the products, a strong sales team is required. To explain and increase the awareness about the products, many players are adopting strategies such as performing some seminars and knowledge sessions, which gives the users an idea of the advantages and availability of the products. For this, the company's marketing and sales strategies play a very crucial part in understanding the characteristics of the industry in which one is competing. Many companies collaborate or come into the partnership for the marketing of the product.

6 GLOBAL DERMAL FILLERS MARKET, BY TYPE

6.1 OVERVIEW

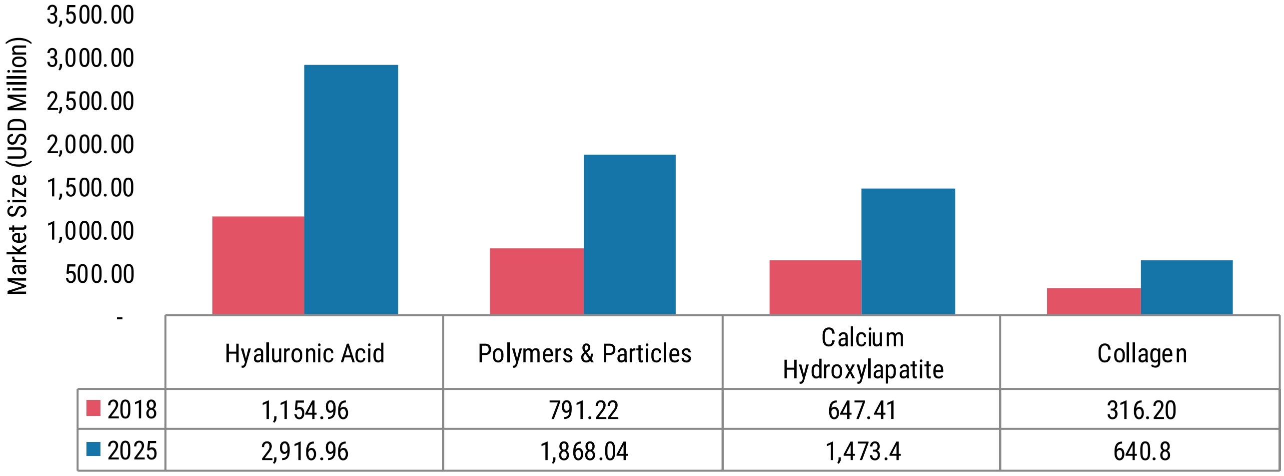
Dermal filler is a minimally invasive procedure used as an anti-aging solution to reduce facial lines and restore facial firmness. Dermal fillers are used to enhance shallow contours, remove wrinkles, soften facial creases, and improve the appearance of scars using different types of products. On the basis of type, the global dermal fillers market has been segmented into hyaluronic acid, polymers & particles, calcium hydroxylapatite, and collagen. In 2018, the hyaluronic acid segment held the largest market share of 39.7% of the dermal fillers market.

TABLE 4 GLOBAL DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	876.85	1,007.27	1,154.96	1,314.32	2,916.96	14.2%
Polymers & Particles	612.76	696.91	791.22	891.40	1,868.04	13.1%
Calcium Hydroxylapatite	506.46	573.13	647.41	725.73	1,473.40	12.5%
Collagen	254.54	284.01	316.20	348.80	640.76	10.7%
Total	2,250.61	2,561.32	2,909.80	3,280.24	6,899.16	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 8 GLOBAL DERMAL FILLERS MARKET, BY TYPE, 2018 & 2025 (USD MILLION)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

6.2 HYALURONIC ACID

Hyaluronic acid fillers are used primarily in non-surgical cosmetic procedures. They are mostly preferred due to their biodegradable nature, high viscosity, durability, and few hypersensitivity reactions. Additionally, they also increase hydration, improve elasticity, and protects from UV radiation. According to a report published by the ISAPS, the market for hyaluronic acid fillers increased by 18% in 2016 as compared to 2015. Juvederm and Restylane are the popular brands made up of HA that are highly preferred dermal fillers. The huge benefits provide by the products would continue to drive the market growth for hyaluronic acid at a significant rate. Juvéderm XC, VOLBELLA, VOLUMA, and VOLLURE are the products that come under Juvederm brand and Restylane Silk, Restylane, Restylane Lyft, Restylane Refyne, and Restylane Defyne are the products that come under brand name Restylane.

TABLE 5 GLOBAL DERMAL FILLERS MARKET, FOR HYALURONIC ACID, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	387.88	442.82	504.60	570.59	1,218.95	13.5%
Europe	259.21	299.07	344.40	393.60	894.86	14.7%
Asia-Pacific	198.74	230.41	266.64	306.20	717.63	15.3%
Middle East & Africa	31.02	34.97	39.32	43.92	85.52	11.7%
Total	876.85	1,007.27	1,154.96	1,314.32	2,916.96	14.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

6.3 POLYMERS & PARTICLES

There are different types of degradable and non-degradable dermal fillers made of polymer and particles. Polymethyl-methacrylate microspheres (PMMA), polylactic acid, polyalkylimide, and Poly-L-lactic acid (PLLA) are polymeric compounds that stimulate the production of collagen to treat deep wrinkles, folds, and furrows, particularly nasolabial folds. There is an increase in demand for polymers and particle dermal fillers owing to lesser risk, low side effects than other facial injectables, and higher longevity. Sculpta, Aquamid, and Bellafill are an example of polymers and particles made from Poly-L-Lactic Acid.

TABLE 6 GLOBAL DERMAL FILLERS MARKET, FOR POLYMERS & PARTICLES, BY REGION, 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	280.81	318.41	360.39	404.74	831.72	12.8%
Europe	175.53	199.60	226.56	255.18	533.96	13.1%
Asia-Pacific	136.24	156.39	179.21	203.78	451.58	14.2%
Middle East & Africa	20.18	22.51	25.06	27.70	50.78	10.6%
Total	612.76	696.91	791.22	891.40	1,868.04	13.1%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

6.4 CALCIUM HYDROXYLAPATITE

Calcium hydroxylapatite is a mineral-like chemical compound found naturally in human bones. The products developed from this chemical are often used to decrease marionette lines, nasolabial folds, and frown lines. As calcium hydroxylapatite is a biosynthetically product, it lowers the risk of an allergic reaction to the user. These type of dermal fillers offers natural result, as it is a stabilized product and doesn't move after injected into the skin and has fewer side effects. MERZ PHARMACEUTICALS is one of the established aesthetic company that provides Radiesse dermal filler developed using calcium hydroxylapatite as a source.

TABLE 7 GLOBAL DERMAL FILLERS MARKET, FOR CALCIUM HYDROXYLAPATITE, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	219.17	247.05	277.96	310.30	613.59	12.0%
Europe	157.08	177.75	200.79	225.07	456.70	12.5%
Asia-Pacific	111.40	127.43	145.51	164.88	357.63	13.8%
Middle East & Africa	18.82	20.90	23.15	25.48	45.48	10.1%
Total	506.46	573.13	647.41	725.73	1,473.40	12.5%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

6.5 COLLAGEN

Collagen is a naturally occurring protein that is found in cartilage, bone, skin, and tendons. The collagen is an essential part of the body and provides strength and elasticity to the skin. Collagens are of two types bovine- and human-based fillers. Zyplast, Zyderm and Artefill are the branded bovine-derived collagen, whereas Autologen, Isolagen, and Dermalogen are the human isolated collagen.Collagen injection is used to treat wrinkles on the face, lip augmentation, and other facial procedures to reduce wrinkles. There is an increase in demand for the product as it is the naturally occurring compound.

TABLE 8 GLOBAL DERMAL FILLERS MARKET, FOR COLLAGEN, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	110.99	123.21	136.45	149.72	264.62	10.0%
Europe	74.53	83.31	92.92	102.64	191.05	10.9%
Asia-Pacific	59.22	66.83	75.25	83.97	165.79	12.0%
Middle East & Africa	9.80	10.67	11.58	12.46	19.30	7.6%
Total	254.54	284.01	316.20	348.80	640.76	10.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

7 GLOBAL DERMAL FILLERS MARKET, BY BRAND

7.1 OVERVIEW

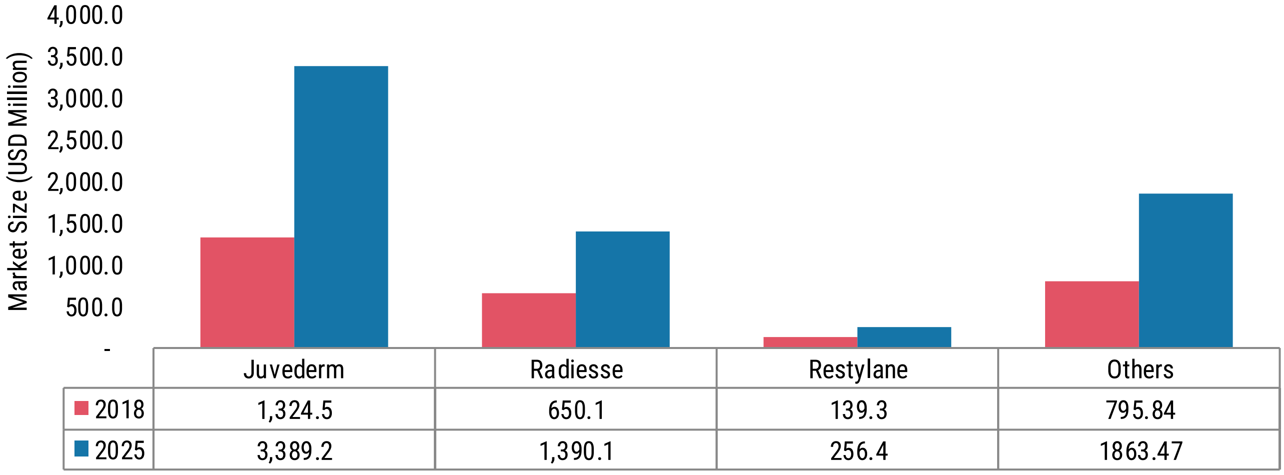
The global dermal fillers market based on brand has been divided into Juvederm, Radiesse, Restylane. The other brands included in the study are Sculptra, Voluma, Belotero. In 2018, the Juvederm segment held the largest market share of 46% of the dermal fillers market.

TABLE 9 GLOBAL DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	1,003.88	1,154.35	1,324.50	1,509.39	3,389.20	14.4%
Radiesse	518.39	581.01	650.12	721.90	1,390.09	11.5%
Restylane	115.51	127.25	139.34	151.44	256.41	9.2%
Others	612.82	698.71	795.84	897.51	1,863.47	12.9%
Total	2,250.61	2,561.32	2,909.80	3,280.24	6,899.16	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 9 GLOBAL DERMAL FILLERS MARKET, BY BRAND, 2018 & 2025 (USD MILLION)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

7.2 JUVEDERM

Juvederm is manufactured by Allergan, which is one of the leading healthcare companies. Juvederm received its first FDA approval in June 2006 and is available in different countries, which include Canada, Australia, the US and Europe. Juvederm is a family of injectable hyaluronic acid (HA) that is developed using Hylacross technology. Juvederm products are a soft gel, compared to other hyaluronic gel products because of its granular consistency. Juvederm products are used to correct facial wrinkles and folds such as wrinkles on the nose, corner of the mouth, and used for lip augmentation. These products are soft tissues that smoothen the skin appearance and adds temporary volume to the skin to hides the wrinkles. The effect of Juvederm lasts for more than nine months to one year. Under the Juvederm brand, there are different products, which include Juvederm Ultra XC, Juvederm Volbella XC, Juvederm Vollure XC, Juvederm XC, and Juvederm Voluma XC. The brand loyalty, best quality and result offered by Juvederm increases the demand for the products under this brand name.

TABLE 10 GLOBAL DERMAL FILLERS MARKET, FOR JUVEDERM, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	552.94	631.50	719.32	814.28	1,752.85	13.6%
Europe	238.95	276.51	319.42	366.13	851.22	15.1%
Asia-Pacific	184.74	215.48	250.89	289.86	706.62	16.0%
Middle East & Africa	27.25	30.86	34.86	39.12	78.50	12.3%
Total	1,003.88	1,154.35	1,324.50	1,509.39	3,389.20	14.4%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

7.3 RADIESSE

Manufactured by BioForm Medical, Inc, and MERZ PHARMACEUTICALS. The product received its first FDA approval in December 2006, and it is available across various countries such as America, Romania, Turkey, South Korea, India, China, Malaysia, Argentina, Canada, Israel, Mexico, all EU. Radiesse is made from synthetic calcium-based microspheres. It offers the same applications as other dermal fillers to increase the volume of face skin. It is also used for correcting wrinkles on the back of the hands. Radiesse works by stimulating the naturally occurring collagen present in the skin. There is an increase in demand for this product as its effect lasts for up to two years. This brand is mostly used to treat the skin around the nose and mouth. Radiesse is ideally recommended to treat the patient between the ages of 35 and 60. In some cases, Radiesse is also suggested for patients who have face fat loss due to Human Immunodeficiency Virus (HIV) infection. The increasing availability of these brands in different regions across the globe drives the market of each brand.

Additionally, similar to the above-mentioned brands, there are other brands used which include Sculptra, Voluma, Belotero, and others used as dermal fillers to treat skin aging.

TABLE 11 GLOBAL DERMAL FILLERS MARKET, FOR RADIESSE, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	205.31	230.95	259.39	289.11	570.76	12.0%
Europe	167.35	186.76	208.06	230.00	430.18	11.0%
Asia-Pacific	125.20	140.86	158.21	176.32	346.27	11.9%
Middle East & Africa	20.54	22.44	24.46	26.48	42.88	8.4%
Total	518.39	581.01	650.12	721.90	1,390.09	11.5%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

7.4 RESTYLANE

Restylane, offered by Galderma Nestlé Skin Health, received FDA approval in December 2003. Restylane is available in various countries such as America, Indonesia, Malaysia, South Korea, Singapore, and Europe countries. Restylane products are made of hyaluronic acid a natural compound. This brand is manufactured by Galderma a global pharmaceutical company. Restylane is the first and only Food and Drug Administration (FDA)-approved dermal filler used for lip enhancement in patients over 21 years. Restylane injections boost the natural supply of hyaluronic acid to reduce the wrinkles. The Restylane brand includes Restylane Lyft, Restylane-L, Restylane Refyne, Restylane Defyne, and Restylane Silk. The effect of the Restylane procedure for wrinkles lasts for around six and nine months, whereas for lip treatment, it lasts for three and four months. The effect varies from patient to patient depending on the patients' metabolization of the filler material.

TABLE 12 GLOBAL DERMAL FILLERS MARKET, FOR RESTYLANE, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	44.12	49.08	53.91	58.77	101.66	9.6%
Europe	38.18	41.74	45.56	49.34	81.60	8.7%
Asia-Pacific	28.67	31.59	34.76	37.94	65.83	9.6%
Middle East & Africa	4.55	4.83	5.12	5.38	7.32	5.3%
Total	115.51	127.25	139.34	151.44	256.41	9.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

8 GLOBAL DERMAL FILLERS MARKET, BY APPLICATION

8.1 OVERVIEW

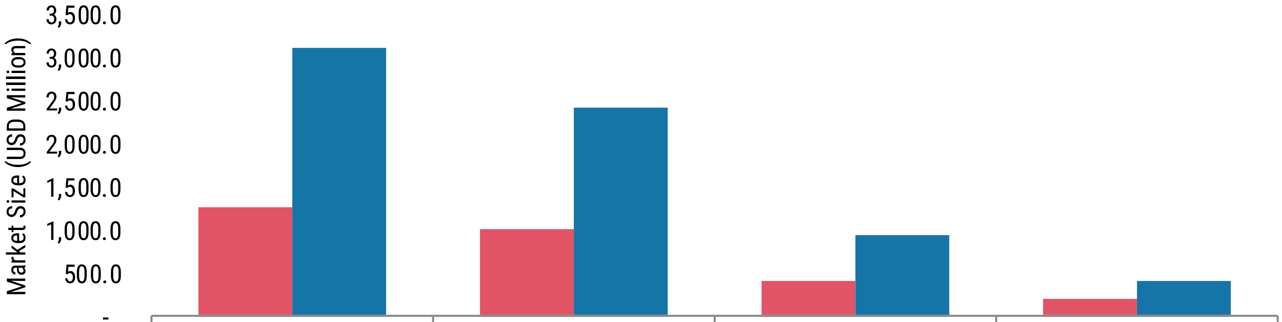
The choice of dermal fillers depends on the application. On the basis of application, the global dermal fillers market has been segmented into facial line correction treatments, facelifts, and lip treatments. Facial line correction treatments held the largest market share in 2018.

TABLE 13 GLOBAL DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	975.88	1,116.02	1,274.02	1,443.26	3,123.61	13.7%
Face-Lift	785.99	895.07	1,017.49	1,147.74	2,422.49	13.3%
Lip Treatments	324.82	367.02	413.96	463.36	932.26	12.4%
Others	163.91	183.20	204.33	225.88	420.80	10.9%
Total	2,250.61	2,561.32	2,909.80	3,280.24	6,899.16	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 10 GLOBAL DERMAL FILLERS MARKET, BY APPLICATION, 2018 & 2025 (USD MILLION)



	Facial Line Correction Treatment	Face-Lift	Lip Treatments	Others
2018	1,274.0	1,017.5	414.0	204.3
2025	3,123.6	2,422.5	932.3	420.8

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

8.2 FACIAL LINE CORRECTION TREATMENT

Facial injectables are used to correct facial lines such as lines on the forehead, around the eyes, and on the neck. These facial lines can be removed or reduced using anti-aging or anti-wrinkle injections such as hyaluronic acid injections, polymers & particles, and calcium hydroxylapatite. The key factors propelling the growth of this segment are the rising awareness about dermal fillers and the increasing demand for anti-aging products by women who are above 35 years. The International Society of Aesthetic Plastic Surgery reported that the total number of nonsurgical procedures performed worldwide was 12,659,147, out of which 3,729,833 procedures were performed using hyaluronic acid in 2017. The increasing availability of the product and growing awareness increases market growth.

TABLE 14 GLOBAL DERMAL FILLERS MARKET, FOR FACIAL LINE CORRECTION TREATMENT, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	435.79	495.69	562.77	633.95	1,324.99	13.1%
Europe	285.48	327.35	374.70	425.60	935.90	14.0%
Asia-Pacific	219.32	253.46	292.38	334.68	770.54	14.9%
Middle East & Africa	35.29	39.52	44.17	49.03	92.18	11.1%
Total	975.88	1,116.02	1,274.02	1,443.26	3,123.61	13.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

8.3 FACE-LIFT

Facelifts, also known as rhytidectomy, are a type of cosmetic surgery that minimizes the visible signs of aging on the face and neck. The procedure involves numerous surgical techniques such as cross-hatching, fan technique, and serial puncture techniques. Facelifts can include relaxation of the facial skin that causes sagging, deepening of the fold lines between the nose and corner of the mouth, and reducing the double chin/turkey neck caused by excess fat on the neck. According to a report published by the American Society of Plastic Surgeons, on average, 125,697 rhytidectomy or facelift procedures were carried out in 2017, out of which 113,978 were performed on females. The increasing technological advancements and availability of innovative products are likely to boost the market growth.

TABLE 15 GLOBAL DERMAL FILLERS MARKET, FOR FACE-LIFT, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	352.77	400.02	452.75	508.44	1,043.39	12.7%
Europe	230.61	263.21	299.88	339.03	725.56	13.5%
Asia-Pacific	174.84	200.87	230.36	262.14	583.53	14.3%
Middle East & Africa	27.77	30.98	34.49	38.13	70.01	10.7%
Total	785.99	895.07	1,017.49	1,147.74	2,422.49	13.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

8.4 LIP TREATMENTS

Lip treatments are carried out to enhance the lip shape, smooth vertical lip lines, and other lip-related problems. Hyaluronic acid fillers (Juvéderm and Restylane products) are the most common dermal fillers used for lip treatments as they reduce the chances of allergic reactions and negligible bruising, and the procedures have long-lasting results. Growing consciousness about facial features and fashion trends drive the growth in this market. According to a report published by the American Society of Plastic Surgeons, 29,797 lip augmentation procedures were carried out in 2017.

TABLE 16 GLOBAL DERMAL FILLERS MARKET, FOR LIP TREATMENTS, BY REGION 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Americas	145.81	164.02	184.17	205.20	401.03	11.8%
Europe	93.42	105.56	119.07	133.29	268.09	12.4%
Asia-Pacific	73.94	84.48	96.35	109.06	234.82	13.6%
Middle East & Africa	11.66	12.96	14.37	15.82	28.32	10.2%
Total	324.82	367.02	413.96	463.36	932.26	12.4%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9 GLOBAL DERMAL FILLERS MARKET, BY REGION

9.1 OVERVIEW

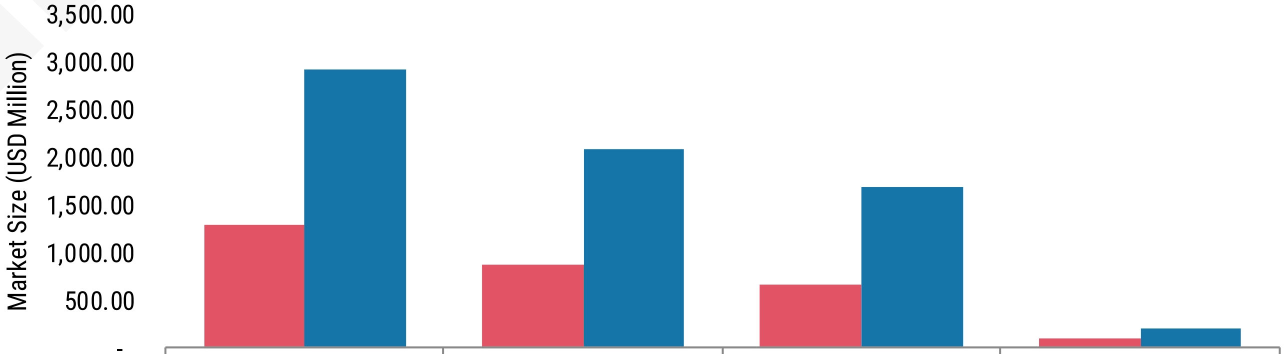
The global dermal fillers market has been segmented on the basis of region into the Americas, Europe, Asia-Pacific, and the Middle East and Africa. The Americas has been segmented into North America and Latin America, with the North America market further divided into the US and Canada. The European dermal fillers market has been further segmented into Germany, France, the UK, Italy, Spain, and the rest of Europe. The dermal fillers market in Asia-Pacific has been segmented into China, India, Japan, South Korea, Singapore, Malaysia, Indonesia and the rest of Asia-Pacific. The Americas held the largest market share for dermal fillers in 2018 attributed to the increasing demand for cosmetic products, growing geriatric population, launching of the new minimally invasive facial procedure, and rising clinical trials to innovate skincare products. On the other hand, Asia-Pacific is expected to represent the highest market growth potential over the forecast period due to the growing demand for cosmetic procedures, developing healthcare infrastructure, and increasing technological advancements coupled with the rising awareness about dermal fillers in the region.

TABLE 17 GLOBAL DERMAL FILLERS MARKET, BY REGION, 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
America	998.84	1,131.49	1,279.40	1,435.35	2,928.88	12.6%
Europe	666.35	759.73	864.67	976.50	2,076.57	13.4%
Asia-Pacific	505.60	581.06	666.61	758.84	1,692.64	14.3%
Middle East & Africa	79.82	89.04	99.11	109.56	201.08	10.7%
Total	2,250.61	2,561.32	2,909.80	3,280.24	6,899.16	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 11 GLOBAL DERMAL FILLERS MARKET, BY REGION, 2018 & 2025 (USD MILLION)



	Americas	Europe	Asia-Pacific	Middle East & Africa
2018	1,279.40	864.67	666.61	99.11
2025	2,928.88	2,076.57	1,692.64	201.08

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.2 AMERICAS

The Americas accounted for the largest market share in 2018 and is likely to continue to command during the assessment period owing to an increase in the number of facial correction and improvement procedures, high per capita disposable income, and growing geriatric population. Also, the increasing awareness about procedures related to dermal fillers, facial injectable, and beauty-related products in the US prompts market growth in this region.

The increasing number of minimally invasive cosmetic procedures in America is expected to boost the market growth. According to the annual plastic surgery procedural statistics, there were 17.5 million surgical and minimally invasive cosmetic procedures performed in the US in 2017, with a 2 percent increase in the number of procedures over 2016. Additionally, the American Society of Plastic Surgeons (ASPS) reported that there were 15.9 million minimally invasive cosmetic procedures performed in the US in 2018. Out of these 2.68 million procedures were performed using soft tissue filler, which has increased by 2% from 2017.The increasing adoption of nonsurgical procedures for cosmetic treatment boosts the market growth in the US.

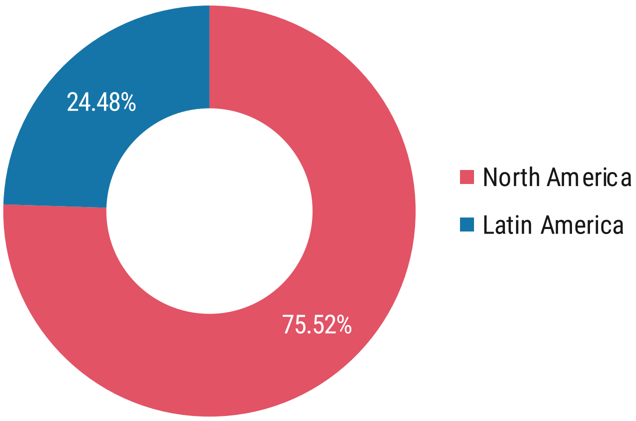
Moreover, increasing product launches will support the growth of the market. Galderma, Nestlé Skin Health's one of the established medical solutions provider, received FDA approval for Restylane Lyft for correction of age-related midface curves using cannula a small blunt tip. This product is also used for cheek augmentation in patients over the age of 21. Hence, increasing product launches are expected to support market growth.

TABLE 18 AMERICAS: DERMAL FILLERS MARKET, BY REGION, 2016–2025 (USD MILLION)

Region	2016	2017	2018	2019	2025	CAGR % (2019-2025)
North America	746.84	850.24	966.20	1,089.39	2,290.46	13.19%
Latin America	252.01	281.24	313.20	345.96	638.41	10.75%
Total	998.84	1,131.49	1,279.40	1,435.35	2,928.88	12.62%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 12 AMERICAS: DERMAL FILLERS MARKET, BY REGION, 2018 (%)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 19 AMERICAS: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	387.88	442.82	504.60	570.59	1,218.95	13.5%
Polymers & Particles	280.81	318.41	360.39	404.74	831.72	12.8%
Calcium Hydroxylapatite	219.17	247.05	277.96	310.30	613.59	12.0%
Collagen	110.99	123.21	136.45	149.72	264.62	10.0%
Total	998.84	1,131.49	1,279.40	1,435.35	2,928.88	12.6%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 20 AMERICAS: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	552.94	631.50	719.32	814.28	1,752.85	13.6%
Radiesse	205.31	230.95	259.39	289.11	570.76	12.0%
Restylane	44.12	49.08	53.91	58.77	101.66	9.6%
Others	196.48	219.96	246.78	273.19	503.61	10.7%
Total	998.84	1,131.49	1,279.40	1,435.35	2,928.88	12.6%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

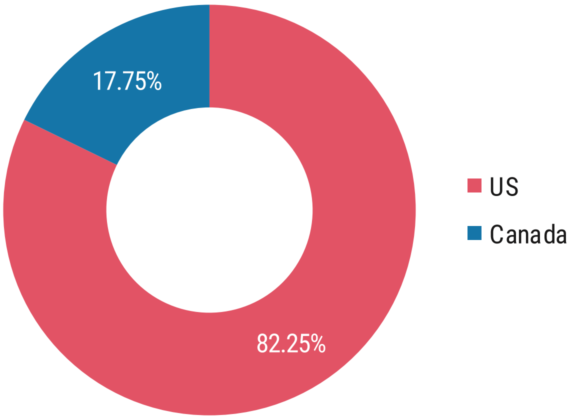
TABLE 21 AMERICAS: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	435.79	495.69	562.77	633.95	1,324.99	13.1%
Face-Lift	352.77	400.02	452.75	508.44	1,043.39	12.7%
Lip Treatments	145.81	164.02	184.17	205.20	401.03	11.8%
Others	64.47	71.76	79.71	87.76	159.46	10.5%
Total	998.84	1,131.49	1,279.40	1,435.35	2,928.88	12.6%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.2.1 NORTH AMERICA

FIGURE 13 NORTH AMERICA: DERMAL FILLERS MARKET, BY COUNTRY, 2018 (%)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 22 NORTH AMERICA: DERMAL FILLERS MARKET, BY COUNTRY, 2016–2025 (USD MILLION)

Country	2016	2017	2018	2019	2025	CAGR % (2019-2025)
US	609.12	696.37	794.67	899.75	1,939.91	13.66%
Canada	137.72	153.87	171.53	189.64	350.55	10.78%
Total	746.84	850.24	966.20	1,089.39	2,290.46	13.19%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 23 NORTH AMERICA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	287.00	329.47	377.51	429.24	947.62	14.1%
Polymers & Particles	209.42	238.84	271.89	307.11	652.97	13.4%
Calcium Hydroxylapatite	166.90	188.96	213.52	239.40	485.90	12.5%
Collagen	83.51	92.98	103.28	113.64	203.97	10.2%
Total	746.84	850.24	966.20	1,089.39	2,290.46	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 24 NORTH AMERICA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	484.40	553.85	631.55	715.88	1,554.28	13.8%
Radiesse	139.88	159.47	181.46	204.84	433.84	13.3%
Restylane	30.26	34.24	38.07	41.99	77.57	10.8%
Others	92.30	102.68	115.12	126.68	224.77	10.0%
Total	746.84	850.24	966.20	1,089.39	2,290.46	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 25 NORTH AMERICA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	325.90	372.54	425.07	481.23	1,036.32	13.6%
Face-Lift	264.27	301.03	342.27	386.13	814.70	13.3%
Lip Treatments	108.83	123.13	139.04	155.79	314.84	12.4%
Others	47.83	53.55	59.82	66.25	124.59	11.1%
Total	746.84	850.24	966.20	1,089.39	2,290.46	13.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.2.1.1 US

TABLE 26 US: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	234.54	270.60	311.61	356.08	808.94	14.7%
Polymers & Particles	170.54	195.43	223.55	253.72	554.81	13.9%
Calcium Hydroxylapatite	135.17	153.61	174.23	196.10	407.38	13.0%
Collagen	68.87	76.73	85.27	93.85	168.77	10.3%
Total	609.12	696.37	794.67	899.75	1,939.91	13.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 27 US: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	435.09	498.60	569.78	647.38	1,425.35	14.06%
Restylane	109.64	125.61	143.64	162.98	355.84	13.90%
Radiesse	24.06	27.53	30.82	34.22	65.69	11.48%
Others	40.32	44.63	50.43	55.17	93.03	9.10%
Total	609.12	696.37	794.67	899.75	1,939.91	13.66%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 28 US: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	265.81	305.13	349.62	397.47	877.75	14.1%
Face-Lift	215.41	246.45	281.44	318.90	690.61	13.7%
Lip Treatments	88.76	100.80	114.26	128.51	265.77	12.9%
Others	39.13	43.99	49.34	54.87	105.79	11.6%
Total	609.12	696.37	794.67	899.75	1,939.91	13.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.2.1.2 CANADA

TABLE 29 CANADA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	52.46	58.86	65.90	73.17	138.68	11.2%
Polymers & Particles	38.88	43.40	48.34	53.39	98.15	10.7%
Calcium Hydroxylapatite	31.74	35.35	39.29	43.30	78.52	10.4%
Collagen	14.64	16.25	18.01	19.78	35.20	10.1%
Total	137.72	153.87	171.53	189.64	350.55	10.78%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 30 CANADA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	49.30	55.25	61.78	68.50	128.93	11.11%
Restylane	30.24	33.86	37.82	41.86	78.00	10.93%
Radiesse	6.20	6.71	7.25	7.76	11.88	7.35%
Others	51.97	58.05	64.69	71.51	131.74	10.72%
Total	137.72	153.87	171.53	189.64	350.55	10.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 31 CANADA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	60.08	67.41	75.45	83.76	158.58	11.2%
Face-Lift	48.86	54.58	60.83	67.23	124.09	10.8%
Lip Treatments	20.07	22.33	24.78	27.28	49.08	10.3%
Others	8.70	9.56	10.47	11.38	18.80	8.7%
Total	137.72	153.87	171.53	189.64	350.55	10.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.2.2 LATIN AMERICA

TABLE 32 LATIN AMERICA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	100.88	113.35	127.09	141.34	271.33	11.5%
Polymers & Particles	71.39	79.57	88.50	97.63	178.76	10.6%
Calcium Hydroxylapatite	52.27	58.10	64.44	70.90	127.68	10.3%
Collagen	27.47	30.23	33.17	36.09	60.65	9.0%
Total	252.01	281.24	313.20	345.96	638.41	10.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 33 LATIN AMERICA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	68.55	77.65	87.77	98.40	198.57	12.4%
Radiesse	65.42	71.48	77.93	84.27	136.92	8.4%
Restylane	13.86	14.83	15.84	16.78	24.09	6.2%
Others	104.18	117.29	131.66	146.50	278.84	11.3%
Total	252.01	281.24	313.20	345.96	638.41	10.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 34 LATIN AMERICA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	109.90	123.15	137.70	152.73	288.66	11.2%
Face-Lift	88.50	98.99	110.48	122.30	228.69	11.0%
Lip Treatments	36.97	40.89	45.13	49.41	86.19	9.7%
Others	16.64	18.22	19.89	21.52	34.88	8.4%
Total	252.01	263.03	293.31	324.44	603.54	10.9%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3 EUROPE

Europe would follow the Americas in terms of market value during the forecast period owing to the increasing acceptance of new aesthetic products, growing support by government bodies for the use of minimally invasive dermal procedures, and the increasing number of product approvals & availability of products across the region. For instance, in October 2015, Galderma a global pharmaceutical company announced the availability of Emervel, the newest range of hyaluronic acid (HA) dermal fillers in Canada. The growing distribution channels and availability of products across the globe increases the market growth for dermal fillers in the European region.

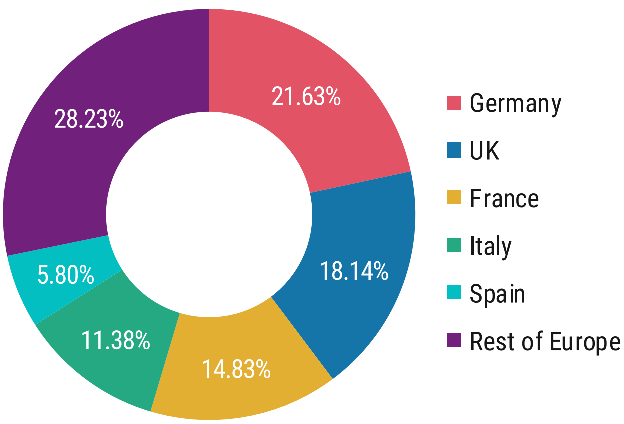
Moreover, the new regulation and favorable government policies support the demand for the product. According to a report published by the Nuffield Council on Bioethics Organization on cosmetic products reported that different equipment and devices marketed for non-medical purposes, such as dermal fillers and implants, currently, which are not included under medical device products would be included under the Medical Devices Regulation 2017 from May 2020. The implementation of the regulation on the use of cosmetic products would increase the quality standards of the products and ultimately lead to an increase in demand for cosmetic procedures.

TABLE 35 EUROPE: DERMAL FILLERS MARKET, BY COUNTRY, 2016–2025 (USD MILLION)

Country	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Germany	144.60	164.61	187.06	210.92	444.39	13.2%
UK	116.94	135.55	156.81	180.07	419.47	15.1%
France	99.42	112.99	128.20	144.33	301.10	13.0%
Italy	76.95	87.10	98.41	110.34	224.27	12.5%
Spain	39.95	44.79	50.11	55.66	105.90	11.3%
Rest of Europe	188.49	214.68	244.08	275.18	581.44	13.3%
Total	666.35	759.73	864.67	976.50	2,076.57	13.4%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 14 EUROPE: DERMAL FILLERS MARKET, BY COUNTRY, 2018 (%)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 36 EUROPE: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	259.21	299.07	344.40	393.60	894.86	14.7%
Polymers & Particles	175.53	199.60	226.56	255.18	533.96	13.1%
Calcium hydroxylapatite	157.08	177.75	200.79	225.07	456.70	12.5%
Collagen	74.53	83.31	92.92	102.64	191.05	10.9%
Total	666.35	759.73	864.67	976.50	2,076.57	13.4%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 37 EUROPE: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	238.95	276.51	319.42	366.13	851.22	15.1%
Restylane	167.35	186.76	208.06	230.00	430.18	11.0%
Radiesse	38.18	41.74	45.56	49.34	81.60	8.7%
Others	221.87	254.71	291.63	331.03	713.56	13.7%
Total	666.35	759.73	864.67	976.50	2,076.57	13.4%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 38 EUROPE: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	285.48	327.35	374.70	425.60	935.90	14.0%
Face-Lift	230.61	263.21	299.88	339.03	725.56	13.5%
Lip Treatments	93.42	105.56	119.07	133.29	268.09	12.4%
Others	56.84	63.61	71.03	78.58	147.01	11.0%
Total	666.35	759.73	864.67	976.50	2,076.57	13.4%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3.1 GERMANY

TABLE 39 GERMANY: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	55.75	64.28	73.96	84.47	191.09	14.6%
Polymers & Particles	39.13	44.52	50.56	56.97	119.54	13.1%
Calcium hydroxylapatite	33.35	37.66	42.45	47.48	95.10	12.3%
Collagen	16.36	18.15	20.09	22.00	38.66	9.9%
Total	144.60	164.61	187.06	210.92	444.39	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 40 GERMANY: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	49.76	57.49	66.32	75.90	174.86	14.9%
Restylane	36.90	41.13	45.75	50.51	93.69	10.8%
Radiesse	8.17	8.92	9.72	10.51	17.23	8.6%
Others	49.77	57.07	65.27	74.01	158.61	13.5%
Total	144.60	164.61	187.06	210.92	444.39	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 41 GERMANY: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	61.11	70.06	80.19	91.07	199.97	14.0%
Face-Lift	50.79	57.95	65.99	74.57	159.09	13.5%
Lip Treatments	19.03	21.27	23.73	26.28	49.01	10.9%
Others	13.67	15.33	17.15	19.01	36.31	11.4%
Total	144.60	164.61	187.06	210.92	444.39	13.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3.2 UK

TABLE 42 UK: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	47.64	55.82	65.26	75.75	187.50	16.3%
Polymers & Particles	29.45	34.04	39.26	44.94	102.77	14.8%
Calcium hydroxylapatite	26.97	31.02	35.62	40.59	90.19	14.2%
Collagen	12.88	14.67	16.68	18.78	39.01	13.0%
Total	116.94	135.55	156.81	180.07	419.47	15.1%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 43 UK: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	41.07	48.32	56.74	66.13	168.46	16.9%
Restylane	28.32	32.14	36.40	40.92	83.93	12.7%
Radiesse	6.61	7.34	8.15	8.97	16.26	10.4%
Others	40.94	47.75	55.52	64.04	150.82	15.3%
Total	116.94	135.55	156.81	180.07	419.47	15.1%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 44 UK: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	49.55	57.80	67.28	77.75	187.84	15.8%
Face-Lift	38.89	45.12	52.24	60.03	140.52	15.2%
Lip Treatments	16.87	19.50	22.48	25.73	58.73	14.7%
Others	11.62	13.14	14.82	16.56	32.38	11.8%
Total	116.94	135.55	156.81	180.07	419.47	15.1%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3.3 FRANCE

TABLE 45 FRANCE: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	39.05	44.82	51.35	58.38	128.78	14.1%
Polymers & Particles	26.07	29.54	33.41	37.50	76.78	12.7%
Calcium Hydroxylapatite	23.51	26.52	29.87	33.39	66.54	12.2%
Collagen	10.78	12.10	13.56	15.06	29.00	11.5%
Total	99.42	112.99	128.20	144.33	301.10	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 46 FRANCE: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	36.31	41.88	48.23	55.12	125.74	14.7%
Restylane	26.37	29.34	32.59	35.91	65.97	10.7%
Radiesse	5.62	6.12	6.66	7.19	11.67	8.4%
Others	31.13	35.65	40.72	46.10	97.72	13.3%
Total	99.42	112.99	128.20	144.33	301.10	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 47 FRANCE: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	43.19	49.37	56.33	63.78	137.51	13.7%
Face-Lift	33.99	38.69	43.97	49.57	104.33	13.2%
Lip Treatments	14.49	16.32	18.35	20.48	40.35	12.0%
Others	7.74	8.61	9.55	10.50	18.91	10.3%
Total	99.42	112.99	128.20	144.33	301.10	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3.4 ITALY

TABLE 48 ITALY: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	29.71	34.10	39.06	44.41	97.56	14.0%
Polymers & Particles	20.20	22.79	25.66	28.67	57.08	12.2%
Calcium hydroxylapatite	18.51	20.80	23.33	25.97	50.46	11.7%
Collagen	8.54	9.42	10.37	11.29	19.18	9.2%
Total	76.95	87.10	98.41	110.34	224.27	12.5%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 49 ITALY: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	28.26	32.47	37.23	42.37	94.17	14.2%
Restylane	18.95	20.99	23.22	25.49	45.61	10.2%
Radiesse	4.50	4.89	5.29	5.69	9.00	7.9%
Others	25.25	28.76	32.66	36.79	75.48	12.7%
Total	76.95	87.10	98.41	110.34	224.27	12.5%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 50 ITALY: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	32.97	37.47	42.51	47.87	99.70	13.0%
Face-Lift	27.93	31.63	35.76	40.12	81.86	12.6%
Lip Treatments	11.22	12.61	14.16	15.76	30.72	11.8%
Others	4.84	5.39	5.99	6.59	11.98	10.5%
Total	76.95	87.10	98.41	110.34	224.27	12.5%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3.5 SPAIN

TABLE 51 SPAIN: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	14.30	16.21	18.34	20.60	41.77	12.5%
Polymers & Particles	10.90	12.18	13.58	15.03	28.01	10.9%
Calcium hydroxylapatite	9.97	11.11	12.36	13.66	25.10	10.7%
Collagen	4.78	5.28	5.82	6.36	11.02	9.6%
Total	39.95	44.79	50.11	55.66	105.90	11.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 52 SPAIN: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	13.59	15.46	17.56	19.80	41.19	13.0%
Restylane	10.59	11.63	12.74	13.85	23.20	9.0%
Radiesse	2.26	2.43	2.60	2.77	4.11	6.8%
Others	13.51	15.27	17.21	19.24	37.41	11.7%
Total	39.95	44.79	50.11	55.66	105.90	11.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 53 SPAIN: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	17.61	19.83	22.28	24.85	48.46	11.8%
Face-Lift	13.71	15.37	17.21	19.12	36.43	11.3%
Lip Treatments	5.36	5.98	6.66	7.37	13.66	10.8%
Others	3.27	3.60	3.96	4.32	7.36	9.3%
Total	39.95	44.79	50.11	55.66	105.90	11.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.3.6 REST OF EUROPE

TABLE 54 REST OF EUROPE: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	72.75	83.83	96.42	109.98	248.17	14.5%
Polymers & Particles	49.77	56.53	64.09	72.07	149.78	13.0%
Calcium hydroxylapatite	44.78	50.64	57.16	63.98	129.31	12.4%
Collagen	21.20	23.68	26.41	29.15	54.18	10.9%
Total	188.49	214.68	244.08	275.18	581.44	13.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 55 REST OF EUROPE: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	69.97	80.89	93.34	106.81	246.80	15.0%
Restylane	46.22	51.53	57.36	63.31	117.78	10.9%
Radiesse	11.03	12.04	13.13	14.20	23.34	8.6%
Others	61.28	70.22	80.24	90.85	193.52	13.4%
Total	188.49	214.68	244.08	275.18	581.44	13.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 56 REST OF EUROPE: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	81.05	92.82	106.11	120.29	262.42	13.9%
Face-Lift	65.29	74.44	84.72	95.62	203.33	13.4%
Lip Treatments	26.45	29.88	33.69	37.68	75.62	12.3%
Others	15.70	17.54	19.55	21.59	40.07	10.9%
Total	188.49	214.68	244.08	275.18	581.44	13.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4 ASIA-PACIFIC

Asia-Pacific is projected to exhibit the fastest market growth from 2019 to 2025 owing to rapidly booming geriatric population, rising per capita disposable income, escalating demand of facial aesthetics products and increasing awareness about non-invasive cosmetic procedures available in the market. According to the report published by the United Nations Population Fund (UNFPA), it is reported that there will be an increase in the geriatric population in the future and estimated that 1.3 billion people would be above 60 years by 2050 in the Asia-Pacific region. Hence the increasing aging population boosts market growth.

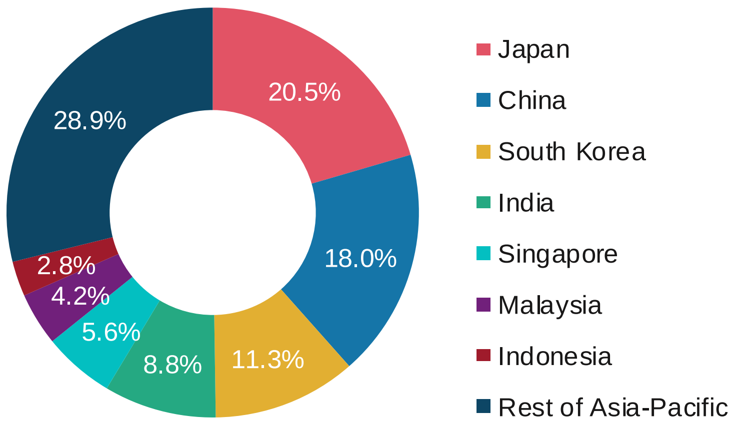
Also, the low cost of cosmetic procedures in Asia-Pacific countries is expected to increase medical tourism that supports industry growth. The presence of developing countries such as India, China, and others with an increasing number of cosmetic clinics performing dermal procedures using minimally invasive techniques enhances the market in the region.

TABLE 57 ASIA-PACIFIC: DERMAL FILLERS MARKET, BY COUNTRY, 2016–2025 (USD MILLION)

Country	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Japan	103.63	118.97	136.34	155.03	343.61	14.2%
China	89.04	103.54	120.18	138.44	330.06	15.6%
South Korea	55.33	64.59	75.24	87.01	211.58	16.0%
India	43.78	50.79	58.81	67.59	159.11	15.3%
Singapore	28.45	32.62	37.33	42.38	93.10	14.0%
Malaysia	21.65	24.57	27.83	31.29	64.32	12.8%
Indonesia	14.52	16.38	18.44	20.62	40.62	12.0%
Rest of Asia-Pacific	149.20	169.60	192.43	216.48	450.24	13.0%
Total	505.60	581.06	666.61	758.84	1,692.64	14.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 15 ASIA-PACIFIC: DERMAL FILLERS MARKET, BY COUNTRY, 2018 (%)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 58 ASIA-PACIFIC: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	198.74	230.41	266.64	306.20	717.63	15.3%
Polymers & Particles	136.24	156.39	179.21	203.78	451.58	14.2%
Calcium hydroxylapatite	111.40	127.43	145.51	164.88	357.63	13.8%
Collagen	59.22	66.83	75.25	83.97	165.79	12.0%
Total	505.60	581.06	666.61	758.84	1,692.64	14.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 59 ASIA-PACIFIC: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	184.74	215.48	250.89	289.86	706.62	16.0%
Restylane	125.20	140.86	158.21	176.32	346.27	11.9%
Radiesse	28.67	31.59	34.76	37.94	65.83	9.6%
Others	167.00	193.13	222.75	254.72	573.92	14.5%
Total	505.60	581.06	666.61	758.84	1,692.64	14.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 60 ASIA-PACIFIC: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	219.32	253.46	292.38	334.68	770.54	14.9%
Face-Lift	174.84	200.87	230.36	262.14	583.53	14.3%
Lip Treatments	73.94	84.48	96.35	109.06	234.82	13.6%
Others	37.50	42.25	47.51	52.96	103.75	11.9%
Total	505.60	581.06	666.61	758.84	1,692.64	14.5%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.1 JAPAN

TABLE 61 JAPAN: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	40.44	46.77	53.98	61.84	142.94	15.0%
Polymers & Particles	28.25	32.40	37.09	42.13	92.77	14.1%
Calcium Hydroxylapatite	22.55	25.78	29.43	33.34	72.16	13.7%
Collagen	12.39	14.02	15.83	17.73	35.73	12.4%
Total	103.63	118.97	136.34	155.03	343.61	14.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 62 JAPAN: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	37.43	43.62	50.73	58.56	141.92	15.9%
Restylane	26.45	29.72	33.35	37.12	72.44	11.8%
Radiesse	5.85	6.45	7.08	7.73	13.32	9.5%
Others	33.90	39.18	45.17	51.63	115.93	14.4%
Total	103.63	118.97	136.34	155.03	343.61	14.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 63 JAPAN: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	43.67	50.34	57.93	66.15	150.26	14.7%
Face-Lift	35.74	40.96	46.87	53.22	116.83	14.0%
Lip Treatments	14.99	17.15	19.58	22.19	48.10	13.8%
Others	9.23	10.51	11.95	13.48	28.41	13.2%
Total	103.63	118.97	136.34	155.03	343.61	14.2%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.2 CHINA

TABLE 64 CHINA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	35.32	41.39	48.40	56.18	139.95	16.4%
Polymers & Particles	24.67	28.66	33.24	38.26	90.77	15.5%
Calcium hydroxylapatite	19.30	22.33	25.79	29.56	68.32	15.0%
Collagen	9.75	11.16	12.75	14.44	31.03	13.6%
Total	89.04	103.54	120.18	138.44	330.06	15.6%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 65 CHINA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	32.30	38.12	44.91	52.51	136.90	17.3%
Restylane	22.10	25.16	28.59	32.24	67.68	13.2%
Radiesse	5.21	5.81	6.47	7.14	13.25	10.8%
Others	29.43	34.45	40.22	46.55	112.24	15.8%
Total	89.04	103.54	120.18	138.44	330.06	15.6%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 66 CHINA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	38.85	45.37	52.88	61.18	149.48	16.1%
Face-Lift	30.48	35.48	41.22	47.52	113.87	15.7%
Lip Treatments	12.85	14.89	17.23	19.78	46.21	15.2%
Others	6.85	7.80	8.85	9.97	20.51	12.8%
Total	89.04	103.54	120.18	138.44	330.06	15.6%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.3 SOUTH KOREA

TABLE 67 SOUTH KOREA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	22.18	26.10	30.65	35.72	90.98	16.9%
Polymers & Particles	13.96	16.27	18.93	21.86	52.68	15.8%
Calcium hydroxylapatite	12.57	14.64	17.01	19.62	46.97	15.7%
Collagen	6.62	7.58	8.66	9.81	20.95	13.5%
Total	55.33	64.59	75.24	87.01	211.58	16.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 68 SOUTH KOREA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	19.99	23.68	28.00	32.87	87.39	17.7%
Restylane	13.51	15.44	17.61	19.94	42.68	13.5%
Radiesse	2.96	3.31	3.70	4.11	7.77	11.2%
Others	18.87	22.15	25.93	30.10	73.74	16.1%
Total	55.33	64.59	75.24	87.01	211.58	16.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 69 SOUTH KOREA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	24.51	28.74	33.62	39.04	97.29	16.4%
Face-Lift	19.08	22.24	25.87	29.87	71.94	15.8%
Lip Treatments	7.71	8.94	10.36	11.91	27.93	15.3%
Others	4.03	4.67	5.40	6.20	14.42	15.1%
Total	55.33	64.59	75.24	87.01	211.58	16.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.4 INDIA

TABLE 70 INDIA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	16.73	19.52	22.73	26.28	63.96	16.0%
Polymers & Particles	11.82	13.75	15.95	18.37	43.75	15.6%
Calcium Hydroxylapatite	9.95	11.51	13.28	15.22	35.16	15.0%
Collagen	5.28	6.02	6.85	7.73	16.23	13.2%
Total	43.78	50.79	58.81	67.59	159.11	15.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 71 INDIA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	16.16	19.03	22.37	26.10	67.18	17.1%
Restylane	10.69	12.14	13.77	15.49	32.10	12.9%
Radiesse	2.52	2.80	3.11	3.43	6.28	10.6%
Others	14.41	16.81	19.57	22.58	53.56	15.5%
Total	43.78	50.79	58.81	67.59	159.11	15.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 72 INDIA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	19.35	22.60	26.35	30.48	74.62	16.1%
Face-Lift	15.21	17.66	20.47	23.54	55.69	15.4%
Lip Treatments	6.88	7.91	9.09	10.35	23.07	14.3%
Others	2.34	2.62	2.92	3.22	5.73	10.1%
Total	43.78	50.79	58.81	67.59	159.11	15.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.5 SINGAPORE

TABLE 73 SINGAPORE: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	11.48	13.36	15.50	17.86	42.54	15.6%
Polymers & Particles	7.49	8.57	9.78	11.08	24.02	13.8%
Calcium Hydroxylapatite	6.18	7.03	7.99	9.02	18.99	13.2%
Collagen	3.31	3.66	4.05	4.42	7.54	9.3%
Total	28.45	32.62	37.33	42.38	93.10	14.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 74 SINGAPORE: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	9.99	11.63	13.51	15.56	37.39	15.7%
Restylane	6.98	7.83	8.77	9.75	18.86	11.6%
Radiesse	1.61	1.77	1.94	2.11	3.61	9.3%
Others	9.88	11.39	13.11	14.95	33.24	14.2%
Total	28.45	32.62	37.33	42.38	93.10	14.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 75 SINGAPORE: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	12.30	14.19	16.35	18.69	42.64	14.7%
Face-Lift	10.27	11.77	13.46	15.27	33.42	13.9%
Lip Treatments	4.25	4.84	5.51	6.23	13.22	13.4%
Others	1.63	1.81	2.01	2.20	3.82	9.6%
Total	28.45	32.62	37.33	42.38	93.10	14.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.6 MALAYSIA

TABLE 76 MALAYSIA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	8.33	9.56	10.96	12.46	27.37	14.0%
Polymers & Particles	5.95	6.74	7.62	8.55	17.37	12.5%
Calcium hydroxylapatite	4.76	5.36	6.02	6.72	13.12	11.8%
Collagen	2.61	2.91	3.23	3.56	6.46	10.5%
Total	21.65	24.57	27.83	31.29	64.32	12.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 77 MALAYSIA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	8.08	9.31	10.70	12.21	27.45	14.5%
Restylane	5.29	5.87	6.51	7.17	12.98	10.4%
Radiesse	1.27	1.38	1.50	1.61	2.58	8.1%
Others	7.02	8.01	9.12	10.29	21.31	12.9%
Total	21.65	24.57	27.83	31.29	64.32	12.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 78 MALAYSIA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	9.40	10.76	12.28	13.92	29.97	13.6%
Face-Lift	7.56	8.59	9.74	10.96	22.71	12.9%
Lip Treatments	3.18	3.57	4.01	4.47	8.68	11.7%
Others	1.51	1.65	1.80	1.94	2.96	7.3%
Total	21.65	24.57	27.83	31.29	64.32	12.8%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.7 INDONESIA

TABLE 79 INDONESIA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	5.68	6.48	7.39	8.36	17.65	13.3%
Polymers & Particles	3.96	4.45	4.99	5.55	10.64	11.5%
Calcium hydroxylapatite	3.18	3.56	3.97	4.40	8.26	11.1%
Collagen	1.71	1.90	2.10	2.30	4.07	10.0%
Total	14.52	16.38	18.44	20.62	40.62	12.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 80 INDONESIA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	5.41	6.19	7.07	8.02	17.29	13.6%
Restylane	3.60	3.98	4.39	4.80	8.33	9.6%
Radiesse	0.82	0.89	0.96	1.03	1.57	7.4%
Others	4.69	5.33	6.03	6.76	13.43	12.1%
Total	14.52	16.38	18.44	20.62	40.62	12.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 81 INDONESIA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	6.33	7.21	8.20	9.26	19.30	13.0%
Face-Lift	4.85	5.47	6.15	6.87	13.49	11.9%
Lip Treatments	2.15	2.39	2.66	2.95	5.40	10.6%
Others	1.20	1.31	1.43	1.55	2.44	7.9%
Total	14.52	16.38	18.44	20.62	40.62	12.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.4.8 REST OF ASIA-PACIFIC

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	58.59	67.25	77.03	87.50	192.25	14.0%
Polymers & Particles	40.13	45.56	51.62	57.98	119.57	12.8%
Calcium hydroxylapatite	32.92	37.22	42.01	47.01	94.64	12.4%
Collagen	17.56	19.58	21.78	23.98	43.78	10.6%
Total	149.20	169.60	192.43	216.48	450.24	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 82 REST OF ASIA-PACIFIC: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	58.59	67.25	77.03	87.50	192.25	14.0%
Polymers & Particles	40.13	45.56	51.62	57.98	119.57	12.8%
Calcium hydroxylapatite	32.92	37.22	42.01	47.01	94.64	12.4%
Collagen	17.56	19.58	21.78	23.98	43.78	10.6%
Total	149.20	169.60	192.43	216.48	450.24	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 83 REST OF ASIA-PACIFIC: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	55.38	63.90	73.59	84.03	191.11	14.7%
Restylane	36.58	40.71	45.22	49.81	91.20	10.6%
Radiesse	8.43	9.19	10.00	10.79	17.45	8.3%
Others	48.80	55.80	63.62	71.86	150.47	13.1%
Total	149.20	169.60	192.43	216.48	450.24	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 84 REST OF ASIA-PACIFIC: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	64.91	74.25	84.77	95.96	206.98	13.7%
Face-Lift	51.65	58.70	66.59	74.90	155.59	13.0%
Lip Treatments	21.94	24.77	27.91	31.19	62.20	12.2%
Others	10.70	11.88	13.16	14.43	25.47	9.9%
Total	149.20	169.60	192.43	216.48	450.24	13.0%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.5 MIDDLE EAST AND AFRICA

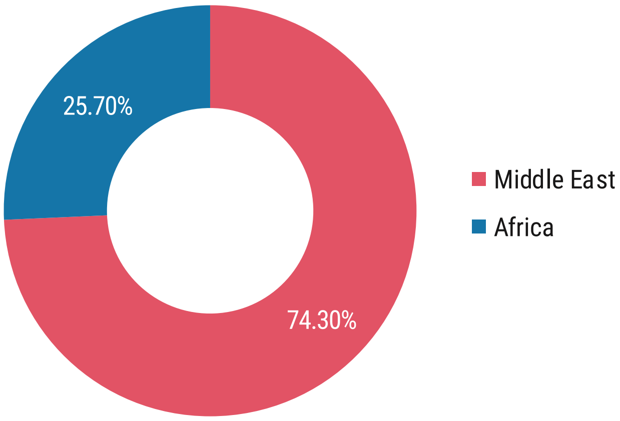
The market in the Middle East and Africa is likely to exhibit the lowest growth owing to limited access to treatment facilities. Moreover, limited developments in technology may slow market growth during the review period. The dermal fillers market in the Middle East & Africa is expected to grow at a significant rate owing to changing fashion trends and focus on appearance. The implementation of a new business strategy such as a growing distribution channel, product launch in the untapped market increases the market growth in this region. In March 2018, Galderma, in collaboration with AMCO and Medica Group, launched the first batch of the world's first hyaluronic acid fillers Restylane in Saudi Arabi. The growing number of beauty clinics & hospitals in countries such as Saudi Arabia and the launch of new products will help to strengthen the market growth.

TABLE 85 MIDDLE EAST AND AFRICA: DERMAL FILLERS MARKET, BY COUNTRY, 2016–2025 (USD MILLION)

Country	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Middle East	58.83	65.89	73.64	81.73	153.63	11.1%
Africa	21.00	23.15	25.47	27.83	47.46	9.3%
Total	79.82	89.04	99.11	109.56	201.08	10.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

FIGURE 16 MIDDLE EAST AND AFRICA: DERMAL FILLERS MARKET, BY COUNTRY, 2018 (%)



Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 86 MIDDLE EAST AND AFRICA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	31.02	34.97	39.32	43.92	85.52	11.7%
Polymers & Particles	20.18	22.51	25.06	27.70	50.78	10.6%
Calcium hydroxylapatite	18.82	20.90	23.15	25.48	45.48	10.1%
Collagen	9.80	10.67	11.58	12.46	19.30	7.6%
Total	79.82	89.04	99.11	109.56	201.08	10.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 87 MIDDLE EAST AND AFRICA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	27.25	30.86	34.86	39.12	78.50	12.3%
Radiesse	20.54	22.44	24.46	26.48	42.88	8.4%
Restylane	4.55	4.83	5.12	5.38	7.32	5.3%
Others	27.48	30.91	34.67	38.58	72.38	11.1%
Total	79.82	89.04	99.11	109.56	201.08	10.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 88 MIDDLE EAST AND AFRICA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	35.29	39.52	44.17	49.03	92.18	11.1%
Face-Lift	27.77	30.98	34.49	38.13	70.01	10.7%
Lip Treatments	11.66	12.96	14.37	15.82	28.32	10.2%
Others	5.11	5.58	6.08	6.58	10.57	8.2%
Total	79.82	89.04	99.11	109.56	201.08	10.7%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.5.1 MIDDLE EAST

TABLE 89 MIDDLE EAST: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	23.18	26.22	29.60	33.18	66.06	12.2%
Polymers & Particles	14.76	16.51	18.44	20.45	38.25	11.0%
Calcium Hydroxylapatite	13.67	15.26	17.00	18.80	34.57	10.7%
Collagen	7.22	7.89	8.60	9.30	14.75	8.0%
Total	58.83	65.89	73.64	81.73	153.63	11.1%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 90 MIDDLE EAST: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	20.07	22.82	25.88	29.16	59.94	12.8%
Radiesse	15.60	17.11	18.72	20.34	33.66	8.8%
Restylane	3.32	3.53	3.75	3.95	5.42	5.4%
Others	19.83	22.43	25.29	28.28	54.61	11.6%
Total	58.83	65.89	73.64	81.73	153.63	11.1%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 91 MIDDLE EAST: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	25.85	29.07	32.63	36.36	70.05	11.5%
Face-Lift	20.59	23.05	25.74	28.55	53.46	11.0%
Lip Treatments	8.61	9.59	10.65	11.76	21.35	10.5%
Others	3.78	4.19	4.62	5.06	8.76	9.6%
Total	58.83	65.89	73.64	81.73	153.63	11.09%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

9.5.2 AFRICA

TABLE 92 AFRICA: DERMAL FILLERS MARKET, BY TYPE, 2016–2025 (USD MILLION)

Type	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Hyaluronic Acid	7.84	8.74	9.72	10.74	19.46	10.4%
Polymers & Particles	5.43	6.00	6.62	7.25	12.53	9.6%
Calcium Hydroxylapatite	5.14	5.63	6.16	6.68	10.91	8.5%
Collagen	2.58	2.77	2.98	3.17	4.56	6.3%
Total	21.00	23.15	25.47	27.83	47.46	9.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 93 AFRICA: DERMAL FILLERS MARKET, BY BRAND, 2016–2025 (USD MILLION)

Brand	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Juvederm	7.18	8.04	8.98	9.96	18.57	10.9%
Restylane	4.94	5.33	5.74	6.14	9.22	7.0%
Radiesse	1.23	1.30	1.37	1.44	1.90	4.8%
Others	7.65	8.48	9.38	10.29	17.76	9.5%
Total	21.00	23.15	25.47	27.83	47.46	9.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

TABLE 94 AFRICA: DERMAL FILLERS MARKET, BY APPLICATION, 2016–2025 (USD MILLION)

Application	2016	2017	2018	2019	2025	CAGR % (2019-2025)
Facial Line Correction Treatment	9.44	10.45	11.54	12.66	22.13	9.8%
Face-Lift	7.18	7.94	8.75	9.58	16.54	9.5%
Lip Treatments	3.05	3.37	3.71	4.06	6.97	9.4%
Others	1.32	1.40	1.47	1.53	1.81	2.9%
Total	21.00	23.15	25.47	27.83	47.46	9.3%

Sources: The American Academy of Facial Esthetic, Australasian Academy of Dento-Facial Aesthetics, THE AMERICAN BOARD OF COSMETIC SURGERY, American Society of Plastic Surgeons, The British Journal of Dermatology, Annual Reports, SEC Filings, Research Journals, White Papers, Corporate Presentations, Company Websites, Paid Databases, MRFR Analysis.

10 COMPETITIVE LANDSCAPE: GLOBAL DERMAL FILLERS MARKET

10.1 OVERVIEW

The global dermal fillers market is a very lucrative, attractive, and profitable market, both for existing players as well as new entrants. At the same time, intense rivalry among existing competitors has been observed. Our analysis revealed that market players have adopted different strategies to increase their business and position in the global dermal fillers market. In recent years, strategic movements made by major players were product launches, acquisitions, and strategic agreements, which have been used as market penetration strategies and to reduce competition. The major players in the global dermal fillers market are Galderma Laboratories, L.P., ALLERGAN, Merz Pharma, Dr. Korman Laboratories, Sinclair Pharma, Teoxane laboratories, Suneva Medical, SciVision Biotech Inc., and Medytox.

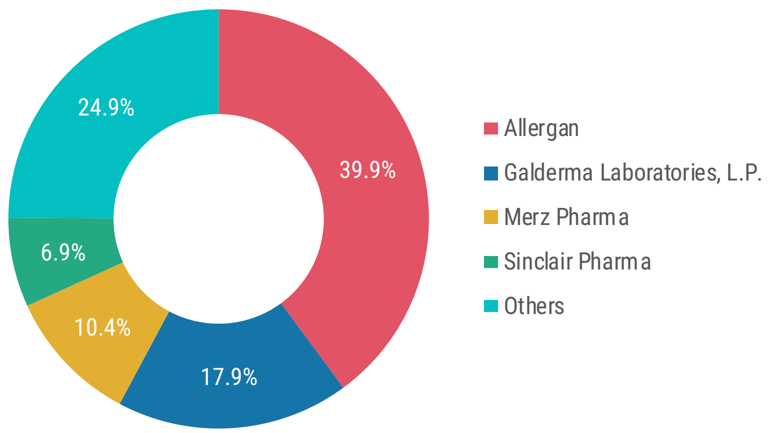
Companies are now entering into acquisitions, collaborations, product launches, product approvals, and expansions to neutralize growing competition from customers, competitors, and to tackle the changing market dynamics.

10.2 COMPETITIVE ANALYSIS

There are numerous players operating in this market all over the globe. Most of these players exist in the American and European regions. There are a lot of large and small market players available in the market which provide a wide range of products for various applications.

Galderma Laboratories, L.P., ALLERGAN, and Merz Pharma are the major players in the global dermal fillers market, contributing a major share of the total global market.

FIGURE 17 DERMAL FILLERS MARKET, MARKET SHARE ANALYSIS (%)



10.3 COMPETITOR DASHBOARD

FIGURE 18 COMPETITOR DASHBOARD: GLOBAL DERMAL FILLERS MARKET

COMPANY NAME	GEOGRAPHY				Type				Brand				Application		
	America	Europe	Asia-Pacific	Middle East and Africa	Hyaluronic Acid	Polymers & Particles	Calcium Hydroxylapatite	Collagen	Juvederm	Radiesse	Restylane	Others	Facial Line Correction Treatment	Face-Lift	Lip Treatments
Galderma Laboratories, L.P.	√	√	√	√	√	X	X	X	X	X	✓	X	√	√	√
ALLERGAN	√	√	√	√	√	X	X	X	√	X	X	X	√	√	√
Merz Pharma	√	√	√	√	X	X	√	X	X	√	X	√	√	√	√
Dr. Korman Laboratories	√	√	√	√	X	X	X	X	X	X	X	√	√	√	√
Sinclair Pharma	√	√	√	√	√	√	√	X	X	X	X	√	√	√	√
Teoxane laboratories	√	√	√	√	√	X	X	X	X	X	X	√	√	√	√
Suneva Medical.	√	√	√	√	√	X	X	X	X	X	X	√	√	√	√
SciVision Biotech, Inc.	√	√	√	√	√	X	X	X	X	X	X	X	√	√	√
Medytox	√	√	√	√	√	X	X	X	X	X	X	√	√	√	√

Source: Annual Report, Press releases, Associations, Government Records, Journals, Expert Interviews, Secondary Research, and Market Research Future Analysis

10.4 COMPETITIVE BENCHMARKING

FIGURE 19 BENCHMARKING OF MAJOR COMPETITORS

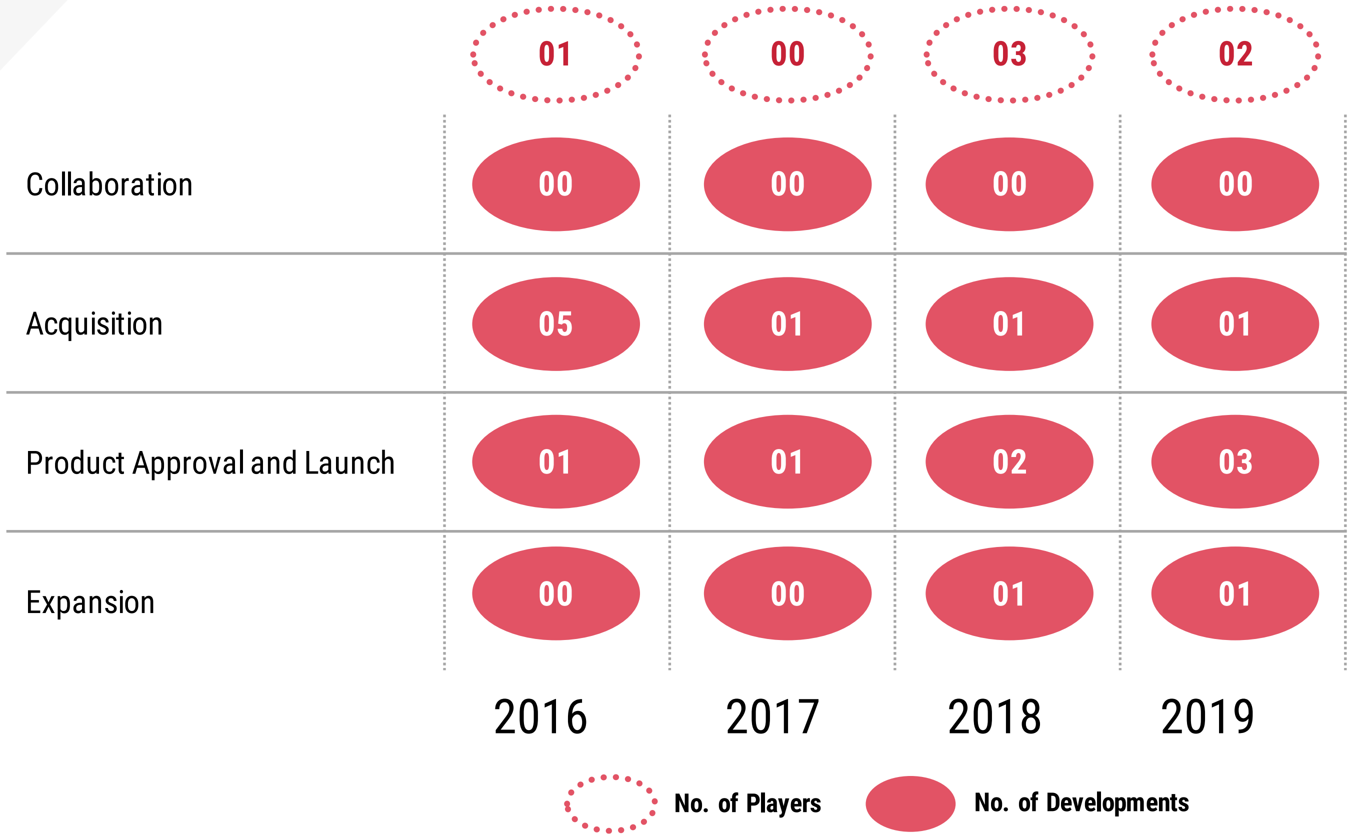
Competitors	Product Portfolio	Regional Presence	Strategic Alliances	Industry Experience
Galderma Laboratories, L.P.	●●●○	●●●●	●●●○	●●●●
ALLERGAN.	●●●○	●●●●	●●●●	●●●●
Merz Pharma	●●●○	●●●●	●●●●	●●●○
Dr. Korman Laboratories	●●○○	●●●●	○○○○	●●○○
Sinclair Pharma	●●●○	●●●●	●●○○	●●●○
Teoxane laboratories	●●●●	●●●●	●○○○	●●○○
Suneva Medical.	●○○○	●●●●	●●○○	●●○○
SciVision Biotech Inc.	●●●○	●●●●	○○○○	●●○○
Medytox	●●○○	●●●●	○○○○	●●○○

LOW	MEDIUM	HIGH	VERY HIGH
●○○○	●●○○	●●●○	●●●●

Source: Annual Report, Press releases, Secondary Research, and Market Research Future Analysis

10.5 MAJOR GROWTH STRATEGY IN THE GLOBAL DERMAL FILLERS MARKET

FIGURE 21 MAJOR STRATEGY ADOPTED BY KEY PLAYERS IN GLOBAL DERMAL FILLERS MARKET



Source: Annual Report, Press releases, Associations, Government Records, Journals, Expert Interviews, Secondary Research, and Market Research Future Analysis

10.6 LEADING PLAYERS IN TERMS OF NUMBER OF DEVELOPMENTS

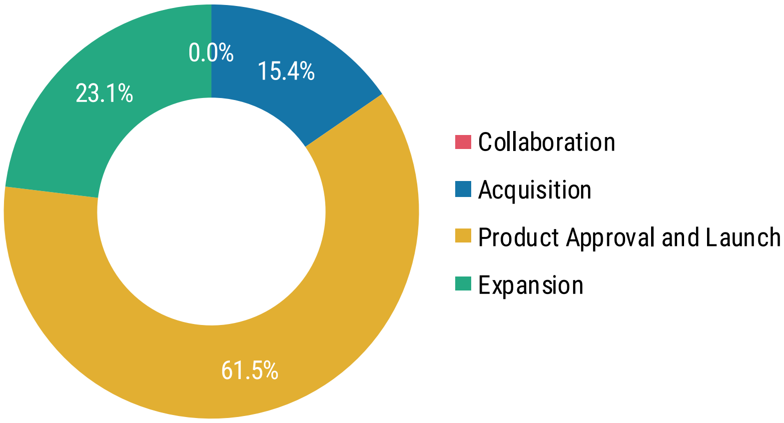
TABLE 95 TOP PLAYERS IN TERMS OF NUMBER OF DEVELOPMENTS IN THE DERMAL FILLERS MARKET

Company Name	Collaboration	Acquisition	Product Approval and Launch	Expansion	Total
Allergan	0	2	3	2	7
Galderma Laboratories, L.P.	0	0	3	0	3
Merz Pharma	0	0	2	1	5
Total	0	2	8	3	15

Source: Company Website, Annual Report, and Press Releases

10.7 KEY DEVELOPMENTS AND GROWTH STRATEGIES

FIGURE 22 DERMAL FILLERS MARKET, KEY DEVELOPMENT ANALYSIS (% SHARE)



Source: MRFR analysis

10.7.1 ACQUISITION

TABLE 96 ACQUISITION: GLOBAL DERMAL FILLERS MARKET

Date	Company	Development
March 2019	Allergan	Allergan acquired Envy Medical, Inc., a privately held company with proprietary technology in skin resurfacing. The acquisition enhanced the former's best-in-class medical aesthetics portfolio.
February 2017	Allergan	Allergan acquired LifeCell Corporation, a leading regenerative medicine company, thus expanding its product portfolio in the aesthetic and plastic surgery segment

Source: Annual Report and Press Releases

10.7.2 PRODUCT APPROVAL AND LAUNCH

TABLE 97 PRODUCT APPROVAL AND LAUNCH: GLOBAL DERMAL FILLERS MARKET

Date	Company	Development
September 2019	Allergan	Allergan received the US Food and Drug Administration (FDA) approval for the use of Juvéderm VOLUMA XC, a hyaluronic acid gel dermal filler, with a TSK STERiGLIDE cannula for cheek augmentation to correct age-related volume deficit in the middle part of the face in adults over the age of 21.
April 2019	Allergan	Allergan announced the launch of Juvéderm VOLUX in Monaco. It is HA-based, the innovative product used as facial filler for chin and jaw lines.
April 2019	Merz Pharma	Merz Pharma launched Belotero Revive, a dermal filler containing a unique combination of hyaluronic acid (HA) and glycerol. The

		company increased its product portfolio in the facial aesthetic market to expand its business in the market.
May 2018	Galderma	Galderma received the Food and Drug Administration (FDA) approval for its Restylane Lyft a hyaluronic acid (HA) dermal filler for the back of the hands of patients over the age of 21
April 2018	Merz Pharma	Merz Pharma launched Belotero Lips series of products specifically designed for lip enhancement and treatment of perioral lines.
October 2017	Galderma	Galderma received the FDA approval for Restylane Silk hyaluronic acid dermal filler. Restylane Silk is specially designed for lip augmentation and is injected via a cannula.
March 2017	Allergan	Allergan received the FDA approval for Juvéderm Vollure XC used to reduce facial wrinkles and folds in adults over the age of 21.
December 2016	Galderma	Galderma received the FDA approval for the Restylane Refyne and Restylane Defyne dermal fillers used for laugh lines.

Source: Annual Report and Press Releases

10.7.3 EXPANSION

TABLE 98 EXPANSION: GLOBAL DERMAL FILLERS MARKET

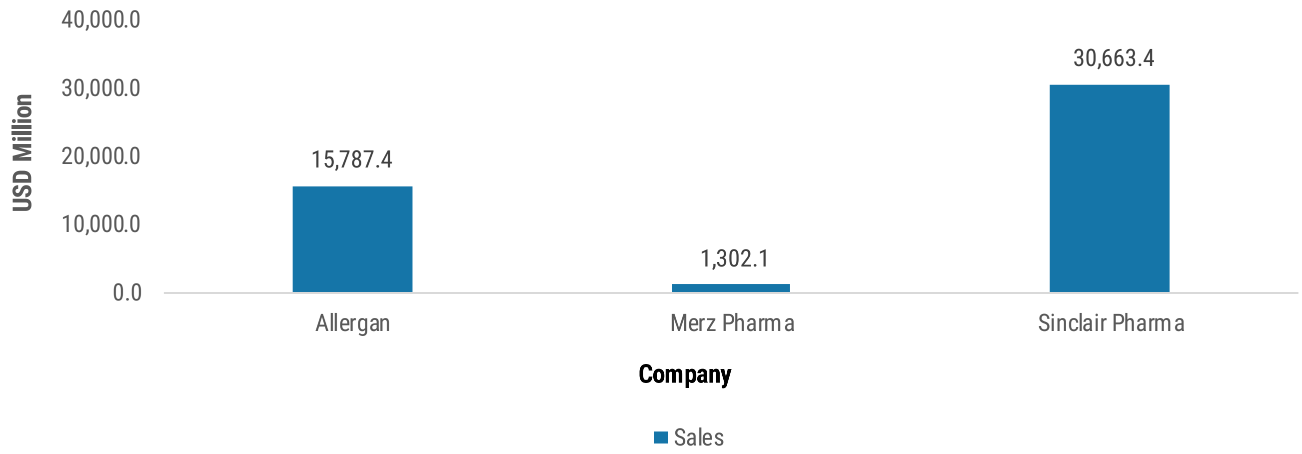
Date	Company	Development
January 2019	Allergan	Allergan announced the establishment of a research & development facility in the Kendall Square section of Cambridge, Massachusetts. Thus, through this, the company aims to expand its research facilities.
September 2018	Allergan	Allergan announced plans to open its first medical aesthetics innovation center in Chengdu, China. Through this, the company plans to expand its foothold in the Chinese market.

Source: Annual Report and Press Releases

10.8 MAJOR PLAYERS FINANCIAL MATRIX & MARKET RATIO

10.8.1 SALES

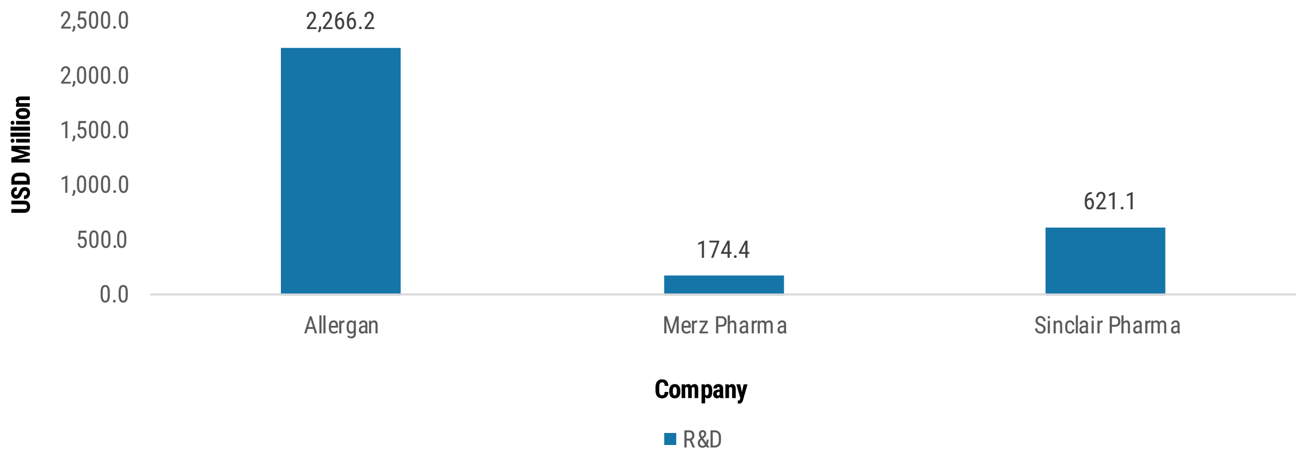
FIGURE 23 SALES, 2018



Source: MRFR analysis

10.8.2 R&D EXPENDITURE

FIGURE 24 MAJOR PLAYERS R&D EXPENDITURE 2018



Source: MRFR analysis

11 COMPANY PROFILES

11.1 GALDERMA LABORATORIES, L.P.

11.1.1 COMPANY OVERVIEW

Company Headquarters: Vaud, Switzerland

Founded: 1981

Workforce: ~10,000

Company Working: Galderma Laboratories, LP (Galderma) is a company under the medical solutional division of Nestlé Skin Health. The company is present in over 100 countries, with six manufacturing units across the world. Galderma offers a wide portfolio of products used to treat different dermatological conditions. Around 1,300 people work at Galderma plants in Canada, Germany, Brazil, Sweden, France, and China.

11.1.2 FINANCIAL OVERVIEW

This is a privately held company. Hence, financial information is not available in the public domain.

11.1.3 PRODUCTS/SERVICES OFFERED

TABLE 99 GALDERMA LABORATORIES, LP: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Fillers	• Restylane Defyne • Restylane Refyne • Restylane • Restylane Silk • Restylane Lyft

Source: Annual Report, Press Releases, and MRFR Analysis

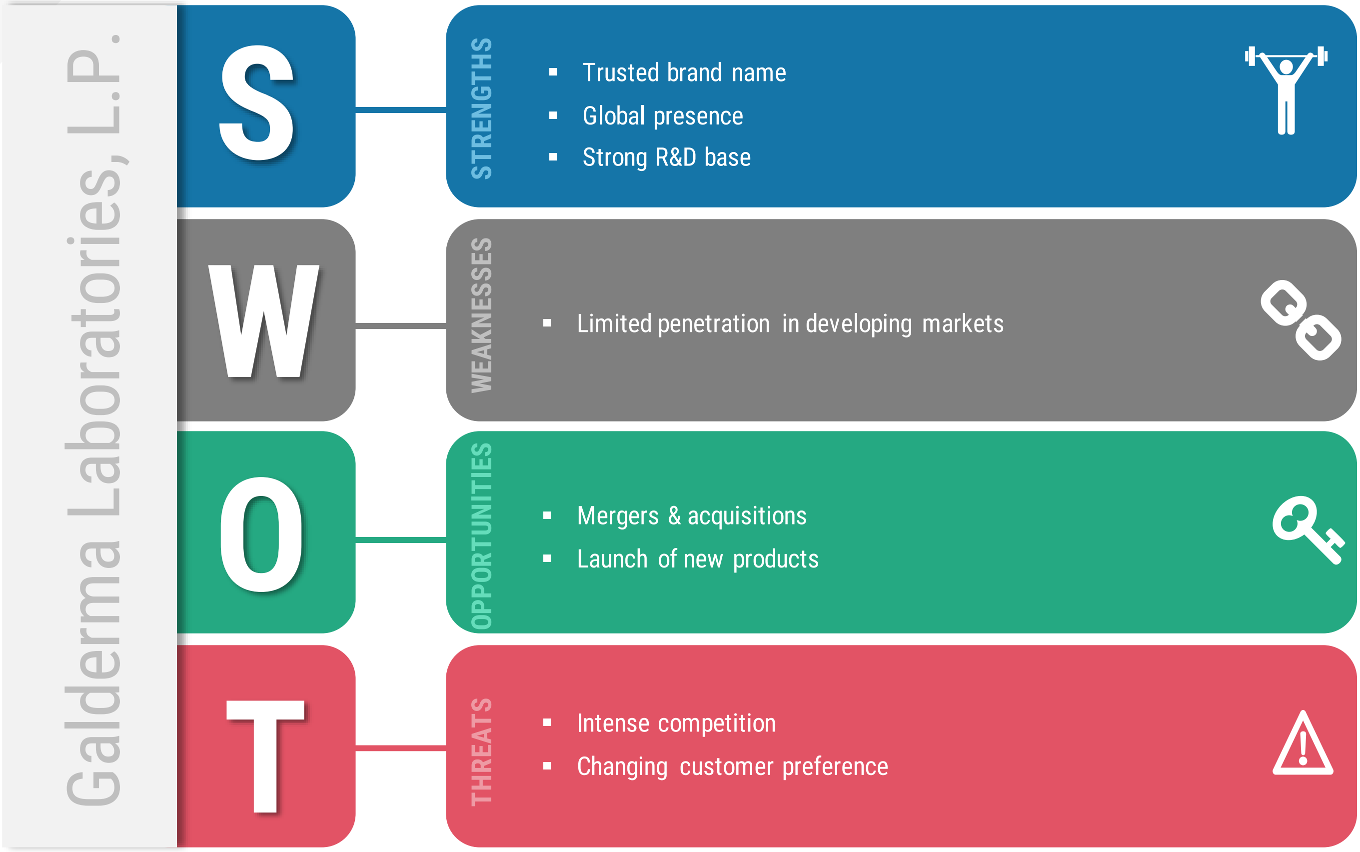
11.1.4 KEY DEVELOPMENTS

Date	Approach	Development
May 2018	Approval	Galderma received the Food and Drug Administration (FDA) approval for its Restylane Lyft a hyaluronic acid (HA) dermal filler for the back of the hands of patients over the age of 21
October 2017	Approval	Galderma received the FDA approval for Restylane Silk hyaluronic acid dermal filler. Restylane Silk is specially designed for lip augmentation and is injected via a cannula.
December 2016	Approval	Galderma received the FDA approval for the Restylane Refyne and Restylane Defyne dermal fillers used for laugh lines.

Source: Annual Report, Press Releases, and MRFR Analysis

11.1.5 SWOT ANALYSIS

FIGURE 25 GALDERMA LABORATORIES, L.P.: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.1.6 KEY STRATEGIES

Galderma focuses on partnerships with different health care practitioners across the world to meet the skin health needs of people. The company is also involved in the research and development of scientifically defined and medically proven solutions for the skin to improve its product line.

11.2 ALLERGAN

11.2.1 COMPANY OVERVIEW

Company Headquarters: Dublin, Ireland

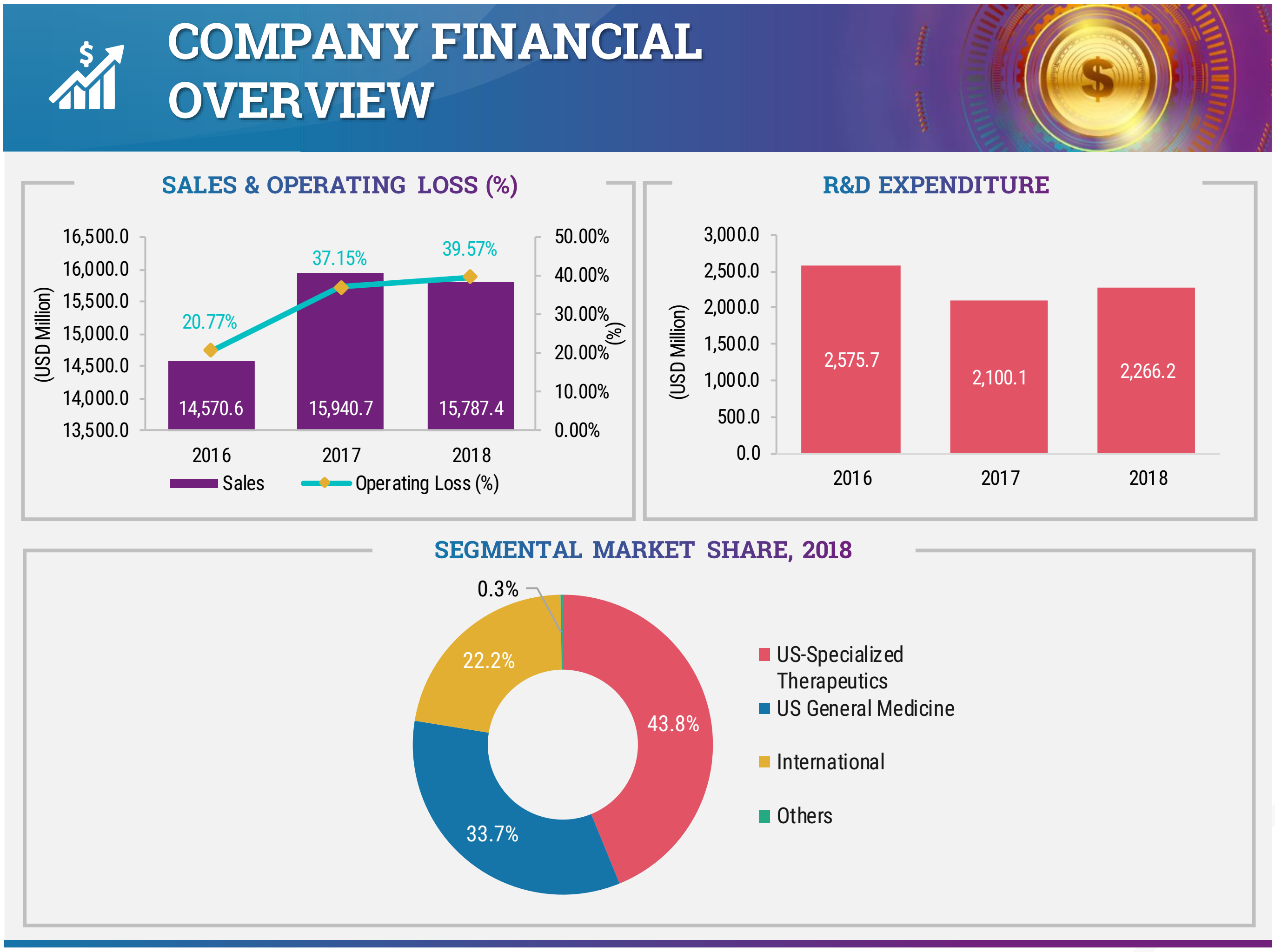
Founded: 1948

Workforce: ~16,900

Company Working: Allergan is a global pharmaceutical company and has its expertise in the manufacturing and marketing of well-known brands such as Botox and Juvederm. The company is involved in manufacturing, developing, and commercializing pharmaceutical products, biological products, and devices for patients around the globe. It has a wide range of products that provide effective treatment for the central nervous system (CNS), eye care, medical aesthetics and dermatology, gastroenterology, women's health, urology, and anti-infective categories. The company is present in more than 100 countries across the globe.

11.2.2 FINANCIAL OVERVIEW

FIGURE 26 ALLERGAN: FINANCIAL OVERVIEW SNAPSHOT



Source: Annual Report, Press Releases, and MRFR Analysis

11.2.3 PRODUCTS/SERVICES OFFERED

TABLE 100 ALLERGAN: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Therapeutics	• Juvéderm • Juvéderm VOLUMA XC • JUVEDERM(TM) ULTRA • JUVEDERM(TM) ULTRA PLUS

Source: Annual Report, Press Releases, and MRFR Analysis

11.2.4 ALLERGAN: KEY DEVELOPMENTS

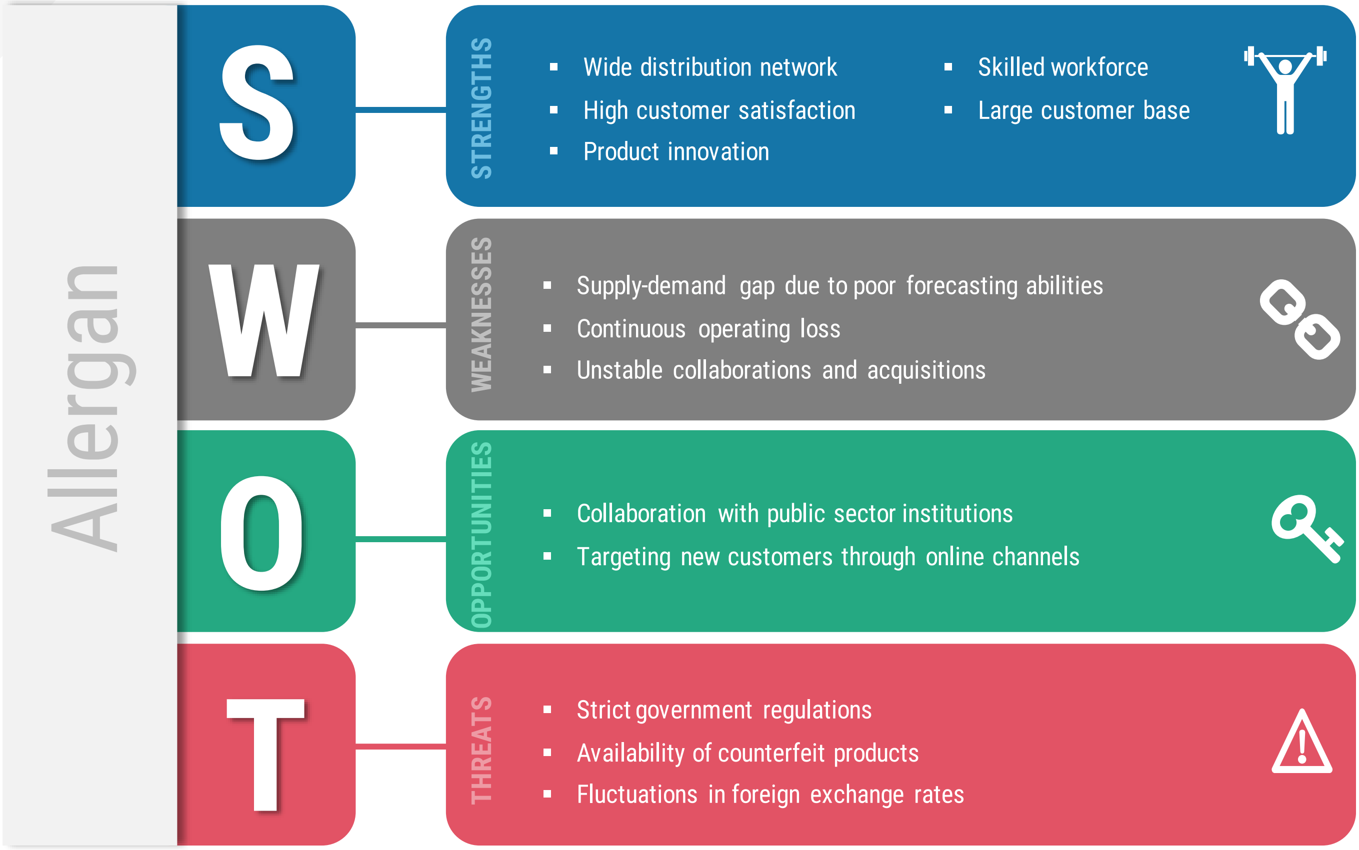
TABLE 101 KEY DEVELOPMENTS

Date	Approach	Development
September 2019	Product Approval	Allergan received the US Food and Drug Administration (FDA) approval for the use of Juvéderm VOLUMA XC, a hyaluronic acid gel dermal filler, with a TSK STERiGLIDE cannula for cheek augmentation to correct age-related volume deficit in the middle part of the face in adults over the age of 21.
April 2019	Launch	Allergan announced the launch of Juvéderm VOLUX in Monaco. It is HA-based, the innovative product used as facial filler for chin and jaw lines.
March 2019	Acquisition	Allergan acquired Envy Medical, Inc., a privately held company with proprietary technology in skin resurfacing. The acquisition enhanced the former's best-in-class medical aesthetics portfolio.
January 2019	Expansion	Allergan announced the establishment of a research & development facility in the Kendall Square section of Cambridge, Massachusetts. Thus, through this, the company aims to expand its research facilities.
September 2018	Expansion	Allergan announced plans to open its first medical aesthetics innovation center in Chengdu, China. Through this, the company plans to expand its foothold in the Chinese market.
February 2017	Acquisition	Allergan acquired LifeCell Corporation, a leading regenerative medicine company, thus expanding its product portfolio in the aesthetic and plastic surgery segment.
March 2017	Product Approval	Allergan received the FDA approval for Juvéderm Vollure XC used to reduce facial wrinkles and folds in adults over the age of 21.

Source: Annual Report, Press Releases, and MRFR Analysis

11.2.5 SWOT ANALYSIS

FIGURE 27 ALLERGAN: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.2.6 KEY STRATEGIES

Allergan focuses on increasing its footprints globally by establishing its manufacturing, research and development, and commercial operations in various regions across the world. To increase sales and marketing, Allergan concentrates on targeted activities that include direct-to-consumer advertising to raise consumer awareness about products. It also aims at engaging physicians and surgeons through its sales team and other programs to ensure they are fully informed about their products offer.

11.3 MERZ PHARMA

11.3.1 COMPANY OVERVIEW

Company Headquarters: Frankfurt, Germany

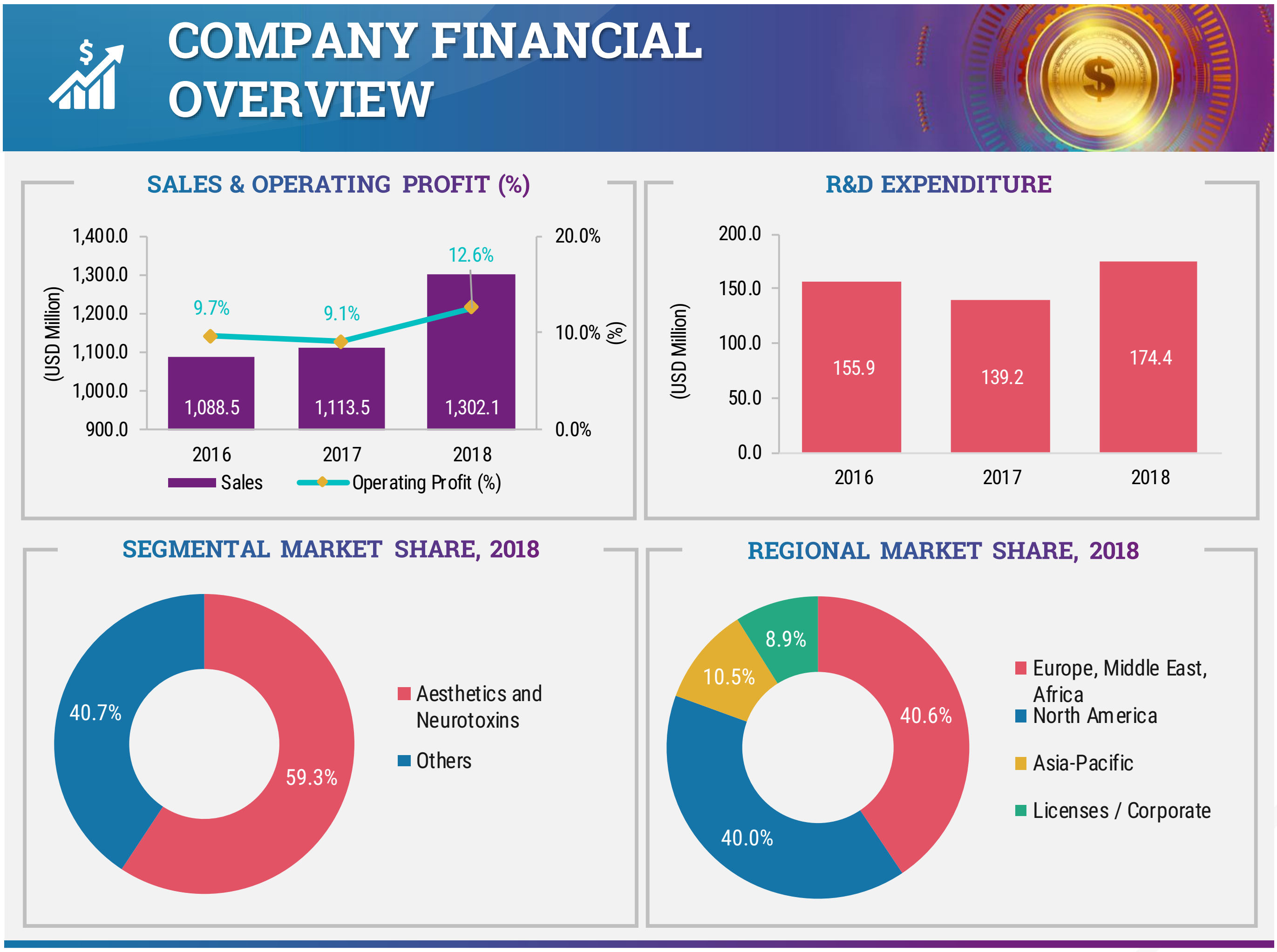
Founded: 1908

Workforce: ~3151

Company Working: Merz Pharma is a global aesthetic and neurotoxin company which has its research & development capabilities. Its aesthetic products are renowned for their extraordinary quality and outstanding results. The company aims to achieve and discover the needs of specialists and work in line to help patients achieve their desired results. It operates in fields such as neurology, over the counter (OTC) medicines, dietary supplements, and skincare products. The company is directly present in more than 34 countries and offers its products in around 90 countries.

11.3.2 FINANCIAL OVERVIEW

FIGURE 28 MERZ PHARMA: FINANCIAL OVERVIEW SNAPSHOT



Source: Annual Report, Press Releases, and MRFR Analysis

11.3.3 PRODUCTS/SERVICES OFFERED

TABLE 102 MERZ PHARMA: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Filler	• Radiesse • Belotero

Source: Annual Report, Press Releases, and MRFR Analysis

11.3.4 KEY DEVELOPMENTS

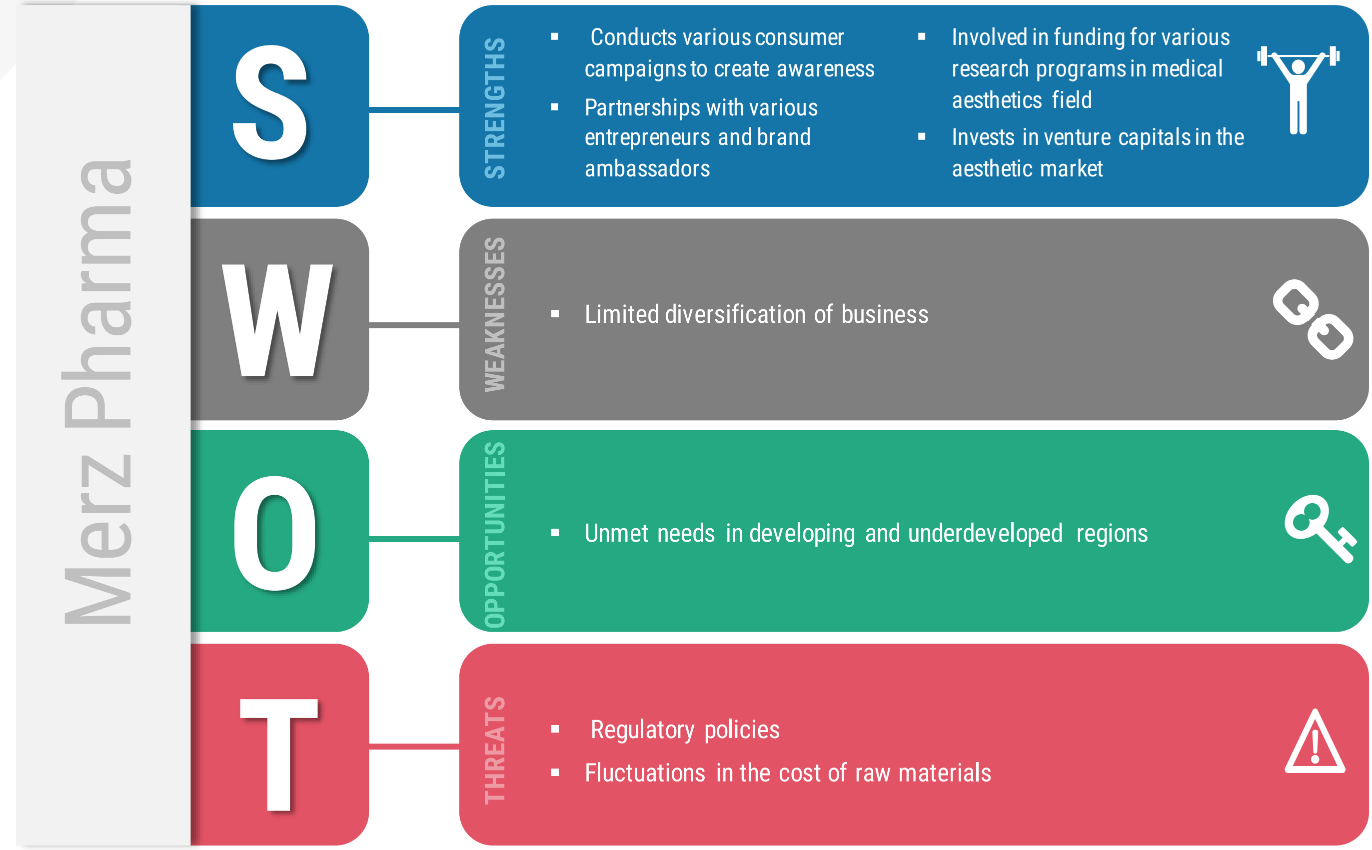
TABLE 103 MERZ PHARMA: KEY DEVELOPMENTS

Date	Approach	Development
April 2019	Product Launch	Merz Pharma launched Belotero Revive, a dermal filler containing a unique combination of hyaluronic acid (HA) and glycerol. The company increased its product portfolio in the facial aesthetic market to expand its business in the market.
June 2018	Investment	The company participated in Cytrellis Biosystems, Inc.'s USD 28.5 million series B financing. Cytrellis Biosystems, Inc. is a Boston-based clinical-stage company involved in developing a novel category of medical devices for the aesthetics industry.
April 2018	Product Launch	Merz Pharma launched Belotero Lips series of products specifically designed for lip enhancement and treatment of perioral lines.
March 2017	Expansion	Merz Pharma constructed a production plant costing Euro 15 million (USD 17.68 million) to produce dermal fillers at its site in Dessau, Germany, to expand its business in the region.

Source: Annual Report, Press Releases, and MRFR Analysis

11.3.5 SWOT ANALYSIS

FIGURE 29 MERZ PHARMA: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.3.6 KEY STRATEGIES

Merz Pharma plans to strategically acquire other aesthetic medical device companies to boost its product portfolio. The company focuses on training its employees to innovate and improve the quality of its products. The company also conducts various consumer campaigns to engage the target audience and brace its position in the facial fat transfer market.

11.4 DR. KORMAN LABORATORIES

11.4.1 COMPANY OVERVIEW

Company Headquarters: Kiryat Bialik, Israel

Founded: 2015

Workforce: ~200

Company Working: Dr. Korman Laboratories is a medical device company engaged in developing, manufacturing, and selling bio revitalization products, mesotherapy products, calcium hydroxyapatite (CaHA), and dermal fillers, among others. The company also manufactures intra-articular hyaluronic acid (IAHA) in different dosages for various indications such as pain and restricted mobility and degeneration of the knee joint and other synovial joints as well as osteoarthritis. Dr. Korman is based in Israel and operates in Western, Central, and Eastern Europe.

11.4.2 FINANCIAL OVERVIEW

This is a privately held company. Hence, financial information is not available in the public domain.

11.4.3 PRODUCTS/SERVICES OFFERED

TABLE 104 DR. KORMAN LABORATORIES: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Fillers	• Filler 8 Mg/Ml • Filler 10 Mg/Ml • Filler 12 Mg/Ml • Filler 14 Mg/Ml • Filler 18 Mg/Ml • Filler 23 Mg/Ml • Filler 26 Mg/Ml

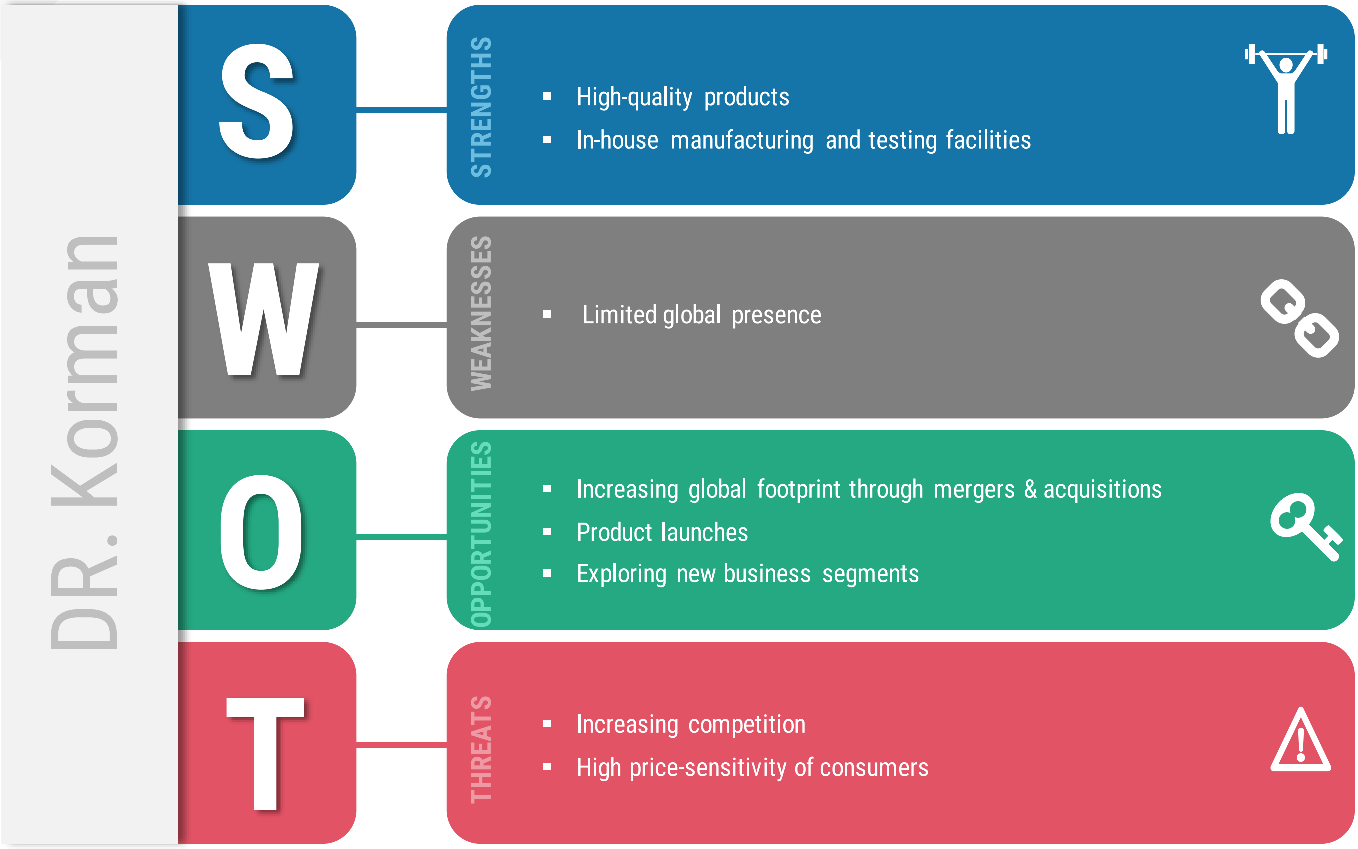
Source: Annual Report, Press Releases, and MRFR Analysis

11.4.4 KEY DEVELOPMENTS

There have been no significant recent developments by the company in the global dermal fillers market in the past three years.

11.4.5 SWOT ANALYSIS

FIGURE 30 DR. KORMAN LABORATORIES: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.4.6 KEY STRATEGIES

DR. Korman Laboratories' business strategy is to develop and manufacture high-quality products to retain customers, thus enabling the company to compete with the leading manufacturers in the market. The company is diversifying its business segments with the product offering for orthopedic treatments and is focusing on entering other areas.

11.5 SINCLAIR PHARMA

11.5.1 COMPANY OVERVIEW

Company Headquarters: London, UK

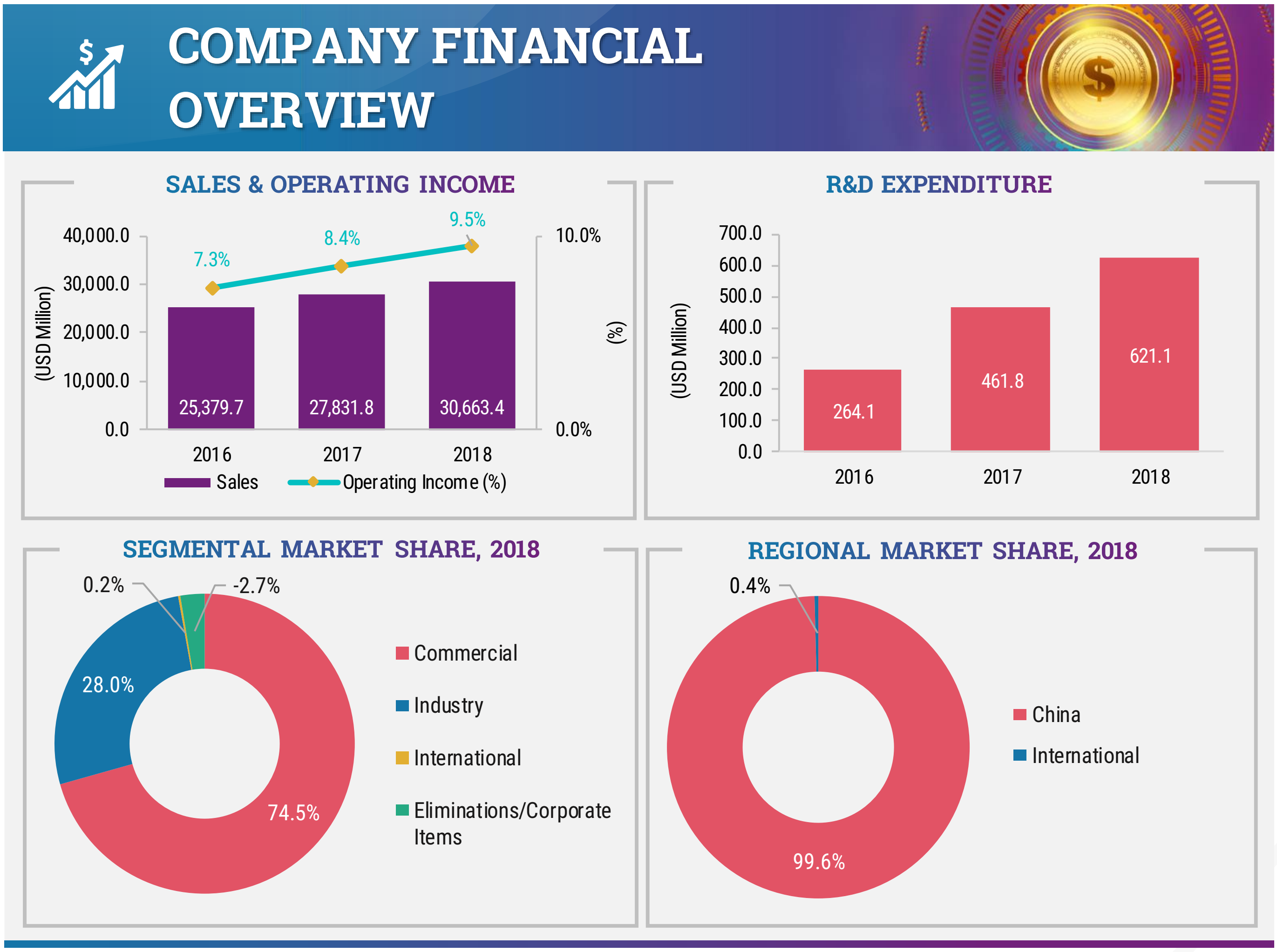
Founded: 1971

Workforce: ~195

Company Working: Sinclair Pharma is a global healthcare company engaged in the development, manufacture, and distribution of pharmaceutical products. Other medical offerings of the company include aesthetics and cosmetic products. The company has a strong presence in Europe, as well as the US, Brazil, and South Korea. The company constitutes a huge network of international distributors throughout the world. Sinclair Pharma operates as a subsidiary of Huadong Medicine Co., Ltd.

11.5.2 FINANCIAL OVERVIEW

FIGURE 31 SINCLAIR PHARMA: FINANCIAL OVERVIEW SNAPSHOT



Source: MRFR Analysis

Note: Sinclair Pharma operates as a subsidiary of Huadong Medicine Co., Ltd. Therefore, the financials mentioned are of the parent company.

11.5.3 PRODUCTS/SERVICES OFFERED

TABLE 105 SINCLAIR PHARMA: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Fillers	• Ellansé • Sculptra • Perfectha • Sinclair College

Source: Annual Report, Press Releases, and MRFR Analysis

11.5.4 KEY DEVELOPMENTS

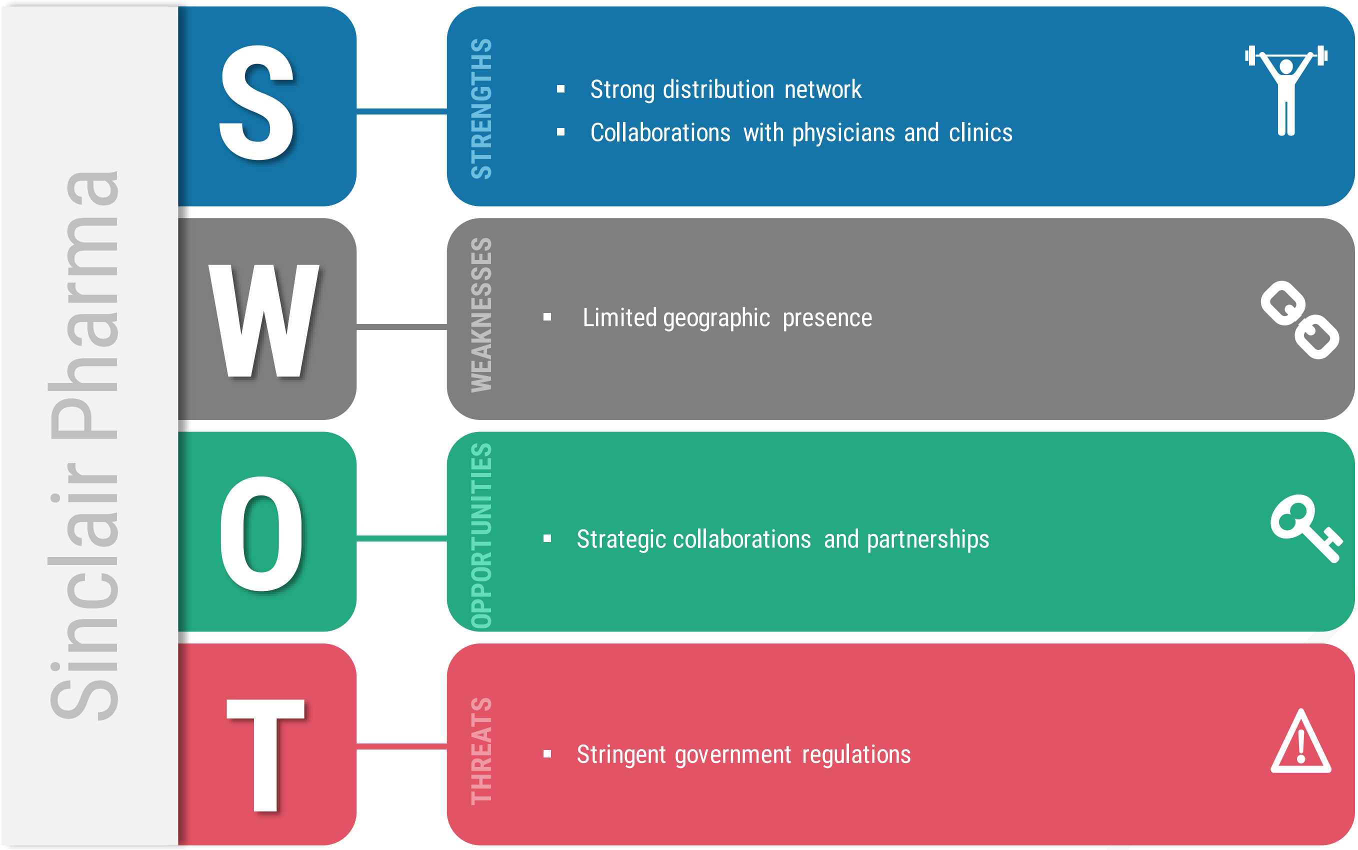
TABLE 106 SINCLAIR PHARMA: KEY DEVELOPMENTS

Date	Approach	Development
August 2015	Partnership	Sinclair Pharma partnered with John Bannon Ltd to supply its aesthetic range in Ireland.

Source: Annual Report, Press Releases, and MRFR Analysis

11.5.5 SWOT ANALYSIS

FIGURE 32 SINCLAIR PHARMA: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.5.6 KEY STRATEGIES

Sinclair Pharma aims to focus on major aesthetics markets such as the US, the UK, and Brazil by providing quality products and generating maximum revenue from these markets. The company plans to collaborate with different physicians and clinics to create awareness about its products in the market.

11.6 TEOXANE LABORATORIES

11.6.1 COMPANY OVERVIEW

Company Headquarters: Geneva, Switzerland

Founded: 2003

Workforce: ~51–200

Company Working: Teoxane Laboratories (Teoxane) is specialized in the designing and manufacturing of hyaluronic acid (HA)-based dermal fillers and cosmeceuticals. The company offers skin treatment products that are used for reducing wrinkles, restoring youthful volume to the face, and treating the neck and décolleté with-looking natural results. It focuses on medical devices, aesthetic products, skincare, beauty, anti-aging solutions, dermal fillers, dermis redensification, and HA.

11.6.2 FINANCIAL OVERVIEW

This is a privately held company. Hence, financial information is not available in the public domain.

11.6.3 PRODUCTS/SERVICES OFFERED

TABLE 107 TEOXANE LABORATORIES: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Fillers	• Teosyal RHA 1 • Teosyal RHA 2 • Teosyal RHA 3 • Teosyal RHA 4 • Teosyal Ultra Deep • Teosyal Ultimate • Teosyal Puresense Kiss • Teosyal Puresense Redensity 2 • Teosyal Puresense Redensity 1 • Teosyal Meso • Teosyal Global Action • Teosyal Deep Lines • Teosyal RHA Kiss • Teosyal Puresense Ultra Deep • Teosyal Puresense Ultimate

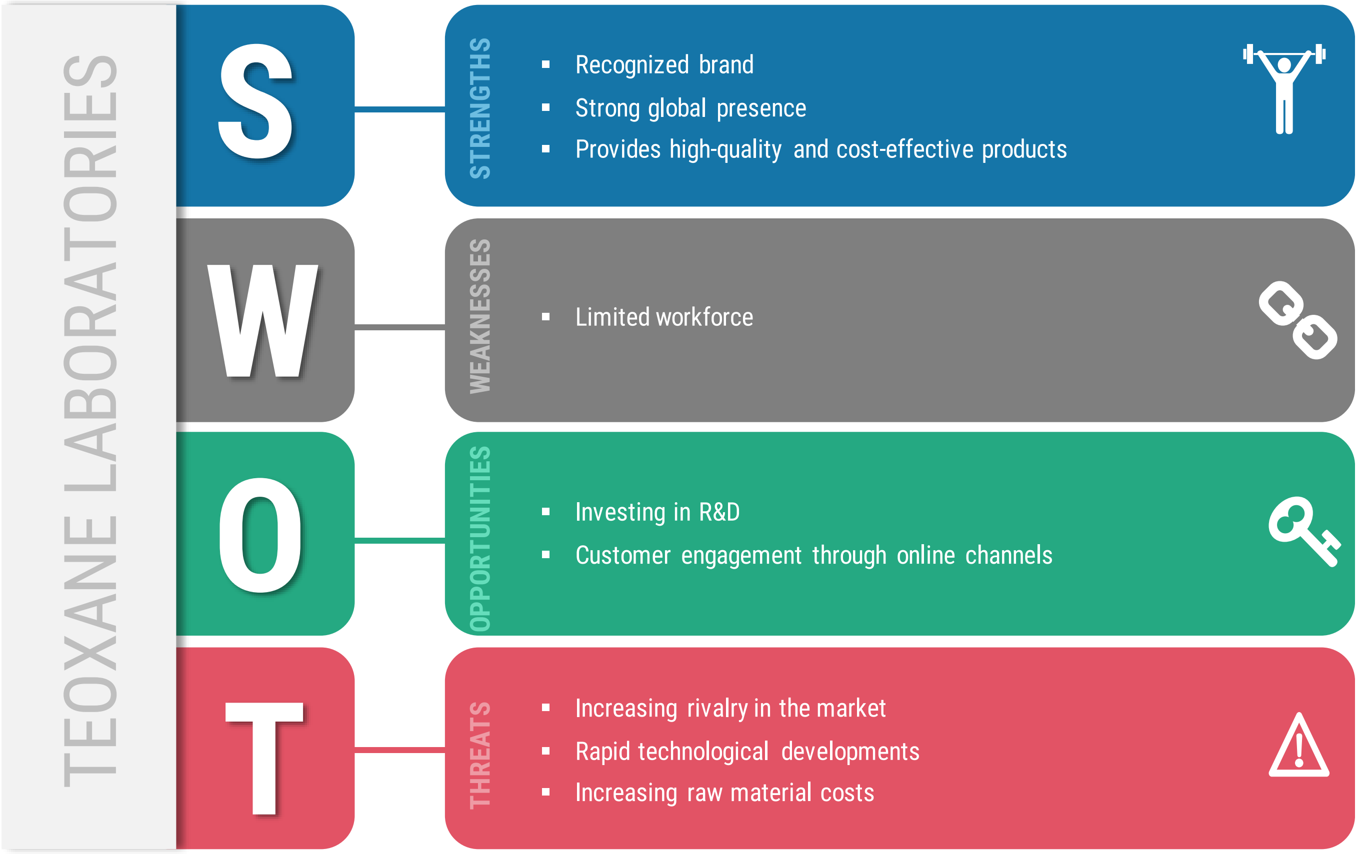
Source: Annual Report, Press Releases, and MRFR Analysis

11.6.4 KEY DEVELOPMENTS

There have been no significant recent developments by the company in the global dermal fillers market in the past three years.

11.6.5 SWOT ANALYSIS

FIGURE 33 TEOXANE LABORATORIES: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.6.6 KEY STRATEGIES

Teoxane focuses on developing innovative technologies to deliver best-in-class solutions. It also aims at providing quality products and services to maintain a diversified business with a strong pipeline of new products. The company has been taking steps to expand its sales in emerging markets such as India and China. Teoxane also focuses on maintaining and enhancing customer satisfaction by providing quality products and improving customer support and services.

11.7 SUNEVA MEDICAL

11.7.1 COMPANY OVERVIEW

Company Headquarters: California, US

Founded: 2009

Workforce: ~195

Company Working: Suneva Medical is engaged in the manufacturing and distribution of aesthetics and skincare products. The company offers products to treat acne, wrinkles, and skin regeneration. The US, Canada, South Korea, Hong Kong, and Singapore are the major markets covered by Suneva Medical, Inc. In 2017, the company celebrated ten years of its flagship brand, Bellafill.

11.7.2 FINANCIAL OVERVIEW

This is a privately held company. Hence, financial information is not available in the public domain.

11.7.3 PRODUCTS/SERVICES OFFERED

TABLE 108 SUNEVA MEDICAL: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Filler	Bellafill

Source: Annual Report, Press Releases, and MRFR Analysis

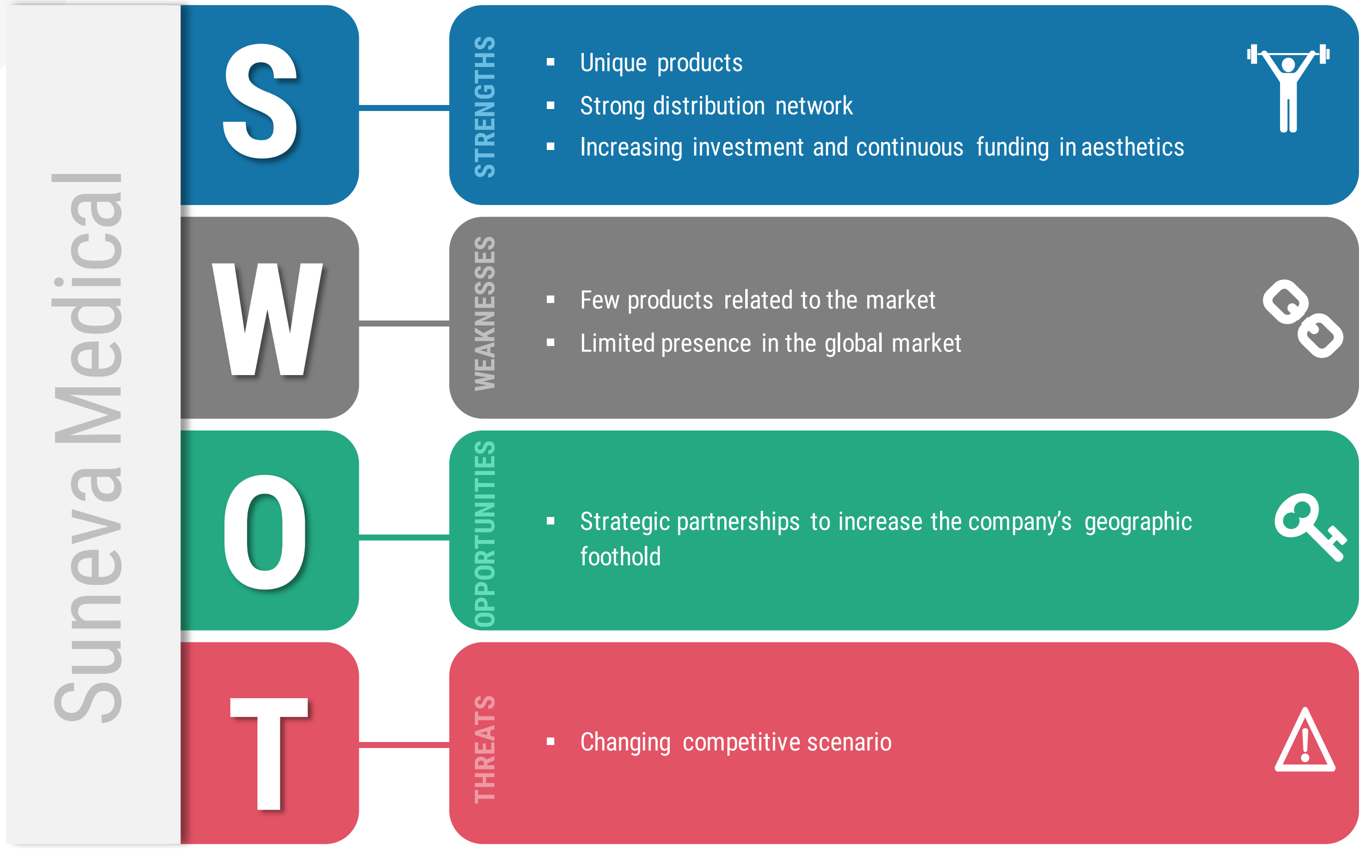
11.7.4 KEY DEVELOPMENTS

Month & Year	Approach	Development
January 2019	Partnership	Suneva Medical signed two partnerships with Healeon Medical and Bimini Technologies. With the help of this, the company aims to extend its product portfolio and brace its position in the market.

Source: Annual Report, Press Releases, and MRFR Analysis

11.7.5 SWOT ANALYSIS

FIGURE 34 SUNEVA MEDICAL: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.7.6 KEY STRATEGIES

Suneva Medical focuses on developing innovative and unique products to achieve maximum revenue and high customer satisfaction. The company is continuously involved in research and funding. Also, the company focuses on offering high-quality products to increase their target audience.

11.8 SCIVISION BIOTECH INC.

11.8.1 COMPANY OVERVIEW

Company Headquarters: Taiwan

Founded: 2001

Workforce: ~108

Company Working: SciVision Biotech Inc. is involved in the manufacturing and marketing of hyaluronic acid products in Taiwan. The company operates through the following segments, namely, absorbable adhesion barriers, dermal implants, synovial fluid supplements, intravesical instillations, and skincare products. Aesthetics and skincare are the core areas of SciVision Biotech Inc.

11.8.2 FINANCIAL OVERVIEW

This is a privately held company. Hence, financial information is not available in the public domain.

11.8.3 PRODUCTS/SERVICES OFFERED

TABLE 109 SCIVISION BIOTECH INC.: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Implant	• Hyadermis • Facille • Hya-Dermis MAX

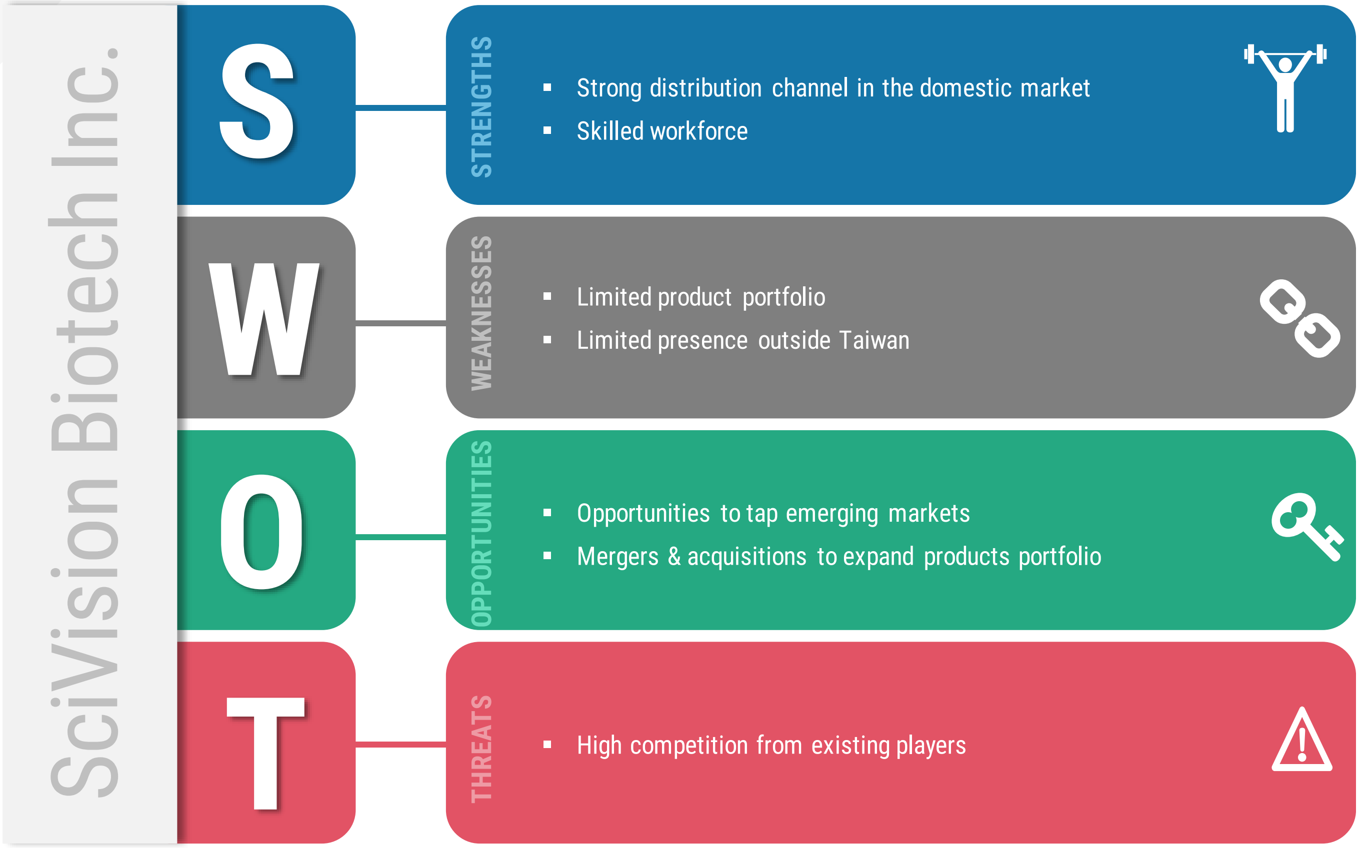
Source: Annual Report, Press Releases, and MRFR Analysis

11.8.4 KEY DEVELOPMENTS

There have been no significant recent developments by the company in the global dermal fillers market in the past three years.

11.8.5 SWOT ANALYSIS

FIGURE 35 SCIVISION BIOTECH INC.: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.8.6 KEY STRATEGIES

SciVision Biotech Inc. operates in the market with a limited portfolio and aims to expand its offerings in the coming years. Investments in research & development are a significant part of the company's operation, which helps it gain a competitive advantage over other players.

11.9 MEDYTOX

11.9.1 COMPANY OVERVIEW

Company Headquarters: Seoul, South Korea

Founded: 2000

Workforce: ~630

Company Working: Medytox manufactures, markets, and distributes medical aesthetics products across the globe. The company operates through business segments including, botulinum toxin product hyaluronic acid filler medical device and prescription drugs. The company is planning to expand its business in the Americas and European countries through its subsidiaries Medytox US, Medybloom China, Medytox Taiwan, Medytox Hong Kong, MedyCeles, and MDT International (Japan). It has three manufacturing plants and one R&D center based in South Korea.

11.9.2 FINANCIAL OVERVIEW

This is a privately held company. Hence, financial information is not available in the public domain.

11.9.3 PRODUCTS/SERVICES OFFERED

TABLE 110 MEDYTOX: PRODUCTS/SERVICES OFFERED

Category	Products/Services
Dermal Filler	• Potenfill • Neuramis

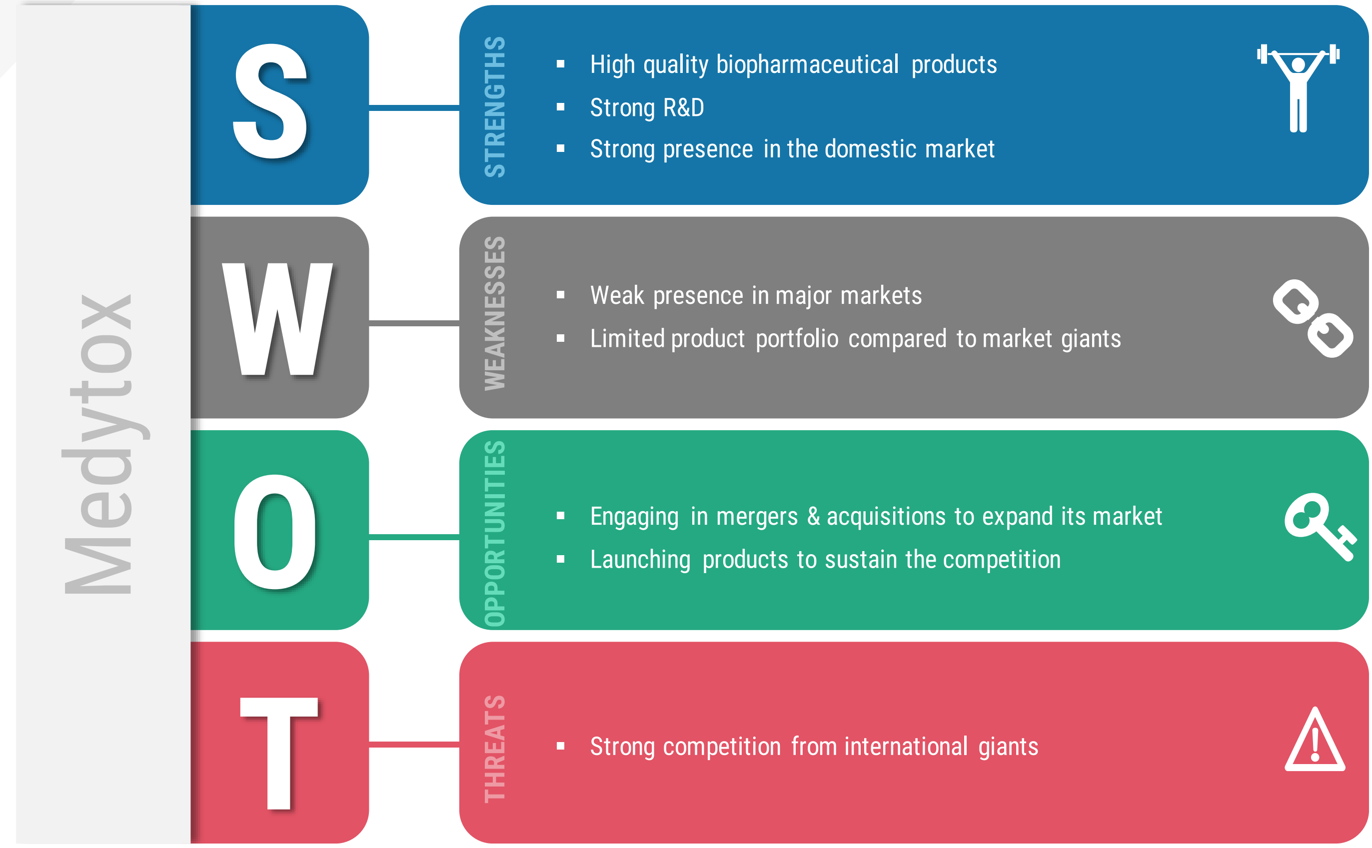
Source: Annual Report, Press Releases, and MRFR Analysis

11.9.4 KEY DEVELOPMENTS

There have been no significant recent developments by the company in the global dermal fillers market in the past three years.

11.9.5 SWOT ANALYSIS

FIGURE 36 MEDYTOX: SWOT ANALYSIS



Source: Annual Report, Press Releases, and MRFR Analysis

11.9.6 KEY STRATEGIES

Medytox focuses on developing innovative and unique biopharmaceutical products to achieve maximum revenue and high customer satisfaction. The company is continuously involved in research and funding. Additionally, the company concentrates on offering high-quality products to increase its target audience and to capture maximum market share.

12 APPENDIX

12.1 REFERENCES

- National Center for Biotechnology Information
- The American Academy of Facial Esthetic
- Australasian Academy of Dento-Facial Aesthetics.
- THE AMERICAN BOARD OF COSMETIC SURGERY
- American Society of Plastic Surgeons
- The British Journal of Dermatology

12.2 RELATED REPORTS

SR. NO.	REPORT TITLE	PUBLISH MONTH
1	Facial Fat Transfer Market Research Report - Global Forecast to 2022 By Types (Microlipo-injection, Autologous Fat Transfer) by treatment types (fat injections, dermal fillers, and others) - Forecast to 2022 https://www.marketresearchfuture.com/reports/facial-fat-transfer-market-1780	May, 2019
2	Facial Injectable Market Research Report - Global Forecast till 2025 By Type (Botulinum Toxin, Hyaluronic Acid, Polymers and Particles and Collagen), Application (Facial Line Correction Treatment, Face Lift and Lip Treatments), End User (Hospitals, Specialty Clinics and Spa & Beauty Clinic) and Region (North America, Europe, Asia-Pacific and Middle East & Africa) - Forecast till 2025 https://www.marketresearchfuture.com/reports/facial-injectable-market-1527	August, 2019
3	Cosmetic Implant Market Research Report- Global Forecast to 2022 By type (dental implant, breast implant, facial implant, buttock implant) by material (polymers, metals, ceramics, biologicals) by end users (hospitals, dental clinics, academics) - Forecast to 2022 https://www.marketresearchfuture.com/reports/cosmetic-implant-market-2018	November, 2019
4	Aesthetics Market Research Report - Global Forecast till 2025 By Procedure (Surgical Aesthetic Procedures and Non-Surgical Aesthetic Procedures), by End User (Hospitals & Clinics, Dermatology Clinics & Cosmetic Centers and Salons & Spas) and by Region (Americas, Europe, Asia-Pacific, and the Middle East & Africa) - Forecast till 2025 https://www.marketresearchfuture.com/reports/aesthetics-market-3136+	July, 2019

DISCLAIMER

Market Research Future strategic analysis services are limited publications containing valuable market information provided to a select group of customers in response to orders. Our customers acknowledge, when ordering, that Market Research Future strategic analysis services are for our customers' internal use and not for general publication or disclosure to third parties. Quantitative market information is based primarily on interviews and therefore, is subject to fluctuation.

Market Research Future does not endorse any vendor, product or service depicted in its research publications. Market Research Future strategic analysis publications consist of the opinions of Market Research Future' research and should not be construed as statements of fact. Market Research Future disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

Market Research Future takes no responsibility for any incorrect information supplied to us by manufacturers or users.

All trademarks, copyrights and other forms of intellectual property belong to their respective owners and may be protected by copyright. Under no circumstance may any of these be reproduced in any form without the prior written agreement of their owner.

No part of this strategic analysis service may be given, lent, resold or disclosed to non-customers without written permission.

Reproduction and/or transmission in any form and by any means including photocopying, mechanical, electronic, recording or otherwise, without the permission of the publisher is prohibited.

For information regarding permission, contact:

Tel: 1-646-845-9349

Email: info@marketresearchfuture.com