

# Facial Injectables Market By Product Type (Dermal Fillers, Botox), By End-user (Hospitals, Dermatology Centers, Physician's Office), By Region (North America, Europe, Asia Pacific, RoW) – Global Forecast up to 2025

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## Abstracts

Global Facial Injectables Market by Product Types (Dermal Fillers, Botox), By End-users (Hospitals, Dermatology Centers, Physician's Office), and By Regions (North America, Europe, Asia Pacific, and Rest of the World) – Global Forecast up to 2025

This market research report includes a detailed segmentation of the global facial injectables market by product types (dermal fillers and Botox), by end-users (hospitals, dermatology centers, and physician's office), and by regions (North America, Europe, APAC, and RoW).

### Research Overview

Infoholic Research predicts that the global facial injectables market will grow at a CAGR of 10.81% during the forecast period 2019–2025. Facial injectables refer to the aesthetic treatment of the skin that results in a more youthful look. There are a variety of aesthetic procedures performed, including those used to treat skin conditions (deep lines & wrinkles), change the contours of jaw or lips, scars & depressions in the skin resulting from acne, congenital or injury imperfections, etc. Dermal fillers and Botox are the top-leading products used to treat these skin conditions. Dermal fillers offer treatment to face, neck, and hands, thereby resulting in a smooth, fuller, and more youthful look. Dermal fillers are increasingly being adopted due to immediate positive results, which have become popular globally. There are temporary fillers that are absorbed by the body and are classified into collagen-based fillers, hyaluronic acid-

based fillers, calcium hydroxylapatite, and poly-L-lactic acid. These have provisional results and are used every 4–6 months. Permanent fillers are made of polymethylmethacrylate (PMMA), which are not absorbed by the body. ArteFill is among the most common brand used as permanent fillers.

An increase in beauty consciousness, growing awareness about facial injections, increasing demand for non-surgical & minimally invasive cosmetic surgeries, and anticipated launch of new products are expected to drive the market growth during the forecast period. The market is also witnessing few emerging trends, including increase in demand for combination treatments, rise in medical tourism, and increasing disposable income, which will drive the market at a significant pace during the forecast period. The facial injectables market in Brazil, India, China, and Russia is also expected to grow at a rapid pace during the forecast period as the adoption of cosmetic procedures in these countries is high.

Most of the vendors are focusing on evidence-based clinical results for the development and advancement of the product. The advancements in technology, the emergence of innovative products with the adoption of minimally invasive procedures, and the demand for facial injectables for the treatment of various skin conditions are driving the market growth.

The market is fueled by innovation and new technological techniques & procedures. The presence of large, small, and local vendors in the market has led to high competition among them. The global facial injectables market is dominated by Allergan, Galderma, Merz Pharma, and Ipsen. These vendors are consistently increasing their footprint in the market; regional vendors are finding it more difficult to compete with larger players, especially on quality, pricing, market reach, and financial resources. Further, they are expanding their inorganic growth by acquiring regional or local players.

Segmentation by Product Types:

Dermal Fillers

Botox

The market players compete on various factors: price, availability, brand, and variety. Price is set to become a major base for competition among players specializing in certain products to gain an edge in the market. The companies with better-skilled

workforce and financial resources are able to manufacture products that may render competitors merchandise non-competitive even before they are launched. This makes it difficult for the latter to recover R&D and commercialization costs. As a result, vendors must develop new products and stay abreast of emerging market trends that influence their product lines.

#### Segmentation by End-users:

Hospitals

Dermatology Centers

Physician's Office

In 2018, dermatology centers gained the highest share in the facial injectables market with a large volume of cosmetic treatments globally.

#### Segmentation by Regions:

North America

Europe

Asia Pacific

RoW

According to the Infoholic Research analysis, North America accounted for the largest share of the global facial injectables market in 2018. In North America, the US and Canada are the leading countries with the newest advancements and comprehensive options in choosing aesthetic/cosmetic treatments. Europe is the second leading region. The market in Europe was largely driven by advancements in aesthetic techniques and growing cosmetic trends. An increase in the aging population, high adoption of advanced products, and increasing demand for minimally invasive procedures are driving the market. The leading European countries are Germany, France, UK, and Italy.

The APAC region is expected to grow faster due to the increased adoption of dermal fillers. The growing number of facial aesthetic clinics offer immense opportunities for the market growth. HA dermal filler treatments, in particular, are gaining popularity in the fast-growing network of spas and beauty clinics in APAC. India and China are estimated to be the fastest-growing countries in this region. Dermal fillers are likely to show strong potential as consumers are moving toward using non-invasive and low-cost anti-aging aesthetic treatments.

**Competitive Analysis –** The competition among leading vendors is due to the availability of a wide range of facial injectables with different brand names in the market. This provides an opportunity for healthcare consumers to choose products based on brand, price, features, model, and discount. Most of the vendors are focusing on delivering bundling product models for increasing their sales and having a larger market share in terms of revenue. Many vendors have established their market presence globally and focus strongly on marketing and selling their products by competing with small and regional vendors. Therefore, the competition among the vendors is expected to hinder the market growth, yet the market will have more products developed and launched in the market. Most of the vendors are primarily focusing on R&D to offer fast technological progress. Manufacturers, including major and mid-sized companies, in the facial injectables market are competing with newer products, advanced features, quality, safety, and efficacy.

The competition is growing among the healthcare service providers – hospitals, dermatology centers, and physician's offices where the customer groups are being consolidated for purchasing products. Diversified product portfolio companies, large volume product buyers (hospitals), and primary competitors (single product manufacturers) have strong market positions in certain segments and regions due to their wide range of products and services they offer. New competitors, especially from Asia, are also taking the competition to a new high with quality, safety, and efficacy of the product over the past few years.

Key Vendors:

Allergan plc

Galderma

Merz Pharma GmbH & Co. KGaA

Ipsen S.A.

#### Key Competitive Facts:

The market is highly competitive, with all the players competing to gain the market share. Intense competition, rapid advancements in technology, frequent changes in government policies, and prices are the key factors that confront the market.

The requirement of high initial investment, implementation, and maintenance cost in the market are also limiting the entry of new players.

Responding to competitive pricing pressures specific to each of our geographic markets.

Protection of proprietary technology for products and manufacturing processes.

**Benefits –** The report provides complete details about the usage and adoption rate of facial injectables. Thus, the key stakeholders can know about the major trends, drivers, investments, vertical player's initiatives, and government initiatives toward the medical devices segment in the upcoming years along with details of the pureplay companies entering the market. Moreover, the report provides details about the major challenges that are going to impact the market growth. Additionally, the report gives complete details about the key business opportunities to key stakeholders in order to expand their business and capture the revenue in specific verticals and to analyze before investing or expanding the business in this market.

#### Key Takeaways:

Understanding the potential market opportunity with precise market size and forecast data.

Detailed market analysis focusing on the growth of facial injectables in the aesthetic industry.

Factors influencing the growth of the facial injectables market.

In-depth competitive analysis of dominant and pureplay vendors.

Prediction analysis of the facial injectables industry in both developed and developing regions.

Key insights related to major segments of the facial injectables market.

The latest market trend analysis impacting the buying behavior of the consumers.

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