

Dermal Fillers Market - Global Outlook & Forecast 2023-2028

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Report description:

The global dermal fillers market is expected to grow at a CAGR of 8.03% during 2022 to 2028

MARKET TRENDS & DRIVERS

Advancements in Aesthetics & Product Launches

Over the last decade, the dermal fillers market has witnessed the launch of advanced products and innovative non-invasive procedures. Rapid and varied changes in dermatology care and advances in technology in aesthetics paved the direction for innumerable procedures that reduced the side effects. There is a significant trend among dermal filler manufacturers to focus on launching new and innovative products into the industry. Many want to provide clients with various filler options to suit their needs.

Increasing Demand for Male Aesthetics

The desire to improve one's appearance is not limited strictly to women. Men increasingly seek treatments to address aesthetic concerns, such as wrinkle reduction, fat or cellulite removal, facial rejuvenation, and hair restoration. This shift in attitude towards male aesthetics can also be attributed to the evolving expectations of modern men. The trend is leaning towards a more youthful, toned, and vibrant aesthetic for men, and it's becoming increasingly common to see men seeking treatments to improve their appearance, further contributing to the dermal fillers market.

Better Access to Cosmetic Procedures Coupled with Medical Tourism

Cosmetic procedures are now a major component of medical tourism. Cosmetic procedures are performed for aesthetic or cosmetic purposes rather than medical necessity. Medical tourists may find the cost of dermal fillers much lower in other countries and may also be able to access treatments unavailable in their home country. By taking advantage of medical tourism, patients

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can access treatments they may not be able to get in their home country.

Increasing Demand for Non-invasive Aesthetic Procedures

As technology and treatments have evolved to deliver without pain and in less recovery time, such as non-invasive treatment, more people are opting for those procedures in recent years and more than ever. Dermal fillers are a non-invasive aesthetic procedure because they do not require surgery and can be administered with minimal risks and side effects. Dermal fillers involve injecting substances below the skin's surface to fill in wrinkles and create volume in areas of the face.

Aging Demographics & Increasing Focus on Improving Appearance

The rapidly growing elderly population and considerable focus on personal grooming and aesthetic appearance primarily drive the demand for dermal fillers. Consumers are more aware of how the sun, environment, and lifestyle factors can age their skin. Dermal fillers can provide immediate, natural-looking results lasting several months to two years or more. They can help eliminate wrinkles and lines, reduce scarring, restore fullness, enhance facial contours, and add volume and shape to hollow or thinning areas, such as sunken cheeks and recessed temples.

Increasing Awareness & Expenditure on Aesthetic/Cosmetic Procedures

Increasing awareness about aesthetic procedures through various platforms and rising per capita expenditure on cosmetics have significantly contributed to the dermal fillers market growth. The rising healthcare expenditure with changing human habits and lifestyles, rising income, and care about appearance have the expenditure on personal care. The demand for dermal fillers will keep rising as the population ages and people become more interested in aesthetics. Aesthetic procedures are becoming increasingly popular due to technological advances and a growing range of procedures available. Patients can now choose from a variety of treatments, including dermal fillers, as well as surgical and non-surgical procedures.

SEGMENTATION INSIGHTS

INSIGHTS BY MATERIAL

The global dermal fillers market by the material is segmented into hyaluronic acid (HA) and non-hyaluronic acid dermal fillers (calcium hydroxylapatite fillers, poly-L-lactic acid fillers, polymethylmethacrylate beads, and other). Hyaluronic Acid Fillers are biodegradable and the most commonly used dermal fillers because of their clear history of safety, freshness, and affordability. Additionally, due to their versatility and adaptability, hyaluronic acid fillers can create natural-looking results and address a variety of indications. In 2022, Hyaluronic acid (HA) dominated the global dermal fillers market, and the trend is likely to continue during the forecast period.

Segmentation by Material

- Hyaluronic Acid
- Non-hyaluronic Acid

INSIGHTS BY APPLICATION

The lips & cheeks enhancement application segment had the highest global dermal fillers market share in 2022. Dermal filler can be used in lips enhancement, adding volume, shape, and definition to the lips. They can also minimize wrinkles and vertical lines above and around the lips. The most commonly used dermal filler for lips enhancement is hyaluronic acid-based fillers. They can

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be used to enhance the shape, size, and symmetry of the lips and reduce wrinkles in the lip area. Examples of commonly used dermal fillers include Juvederm, Radiesse, Belotero, and Restylane. These fillers are developed with hyaluronic acid, a naturally occurring substance in the skin, which can enhance lips and cheeks. The fillers also contain lidocaine, a numbing agent, to reduce discomfort during injections.

Segmentation by Application

- Lips & Cheeks Enhancement
- Wrinkle & Scar Treatment
- Restoration of Volume

INSIGHTS BY GENDER

Dermal fillers are becoming increasingly popular among men and women as a non-invasive treatment for facial aging. The female segment dominated the global dermal fillers market in 2022. For women, dermal fillers often address age-related changes in facial structure, such as a flattening of the midface and loss of volume in the lips and cheeks. They can also fill in wrinkles and expression lines and subtly volumize and enhance specific features, such as a prominent nose or chin.

Segmentation by Gender

- Female
- Male

INSIGHTS BY END-USER

The global dermal fillers market by end-users is segmented into hospitals, specialty & dermatology clinics, and medical spas & beauty centers. Hospitals are the prime and major market growth contributors. The rising number of hospitals and demand for aesthetic procedures positively triggered the high market growth. In 2022, the hospital's segment accounted for 38.91% of the global dermal fillers market share. A plastic surgeon or dermatologist typically does the procedure in a hospital setting. The procedure typically takes less than 30 minutes, and results can often be seen immediately. The availability of the best practitioners, professionals, and experienced expertise, better access to aesthetic treatments, and the presence of high technology and advanced healthcare services derived high market growth by the segment.

Segmentation by End-user

- Hospitals
- Specialty & Dermatology Clinics
- Medical Spa & Beauty Centers

GEOGRAPHY ANALYSIS

North America is the most dominant region in the global dermal fillers market, and in 2022, the region accounted for over 33% of the global market size. The growing awareness about aesthetic procedures, advanced technology usage, increasing disposable income, and availability of recovery centers contribute to the region's market growth. Further, every year, Americans spend billions of dollars on cosmetic procedures indicating high per capita expenditure and wide acceptance of medical aesthetic procedures in the region.

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Segmentation by Geography

- North America
 - o US
 - o Canada
- Europe
 - o Germany
 - o Italy
 - o Spain
 - o UK
 - o France
- APAC
 - o China
 - o Japan
 - o South Korea
 - o India
 - o Australia
- Latin America
 - o Brazil
 - o Argentina
 - o Mexico
- Middle East & Africa
 - o Turkey
 - o Saudi Arabia
 - o South Africa

VENDOR LANDSCAPE

The global dermal fillers market is competitive and fast-growing, with many leading companies offering unique products. Manufacturers constantly race to gain market share and deliver innovative products that meet consumer expectations for quality, convenience, and results. Companies compete for customers by investing heavily in research and development to develop advanced dermal fillers. In addition to product innovation, companies are racing to provide the most competitive prices and best customer service. Manufacturers also aggressively advertise and promote their products to gain an edge in the marketplace.

Key Company Profiles

- AbbVie
- Galderma
- Merz Pharma
- Sinclair
- TEOXANE

Other Prominent Vendors

- BioPlus
- Biotech

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- Cytophil
- Dr. Korman
- FILLMED
- HUGEL
- Medytox
- Prollenium Medical Technologies
- Shanghai Bioha Technology
- Suneva Medical

KEY QUESTIONS ANSWERED:

- 1.□How big is the global dermal fillers market?
- 2.□What is the growth rate of the dermal fillers market?
- 3.□What are the growing trends in the dermal fillers market?
- 4.□Who are the key players in the global dermal fillers market?
- 5.□Which region holds the most significant global dermal fillers market share?

Table of Contents:

- 1 RESEARCH METHODOLOGY
- 2 RESEARCH OBJECTIVES
- 3 RESEARCH PROCESS
- 4 SCOPE & COVERAGE
 - 4.1 MARKET DEFINITION
 - 4.1.1 INCLUSIONS
 - 4.1.2 EXCLUSIONS
 - 4.1.3 MARKET ESTIMATION CAVEATS
 - 4.2 BASE YEAR
 - 4.3 SCOPE OF THE STUDY
 - 4.3.1 MARKET SEGMENTATION BY MATERIAL
 - 4.3.2 MARKET SEGMENTATION BY APPLICATION
 - 4.3.3 MARKET SEGMENTATION BY GENDER
 - 4.3.4 MARKET SEGMENTATION BY END-USER
 - 4.3.5 MARKET SEGMENTATION BY GEOGRAPHY
- 5 REPORT ASSUMPTIONS & CAVEATS
 - 5.1 KEY CAVEATS
 - 5.2 CURRENCY CONVERSION
 - 5.3 MARKET DERIVATION
- 6 MARKET AT A GLANCE
- 7 PREMIUM INSIGHTS
 - 7.1 OVERVIEW
- 8 INTRODUCTION
 - 8.1 OVERVIEW

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8.1.1 INFLUENCE OF SOCIAL MEDIA

9 MARKET OPPORTUNITIES & TRENDS

9.1 RISE IN DEMAND FOR MALE AESTHETIC TREATMENTS

9.2 ADVANCES IN AESTHETIC TREATMENTS & PRODUCT LAUNCHES

9.3 BETTER ACCESS TO COSMETIC PROCEDURES & RISE IN MEDICAL TOURISM

10 MARKET GROWTH ENABLERS

10.1 SURGE IN DEMAND FOR NON-INVASIVE AESTHETIC PROCEDURES

10.2 AGING DEMOGRAPHICS & INCREASING FOCUS ON IMPROVING APPEARANCE

10.3 HIGH AWARENESS & EXPENDITURE ON AESTHETIC/COSMETIC PROCEDURES

11 MARKET RESTRAINTS

11.1 COMPLICATIONS ASSOCIATED WITH DERMAL FILLERS

11.2 HIGH COST OF DERMAL FILLERS

11.3 LACK OF REGULATIONS ASSOCIATED WITH USE OF DERMAL FILLERS

12 MARKET LANDSCAPE

12.1 MARKET OVERVIEW

12.2 MARKET SIZE & FORECAST

12.2.1 GEOGRAPHY INSIGHTS

12.2.2 MATERIAL SEGMENTATION INSIGHTS

12.2.3 APPLICATION SEGMENTATION INSIGHTS

12.2.4 GENDER SEGMENTATION INSIGHTS

12.2.5 END-USER SEGMENTATION INSIGHTS

12.3 FIVE FORCES ANALYSIS

12.3.1 THREAT OF NEW ENTRANTS

12.3.2 BARGAINING POWER OF SUPPLIERS

12.3.3 BARGAINING POWER OF BUYERS

12.3.4 THREAT OF SUBSTITUTES

12.3.5 COMPETITIVE RIVALRY

13 MATERIAL

13.1 MARKET SNAPSHOT & GROWTH ENGINE

13.2 MARKET OVERVIEW

13.3 HYALURONIC ACID

13.3.1 MARKET OVERVIEW

13.3.2 MARKET SIZE & FORECAST

13.3.3 HYALURONIC ACID SEGMENT BY GEOGRAPHY

13.4 NON-HYALURONIC ACID

13.4.1 MARKET OVERVIEW

13.4.2 MARKET SIZE & FORECAST

13.4.3 NON-HYALURONIC ACID SEGMENT BY GEOGRAPHY

14 APPLICATION

14.1 MARKET SNAPSHOT & GROWTH ENGINE

14.2 MARKET OVERVIEW

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- 14.3 LIPS & CHEEKS ENHANCEMENT
 - 14.3.1 MARKET OVERVIEW
 - 14.3.2 MARKET SIZE & FORECAST
 - 14.3.3 LIPS & CHEEKS ENHANCEMENT BY GEOGRAPHY
- 14.4 WRINKLE & SCAR TREATMENT
 - 14.4.1 MARKET OVERVIEW
 - 14.4.2 MARKET SIZE & FORECAST
 - 14.4.3 WRINKLE & SCAR TREATMENT BY GEOGRAPHY
- 14.5 RESTORATION OF VOLUME
 - 14.5.1 MARKET OVERVIEW
 - 14.5.2 MARKET SIZE & FORECAST
 - 14.5.3 RESTORATION OF VOLUME BY GEOGRAPHY

- 15 GENDER
 - 15.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 15.2 MARKET OVERVIEW
 - 15.3 FEMALE
 - 15.3.1 MARKET OVERVIEW
 - 15.3.2 MARKET SIZE & FORECAST
 - 15.3.3 FEMALE SEGMENT BY GEOGRAPHY
 - 15.4 MALE
 - 15.4.1 MARKET OVERVIEW
 - 15.4.2 MARKET SIZE & FORECAST
 - 15.4.3 MALE SEGMENT BY GEOGRAPHY

- 16 END USER
 - 16.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 16.2 MARKET OVERVIEW
 - 16.3 HOSPITALS
 - 16.3.1 MARKET OVERVIEW
 - 16.3.2 MARKET SIZE & FORECAST
 - 16.3.3 HOSPITALS SEGMENT BY GEOGRAPHY
 - 16.4 SPECIALTY & DERMATOLOGY CLINICS
 - 16.4.1 MARKET OVERVIEW
 - 16.4.2 MARKET SIZE & FORECAST
 - 16.4.3 SPECIALTY & DERMATOLOGY CLINICS BY GEOGRAPHY
 - 16.5 MEDICAL SPAS & BEAUTY CENTERS
 - 16.5.1 MARKET OVERVIEW
 - 16.5.2 MARKET SIZE & FORECAST
 - 16.5.3 MEDICAL SPA & BEAUTY CENTERS GEOGRAPHY

- 17 GEOGRAPHY
 - 17.1 MARKET SNAPSHOT & GROWTH ENGINE
 - 17.2 GEOGRAPHIC OVERVIEW

- 18 NORTH AMERICA
 - 18.1 MARKET OVERVIEW

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- 18.2 MARKET SIZE & FORECAST
 - 18.2.1 NORTH AMERICA BY MATERIAL SEGMENTATION
 - 18.2.2 NORTH AMERICA BY APPLICATION SEGMENTATION
 - 18.2.3 NORTH AMERICA BY GENDER SEGMENTATION
 - 18.2.4 NORTH AMERICA BY END-USER SEGMENTATION
- 18.3 KEY COUNTRIES
 - 18.3.1 US: MARKET SIZE & FORECAST
 - 18.3.2 CANADA: MARKET SIZE & FORECAST

- 19 EUROPE
 - 19.1 MARKET OVERVIEW
 - 19.2 MARKET SIZE & FORECAST
 - 19.2.1 EUROPE BY MATERIAL SEGMENTATION
 - 19.2.2 EUROPE BY APPLICATION SEGMENTATION
 - 19.2.3 EUROPE BY GENDER SEGMENTATION
 - 19.2.4 EUROPE BY END-USER SEGMENTATION
 - 19.3 KEY COUNTRIES
 - 19.3.1 GERMANY: MARKET SIZE & FORECAST
 - 19.3.2 ITALY: MARKET SIZE & FORECAST
 - 19.3.3 SPAIN: MARKET SIZE & FORECAST
 - 19.3.4 UK: MARKET SIZE & FORECAST
 - 19.3.5 FRANCE: MARKET SIZE & FORECAST

- 20 APAC
 - 20.1 MARKET OVERVIEW
 - 20.2 MARKET SIZE & FORECAST
 - 20.2.1 APAC BY MATERIAL SEGMENTATION
 - 20.2.2 APAC BY APPLICATION SEGMENTATION
 - 20.2.3 APAC BY GENDER SEGMENTATION
 - 20.2.4 APAC BY END-USER SEGMENTATION
 - 20.3 KEY COUNTRIES
 - 20.3.1 CHINA: MARKET SIZE & FORECAST
 - 20.3.2 JAPAN: MARKET SIZE & FORECAST
 - 20.3.3 SOUTH KOREA: MARKET SIZE & FORECAST
 - 20.3.4 INDIA: MARKET SIZE & FORECAST
 - 20.3.5 AUSTRALIA: MARKET SIZE & FORECAST

- 21 LATIN AMERICA
 - 21.1 MARKET OVERVIEW
 - 21.2 MARKET SIZE & FORECAST
 - 21.2.1 LATIN AMERICA BY MATERIAL SEGMENTATION
 - 21.2.2 LATIN AMERICA BY APPLICATION SEGMENTATION
 - 21.2.3 LATIN AMERICA BY GENDER SEGMENTATION
 - 21.2.4 LATIN AMERICA BY END-USER SEGMENTATION
 - 21.3 KEY COUNTRIES
 - 21.3.1 BRAZIL: MARKET SIZE & FORECAST
 - 21.3.2 ARGENTINA: MARKET SIZE & FORECAST

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21.3.3 MEXICO: MARKET SIZE & FORECAST

22 MIDDLE EAST & AFRICA

22.1 MARKET OVERVIEW

22.2 MARKET SIZE & FORECAST

22.2.1 MIDDLE EAST & AFRICA BY MATERIAL SEGMENTATION

22.2.2 MIDDLE EAST & AFRICA BY APPLICATION SEGMENTATION

22.2.3 MIDDLE EAST & AFRICA BY GENDER SEGMENTATION

22.2.4 MIDDLE EAST & AFRICA BY END-USER SEGMENTATION

22.3 KEY COUNTRIES

22.3.1 TURKEY: MARKET SIZE & FORECAST

22.3.2 SAUDI ARABIA: MARKET SIZE & FORECAST

22.3.3 SOUTH AFRICA: MARKET SIZE & FORECAST

23 COMPETITIVE LANDSCAPE

23.1 COMPETITION OVERVIEW

23.2 MARKET SHARE ANALYSIS

23.2.1 ABBVIE

23.2.2 GALDERMA

23.2.3 MERZ PHARMA

23.2.4 SINCLAIR

23.2.5 TEOXANE

24 KEY COMPANY PROFILES

24.1 ABBVIE

24.1.1 BUSINESS OVERVIEW

24.1.2 PRODUCT OFFERINGS

24.1.3 KEY STRATEGIES

24.1.4 KEY STRENGTHS

24.1.5 KEY OPPORTUNITIES

24.2 GALDERMA

24.2.1 BUSINESS OVERVIEW

24.2.2 PRODUCT OFFERINGS

24.2.3 KEY STRATEGIES

24.2.4 KEY STRENGTHS

24.2.5 KEY OPPORTUNITIES

24.3 MERZ PHARMA

24.3.1 BUSINESS OVERVIEW

24.3.2 PRODUCT OFFERINGS

24.3.3 KEY STRATEGIES

24.3.4 KEY STRENGTHS

24.3.5 KEY OPPORTUNITIES

24.4 SINCLAIR

24.4.1 BUSINESS OVERVIEW

24.4.2 PRODUCT OFFERINGS

24.4.3 KEY STRATEGIES

24.4.4 KEY STRENGTHS

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24.4.5 KEY OPPORTUNITIES	
24.5 TEOXANE	
24.5.1 BUSINESS OVERVIEW	
24.5.2 PRODUCT OFFERINGS	
24.5.3 KEY STRATEGIES	
24.5.4 KEY STRENGTHS	
24.5.5 KEY OPPORTUNITIES	
25 OTHER PROMINENT VENDORS	
25.1 BIOPLUS	
25.1.1 BUSINESS OVERVIEW	
25.1.2 PRODUCT OFFERINGS	
25.2 BIOTECH	
25.2.1 BUSINESS OVERVIEW	
25.2.2 PRODUCT OFFERINGS	
25.3 CYTOPHIL	
25.3.1 BUSINESS OVERVIEW	
25.3.2 PRODUCT OFFERINGS	
25.4 DR. KORMAN	
25.4.1 BUSINESS OVERVIEW	
25.4.2 PRODUCT OFFERINGS	
25.5 FILLMED	
25.5.1 BUSINESS OVERVIEW	
25.5.2 PRODUCT OFFERINGS	
25.6 HUGEL	
25.6.1 BUSINESS OVERVIEW	
25.6.2 PRODUCT OFFERINGS	
25.7 MEDYTOX	
25.7.1 BUSINESS OVERVIEW	
25.7.2 PRODUCT OFFERINGS	
25.8 PROLLENium MEDICAL TECHNOLOGIES	
25.8.1 BUSINESS OVERVIEW	
25.8.2 PRODUCT OFFERINGS	
25.9 SHANGHAI BIOHA TECHNOLOGY	
25.9.1 BUSINESS OVERVIEW	
25.9.2 PRODUCT OFFERINGS	
25.10 SUNEVA MEDICAL	
25.10.1 BUSINESS OVERVIEW	
25.10.2 PRODUCT OFFERINGS	
26 REPORT SUMMARY	
26.1 KEY TAKEAWAYS	
26.2 STRATEGIC RECOMMENDATIONS	
27 QUANTITATIVE SUMMARY	
27.1 BY MATERIAL SEGMENTATION	
27.1.1 NORTH AMERICA BY MATERIAL	

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- 27.1.2 EUROPE BY MATERIAL
- 27.1.3 APAC BY MATERIAL
- 27.1.4 LATIN AMERICA BY MATERIAL
- 27.1.5 MIDDLE EAST & AFRICA BY MATERIAL
- 27.2 BY APPLICATION SEGMENTATION
 - 27.2.1 NORTH AMERICA BY APPLICATION
 - 27.2.2 EUROPE BY APPLICATION
 - 27.2.3 APAC BY APPLICATION
 - 27.2.4 LATIN AMERICA BY APPLICATION
 - 27.2.5 MIDDLE EAST & AFRICA BY APPLICATION
- 27.3 BY GENDER SEGMENTATION
 - 27.3.1 NORTH AMERICA BY GENDER
 - 27.3.2 EUROPE BY GENDER
 - 27.3.3 APAC BY GENDER
 - 27.3.4 LATIN AMERICA BY GENDER SEGMENT
 - 27.3.5 MIDDLE EAST & AFRICA BY GENDER
- 27.4 BY END-USER SEGMENTATION
 - 27.4.1 NORTH AMERICA BY END USER
 - 27.4.2 EUROPE BY END USER
 - 27.4.3 APAC BY END USER
 - 27.4.4 LATIN AMERICA BY END USER
 - 27.4.5 MIDDLE EAST & AFRICA BY END USER
- 27.5 MARKET BY GEOGRAPHY
 - 27.5.1 HYALURONIC ACID SEGMENT BY GEOGRAPHY
 - 27.5.2 NON-HYALURONIC ACID SEGMENT BY GEOGRAPHY
 - 27.5.3 LIPS & CHEEKS ENHANCEMENT BY GEOGRAPHY
 - 27.5.4 WRINKLE & SCAR TREATMENT BY GEOGRAPHY
 - 27.5.5 RESTORATION OF VOLUME BY GEOGRAPHY
 - 27.5.6 HOSPITALS SEGMENT BY GEOGRAPHY
 - 27.5.7 SPECIALTY & DERMATOLOGY CLINICS BY GEOGRAPHY
 - 27.5.8 MEDICAL SPAS & BEAUTY CENTERS GEOGRAPHY

28 APPENDIX

28.1 ABBREVIATIONS

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