

Facial Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The facial care market is expected to register a CAGR of 9.1% over the forecast period.

The COVID-19 pandemic had an adverse impact on the facial care market initially, with the delay or cancellation of non-COVID treatment such as surgical, cosmetic interventions, and non-urgent medical treatment. For instance, a study published in the European Journal of Plastic Surgery in June 2021 stated that 78.9% of aesthetic surgeries declined after the COVID-19 outbreak. However, the decrease in the number of COVID-19 cases and the resumption of cosmetic procedures enabled the market to grow gradually. For instance, a study published in the Journal of Plastic, Reconstructive & Aesthetic Surgery in March 2021 stated that the Clinic in London has observed a surge in cosmetic surgery after the lockdown. Further, in February 2022, The American Academy of Facial Plastic and Reconstructive Surgery (AAFPRS) stated that the number of surgical and non-surgical facial plastic surgeries has increased to a great extent, and it was estimated that over 1.4 million surgical and non-surgical procedures were performed in 2021. AAFPRS also stated that plastic surgeons performed more than 600 procedures in 2021, which depicts an increase of 40% as compared to the previous year. Thus, the COVID-19 outbreak adversely impacted the market's growth in its preliminary phase. Moreover, the market is expected to grow further at a stable pace with the increasing demand for facial care globally.

Further, the facial care market is expected to grow with the technological advancements in facial care products and an increasing number of people opting for plastic surgery procedures. The volume of plastic surgery procedures has been on the rise globally, which is expected to create more demand for facial care products and boost the growth of the market. For instance, according to a survey conducted by the American Society of Plastic Surgeons in June 2022, the demand for cosmetic procedures has increased among women of the age group 31-45. It was stated that the age group actively seeks facial care procedures such as cheek implant lip augmentation, facelifts, soft tissue fillers, etc. The 45 years and above age group were most likely to undergo facelift

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and eyelid surgery. The survey also mentioned the driving factors for the elevated demand for facial care procedures were due to aging, stress caused by the pandemic, the need for improvisation in the appearance of video calls, and others. Further, as per the data published in the International Society of Aesthetic Plastic Surgery (ISAPS) Survey in 2021, over 12.8 million surgical cosmetic procedures were performed in 2021 globally. Thus, with the increasing volume of cosmetic procedures, the demand for facial care products is expected to increase and is anticipated to drive market growth.

Furthermore, the market players have received regulatory approvals and launched their facial care products that have advanced or improved technology to provide better outcomes and can be customized as per the needs of the patients. For instance, in March 2021, Joonghun Pharmaceutical, a South Korea-based pharmaceutical company, launched its premium cross-linked hyaluronic acid dermal filler, Artgaon. The high-quality dermal filler consists of unique cross-linking technology, which offers higher standards of safety, high elastic (G prime), and cohesive properties inside the skin and supports the injection force of 7-8 newtons. The company stated that these features would not only provide aesthetic benefits to the patients but also enable the doctor to use the dermal filler on the patients as per their ease and requirement. Further, in July 2021, LUCID Implants, an India-based pharmaceutical company, announced to manufacture the of polyether ether ketone (PEEK) based customized implants using advanced 3D printing technologies and virtual surgical planning. The customized implant would be made as per the unique facial anatomy of the patient.

Therefore, owing to the aforementioned factors, including the increasing number of people opting for plastic surgery procedures and technologically advanced facial care products approved and launched by the market players, the studied market is anticipated to witness growth over the analysis period. However, the lack of reimbursement policies supporting cosmetic procedures and stringent regulatory reforms are likely to impede market growth.

Facial Care Market Trends

The Dermal Fillers Segment is Expected to Witness Significant Growth Over the Forecast Period

Dermal Filler is a gel-like substance, such as hyaluronic acid (HA), that is injected under the skin to improve the appearance of the skin, make skin plump up, smoothen the fine lines, etc. Dermal filler has a wide application in facial care for wrinkle reductions, improvement of skin appearance, lip augmentation, and others. The procedure of dermal fillers has been on the rise globally, which is expected to boost the growth of the segment. For instance, as per the data published by the ISAPS survey in 2021, over 5.3 million procedures of hyaluronic acid alone were performed in 2021 globally, which showed an increase of 30.3% as compared to the previous year.

Furthermore, several research studies have shown the high efficacy, safety, and wide applications of dermal fillers for facial care, which depicts the vast potential of dermal fillers for more demand in the future. For instance, a study published in the Journal of Cosmetic Dermatology in May 2022 stated that hyaluronic acid fillers are effective for the purpose of dermal fillers for improving facial appearance. The study mentioned that the HA dermal filler showed safety and efficacy to be used in the Chinese population for lip augmentation. Further, a multicenter study published in the Dermatologic Surgery in July 2021 demonstrated the long-term efficacy and safety of the polycaprolactone-dermal filler (PCL-filler) for the management of moderate/severe nasolabial folds having the WSRS (wrinkle severity rating scale) of 3 to 4, for a month. Thus, the high efficacy, safety, and wide applications of dermal fillers are expected to create more growth opportunities for the segment.

Also, the key developments by the market players in dermal fillers are also boosting the growth of the segment. For instance, in February 2022, Allergan Aesthetics, an AbbVie company, received FDA approval for its dermal filler JUVEDERM VOLBELLA XC, which is intended for improvisation of the infraorbital hollows or undereye hollows, in adults over the age of 21 years. The launch of the dermal filler would enable the company to expand its treatment portfolio to address the unmet needs of the patient.

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Therefore, the dermal fillers segment is expected to witness significant growth over the forecast period due to the abovementioned factors, including its efficiency, safety, and recent product launches.

North America is Expected to Witness Significant Growth Over the Forecast Period

North America is expected to witness significant growth during the forecast period, with the high volume of aesthetic/cosmetic procedures, advanced healthcare and research infrastructure, and the presence of leading players.

The region has a high volume of cosmetic or aesthetic procedures, which also include facial care procedures. For instance, as per the data published by the International Society of Aesthetic Plastic Surgery (ISAPS) Survey in 2021, the United States performs one of the highest numbers of surgical and non-surgical procedures related to aesthetics. The survey stated that over 5,355,604 non-surgical procedures and 1,992,296 surgical procedures were performed in 2021 in the United States. The same source also stated that over 542,605 facial rejuvenation procedures were performed in the United States in 2021. Further, the survey also stated that over 33,750 and 39,305 procedures of lip enhancement/ perioral procedures were performed in the United States and Mexico, respectively, in 2021.

Furthermore, the presence of leading players and their key developments in the region are also expected to boost the growth of the market in North America. For instance, in February 2021, Galderma received USFDA approval for its chin filler, Restylane Defyne. The dermal filler is intended for the correction and augmentation of mild to moderate chin retrusion for adults over the age of 21 years.

Therefore, owing to the aforementioned factors, including the high volume of cosmetic procedures, high disposable income, and recent developments by the key players, the growth of the studied market is anticipated in the North America region.

Facial Care Industry Overview

The facial care market is moderately fragmented in nature due to the presence of a few companies operating globally as well as regionally. The key players operating in the market include Cutera, Candela Corporation, Medytox Inc., Stryker Corporation, and Zimmer Biomet Holdings Inc.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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