

Dermal Fillers Market Assessment, By Product Type [Biodegradable, Non-Biodegradable], By Application [Reconstructive Surgeries, Skin Treatments, Others], By Ingredients [Hyaluronic Acid, Calcium Hydroxylapatite, Poly-L-Lactic Acid, Others], By End-user [Specialty Dermatology Clinics, Hospitals and Clinics, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-01-09 | 241 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

- Single User License \$4500.00
- Multi-User/Corporate Licence \$5700.00
- Custom Research License \$8200.00

Report description:

Global dermal fillers market is projected to witness a CAGR of 9.30% during the forecast period 2025-2032, growing from USD 6.57 billion in 2024 to USD 13.29 billion in 2032. Dermal fillers are injectable substances used in cosmetic dermatology designed to increase the volume of certain skin areas to reduce the appearance of wrinkles, fine lines, and sagging. The goal of dermal fillers, typically composed of collagen, hyaluronic acid, or synthetic substances, is to restore a young appearance of skin augmentation. This non-invasive cosmetic process has grown in popularity because of its effectiveness in addressing indications of aging. It provides people with a temporary option to get a revitalized appearance without requiring the recovery time that is usually connected with surgical procedures.

Several factors significantly influence the global dermal filler market. Demand for dermal fillers has increased due to customers' growing aesthetic consciousness and preference for less painful procedures. Additionally, advancements in product formulas that ensure results that seem natural and last longer help the industry grow. Another driver propelling the market is the globally aging population, which is expanding the market, especially in developed nations, as people seek out anti-aging products more and more. Significant drivers driving the dermal fillers market towards a steady rise are the growing accessibility of beauty-enhancing procedures worldwide and the growing acceptance of such procedures. For example, CollPlant Biotechnologies Ltd. reported in November 2023 that the United States Patent and Trademark Office had granted a patent to its photocurable dermal filler product. The product has the ability to regenerate tissue and raise the skin.

Rising Consumer Awareness Boosts Market Growth

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Consumers' growing awareness of aesthetics is one of the main reasons propelling the global dermal fillers market. This phenomenon is intimately related to the increasing emphasis on individual well-being and the progressive development of societal standards. People are gaining the ability to choose objects that align with their aesthetic preferences as societies embrace a more expansive definition of beauty. Because people want to alter their physical appearance to meet their notions of beauty, the demand for cosmetic procedures, such as dermal fillers, has significantly increased. The catalyst for aesthetic sensibility is the result of many factors coming together. In the modern era, social media platforms and digital communication have completely changed how people view and portray themselves. Social media's pervasive influence raises people's awareness of aesthetic potential by exposing them to beauty standards and ideals. Driven by the desire to achieve a younger and more refreshed look, people research cosmetic procedures like dermal injections to achieve or surpass their expectations. Furthermore, prominent figures and celebrities' normalization of these treatments fosters a broader public acceptance of the pursuit of aesthetic modifications. Innovative product launches in the market further enhance market growth while boosting awareness. For example, in March 2023, Israeli beauty company Hallura Ltd. reported successful outcomes from a multi-site European clinical trial for their next-generation hyaluronic acid dermal filler, the BiOLinkMatrix platform. The safety and efficacy of the filler have been assessed in several applications, including nasolabial fold repair, lip and cheek enhancement, and more.

Technological Developments to Fuel Market Growth

Treatment options have been transformed by advancements in filler compositions, including the introduction of hyaluronic acid-based fillers with different levels of cross-linking. Because of these developments, professionals can now tailor their therapies to produce better, more durable results. For example, new biodegradable and bioresorbable fillers address sustainability issues and appeal more to consumers who care about the environment. Furthermore, sophisticated injection techniques have increased the accuracy and efficacy of dermal filler administration, reducing patient discomfort and recovery time. As more people look for non-surgical choices for aesthetic enhancements, demand has been further stimulated by the growth in minimally invasive procedures. Furthermore, as research and development continue, projects are broadening the range of dermal filler treatments beyond conventional ones like wrinkle treatment and lip augmentation to include volume restoration and facial contouring. This continuous innovation drives market growth and enhances consumer confidence in aesthetic procedures, solidifying the role of technology as a key factor in the dermal fillers market expansion. One of the most notable advancements is the introduction of microdroplet injection techniques used with products like Juvederm Skinvive, launched in May 2024. This method allows for more precise and natural-looking enhancements by delivering smaller amounts of filler in multiple microdroplets, resulting in smoother and more subtle results that integrate seamlessly with the skin.

Biodegradable Fillers Segment Dominates the Dermal Fillers Market

Biodegradable fillers are emerging as a significant driver of the global dermal fillers market, reflecting a growing consumer preference for sustainable and safe aesthetic solutions. These fillers, made from naturally occurring substances like hyaluronic acid and poly-L-lactic acid, offer several advantages that align with current market trends. The biodegradable segment is particularly appealing due to its eco-friendly nature, as these fillers can be safely absorbed by the body over time, reducing the risk of long-term complications associated with non-biodegradable options. The increasing acceptance of minimally invasive procedures has fueled the demand for biodegradable fillers. Patients appreciate their temporary results, which allow for adjustments in treatment as preferences evolve.

As consumers become more environmentally conscious, the shift towards biodegradable options will continue, positioning these fillers as a key growth area in the aesthetic medicine sector. This trend not only reflects changing consumer attitudes but also presents lucrative opportunities for companies involved in developing and distributing innovative biodegradable dermal fillers. For instance, AbbVie Inc. introduced HArmonyCa, an injectable, biodegradable dermal filler with lidocaine that uses hyaluronic acid for instant lift and calcium hydroxylapatite (CaHA) for long-term collagen stimulation, in April 2023.

North America Dominates Dermal Fillers Market Share

North America is poised to have the highest market share in the global dermal fillers market. The region's strong position can be attributed to various factors that work together to give it dominance in the market. The area has a developed and well-established healthcare system, particularly in the areas of aesthetic and cosmetic medicine. A number of variables, such as social emphasis on youth and changes in beauty standards, contribute to the high rate of people receiving cosmetic operations in countries like the United States and Canada. Additionally, the population of North America has more disposable income, enabling more people

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

to both afford and select dermal filler procedures. Galderma Laboratories, L.P.'s tailored treatment, RESTYLANE EYELIGHT, debuted in Canada in May 2023. Enhancing infraorbital hollowing is its goal. The injectable dermal filler RESTYLANE EYELIGHT, which contains hyaluronic acid, is designed to fill up the spaces under the eyes, eliminating bags and reducing the look of age and/or exhaustion. It contains hyaluronic acid as a component of their NASHA gel technology.

Future Market Scenario (2025-2032F)

The dermal filler market is set to grow because of new developments in technology, life sciences, and materials research. There is a rising need for non-invasive treatments that will boost innovation. New technologies like AI-powered devices, super-resolution imaging, and government funding for R&D will help the market grow even more in the next few years.

Furthermore, technological advancements like AI integration in laser devices are changing the field by improving image analysis and making research processes faster, which greatly supports market growth. Other than this, innovations are the supporting pillars of this ever-growing market. For instance, Croma-Pharma GmbH introduced PhilArt, a whole range of injectable skin enhancers, in April 2023. PhilArt is an injectable gel made of long-chain polynucleotides that rejuvenates the skin, restores its suppleness, scavenges free radicals, hydrates the skin, fosters the creation of fibroblasts and fibers, and encourages the body's cell regeneration.

Table of Contents:

1. Project Scope and Definitions
2. Research Methodology
3. Executive Summary
4. Global Dermal Fillers Market Outlook, 2018-2032F
 - 4.1. Market Size Analysis & Forecast
 - 4.1.1. By Value
 - 4.1.2. By Volume (Number of Procedures)
 - 4.2. Market Share Analysis & Forecast
 - 4.2.1. By Product Type
 - 4.2.1.1. Biodegradable
 - 4.2.1.2. Non-Biodegradable
 - 4.2.2. By Application
 - 4.2.2.1. Reconstructive Surgeries
 - 4.2.2.2. Skin Treatments
 - 4.2.2.3. Others
 - 4.2.3. By Ingredients
 - 4.2.3.1. Hyaluronic Acid
 - 4.2.3.2. Calcium Hydroxylapatite
 - 4.2.3.3. Poly-L-Lactic Acid
 - 4.2.3.4. Others
 - 4.2.4. By End-user
 - 4.2.4.1. Specialty Dermatology Clinics
 - 4.2.4.2. Hospitals and Clinics
 - 4.2.4.3. Others
 - 4.2.5. By Region
 - 4.2.5.1. North America
 - 4.2.5.2. Europe
 - 4.2.5.3. Asia-Pacific
 - 4.2.5.4. South America
 - 4.2.5.5. Middle East and Africa
 - 4.2.6. By Company Market Share Analysis (Top 5 Companies and Others - By Value, 2024)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.3.□Market Map Analysis, 2024
 - 4.3.1.□By Product Type
 - 4.3.2.□By Application
 - 4.3.3.□By Ingredients
 - 4.3.4.□By End-user
 - 4.3.5.□By Region
- 5.□North America Dermal Fillers Market Outlook, 2018-2032F*
 - 5.1.□Market Size Analysis & Forecast
 - 5.1.1.□By Value
 - 5.1.2.□By Volume (Number of Procedures)
 - 5.2.□Market Share Analysis & Forecast
 - 5.2.1.□By Product Type
 - 5.2.1.1.□Biodegradable
 - 5.2.1.2.□Non-Biodegradable
 - 5.2.2.□By Application
 - 5.2.2.1.□Reconstructive Surgeries
 - 5.2.2.2.□Skin Treatments
 - 5.2.2.3.□Others
 - 5.2.3.□By Ingredients
 - 5.2.3.1.□Hyaluronic Acid
 - 5.2.3.2.□Calcium Hydroxylapatite
 - 5.2.3.3.□Poly-L-Lactic Acid
 - 5.2.3.4.□Others
 - 5.2.4.□By End-user
 - 5.2.4.1.□Specialty Dermatology Clinics
 - 5.2.4.2.□Hospitals and Clinics
 - 5.2.4.3.□Others
 - 5.2.5.□By Country Share
 - 5.2.5.1.□United States
 - 5.2.5.2.□Canada
 - 5.2.5.3.□Mexico
 - 5.3.□Country Market Assessment
 - 5.3.1.□United States Dermal Fillers Market Outlook, 2018-2032F*
 - 5.3.1.1.□Market Size Analysis & Forecast
 - 5.3.1.1.1.□By Value
 - 5.3.1.1.2.□By Volume (Number of Procedures)
 - 5.3.1.2.□Market Share Analysis & Forecast
 - 5.3.1.2.1.□By Product Type
 - 5.3.1.2.1.1.□Biodegradable
 - 5.3.1.2.1.2.□Non-Biodegradable
 - 5.3.1.2.2.□By Application
 - 5.3.1.2.2.1.□Reconstructive Surgeries
 - 5.3.1.2.2.2.□Skin Treatments
 - 5.3.1.2.2.3.□Others
 - 5.3.1.2.3.□By Ingredients
 - 5.3.1.2.3.1.□Hyaluronic Acid
 - 5.3.1.2.3.2.□Calcium Hydroxylapatite

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.1.2.3.3.□Poly-L-Lactic Acid
- 5.3.1.2.3.4.□Others
- 5.3.1.2.4.□By End-user
- 5.3.1.2.4.1.□Specialty Dermatology Clinics
- 5.3.1.2.4.2.□Hospitals and Clinics
- 5.3.1.2.4.3.□Others
- 5.3.2.□Canada
- 5.3.3.□Mexico
- *All segments will be provided for all regions and countries covered
- 6.□Europe Dermal Fillers Market Outlook, 2018-2032F
- 6.1.□Germany
- 6.2.□France
- 6.3.□Italy
- 6.4.□United Kingdom
- 6.5.□Russia
- 6.6.□Netherlands
- 6.7.□Spain
- 6.8.□Turkey
- 6.9.□Poland
- 7.□Asia-Pacific Dermal Fillers Market Outlook, 2018-2032F
- 7.1.□India
- 7.2.□China
- 7.3.□Japan
- 7.4.□Australia
- 7.5.□Vietnam
- 7.6.□South Korea
- 7.7.□Indonesia
- 7.8.□Philippines
- 8.□South America Dermal Fillers Market Outlook, 2018-2032F
- 8.1.□Brazil
- 8.2.□Argentina
- 9.□Middle East and Africa Dermal Fillers Market Outlook, 2018-2032F
- 9.1.□Saudi Arabia
- 9.2.□UAE
- 9.3.□South Africa
- 10.□Demand Supply Analysis
- 11.□Value Chain Analysis
- 12.□Porter's Five Forces Analysis
- 13.□PESTLE Analysis
- 14.□Pricing Analysis
- 15.□Market Dynamics
- 15.1.□Market Drivers
- 15.2.□Market Challenges
- 16.□Market Trends and Developments
- 17.□Regulatory Framework and Innovation
- 17.1.□Regulatory Approvals
- 17.2.□Clinical Trials

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 18. □ Case Studies
 - 19. □ Competitive Landscape
 - 19.1. □ Competition Matrix of Top 5 Market Leaders
 - 19.2. □ SWOT Analysis for Top 5 Players
 - 19.3. □ Key Players Landscape for Top 10 Market Players
 - 19.3.1. □ Galderma SA
 - 19.3.1.1. □ Company Details
 - 19.3.1.2. □ Key Management Personnel
 - 19.3.1.3. □ Products and Services
 - 19.3.1.4. □ Financials (As Reported)
 - 19.3.1.5. □ Key Market Focus and Geographical Presence
 - 19.3.1.6. □ Recent Developments/Collaborations/Partnerships/Mergers and Acquisitions
 - 19.3.2. □ Bioplus Co., Ltd.
 - 19.3.3. □ Prollenium Medical Technologies Inc.
 - 19.3.4. □ BIOXIS Pharmaceuticals SAS
 - 19.3.5. □ Sinclair, Inc.
 - 19.3.6. □ Allergan Aesthetics (AbbVie Inc.)
 - 19.3.7. □ Dr. Korman Laboratories Ltd.
 - 19.3.8. □ Zhejiang Jingjia Medical Technology Co., Ltd.
 - 19.3.9. □ Medytox Inc.
 - 19.3.10. □ SciVision Biotech Inc.
- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
- 20. □ Strategic Recommendations
 - 21. □ About Us and Disclaimer

Dermal Fillers Market Assessment, By Product Type [Biodegradable, Non-Biodegradable], By Application [Reconstructive Surgeries, Skin Treatments, Others], By Ingredients [Hyaluronic Acid, Calcium Hydroxylapatite, Poly-L-Lactic Acid, Others], By End-user [Specialty Dermatology Clinics, Hospitals and Clinics, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-01-09 | 241 pages | Market Xcel - Markets and Data

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
<input type="checkbox"/>	Single User License	\$4500.00
<input type="checkbox"/>	Muti-User/Corporate Licence	\$5700.00
<input type="checkbox"/>	Custom Research License	\$8200.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-05"/>
		Signature	<input type="text"/>