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Global Aesthetic Injectables Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Aesthetic Injectables market size is expected to reach $ 23994 million by 2032, rising at a market growth of 13.3% CAGR during the forecast period (2026-2032).

Aesthetic Injectables refer to professionally administered injectable products used in medical aesthetics to modify facial muscle activity, restore soft-tissue volume, correct wrinkles and folds, improve facial contours, stimulate collagen remodeling, and enhance skin quality. The market is centered on standardized commercial products supplied to licensed medical and aesthetic practitioners and covers Aesthetic Botulinum Toxin, HA-based Injectables, PLLA & PDLLA Injectables, CaHA Injectables, and other qualified aesthetic injectable products. Product formats include lyophilized or ready-to-use neuromodulators, prefilled injectable gels, reconstituted biostimulatory preparations, and other regulated injectable formulations. Product performance is differentiated by treatment mechanism, rheological and material characteristics, injection depth, anatomical indication, onset of effect, duration, reversibility, safety profile, and practitioner handling characteristics. FDA guidance similarly distinguishes injectable botulinum toxin products from dermal fillers, while recognizing dermal fillers as injectable soft-tissue implants used to create smoother or fuller facial contours. The primary downstream settings are medical aesthetic clinics and licensed medspas, dermatology clinics, plastic and cosmetic surgery clinics, hospitals and medical centers, and other licensed medical settings.

Key Findings

Global Aesthetic Injectables sales volume reached approximately 30.5 million equivalent syringes and vials in 2025

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Average manufacturer-level pricing was approximately US$320.7 per equivalent commercial unit in 2025

Aesthetic Botulinum Toxin remained the largest product category, while HA-based Injectables formed the second major revenue pool

Demand remains centered on professionally administered treatments where safety, practitioner expertise and regulatory compliance materially influence product adoption

Market Trends

The Aesthetic Injectables market is shifting from single-indication wrinkle correction toward more comprehensive and individualized treatment strategies that combine neuromodulation, volume restoration, structural support, collagen stimulation and skin-quality improvement. Botulinum toxin and hyaluronic acid fillers remain the two most widely performed non-surgical aesthetic procedures globally, demonstrating the continued commercial importance of established injectable categories. At the same time, product innovation is increasingly focused on more natural outcomes, differentiated duration, improved rheology, lower treatment burden and regenerative or biostimulatory effects. This is creating a broader role for PLLA & PDLLA and CaHA products alongside traditional HA fillers. The market is also becoming more portfolio-driven: physicians increasingly select different injectable technologies according to anatomical area, desired treatment effect and patient age rather than relying on a single filler platform. Recent company performance also indicates that category momentum is not uniform; neuromodulators and biostimulatory products have shown stronger momentum in some markets while conventional fillers have faced periods of softer demand, reinforcing the importance of differentiated product positioning and broader injectable portfolios.

Market Dynamics

Drivers

Growth in Aesthetic Injectables is supported by the large and expanding global base of non-surgical aesthetic procedures, increasing acceptance of minimally invasive

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treatments and continuing demand for facial rejuvenation with relatively limited recovery time. ISAPS reported approximately 20.5 million non-surgical procedures performed by plastic surgeons in 2024, with botulinum toxin and hyaluronic acid fillers ranking as the two most popular non-surgical procedures. Product innovation is also broadening the addressable patient population by giving practitioners greater flexibility in treatment duration, facial anatomy, tissue layer and aesthetic objective. Wider physician training, expansion of licensed medical-aesthetic networks and new regulatory approvals in major markets further support product availability. Importantly, the market benefits from repeat-treatment characteristics: neuromodulators, HA fillers and many biostimulatory products require periodic retreatment or staged treatment protocols, creating recurring product demand rather than relying solely on first-time patients.

Restraints

Market expansion is constrained by the discretionary nature of aesthetic expenditure, regulatory requirements, treatment cost and sensitivity of premium injectable demand to consumer confidence. Different jurisdictions apply different approval, registration and professional-use requirements, increasing the cost and time required for manufacturers to commercialize products globally. The filler market can also experience periods of slower demand even when the wider injectable category remains resilient; 2025 company disclosures showed softer performance for certain established HA filler portfolios while neuromodulators and selected biostimulatory products performed more strongly. In addition, product economics depend not only on the manufacturer selling price but also on physician training, clinic acquisition costs, distributor margins and treatment pricing. Competitive pricing from regional manufacturers, especially in HA fillers and botulinum toxin, can put pressure on established premium products and increase the importance of clinical evidence, brand reputation, injector preference and product differentiation.

Opportunities

Future market opportunities are increasingly associated with product differentiation rather than simple expansion of conventional filler volumes. Longer-lasting or faster-onset neuromodulators, differentiated HA rheology, collagen-stimulating injectables and combination treatment protocols can expand the range of aesthetic objectives addressed by injectable products. Biostimulatory approaches are particularly relevant where patients seek gradual tissue remodeling, structural improvement and more natural-looking results rather than immediate volumization alone; established injectable

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aesthetics companies are consequently expanding clinical evidence and indications around these technologies. Geographic expansion represents another opportunity. Manufacturers with regulatory approvals across the United States, Europe, China and other major markets can leverage established production platforms across a broader commercial base, while Asian manufacturers are increasingly extending toxin, filler and skin-quality portfolios internationally. Hugel, for example, reported continued overseas expansion of botulinum toxin and HA filler sales in 2025, illustrating the growing international role of Asian injectable manufacturers.

Challenges

The key long-term challenges are safety management, regulatory compliance, counterfeit products and increasingly crowded competitive positioning. Injectable aesthetics require professional administration because adverse outcomes can arise from incorrect injection technique, unsuitable anatomical placement or use of unapproved products. FDA guidance highlights serious dermal filler risks and advises against purchasing fillers from unauthorized online sources, while the agency has also issued warnings regarding unapproved and misbranded botulinum toxin products following reports of adverse events. These issues increase the importance of traceability, licensed distribution, physician education and post-market surveillance. At the commercial level, mature HA filler markets contain numerous products with similar headline indications, making differentiation increasingly dependent on material properties, clinical evidence, durability, handling characteristics and physician loyalty. Manufacturers must therefore balance regulatory investment and clinical development with competitive pricing while maintaining sufficient margins to support practitioner training and international market access.

Industry Chain Analysis

The upstream industry chain for Aesthetic Injectables varies significantly by technology. Aesthetic Botulinum Toxin depends on biological strain management, fermentation and purification capabilities, formulation excipients, sterile vial systems and stringent biologics quality control. HA-based Injectables require medical-grade hyaluronic acid, crosslinking and purification technologies, sterile formulation, prefilled syringes, needles and packaging systems. PLLA & PDLLA and CaHA products require controlled particle or microsphere characteristics, carrier systems and formulation technologies that influence injectability, tissue response and duration. Across all categories, upstream

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quality consistency is critical because small differences in purity, particle distribution, rheology, potency or sterility can materially affect product performance and regulatory acceptance.

Midstream value creation is concentrated in formulation development, aseptic manufacturing, fill-finish, clinical development, regulatory registration, brand development and professional medical education. Downstream products reach medical aesthetic clinics and licensed medspas, dermatology clinics, plastic and cosmetic surgery clinics, hospitals and other licensed medical settings through direct sales or authorized professional distribution. The industry generally supports attractive product-level margins because value is created through proprietary formulation, manufacturing know-how, clinical evidence, regulatory approval and practitioner confidence rather than through raw-material cost alone. However, profitability varies by category and company structure: vertically integrated manufacturers can retain a larger portion of product value, while licensing, outsourced production and multi-layer distribution models allocate economics across several participants.

Segment Insights

Aesthetic Botulinum Toxin remains the largest segment of the Aesthetic Injectables market and represents roughly half of global product revenue in the current research model. Its position is supported by a large repeat-treatment base, broad use for dynamic facial wrinkles and established physician familiarity. HA-based Injectables form the second-largest segment and account for roughly one-third of market revenue, supported by applications in facial volume restoration, contouring, wrinkle correction and lip enhancement. The FDA explicitly distinguishes botulinum toxin products from dermal fillers because the former act through neuromuscular modulation while fillers create structural volume or contour changes.

PLLA & PDLLA Injectables and CaHA Injectables remain smaller than the two established categories but occupy an increasingly important position in biostimulatory aesthetics. Their value proposition is based more heavily on collagen stimulation, tissue remodeling and structural improvement than on immediate gel-based filling alone. This creates differentiated use cases and can support premium positioning, although treatment protocols, onset and duration differ substantially from conventional HA fillers. Others remain a heterogeneous segment covering qualified injectable aesthetic materials outside the four primary categories. Overall, the market is therefore developing toward coexistence of neuromodulators, conventional fillers and

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biostimulatory products rather than replacement of one technology by another.

Downstream Market Opportunities

Medical aesthetic clinics and licensed medspas represent the core commercial channel for Aesthetic Injectables because they combine high procedure frequency, specialized injector capacity and recurring patient relationships. Dermatology clinics and plastic and cosmetic surgery clinics are also important because injectable treatments can complement broader facial rejuvenation and aesthetic treatment plans. Hospitals and medical centers are relevant where local regulation places injectable procedures within more formal medical environments. The strongest downstream opportunity is increasingly associated with protocol-based treatment rather than one-product transactions: practitioners can combine Aesthetic Botulinum Toxin, HA-based Injectables and biostimulatory products to address muscle activity, volume loss, contour, skin quality and structural aging in a coordinated plan. This increases the importance of physician education and portfolio breadth, while creating opportunities for suppliers capable of supporting multiple treatment objectives within the same professional channel.

Regional Insights

North America and Europe remain major high-value markets for Aesthetic Injectables, supported by established medical-aesthetic infrastructure, broad physician familiarity and commercial access to multiple toxin, filler and biostimulatory platforms. These regions also remain important launch markets for differentiated injectable technologies. Asia Pacific has a different competitive profile: it combines substantial procedure demand with a dense manufacturing base in South Korea and China, where producers have developed botulinum toxin, HA fillers, skin-quality injectables and regenerative-material platforms. International expansion by Asian manufacturers is increasing competitive pressure in markets historically dominated by Western brands; Hugel reported that overseas sales represented a growing share of its toxin and filler business in 2025, with particularly strong expansion in the Americas.

Regional opportunity is nevertheless highly dependent on regulation and physician-channel structure. Approval pathways, permitted indications, injector qualifications and distribution rules vary significantly across countries, so commercial success requires more than manufacturing scale alone. Mature markets favor clinical evidence, premium

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branding and physician loyalty, while developing medical-aesthetic markets provide opportunities for broader patient penetration and new product launches. Companies with products approved across several major regulatory jurisdictions are therefore positioned to spread development and manufacturing investment over a wider commercial base.

Competitive Landscape Analysis

The Aesthetic Injectables market has a layered competitive structure consisting of diversified global aesthetics companies, specialized botulinum toxin manufacturers, HA filler and biostimulatory specialists, and increasingly international Asian manufacturers. Established portfolio companies such as AbbVie, Galderma and Merz compete through broad product recognition, physician relationships, clinical development and multi-category portfolios, while Ipsen, Hugel, Medytox, Daewoong and Lanzhou Institute of Biological Products contribute important manufacturing positions in botulinum toxin. Teoxane, Croma-Pharma, Prollenium, CGBIO, PharmaResearch and other specialized manufacturers compete through filler rheology, material technologies and biostimulatory differentiation, while Bloomage Biotechnology, IMEIK and Shanghai Haohai represent an increasingly significant Chinese manufacturing base. Competitive advantage is becoming less dependent on a single established brand and more dependent on portfolio breadth, clinical differentiation, international approvals, reliable sterile manufacturing, physician training and channel execution. Recent company results also demonstrate that competitive momentum can shift between categories: Galderma reported double-digit growth in Injectable Aesthetics in 2025, while certain mature filler portfolios elsewhere experienced softer demand, indicating active share redistribution rather than uniform market growth.

Report Scope

This report studies the global Aesthetic Injectables production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aesthetic Injectables and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Aesthetic Injectables that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Aesthetic Injectables total production and demand, 2021-2032, (K Units)

Global Aesthetic Injectables total production value, 2021-2032, (USD Million)

Global Aesthetic Injectables production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Aesthetic Injectables consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Aesthetic Injectables domestic production, consumption, key domestic manufacturers and share

Global Aesthetic Injectables production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Aesthetic Injectables production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Aesthetic Injectables production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Aesthetic Injectables market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include AbbVie Inc., Galderma Group AG, Merz Pharma GmbH & Co. KGaA, Ipsen S.A., Revance, Daewoong Pharmaceutical Co., Ltd., Hugel, Inc., Medytox Inc., Huons BioPharma Co., Ltd., LG Chem, Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Aesthetic Injectables market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Aesthetic Injectables Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Aesthetic Injectables Market, Segmentation by Type:

Aesthetic Botulinum Toxin

HA-based Injectables

PLLA & PDLLA Injectables

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CaHA Injectables

Others

Global Aesthetic Injectables Market, Segmentation by Product Presentation:

Lyophilized Powder Vial

Ready-to-use Liquid Toxin

Reconstituted Microsphere/Polymer Vial

Others

Global Aesthetic Injectables Market, Segmentation by Effect Duration:

Up to 6 Months

More than 6 Months to 12 Months

More than 12 Months to 24 Months

More than 24 Months / Semi-permanent

Global Aesthetic Injectables Market, Segmentation by Application:

Medical Aesthetic Clinics & Licensed Medspas

Dermatology Clinics

Plastic & Cosmetic Surgery Clinics

Hospitals & Medical Centers

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Others

Companies Profiled:

AbbVie Inc.

Galderma Group AG

Merz Pharma GmbH & Co. KGaA

Ipsen S.A.

Revance

Daewoong Pharmaceutical Co., Ltd.

Hugel, Inc.

Medytox Inc.

Huons BioPharma Co., Ltd.

LG Chem, Ltd.

Teoxane SA

Croma-Pharma GmbH

IBSA Institut Biochimique SA

Prollenium Medical Technologies Inc.

Laboratoires VIVACY

BioScience GmbH

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MATEX LAB S.p.A.

SYMATESE

Tiger Aesthetics Medical, LLC

Mastelli S.r.l.

PharmaResearch Co., Ltd.

REGEN Biotech, Inc.

CGBIO Co., Ltd.

DEXLEVO Inc.

BioPlus Co., Ltd.

Humedix Co., Ltd.

Across Co., Ltd.

JETEMA Co., Ltd.

GENOSS Co., Ltd.

BNC Korea Co., Ltd.

SciVision Biotech Inc.

Sunmax Biotechnology Co., Ltd.

NPO Microgen

Huadong Medicine Co., Ltd.

Bloomage Biotechnology Corporation Limited

IMEIK Technology Development Co., Ltd.

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Shanghai Haohai Biological Technology Co., Ltd.

Shanxi Jinbo Bio-Pharmaceutical Co., Ltd.

Lanzhou Institute of Biological Products Co., Ltd.

Bohus BioTech

Key Questions Answered

1. How big is the global Aesthetic Injectables market?
2. What is the demand of the global Aesthetic Injectables market?
3. What is the year over year growth of the global Aesthetic Injectables market?
4. What is the total value of the global Aesthetic Injectables market?
5. Who are the Major Players in the global Aesthetic Injectables market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Aesthetic Injectables Introduction
1.2 World Aesthetic Injectables Supply & Forecast
  1.2.1 World Aesthetic Injectables Production Value (2021 & 2025 & 2032)
  1.2.2 World Aesthetic Injectables Production (2021-2032)
  1.2.3 World Aesthetic Injectables Pricing Trends (2021-2032)
1.3 World Aesthetic Injectables Production by Region (Based on Production Site)
  1.3.1 World Aesthetic Injectables Production Value by Region (2021-2032)
  1.3.2 World Aesthetic Injectables Production by Region (2021-2032)
  1.3.3 World Aesthetic Injectables Average Price by Region (2021-2032)
  1.3.4 North America Aesthetic Injectables Production (2021-2032)
  1.3.5 Europe Aesthetic Injectables Production (2021-2032)
  1.3.6 China Aesthetic Injectables Production (2021-2032)
  1.3.7 Japan Aesthetic Injectables Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Aesthetic Injectables Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Aesthetic Injectables Major Market Trends

2 DEMAND SUMMARY

2.1 World Aesthetic Injectables Demand (2021-2032)
2.2 World Aesthetic Injectables Consumption by Region
  2.2.1 World Aesthetic Injectables Consumption by Region (2021-2026)
  2.2.2 World Aesthetic Injectables Consumption Forecast by Region (2027-2032)
2.3 United States Aesthetic Injectables Consumption (2021-2032)
2.4 China Aesthetic Injectables Consumption (2021-2032)
2.5 Europe Aesthetic Injectables Consumption (2021-2032)
2.6 Japan Aesthetic Injectables Consumption (2021-2032)
2.7 South Korea Aesthetic Injectables Consumption (2021-2032)
2.8 ASEAN Aesthetic Injectables Consumption (2021-2032)
2.9 India Aesthetic Injectables Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Aesthetic Injectables Production Value by Manufacturer (2021-2026)

+357 96 030922
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3.2 World Aesthetic Injectables Production by Manufacturer (2021-2026)
3.3 World Aesthetic Injectables Average Price by Manufacturer (2021-2026)
3.4 Aesthetic Injectables Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Aesthetic Injectables Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Aesthetic Injectables in 2025
  3.5.3 Global Concentration Ratios (CR8) for Aesthetic Injectables in 2025
3.6 Aesthetic Injectables Market: Overall Company Footprint Analysis
  3.6.1 Aesthetic Injectables Market: Region Footprint
  3.6.2 Aesthetic Injectables Market: Company Product Type Footprint
  3.6.3 Aesthetic Injectables Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Aesthetic Injectables Production Value Comparison
  4.1.1 United States VS China: Aesthetic Injectables Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Aesthetic Injectables Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Aesthetic Injectables Production Comparison
  4.2.1 United States VS China: Aesthetic Injectables Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Aesthetic Injectables Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Aesthetic Injectables Consumption Comparison
  4.3.1 United States VS China: Aesthetic Injectables Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Aesthetic Injectables Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Aesthetic Injectables Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Aesthetic Injectables Manufacturers, Headquarters and Production Site (States, Country)

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4.4.2 United States Based Manufacturers Aesthetic Injectables Production Value (2021-2026)
4.4.3 United States Based Manufacturers Aesthetic Injectables Production (2021-2026)
4.5 China Based Aesthetic Injectables Manufacturers and Market Share
4.5.1 China Based Aesthetic Injectables Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Aesthetic Injectables Production Value (2021-2026)
4.5.3 China Based Manufacturers Aesthetic Injectables Production (2021-2026)
4.6 Rest of World Based Aesthetic Injectables Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Aesthetic Injectables Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Aesthetic Injectables Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Aesthetic Injectables Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Aesthetic Injectables Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Aesthetic Botulinum Toxin
5.2.2 HA-based Injectables
5.2.3 PLLA & PDLLA Injectables
5.2.4 CaHA Injectables
5.2.5 Others
5.3 Market Segment by Type
5.3.1 World Aesthetic Injectables Production by Type (2021-2032)
5.3.2 World Aesthetic Injectables Production Value by Type (2021-2032)
5.3.3 World Aesthetic Injectables Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PRODUCT PRESENTATION

6.1 World Aesthetic Injectables Market Size Overview by Product Presentation: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Product Presentation
6.2.1 Lyophilized Powder Vial
6.2.2 Ready-to-use Liquid Toxin

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info@marketpublishers.com

6.2.3 Reconstituted Microsphere/Polymer Vial
6.2.4 Others
6.3 Market Segment by Product Presentation
6.3.1 World Aesthetic Injectables Production by Product Presentation (2021-2032)
6.3.2 World Aesthetic Injectables Production Value by Product Presentation (2021-2032)
6.3.3 World Aesthetic Injectables Average Price by Product Presentation (2021-2032)

7 MARKET ANALYSIS BY EFFECT DURATION

7.1 World Aesthetic Injectables Market Size Overview by Effect Duration: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Effect Duration
7.2.1 Up to 6 Months
7.2.2 More than 6 Months to 12 Months
7.2.3 More than 12 Months to 24 Months
7.2.4 More than 24 Months / Semi-permanent
7.3 Market Segment by Effect Duration
7.3.1 World Aesthetic Injectables Production by Effect Duration (2021-2032)
7.3.2 World Aesthetic Injectables Production Value by Effect Duration (2021-2032)
7.3.3 World Aesthetic Injectables Average Price by Effect Duration (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Aesthetic Injectables Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Medical Aesthetic Clinics & Licensed Medspas
8.2.2 Dermatology Clinics
8.2.3 Plastic & Cosmetic Surgery Clinics
8.2.4 Hospitals & Medical Centers
8.2.5 Others
8.3 Market Segment by Application
8.3.1 World Aesthetic Injectables Production by Application (2021-2032)
8.3.2 World Aesthetic Injectables Production Value by Application (2021-2032)
8.3.3 World Aesthetic Injectables Average Price by Application (2021-2032)

9 COMPANY PROFILES

+357 96 030922
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9.1 AbbVie Inc.
9.1.1 AbbVie Inc. Details
9.1.2 AbbVie Inc. Major Business
9.1.3 AbbVie Inc. Aesthetic Injectables Product and Services
9.1.4 AbbVie Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 AbbVie Inc. Recent Developments/Updates
9.1.6 AbbVie Inc. Competitive Strengths & Weaknesses
9.2 Galderma Group AG
9.2.1 Galderma Group AG Details
9.2.2 Galderma Group AG Major Business
9.2.3 Galderma Group AG Aesthetic Injectables Product and Services
9.2.4 Galderma Group AG Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Galderma Group AG Recent Developments/Updates
9.2.6 Galderma Group AG Competitive Strengths & Weaknesses
9.3 Merz Pharma GmbH & Co. KGaA
9.3.1 Merz Pharma GmbH & Co. KGaA Details
9.3.2 Merz Pharma GmbH & Co. KGaA Major Business
9.3.3 Merz Pharma GmbH & Co. KGaA Aesthetic Injectables Product and Services
9.3.4 Merz Pharma GmbH & Co. KGaA Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Merz Pharma GmbH & Co. KGaA Recent Developments/Updates
9.3.6 Merz Pharma GmbH & Co. KGaA Competitive Strengths & Weaknesses
9.4 Ipsen S.A.
9.4.1 Ipsen S.A. Details
9.4.2 Ipsen S.A. Major Business
9.4.3 Ipsen S.A. Aesthetic Injectables Product and Services
9.4.4 Ipsen S.A. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Ipsen S.A. Recent Developments/Updates
9.4.6 Ipsen S.A. Competitive Strengths & Weaknesses
9.5 Revance
9.5.1 Revance Details
9.5.2 Revance Major Business
9.5.3 Revance Aesthetic Injectables Product and Services
9.5.4 Revance Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Revance Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.5.6 Revance Competitive Strengths & Weaknesses
9.6 Daewoong Pharmaceutical Co., Ltd.
9.6.1 Daewoong Pharmaceutical Co., Ltd. Details
9.6.2 Daewoong Pharmaceutical Co., Ltd. Major Business
9.6.3 Daewoong Pharmaceutical Co., Ltd. Aesthetic Injectables Product and Services
9.6.4 Daewoong Pharmaceutical Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Daewoong Pharmaceutical Co., Ltd. Recent Developments/Updates
9.6.6 Daewoong Pharmaceutical Co., Ltd. Competitive Strengths & Weaknesses
9.7 Hugel, Inc.
9.7.1 Hugel, Inc. Details
9.7.2 Hugel, Inc. Major Business
9.7.3 Hugel, Inc. Aesthetic Injectables Product and Services
9.7.4 Hugel, Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Hugel, Inc. Recent Developments/Updates
9.7.6 Hugel, Inc. Competitive Strengths & Weaknesses
9.8 Medytox Inc.
9.8.1 Medytox Inc. Details
9.8.2 Medytox Inc. Major Business
9.8.3 Medytox Inc. Aesthetic Injectables Product and Services
9.8.4 Medytox Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Medytox Inc. Recent Developments/Updates
9.8.6 Medytox Inc. Competitive Strengths & Weaknesses
9.9 Huons BioPharma Co., Ltd.
9.9.1 Huons BioPharma Co., Ltd. Details
9.9.2 Huons BioPharma Co., Ltd. Major Business
9.9.3 Huons BioPharma Co., Ltd. Aesthetic Injectables Product and Services
9.9.4 Huons BioPharma Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Huons BioPharma Co., Ltd. Recent Developments/Updates
9.9.6 Huons BioPharma Co., Ltd. Competitive Strengths & Weaknesses
9.10 LG Chem, Ltd.
9.10.1 LG Chem, Ltd. Details
9.10.2 LG Chem, Ltd. Major Business
9.10.3 LG Chem, Ltd. Aesthetic Injectables Product and Services
9.10.4 LG Chem, Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.10.5 LG Chem, Ltd. Recent Developments/Updates
9.10.6 LG Chem, Ltd. Competitive Strengths & Weaknesses
9.11 Teoxane SA
9.11.1 Teoxane SA Details
9.11.2 Teoxane SA Major Business
9.11.3 Teoxane SA Aesthetic Injectables Product and Services
9.11.4 Teoxane SA Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Teoxane SA Recent Developments/Updates
9.11.6 Teoxane SA Competitive Strengths & Weaknesses
9.12 Croma-Pharma GmbH
9.12.1 Croma-Pharma GmbH Details
9.12.2 Croma-Pharma GmbH Major Business
9.12.3 Croma-Pharma GmbH Aesthetic Injectables Product and Services
9.12.4 Croma-Pharma GmbH Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Croma-Pharma GmbH Recent Developments/Updates
9.12.6 Croma-Pharma GmbH Competitive Strengths & Weaknesses
9.13 IBSA Institut Biochimique SA
9.13.1 IBSA Institut Biochimique SA Details
9.13.2 IBSA Institut Biochimique SA Major Business
9.13.3 IBSA Institut Biochimique SA Aesthetic Injectables Product and Services
9.13.4 IBSA Institut Biochimique SA Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 IBSA Institut Biochimique SA Recent Developments/Updates
9.13.6 IBSA Institut Biochimique SA Competitive Strengths & Weaknesses
9.14 Prollenium Medical Technologies Inc.
9.14.1 Prollenium Medical Technologies Inc. Details
9.14.2 Prollenium Medical Technologies Inc. Major Business
9.14.3 Prollenium Medical Technologies Inc. Aesthetic Injectables Product and Services
9.14.4 Prollenium Medical Technologies Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Prollenium Medical Technologies Inc. Recent Developments/Updates
9.14.6 Prollenium Medical Technologies Inc. Competitive Strengths & Weaknesses
9.15 Laboratoires VIVACY
9.15.1 Laboratoires VIVACY Details
9.15.2 Laboratoires VIVACY Major Business
9.15.3 Laboratoires VIVACY Aesthetic Injectables Product and Services

+357 96 030922
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9.15.4 Laboratoires VIVACY Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 Laboratoires VIVACY Recent Developments/Updates
9.15.6 Laboratoires VIVACY Competitive Strengths & Weaknesses
9.16 BioScience GmbH
9.16.1 BioScience GmbH Details
9.16.2 BioScience GmbH Major Business
9.16.3 BioScience GmbH Aesthetic Injectables Product and Services
9.16.4 BioScience GmbH Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 BioScience GmbH Recent Developments/Updates
9.16.6 BioScience GmbH Competitive Strengths & Weaknesses
9.17 MATEX LAB S.p.A.
9.17.1 MATEX LAB S.p.A. Details
9.17.2 MATEX LAB S.p.A. Major Business
9.17.3 MATEX LAB S.p.A. Aesthetic Injectables Product and Services
9.17.4 MATEX LAB S.p.A. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.17.5 MATEX LAB S.p.A. Recent Developments/Updates
9.17.6 MATEX LAB S.p.A. Competitive Strengths & Weaknesses
9.18 SYMATESE
9.18.1 SYMATESE Details
9.18.2 SYMATESE Major Business
9.18.3 SYMATESE Aesthetic Injectables Product and Services
9.18.4 SYMATESE Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.18.5 SYMATESE Recent Developments/Updates
9.18.6 SYMATESE Competitive Strengths & Weaknesses
9.19 Tiger Aesthetics Medical, LLC
9.19.1 Tiger Aesthetics Medical, LLC Details
9.19.2 Tiger Aesthetics Medical, LLC Major Business
9.19.3 Tiger Aesthetics Medical, LLC Aesthetic Injectables Product and Services
9.19.4 Tiger Aesthetics Medical, LLC Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.19.5 Tiger Aesthetics Medical, LLC Recent Developments/Updates
9.19.6 Tiger Aesthetics Medical, LLC Competitive Strengths & Weaknesses
9.20 Mastelli S.r.l.
9.20.1 Mastelli S.r.l. Details
9.20.2 Mastelli S.r.l. Major Business

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9.20.3 Mastelli S.r.l. Aesthetic Injectables Product and Services
9.20.4 Mastelli S.r.l. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.20.5 Mastelli S.r.l. Recent Developments/Updates
9.20.6 Mastelli S.r.l. Competitive Strengths & Weaknesses
9.21 PharmaResearch Co., Ltd.
9.21.1 PharmaResearch Co., Ltd. Details
9.21.2 PharmaResearch Co., Ltd. Major Business
9.21.3 PharmaResearch Co., Ltd. Aesthetic Injectables Product and Services
9.21.4 PharmaResearch Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.21.5 PharmaResearch Co., Ltd. Recent Developments/Updates
9.21.6 PharmaResearch Co., Ltd. Competitive Strengths & Weaknesses
9.22 REGEN Biotech, Inc.
9.22.1 REGEN Biotech, Inc. Details
9.22.2 REGEN Biotech, Inc. Major Business
9.22.3 REGEN Biotech, Inc. Aesthetic Injectables Product and Services
9.22.4 REGEN Biotech, Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.22.5 REGEN Biotech, Inc. Recent Developments/Updates
9.22.6 REGEN Biotech, Inc. Competitive Strengths & Weaknesses
9.23 CGBIO Co., Ltd.
9.23.1 CGBIO Co., Ltd. Details
9.23.2 CGBIO Co., Ltd. Major Business
9.23.3 CGBIO Co., Ltd. Aesthetic Injectables Product and Services
9.23.4 CGBIO Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.23.5 CGBIO Co., Ltd. Recent Developments/Updates
9.23.6 CGBIO Co., Ltd. Competitive Strengths & Weaknesses
9.24 DEXLEVO Inc.
9.24.1 DEXLEVO Inc. Details
9.24.2 DEXLEVO Inc. Major Business
9.24.3 DEXLEVO Inc. Aesthetic Injectables Product and Services
9.24.4 DEXLEVO Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.24.5 DEXLEVO Inc. Recent Developments/Updates
9.24.6 DEXLEVO Inc. Competitive Strengths & Weaknesses
9.25 BioPlus Co., Ltd.
9.25.1 BioPlus Co., Ltd. Details

+357 96 030922
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9.25.2 BioPlus Co., Ltd. Major Business
9.25.3 BioPlus Co., Ltd. Aesthetic Injectables Product and Services
9.25.4 BioPlus Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.25.5 BioPlus Co., Ltd. Recent Developments/Updates
9.25.6 BioPlus Co., Ltd. Competitive Strengths & Weaknesses
9.26 Humedix Co., Ltd.
9.26.1 Humedix Co., Ltd. Details
9.26.2 Humedix Co., Ltd. Major Business
9.26.3 Humedix Co., Ltd. Aesthetic Injectables Product and Services
9.26.4 Humedix Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.26.5 Humedix Co., Ltd. Recent Developments/Updates
9.26.6 Humedix Co., Ltd. Competitive Strengths & Weaknesses
9.27 Across Co., Ltd.
9.27.1 Across Co., Ltd. Details
9.27.2 Across Co., Ltd. Major Business
9.27.3 Across Co., Ltd. Aesthetic Injectables Product and Services
9.27.4 Across Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.27.5 Across Co., Ltd. Recent Developments/Updates
9.27.6 Across Co., Ltd. Competitive Strengths & Weaknesses
9.28 JETEMA Co., Ltd.
9.28.1 JETEMA Co., Ltd. Details
9.28.2 JETEMA Co., Ltd. Major Business
9.28.3 JETEMA Co., Ltd. Aesthetic Injectables Product and Services
9.28.4 JETEMA Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.28.5 JETEMA Co., Ltd. Recent Developments/Updates
9.28.6 JETEMA Co., Ltd. Competitive Strengths & Weaknesses
9.29 GENOSS Co., Ltd.
9.29.1 GENOSS Co., Ltd. Details
9.29.2 GENOSS Co., Ltd. Major Business
9.29.3 GENOSS Co., Ltd. Aesthetic Injectables Product and Services
9.29.4 GENOSS Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.29.5 GENOSS Co., Ltd. Recent Developments/Updates
9.29.6 GENOSS Co., Ltd. Competitive Strengths & Weaknesses
9.30 BNC Korea Co., Ltd.

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9.30.1 BNC Korea Co., Ltd. Details
9.30.2 BNC Korea Co., Ltd. Major Business
9.30.3 BNC Korea Co., Ltd. Aesthetic Injectables Product and Services
9.30.4 BNC Korea Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.30.5 BNC Korea Co., Ltd. Recent Developments/Updates
9.30.6 BNC Korea Co., Ltd. Competitive Strengths & Weaknesses
9.31 SciVision Biotech Inc.
9.31.1 SciVision Biotech Inc. Details
9.31.2 SciVision Biotech Inc. Major Business
9.31.3 SciVision Biotech Inc. Aesthetic Injectables Product and Services
9.31.4 SciVision Biotech Inc. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.31.5 SciVision Biotech Inc. Recent Developments/Updates
9.31.6 SciVision Biotech Inc. Competitive Strengths & Weaknesses
9.32 Sunmax Biotechnology Co., Ltd.
9.32.1 Sunmax Biotechnology Co., Ltd. Details
9.32.2 Sunmax Biotechnology Co., Ltd. Major Business
9.32.3 Sunmax Biotechnology Co., Ltd. Aesthetic Injectables Product and Services
9.32.4 Sunmax Biotechnology Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.32.5 Sunmax Biotechnology Co., Ltd. Recent Developments/Updates
9.32.6 Sunmax Biotechnology Co., Ltd. Competitive Strengths & Weaknesses
9.33 NPO Microgen
9.33.1 NPO Microgen Details
9.33.2 NPO Microgen Major Business
9.33.3 NPO Microgen Aesthetic Injectables Product and Services
9.33.4 NPO Microgen Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.33.5 NPO Microgen Recent Developments/Updates
9.33.6 NPO Microgen Competitive Strengths & Weaknesses
9.34 Huadong Medicine Co., Ltd.
9.34.1 Huadong Medicine Co., Ltd. Details
9.34.2 Huadong Medicine Co., Ltd. Major Business
9.34.3 Huadong Medicine Co., Ltd. Aesthetic Injectables Product and Services
9.34.4 Huadong Medicine Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.34.5 Huadong Medicine Co., Ltd. Recent Developments/Updates
9.34.6 Huadong Medicine Co., Ltd. Competitive Strengths & Weaknesses

+357 96 030922
info@marketpublishers.com

9.35 Bloomage Biotechnology Corporation Limited
9.35.1 Bloomage Biotechnology Corporation Limited Details
9.35.2 Bloomage Biotechnology Corporation Limited Major Business
9.35.3 Bloomage Biotechnology Corporation Limited Aesthetic Injectables Product and Services
9.35.4 Bloomage Biotechnology Corporation Limited Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.35.5 Bloomage Biotechnology Corporation Limited Recent Developments/Updates
9.35.6 Bloomage Biotechnology Corporation Limited Competitive Strengths & Weaknesses
9.36 IMEIK Technology Development Co., Ltd.
9.36.1 IMEIK Technology Development Co., Ltd. Details
9.36.2 IMEIK Technology Development Co., Ltd. Major Business
9.36.3 IMEIK Technology Development Co., Ltd. Aesthetic Injectables Product and Services
9.36.4 IMEIK Technology Development Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.36.5 IMEIK Technology Development Co., Ltd. Recent Developments/Updates
9.36.6 IMEIK Technology Development Co., Ltd. Competitive Strengths & Weaknesses
9.37 Shanghai Haohai Biological Technology Co., Ltd.
9.37.1 Shanghai Haohai Biological Technology Co., Ltd. Details
9.37.2 Shanghai Haohai Biological Technology Co., Ltd. Major Business
9.37.3 Shanghai Haohai Biological Technology Co., Ltd. Aesthetic Injectables Product and Services
9.37.4 Shanghai Haohai Biological Technology Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.37.5 Shanghai Haohai Biological Technology Co., Ltd. Recent Developments/Updates
9.37.6 Shanghai Haohai Biological Technology Co., Ltd. Competitive Strengths & Weaknesses
9.38 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd.
9.38.1 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Details
9.38.2 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Major Business
9.38.3 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Aesthetic Injectables Product and Services
9.38.4 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.38.5 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Recent Developments/Updates

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info@marketpublishers.com

9.38.6 Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Competitive Strengths & Weaknesses
9.39 Lanzhou Institute of Biological Products Co., Ltd.
9.39.1 Lanzhou Institute of Biological Products Co., Ltd. Details
9.39.2 Lanzhou Institute of Biological Products Co., Ltd. Major Business
9.39.3 Lanzhou Institute of Biological Products Co., Ltd. Aesthetic Injectables Product and Services
9.39.4 Lanzhou Institute of Biological Products Co., Ltd. Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.39.5 Lanzhou Institute of Biological Products Co., Ltd. Recent Developments/Updates
9.39.6 Lanzhou Institute of Biological Products Co., Ltd. Competitive Strengths & Weaknesses
9.40 Bohus BioTech
9.40.1 Bohus BioTech Details
9.40.2 Bohus BioTech Major Business
9.40.3 Bohus BioTech Aesthetic Injectables Product and Services
9.40.4 Bohus BioTech Aesthetic Injectables Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.40.5 Bohus BioTech Recent Developments/Updates
9.40.6 Bohus BioTech Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Aesthetic Injectables Industry Chain
10.2 Aesthetic Injectables Upstream Analysis
10.2.1 Aesthetic Injectables Core Raw Materials
10.2.2 Main Manufacturers of Aesthetic Injectables Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Aesthetic Injectables Production Mode
10.6 Aesthetic Injectables Procurement Model
10.7 Aesthetic Injectables Industry Sales Model and Sales Channels
10.7.1 Aesthetic Injectables Sales Model
10.7.2 Aesthetic Injectables Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

+357 96 030922
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12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. World Aesthetic Injectables Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Aesthetic Injectables Production Value by Region (2021-2026) & (USD Million)
Table 3. World Aesthetic Injectables Production Value by Region (2027-2032) & (USD Million)
Table 4. World Aesthetic Injectables Production Value Market Share by Region (2021-2026)
Table 5. World Aesthetic Injectables Production Value Market Share by Region (2027-2032)
Table 6. World Aesthetic Injectables Production by Region (2021-2026) & (K Units)
Table 7. World Aesthetic Injectables Production by Region (2027-2032) & (K Units)
Table 8. World Aesthetic Injectables Production Market Share by Region (2021-2026)
Table 9. World Aesthetic Injectables Production Market Share by Region (2027-2032)
Table 10. World Aesthetic Injectables Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World Aesthetic Injectables Average Price by Region (2027-2032) & (US$/Unit)
Table 12. Aesthetic Injectables Major Market Trends
Table 13. World Aesthetic Injectables Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
Table 14. World Aesthetic Injectables Consumption by Region (2021-2026) & (K Units)
Table 15. World Aesthetic Injectables Consumption Forecast by Region (2027-2032) & (K Units)
Table 16. World Aesthetic Injectables Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Aesthetic Injectables Producers in 2025
Table 18. World Aesthetic Injectables Production by Manufacturer (2021-2026) & (K Units)
Table 19. Production Market Share of Key Aesthetic Injectables Producers in 2025
Table 20. World Aesthetic Injectables Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global Aesthetic Injectables Company Evaluation Quadrant
Table 22. World Aesthetic Injectables Industry Rank of Major Manufacturers, Based on

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Production Value in 2025
Table 23. Head Office and Aesthetic Injectables Production Site of Key Manufacturer
Table 24. Aesthetic Injectables Market: Company Product Type Footprint
Table 25. Aesthetic Injectables Market: Company Product Application Footprint
Table 26. Aesthetic Injectables Competitive Factors
Table 27. Aesthetic Injectables New Entrant and Capacity Expansion Plans
Table 28. Aesthetic Injectables Mergers & Acquisitions Activity
Table 29. United States VS China Aesthetic Injectables Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Aesthetic Injectables Production Comparison, (2021 & 2025 & 2032) & (K Units)
Table 31. United States VS China Aesthetic Injectables Consumption Comparison, (2021 & 2025 & 2032) & (K Units)
Table 32. United States Based Aesthetic Injectables Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Aesthetic Injectables Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Aesthetic Injectables Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Aesthetic Injectables Production (2021-2026) & (K Units)
Table 36. United States Based Manufacturers Aesthetic Injectables Production Market Share (2021-2026)
Table 37. China Based Aesthetic Injectables Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Aesthetic Injectables Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Aesthetic Injectables Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Aesthetic Injectables Production, (2021-2026) & (K Units)
Table 41. China Based Manufacturers Aesthetic Injectables Production Market Share (2021-2026)
Table 42. Rest of World Based Aesthetic Injectables Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Aesthetic Injectables Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Aesthetic Injectables Production Value Market Share (2021-2026)

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Table 45. Rest of World Based Manufacturers Aesthetic Injectables Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers Aesthetic Injectables Production Market Share (2021-2026)
Table 47. World Aesthetic Injectables Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Aesthetic Injectables Production by Type (2021-2026) & (K Units)
Table 49. World Aesthetic Injectables Production by Type (2027-2032) & (K Units)
Table 50. World Aesthetic Injectables Production Value by Type (2021-2026) & (USD Million)
Table 51. World Aesthetic Injectables Production Value by Type (2027-2032) & (USD Million)
Table 52. World Aesthetic Injectables Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World Aesthetic Injectables Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World Aesthetic Injectables Production Value by Product Presentation, (USD Million), 2021 & 2025 & 2032
Table 55. World Aesthetic Injectables Production by Product Presentation (2021-2026) & (K Units)
Table 56. World Aesthetic Injectables Production by Product Presentation (2027-2032) & (K Units)
Table 57. World Aesthetic Injectables Production Value by Product Presentation (2021-2026) & (USD Million)
Table 58. World Aesthetic Injectables Production Value by Product Presentation (2027-2032) & (USD Million)
Table 59. World Aesthetic Injectables Average Price by Product Presentation (2021-2026) & (US$/Unit)
Table 60. World Aesthetic Injectables Average Price by Product Presentation (2027-2032) & (US$/Unit)
Table 61. World Aesthetic Injectables Production Value by Effect Duration, (USD Million), 2021 & 2025 & 2032
Table 62. World Aesthetic Injectables Production by Effect Duration (2021-2026) & (K Units)
Table 63. World Aesthetic Injectables Production by Effect Duration (2027-2032) & (K Units)
Table 64. World Aesthetic Injectables Production Value by Effect Duration (2021-2026) & (USD Million)
Table 65. World Aesthetic Injectables Production Value by Effect Duration (2027-2032) & (USD Million)
Table 66. World Aesthetic Injectables Average Price by Effect Duration (2021-2026) &

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(US$/Unit)
Table 67. World Aesthetic Injectables Average Price by Effect Duration (2027-2032) & (US$/Unit)
Table 68. World Aesthetic Injectables Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Aesthetic Injectables Production by Application (2021-2026) & (K Units)
Table 70. World Aesthetic Injectables Production by Application (2027-2032) & (K Units)
Table 71. World Aesthetic Injectables Production Value by Application (2021-2026) & (USD Million)
Table 72. World Aesthetic Injectables Production Value by Application (2027-2032) & (USD Million)
Table 73. World Aesthetic Injectables Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World Aesthetic Injectables Average Price by Application (2027-2032) & (US$/Unit)
Table 75. AbbVie Inc. Basic Information, Manufacturing Base and Competitors
Table 76. AbbVie Inc. Major Business
Table 77. AbbVie Inc. Aesthetic Injectables Product and Services
Table 78. AbbVie Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. AbbVie Inc. Recent Developments/Updates
Table 80. AbbVie Inc. Competitive Strengths & Weaknesses
Table 81. Galderma Group AG Basic Information, Manufacturing Base and Competitors
Table 82. Galderma Group AG Major Business
Table 83. Galderma Group AG Aesthetic Injectables Product and Services
Table 84. Galderma Group AG Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Galderma Group AG Recent Developments/Updates
Table 86. Galderma Group AG Competitive Strengths & Weaknesses
Table 87. Merz Pharma GmbH & Co. KGaA Basic Information, Manufacturing Base and Competitors
Table 88. Merz Pharma GmbH & Co. KGaA Major Business
Table 89. Merz Pharma GmbH & Co. KGaA Aesthetic Injectables Product and Services
Table 90. Merz Pharma GmbH & Co. KGaA Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Merz Pharma GmbH & Co. KGaA Recent Developments/Updates
Table 92. Merz Pharma GmbH & Co. KGaA Competitive Strengths & Weaknesses

+357 96 030922
info@marketpublishers.com

Table 93. Ipsen S.A. Basic Information, Manufacturing Base and Competitors
Table 94. Ipsen S.A. Major Business
Table 95. Ipsen S.A. Aesthetic Injectables Product and Services
Table 96. Ipsen S.A. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Ipsen S.A. Recent Developments/Updates
Table 98. Ipsen S.A. Competitive Strengths & Weaknesses
Table 99. Revance Basic Information, Manufacturing Base and Competitors
Table 100. Revance Major Business
Table 101. Revance Aesthetic Injectables Product and Services
Table 102. Revance Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Revance Recent Developments/Updates
Table 104. Revance Competitive Strengths & Weaknesses
Table 105. Daewoong Pharmaceutical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 106. Daewoong Pharmaceutical Co., Ltd. Major Business
Table 107. Daewoong Pharmaceutical Co., Ltd. Aesthetic Injectables Product and Services
Table 108. Daewoong Pharmaceutical Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Daewoong Pharmaceutical Co., Ltd. Recent Developments/Updates
Table 110. Daewoong Pharmaceutical Co., Ltd. Competitive Strengths & Weaknesses
Table 111. Hugel, Inc. Basic Information, Manufacturing Base and Competitors
Table 112. Hugel, Inc. Major Business
Table 113. Hugel, Inc. Aesthetic Injectables Product and Services
Table 114. Hugel, Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Hugel, Inc. Recent Developments/Updates
Table 116. Hugel, Inc. Competitive Strengths & Weaknesses
Table 117. Medytox Inc. Basic Information, Manufacturing Base and Competitors
Table 118. Medytox Inc. Major Business
Table 119. Medytox Inc. Aesthetic Injectables Product and Services
Table 120. Medytox Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Medytox Inc. Recent Developments/Updates
Table 122. Medytox Inc. Competitive Strengths & Weaknesses
Table 123. Huons BioPharma Co., Ltd. Basic Information, Manufacturing Base and

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Competitors
Table 124. Huons BioPharma Co., Ltd. Major Business
Table 125. Huons BioPharma Co., Ltd. Aesthetic Injectables Product and Services
Table 126. Huons BioPharma Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Huons BioPharma Co., Ltd. Recent Developments/Updates
Table 128. Huons BioPharma Co., Ltd. Competitive Strengths & Weaknesses
Table 129. LG Chem, Ltd. Basic Information, Manufacturing Base and Competitors
Table 130. LG Chem, Ltd. Major Business
Table 131. LG Chem, Ltd. Aesthetic Injectables Product and Services
Table 132. LG Chem, Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. LG Chem, Ltd. Recent Developments/Updates
Table 134. LG Chem, Ltd. Competitive Strengths & Weaknesses
Table 135. Teoxane SA Basic Information, Manufacturing Base and Competitors
Table 136. Teoxane SA Major Business
Table 137. Teoxane SA Aesthetic Injectables Product and Services
Table 138. Teoxane SA Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Teoxane SA Recent Developments/Updates
Table 140. Teoxane SA Competitive Strengths & Weaknesses
Table 141. Croma-Pharma GmbH Basic Information, Manufacturing Base and Competitors
Table 142. Croma-Pharma GmbH Major Business
Table 143. Croma-Pharma GmbH Aesthetic Injectables Product and Services
Table 144. Croma-Pharma GmbH Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Croma-Pharma GmbH Recent Developments/Updates
Table 146. Croma-Pharma GmbH Competitive Strengths & Weaknesses
Table 147. IBSA Institut Biochimique SA Basic Information, Manufacturing Base and Competitors
Table 148. IBSA Institut Biochimique SA Major Business
Table 149. IBSA Institut Biochimique SA Aesthetic Injectables Product and Services
Table 150. IBSA Institut Biochimique SA Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. IBSA Institut Biochimique SA Recent Developments/Updates

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Table 152. IBSA Institut Biochimique SA Competitive Strengths & Weaknesses
Table 153. Prollenium Medical Technologies Inc. Basic Information, Manufacturing Base and Competitors
Table 154. Prollenium Medical Technologies Inc. Major Business
Table 155. Prollenium Medical Technologies Inc. Aesthetic Injectables Product and Services
Table 156. Prollenium Medical Technologies Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Prollenium Medical Technologies Inc. Recent Developments/Updates
Table 158. Prollenium Medical Technologies Inc. Competitive Strengths & Weaknesses
Table 159. Laboratoires VIVACY Basic Information, Manufacturing Base and Competitors
Table 160. Laboratoires VIVACY Major Business
Table 161. Laboratoires VIVACY Aesthetic Injectables Product and Services
Table 162. Laboratoires VIVACY Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Laboratoires VIVACY Recent Developments/Updates
Table 164. Laboratoires VIVACY Competitive Strengths & Weaknesses
Table 165. BioScience GmbH Basic Information, Manufacturing Base and Competitors
Table 166. BioScience GmbH Major Business
Table 167. BioScience GmbH Aesthetic Injectables Product and Services
Table 168. BioScience GmbH Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. BioScience GmbH Recent Developments/Updates
Table 170. BioScience GmbH Competitive Strengths & Weaknesses
Table 171. MATEX LAB S.p.A. Basic Information, Manufacturing Base and Competitors
Table 172. MATEX LAB S.p.A. Major Business
Table 173. MATEX LAB S.p.A. Aesthetic Injectables Product and Services
Table 174. MATEX LAB S.p.A. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. MATEX LAB S.p.A. Recent Developments/Updates
Table 176. MATEX LAB S.p.A. Competitive Strengths & Weaknesses
Table 177. SYMATESE Basic Information, Manufacturing Base and Competitors
Table 178. SYMATESE Major Business
Table 179. SYMATESE Aesthetic Injectables Product and Services

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Table 180. SYMATESE Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. SYMATESE Recent Developments/Updates
Table 182. SYMATESE Competitive Strengths & Weaknesses
Table 183. Tiger Aesthetics Medical, LLC Basic Information, Manufacturing Base and Competitors
Table 184. Tiger Aesthetics Medical, LLC Major Business
Table 185. Tiger Aesthetics Medical, LLC Aesthetic Injectables Product and Services
Table 186. Tiger Aesthetics Medical, LLC Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 187. Tiger Aesthetics Medical, LLC Recent Developments/Updates
Table 188. Tiger Aesthetics Medical, LLC Competitive Strengths & Weaknesses
Table 189. Mastelli S.r.l. Basic Information, Manufacturing Base and Competitors
Table 190. Mastelli S.r.l. Major Business
Table 191. Mastelli S.r.l. Aesthetic Injectables Product and Services
Table 192. Mastelli S.r.l. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 193. Mastelli S.r.l. Recent Developments/Updates
Table 194. Mastelli S.r.l. Competitive Strengths & Weaknesses
Table 195. PharmaResearch Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 196. PharmaResearch Co., Ltd. Major Business
Table 197. PharmaResearch Co., Ltd. Aesthetic Injectables Product and Services
Table 198. PharmaResearch Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 199. PharmaResearch Co., Ltd. Recent Developments/Updates
Table 200. PharmaResearch Co., Ltd. Competitive Strengths & Weaknesses
Table 201. REGEN Biotech, Inc. Basic Information, Manufacturing Base and Competitors
Table 202. REGEN Biotech, Inc. Major Business
Table 203. REGEN Biotech, Inc. Aesthetic Injectables Product and Services
Table 204. REGEN Biotech, Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 205. REGEN Biotech, Inc. Recent Developments/Updates
Table 206. REGEN Biotech, Inc. Competitive Strengths & Weaknesses
Table 207. CGBIO Co., Ltd. Basic Information, Manufacturing Base and Competitors

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Table 208. CGBIO Co., Ltd. Major Business
Table 209. CGBIO Co., Ltd. Aesthetic Injectables Product and Services
Table 210. CGBIO Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 211. CGBIO Co., Ltd. Recent Developments/Updates
Table 212. CGBIO Co., Ltd. Competitive Strengths & Weaknesses
Table 213. DEXLEVO Inc. Basic Information, Manufacturing Base and Competitors
Table 214. DEXLEVO Inc. Major Business
Table 215. DEXLEVO Inc. Aesthetic Injectables Product and Services
Table 216. DEXLEVO Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 217. DEXLEVO Inc. Recent Developments/Updates
Table 218. DEXLEVO Inc. Competitive Strengths & Weaknesses
Table 219. BioPlus Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 220. BioPlus Co., Ltd. Major Business
Table 221. BioPlus Co., Ltd. Aesthetic Injectables Product and Services
Table 222. BioPlus Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 223. BioPlus Co., Ltd. Recent Developments/Updates
Table 224. BioPlus Co., Ltd. Competitive Strengths & Weaknesses
Table 225. Humedix Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 226. Humedix Co., Ltd. Major Business
Table 227. Humedix Co., Ltd. Aesthetic Injectables Product and Services
Table 228. Humedix Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 229. Humedix Co., Ltd. Recent Developments/Updates
Table 230. Humedix Co., Ltd. Competitive Strengths & Weaknesses
Table 231. Across Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 232. Across Co., Ltd. Major Business
Table 233. Across Co., Ltd. Aesthetic Injectables Product and Services
Table 234. Across Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 235. Across Co., Ltd. Recent Developments/Updates
Table 236. Across Co., Ltd. Competitive Strengths & Weaknesses
Table 237. JETEMA Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 238. JETEMA Co., Ltd. Major Business

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Table 239. JETEMA Co., Ltd. Aesthetic Injectables Product and Services
Table 240. JETEMA Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 241. JETEMA Co., Ltd. Recent Developments/Updates
Table 242. JETEMA Co., Ltd. Competitive Strengths & Weaknesses
Table 243. GENOSS Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 244. GENOSS Co., Ltd. Major Business
Table 245. GENOSS Co., Ltd. Aesthetic Injectables Product and Services
Table 246. GENOSS Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 247. GENOSS Co., Ltd. Recent Developments/Updates
Table 248. GENOSS Co., Ltd. Competitive Strengths & Weaknesses
Table 249. BNC Korea Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 250. BNC Korea Co., Ltd. Major Business
Table 251. BNC Korea Co., Ltd. Aesthetic Injectables Product and Services
Table 252. BNC Korea Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 253. BNC Korea Co., Ltd. Recent Developments/Updates
Table 254. BNC Korea Co., Ltd. Competitive Strengths & Weaknesses
Table 255. SciVision Biotech Inc. Basic Information, Manufacturing Base and Competitors
Table 256. SciVision Biotech Inc. Major Business
Table 257. SciVision Biotech Inc. Aesthetic Injectables Product and Services
Table 258. SciVision Biotech Inc. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 259. SciVision Biotech Inc. Recent Developments/Updates
Table 260. SciVision Biotech Inc. Competitive Strengths & Weaknesses
Table 261. Sunmax Biotechnology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 262. Sunmax Biotechnology Co., Ltd. Major Business
Table 263. Sunmax Biotechnology Co., Ltd. Aesthetic Injectables Product and Services
Table 264. Sunmax Biotechnology Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 265. Sunmax Biotechnology Co., Ltd. Recent Developments/Updates
Table 266. Sunmax Biotechnology Co., Ltd. Competitive Strengths & Weaknesses
Table 267. NPO Microgen Basic Information, Manufacturing Base and Competitors
Table 268. NPO Microgen Major Business
Table 269. NPO Microgen Aesthetic Injectables Product and Services
Table 270. NPO Microgen Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 271. NPO Microgen Recent Developments/Updates
Table 272. NPO Microgen Competitive Strengths & Weaknesses
Table 273. Huadong Medicine Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 274. Huadong Medicine Co., Ltd. Major Business
Table 275. Huadong Medicine Co., Ltd. Aesthetic Injectables Product and Services
Table 276. Huadong Medicine Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 277. Huadong Medicine Co., Ltd. Recent Developments/Updates
Table 278. Huadong Medicine Co., Ltd. Competitive Strengths & Weaknesses
Table 279. Bloomage Biotechnology Corporation Limited Basic Information, Manufacturing Base and Competitors
Table 280. Bloomage Biotechnology Corporation Limited Major Business
Table 281. Bloomage Biotechnology Corporation Limited Aesthetic Injectables Product and Services
Table 282. Bloomage Biotechnology Corporation Limited Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 283. Bloomage Biotechnology Corporation Limited Recent Developments/Updates
Table 284. Bloomage Biotechnology Corporation Limited Competitive Strengths & Weaknesses
Table 285. IMEIK Technology Development Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 286. IMEIK Technology Development Co., Ltd. Major Business
Table 287. IMEIK Technology Development Co., Ltd. Aesthetic Injectables Product and Services
Table 288. IMEIK Technology Development Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 289. IMEIK Technology Development Co., Ltd. Recent Developments/Updates

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Table 290. IMEIK Technology Development Co., Ltd. Competitive Strengths & Weaknesses
Table 291. Shanghai Haohai Biological Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 292. Shanghai Haohai Biological Technology Co., Ltd. Major Business
Table 293. Shanghai Haohai Biological Technology Co., Ltd. Aesthetic Injectables Product and Services
Table 294. Shanghai Haohai Biological Technology Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 295. Shanghai Haohai Biological Technology Co., Ltd. Recent Developments/Updates
Table 296. Shanghai Haohai Biological Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 297. Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 298. Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Major Business
Table 299. Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Aesthetic Injectables Product and Services
Table 300. Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 301. Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Recent Developments/Updates
Table 302. Shanxi Jinbo Bio-Pharmaceutical Co., Ltd. Competitive Strengths & Weaknesses
Table 303. Lanzhou Institute of Biological Products Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 304. Lanzhou Institute of Biological Products Co., Ltd. Major Business
Table 305. Lanzhou Institute of Biological Products Co., Ltd. Aesthetic Injectables Product and Services
Table 306. Lanzhou Institute of Biological Products Co., Ltd. Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 307. Lanzhou Institute of Biological Products Co., Ltd. Recent Developments/Updates
Table 308. Lanzhou Institute of Biological Products Co., Ltd. Competitive Strengths & Weaknesses
Table 309. Bohus BioTech Basic Information, Manufacturing Base and Competitors
Table 310. Bohus BioTech Major Business

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Table 311. Bohus BioTech Aesthetic Injectables Product and Services
Table 312. Bohus BioTech Aesthetic Injectables Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 313. Bohus BioTech Recent Developments/Updates
Table 314. Bohus BioTech Competitive Strengths & Weaknesses
Table 315. Global Key Players of Aesthetic Injectables Upstream (Raw Materials)
Table 316. Global Aesthetic Injectables Typical Customers
Table 317. Aesthetic Injectables Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Aesthetic Injectables Picture
Figure 2. World Aesthetic Injectables Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Aesthetic Injectables Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Aesthetic Injectables Production (2021-2032) & (K Units)
Figure 5. World Aesthetic Injectables Average Price (2021-2032) & (US$/Unit)
Figure 6. World Aesthetic Injectables Production Value Market Share by Region (2021-2032)
Figure 7. World Aesthetic Injectables Production Market Share by Region (2021-2032)
Figure 8. North America Aesthetic Injectables Production (2021-2032) & (K Units)
Figure 9. Europe Aesthetic Injectables Production (2021-2032) & (K Units)
Figure 10. China Aesthetic Injectables Production (2021-2032) & (K Units)
Figure 11. Japan Aesthetic Injectables Production (2021-2032) & (K Units)
Figure 12. Aesthetic Injectables Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 15. World Aesthetic Injectables Consumption Market Share by Region (2021-2032)
Figure 16. United States Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 17. China Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 18. Europe Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 19. Japan Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 20. South Korea Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 21. ASEAN Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 22. India Aesthetic Injectables Consumption (2021-2032) & (K Units)
Figure 23. Producer Shipments of Aesthetic Injectables by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Aesthetic Injectables Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Aesthetic Injectables Markets in 2025
Figure 26. United States VS China: Aesthetic Injectables Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Aesthetic Injectables Production Market Share

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Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Aesthetic Injectables Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Aesthetic Injectables Production Market Share 2025
Figure 30. China Based Manufacturers Aesthetic Injectables Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Aesthetic Injectables Production Market Share 2025
Figure 32. World Aesthetic Injectables Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Aesthetic Injectables Production Value Market Share by Type in 2025
Figure 34. Aesthetic Botulinum Toxin
Figure 35. HA-based Injectables
Figure 36. PLLA & PDLLA Injectables
Figure 37. CaHA Injectables
Figure 38. Others
Figure 39. World Aesthetic Injectables Production Market Share by Type (2021-2032)
Figure 40. World Aesthetic Injectables Production Value Market Share by Type (2021-2032)
Figure 41. World Aesthetic Injectables Average Price by Type (2021-2032) & (US$/Unit)
Figure 42. World Aesthetic Injectables Production Value by Product Presentation, (USD Million), 2021 & 2025 & 2032
Figure 43. World Aesthetic Injectables Production Value Market Share by Product Presentation in 2025
Figure 44. Lyophilized Powder Vial
Figure 45. Ready-to-use Liquid Toxin
Figure 46. Reconstituted Microsphere/Polymer Vial
Figure 47. Others
Figure 48. World Aesthetic Injectables Production Market Share by Product Presentation (2021-2032)
Figure 49. World Aesthetic Injectables Production Value Market Share by Product Presentation (2021-2032)
Figure 50. World Aesthetic Injectables Average Price by Product Presentation (2021-2032) & (US$/Unit)
Figure 51. World Aesthetic Injectables Production Value by Effect Duration, (USD Million), 2021 & 2025 & 2032
Figure 52. World Aesthetic Injectables Production Value Market Share by Effect Duration in 2025

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Figure 53. Up to 6 Months
Figure 54. More than 6 Months to 12 Months
Figure 55. More than 12 Months to 24 Months

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