

Dermatology Excimer Laser Market – Global Industry Size, Share, Trends, Opportunity & Forecast, Segmented by Product (Tabletop Excimer Lasers, Hand-held Excimer Lasers, Trolley Mounted Excimer Lasers), By Application (Psoriasis, Vitiligo, Atopic Dermatitis, Allergic Rhinitis, Alopecia Areata, Others), End User (Hospitals, Dermatology Clinics, Plastic Surgery Centers), By Region & Competition, 2019-2029F

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Abstracts

Global Dermatology Excimer Laser Market was valued at USD 583.58 million in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 9.85% through 2029. The global dermatology excimer laser market is witnessing robust growth, driven by technological advancements, a rising incidence of skin disorders, and an increasing demand for aesthetic treatments. Excimer lasers, particularly those operating at a wavelength of 308 nm, are preferred for their precision and efficacy in managing various dermatological conditions such as psoriasis, vitiligo, and atopic dermatitis.

This market is positioned for significant expansion, bolstered by ongoing innovations and heightened awareness surrounding skin health. Although challenges like high costs and regulatory complexities remain, the overall outlook is favorable. Opportunities for innovation and market expansion are abundant across various regions and applications.

To maximize this growth potential, stakeholders should prioritize enhancing their product portfolios and addressing evolving market demands. This strategic focus will

enable them to effectively leverage emerging opportunities in the excimer laser segment.

Key Market Drivers

Rising Prevalence of Skin Disorders

Prevalence of Chronic Skin Conditions: Chronic dermatological conditions like psoriasis, vitiligo, eczema, and atopic dermatitis are becoming increasingly common worldwide. For instance, over 125 million people globally suffer from psoriasis, a condition characterized by recurring flare-ups and chronic symptoms. Traditional treatments like topical creams and UV therapies often yield limited or slow results.

Excimer Lasers Offer a Targeted, Efficient Alternative: Excimer lasers provide a more targeted treatment, focusing only on the affected skin areas without damaging surrounding tissues. This precision is a significant advantage for patients seeking quicker relief and lasting results, making excimer lasers an attractive solution for both dermatologists and patients. Another key aspect of rising skin disorder prevalence is the increasing cases of both melanoma and non-melanoma skin cancers. Excimer lasers are used in treating early-stage lesions and cosmetic management of skin damage, enhancing the demand for this technology.

As skin disorders like psoriasis and vitiligo become more common, patients are increasingly seeking minimally invasive treatment options. Traditional systemic treatments or biologics come with potential side effects, leading many patients to prefer excimer laser therapy, which offers precision, reduced side effects, and quicker recovery times. Patients dealing with chronic conditions often need frequent and long-term treatments. The excimer laser, requiring fewer treatment sessions compared to traditional methods like UV therapy, appeals to patients and healthcare providers for its efficiency. Patients suffering from conditions that do not respond well to topical creams or oral medications are turning to laser treatments. The excimer laser, particularly the 308 nm wavelength, has proven highly effective in managing treatment-resistant cases. As more success stories emerge, awareness and acceptance of this technology grow, fueling market demand. Excimer lasers can provide tailored treatments based on the severity and location of skin disorders. For conditions like vitiligo, where repigmentation is a priority, excimer lasers provide focused light therapy, encouraging effective results without impacting healthy skin.

Health organizations and dermatology advocacy groups have intensified campaigns to

raise awareness of skin health and the benefits of early intervention in treating disorders like psoriasis and vitiligo. As more patients recognize the need for proactive and effective treatments, the excimer laser market grows in response to heightened demand for advanced care options. The growing number of dermatologists recommending excimer laser therapy for patients with chronic or difficult-to-treat skin disorders contributes to the technology's growing popularity. As dermatologists report positive patient outcomes, more clinics and hospitals adopt excimer laser technology to meet demand. In developed countries with robust healthcare systems, the diagnosis rates for skin disorders have increased. Advanced diagnostic tools and more dermatology specialists mean that conditions such as psoriasis, eczema, and vitiligo are being identified earlier, leading to increased treatment demand. In emerging markets, improved healthcare access is also driving higher diagnosis rates, which directly boosts the need for effective treatments such as excimer lasers. Urbanization, pollution, and lifestyle changes, particularly in emerging markets, are contributing to the rise in skin disorders. For example, increased exposure to harmful UV radiation due to ozone depletion and growing stress levels linked to modern lifestyles have been connected to the rise in conditions like psoriasis. As the prevalence of these disorders grows, the demand for efficient, technologically advanced solutions like excimer lasers also rises.

Many skin conditions like psoriasis and vitiligo are chronic, meaning patients require ongoing care. Excimer lasers provide an effective, ongoing treatment option that addresses flare-ups and relapses over time. This recurring demand ensures a consistent market for excimer laser devices. Given the chronic nature of many skin disorders, excimer laser therapy often becomes part of a long-term treatment plan for patients, ensuring steady demand from both dermatology clinics and hospitals. Rising cases of pediatric skin conditions, such as eczema and vitiligo, are prompting a need for treatments that are safe, effective, and minimally invasive. Excimer lasers, known for their precision and reduced side effects, are increasingly being used to treat children with chronic skin disorders. This segment offers significant growth potential as more pediatric dermatologists adopt excimer lasers.

Technological Advancements in Laser Therapy

Advances in Laser Wavelength Technology: The excimer laser's ability to emit ultraviolet light at a specific wavelength (typically 308 nm) allows it to target only the affected skin areas, minimizing damage to surrounding healthy tissue. This targeted treatment is particularly beneficial for conditions like psoriasis, vitiligo, and eczema, where precision is key to effective treatment without side effects.

Newer excimer lasers offer more refined targeting, improving outcomes for patients with chronic, treatment-resistant conditions. For example, excimer lasers can focus on specific patches of psoriasis, leaving surrounding skin unharmed, which is not possible with traditional phototherapy methods. Technological improvements have reduced the risk of post-treatment hyperpigmentation, a common concern in older laser models. This has led to greater patient satisfaction, particularly in individuals with darker skin tones. Many of the latest excimer lasers come integrated with advanced imaging systems that allow dermatologists to precisely map the affected area before treatment. These systems improve accuracy, ensure optimal treatment dosages, and help to avoid over- or under-treatment.

Compared to traditional UVB phototherapy or other laser treatments, excimer lasers often require fewer sessions to achieve visible results. Technological advancements have further optimized treatment parameters, allowing for quicker sessions while maintaining or improving efficacy. Faster, more effective treatments are more convenient for patients, which boosts satisfaction and encourages more people to seek laser therapy. For chronic conditions like psoriasis or vitiligo, this leads to ongoing demand, as patients often need continuous management of their skin condition. Excimer lasers are non-invasive, with minimal recovery time. This makes them ideal for patients who want effective treatments without the need for surgery or significant downtime. As patients increasingly prefer non-invasive therapies, excimer lasers stand out as a preferred option in dermatological care. New excimer laser devices are often equipped with real-time monitoring systems that adjust laser intensity based on the patient's skin response during treatment. This feature enhances safety and ensures optimal treatment efficacy. Some of the latest excimer lasers are integrated with software that tracks treatment progress over time, allowing dermatologists to analyze data and customize treatments based on patient history. This personalized approach increases the chances of successful outcomes and allows clinicians to refine treatment protocols, boosting patient trust and satisfaction. Some advanced excimer laser systems now support telemedicine capabilities, enabling patients to consult with dermatologists remotely and receive guidance on laser therapy, particularly in follow-up care. This innovation makes dermatology treatments more accessible to patients in remote or underserved areas, expanding the market reach for excimer lasers.

Technological advancements have led to the development of more compact, portable excimer laser systems that can be used in a wider range of clinical settings. Smaller dermatology clinics, private practices, and even mobile dermatology services can now offer excimer laser treatments, broadening the market scope. As excimer laser devices become more user-friendly and compact, they are being adopted by a growing number

of aesthetic clinics and medical spas, which offer both medical and cosmetic treatments. This expansion into non-traditional settings increases the overall market size for these devices. Technological advancements have made excimer lasers more user-friendly, allowing dermatologists to operate the devices more efficiently. Improved software interfaces, touchscreen controls, and automated treatment protocols reduce the learning curve for healthcare professionals, enabling quicker adoption across clinics. Many laser manufacturers now offer comprehensive training modules and certification programs to ensure clinicians can quickly become proficient with new laser technologies. This makes it easier for dermatology practices to integrate excimer laser treatments into their services, thus expanding the adoption of these devices. Some excimer lasers now incorporate AI-driven technology to automate certain aspects of treatment, such as dosage control and treatment duration. These advancements not only reduce human error but also ensure consistent treatment results, making excimer laser therapy more appealing to both providers and patients.

Modern excimer lasers are equipped with advanced cooling mechanisms that help minimize the heat generated during treatment, reducing patient discomfort and the risk of burns. These safety enhancements make excimer laser therapy more attractive for both patients and clinicians. The latest generation of excimer lasers significantly reduces the risk of side effects such as skin irritation, redness, or scarring. Improved safety protocols ensure that patients with sensitive skin or underlying conditions can receive treatment without the typical concerns associated with older laser systems. As excimer laser technology improves, regulatory bodies such as the FDA and the European Medicines Agency (EMA) are approving more devices for broader dermatological use. These approvals build trust among clinicians and patients, driving higher adoption rates. Technological improvements have made excimer lasers more energy-efficient and durable, reducing the overall cost of operation. Maintenance costs have also decreased as manufacturers design longer-lasting components, making excimer lasers more affordable for smaller clinics and dermatology practices. The reduced cost of ownership, coupled with the increased demand for laser treatments, provides a strong return on investment (ROI) for dermatology clinics that invest in excimer lasers. As clinics realize the financial benefits of offering advanced laser treatments, they are more likely to adopt these devices, further driving market growth. As the cost of manufacturing excimer lasers decreases, these devices are becoming more accessible in emerging markets, such as Asia-Pacific and Latin America. The combination of affordability and rising demand for advanced dermatological care in these regions presents a significant growth opportunity for manufacturers.

Key Market Challenges

High Costs of Excimer Laser Devices and Treatments

One of the most significant challenges facing the global excimer laser market is the high upfront cost of acquiring these devices. Advanced excimer laser systems are expensive, often requiring a substantial capital investment from dermatology clinics, hospitals, and aesthetic centers. This limits the ability of smaller clinics or those in emerging markets to adopt these technologies. For smaller dermatology clinics, particularly in developing economies or rural areas, the cost of purchasing and maintaining excimer lasers can be prohibitive. These practices often operate on tighter budgets, and the high cost of these devices reduces their accessibility, limiting market penetration in less affluent regions.

In addition to the initial purchase price, the ongoing maintenance and operational costs of excimer lasers can be high. This includes expenses related to software updates, device calibration, repairs, and the cost of consumables. These additional costs can deter some healthcare providers from investing in excimer laser technology, particularly if patient demand is uncertain or treatments are not reimbursable. The high cost of excimer laser devices translates into expensive treatment sessions for patients. While the technology is highly effective, the price per treatment can be prohibitive, especially for conditions that require multiple sessions. This restricts the accessibility of excimer laser therapy to wealthier patients, limiting its reach in lower-income populations.

In many regions, excimer laser treatments are not fully covered by health insurance, particularly when used for cosmetic purposes or for chronic conditions like psoriasis or vitiligo, where the treatment is considered elective or non-essential. This lack of coverage discourages patients from opting for excimer laser therapy, further constraining market growth.

Stringent Regulatory Approvals and Compliance Requirements

The excimer laser market is subject to stringent regulatory requirements in different regions, particularly in North America and Europe. Obtaining regulatory approval from bodies like the U.S. Food and Drug Administration (FDA), European Medicines Agency (EMA), or other local health authorities can be a lengthy and costly process for manufacturers. Regulatory hurdles can significantly delay the time it takes for new excimer laser products to enter the market. Companies must invest considerable resources into clinical trials, safety testing, and compliance with health standards, all of which can take years to complete. These delays hinder manufacturers from quickly

introducing innovative products and capitalizing on market demand.

Even after gaining regulatory approval, excimer laser manufacturers must continue to adhere to strict safety standards and reporting requirements. Any post-market safety concerns, device malfunctions, or adverse patient outcomes must be reported and addressed promptly. This ongoing regulatory burden increases operational costs for manufacturers and creates barriers for smaller or emerging companies trying to enter the market. The regulatory landscape for excimer lasers varies significantly across different geographies. While some regions have well-established regulatory frameworks, others may have less developed or inconsistent regulations. This can create challenges for manufacturers seeking to expand their market presence globally, as they must navigate diverse regulatory environments, invest in localized compliance measures, and adapt their products to meet specific regional standards.

The complexity and cost associated with meeting regulatory standards can also stifle innovation in the excimer laser market. Smaller companies with limited resources may struggle to invest in research and development (R&D) due to the financial burden of regulatory compliance, which can slow the introduction of new, innovative technologies into the market.

Limited Awareness and Access in Emerging Markets

While excimer lasers are widely known and utilized in developed countries, awareness of their benefits and applications remains limited in many emerging markets. Patients in these regions may not be familiar with advanced dermatological treatments, leading to low demand for excimer laser therapy. In some emerging markets, cultural factors or lack of education about skin health and dermatological conditions further exacerbate this issue. For instance, patients may prioritize more traditional or less expensive treatment methods over excimer laser therapy due to a lack of understanding about its efficacy and safety. This low awareness limits the growth potential for excimer lasers in these regions, where there is significant untapped demand.

Emerging markets often face challenges related to underdeveloped healthcare infrastructure, particularly in rural areas. This includes a lack of access to advanced medical technologies, specialized dermatological care, and trained professionals capable of using excimer lasers. Without sufficient infrastructure, even in regions where there is growing demand for aesthetic or dermatological treatments, the availability of excimer laser therapy remains limited. Urban areas in emerging markets may have access to excimer laser treatments due to the presence of larger, better-equipped

healthcare facilities, but rural and less developed areas often lack these services. This geographic disparity restricts the overall market size, as excimer laser therapy is not accessible to large segments of the population.

Even in regions where there is increasing awareness and demand for advanced dermatology treatments, the high cost of excimer laser devices and the subsequent treatment expenses can be prohibitive. In many emerging economies, healthcare budgets are limited, and patients often must pay out-of-pocket for elective treatments. This restricts the adoption of excimer laser therapy to a small, wealthier segment of the population, limiting market growth in these areas.

Key Market Trends

Focus on Holistic Skin Health and Preventive Care

As consumers become more aware of the importance of holistic skin health, demand for advanced treatments like excimer lasers could rise beyond traditional therapeutic applications. Dermatology clinics are increasingly incorporating preventive care and maintenance into their offerings, focusing on treatments that not only address existing conditions but also prevent future skin issues. Excimer lasers, with their ability to address a range of skin concerns from pigmentation to inflammatory conditions, could see increased demand as part of a broader focus on skin health and wellness.

The growth of wellness centers and skin-care clinics that offer both therapeutic and cosmetic treatments provides an additional market opportunity. As more clinics offer comprehensive skin health solutions, excimer lasers may become a staple in these offerings, particularly for their ability to treat both medical and aesthetic skin conditions.

Sustainability and Eco-Friendly Technologies

Sustainability is becoming an increasingly important factor for both consumers and healthcare providers. The demand for eco-friendly medical devices and technologies is growing, and companies that prioritize sustainable manufacturing practices and energy-efficient devices may gain a competitive edge. Innovations in excimer laser technology that focus on reducing energy consumption, minimizing waste, or using eco-friendly materials could appeal to environmentally conscious consumers and healthcare providers.

A growing number of patients, particularly younger demographics, are becoming more

selective about the products and treatments they choose based on environmental impact. The integration of sustainable practices in the production and use of excimer laser systems may become a differentiating factor for clinics and manufacturers looking to appeal to this eco-conscious consumer base.

Segmental Insights

Product Insights

Based on the category of Product, the Trolley-mounted Excimer Laser segment emerged as the dominant in the global market for Dermatology Excimer Laser in 2023. Trolley-mounted excimer lasers are designed to offer a balance between portability and high performance. While compact and easy to maneuver around clinical environments, they are powerful enough to perform complex dermatological treatments. This mobility is crucial for dermatology practices and hospitals where space constraints or frequent movement between treatment rooms require flexible equipment. Many dermatology clinics treat a variety of conditions and rely on multipurpose equipment. Trolley-mounted excimer lasers can be quickly moved between treatment areas or shared among multiple specialists, making them highly efficient for busy clinical settings. This flexibility is a major reason why they are favored by both large hospitals and smaller dermatology practices. Trolley-mounted lasers are equipped with a user-friendly design that makes them adaptable across different treatment environments. Whether in a large dermatology center, a small clinic, or even a hospital department focused on multiple specialties, the trolley-mounted design allows for seamless integration into existing workflows. This adaptability enhances their appeal to a wide range of healthcare providers globally.

Trolley-mounted excimer lasers are typically equipped with advanced technology that delivers precise, targeted laser energy. This is particularly important for treating specific skin conditions like vitiligo, psoriasis, and eczema, where localized treatment is needed. The high precision of these lasers reduces collateral damage to surrounding healthy tissue, improving treatment outcomes and minimizing side effects. Dermatology practices require dependable equipment, and trolley-mounted excimer lasers are known for their reliability and consistent performance. Their sturdy construction and advanced laser technology ensure long-lasting use, minimizing maintenance requirements and reducing downtime. This makes them an attractive investment for healthcare facilities looking for long-term, cost-effective solutions. Trolley-mounted lasers often come with sophisticated user interfaces that allow for easy adjustment of laser settings to match the specific needs of each patient and condition. Additionally, these systems incorporate

a variety of safety features, such as real-time feedback and automated shut-off mechanisms, which improve patient safety and build confidence among healthcare providers. The advanced capabilities of trolley-mounted excimer lasers ensure that they remain at the forefront of technological advancements in the dermatology excimer laser market.

Trolley-mounted excimer lasers are highly effective in treating a range of chronic skin conditions, including psoriasis, vitiligo, eczema, and other inflammatory or autoimmune disorders. These conditions often require ongoing treatment, and the high efficacy and safety profile of trolley-mounted lasers make them a preferred option for both patients and clinicians.

In addition to therapeutic dermatology, trolley-mounted excimer lasers are also used for cosmetic treatments such as skin resurfacing, scar revision, and pigmentation correction. Their versatility in addressing both medical and aesthetic concerns broadens their market potential, appealing to clinics offering comprehensive skin care services. Trolley-mounted excimer lasers are also popular because of their ability to treat large surface areas of the skin in a single session. This is particularly beneficial for patients with extensive psoriasis or vitiligo patches. The ability to cover large areas quickly improves patient throughput for clinics and hospitals, enhancing operational efficiency. For dermatology centers and clinics that treat a high volume of patients, trolley-mounted excimer lasers represent a cost-effective investment. Their durability, combined with their ability to treat multiple patients per day, ensures a high return on investment (ROI) over time. This economic advantage is particularly important for healthcare providers looking to maximize their financial efficiency. Trolley-mounted lasers generally require less maintenance compared to larger, stationary systems, which can be more prone to technical issues. This means fewer disruptions to daily operations, allowing clinics to maintain a steady flow of treatments and reduce the long-term cost of ownership. These factors are expected to drive the growth of this segment.

Application Insights

The Psoriasis segment is projected to experience rapid growth during the forecast period. Psoriasis is one of the most common chronic skin conditions, affecting an estimated 2-3% of the global population. This equates to tens of millions of patients worldwide seeking effective treatment options. As a result, the large patient pool creates a significant and continuous demand for psoriasis therapies, including excimer laser treatments. Psoriasis is a chronic, relapsing disease that requires ongoing treatment. Unlike acute skin conditions, psoriasis often persists over a patient's lifetime,

necessitating regular intervention. This long-term management approach drives demand for effective and safe therapeutic options, where excimer lasers play a crucial role.

Traditional treatments for psoriasis, such as topical creams, phototherapy, and systemic medications, are often limited by side effects or incomplete effectiveness. Excimer laser therapy offers a targeted, non-invasive alternative, making it a preferred choice for patients with moderate to severe cases, especially those who do not respond well to conventional treatments. This helps position excimer laser therapy as a leading option for managing psoriasis. The key advantage of excimer lasers in treating psoriasis lies in their ability to deliver focused, high-energy UVB light directly to the affected areas of the skin. This allows for highly localized treatment, which is particularly beneficial for patients with limited or small patches of psoriasis. By avoiding unnecessary exposure to healthy skin, excimer lasers minimize side effects like burns or skin thinning, which are more common with broad-spectrum phototherapy. Studies have shown that excimer laser therapy can achieve faster results in reducing psoriasis plaques compared to traditional phototherapy. The precision and intensity of the laser energy accelerate the clearing of psoriatic lesions, leading to quicker patient recovery. This efficiency makes excimer laser treatments highly attractive for patients and healthcare providers alike, further driving demand in the psoriasis segment. Patients suffering from psoriasis often face long-term emotional and physical burdens due to the visibility and discomfort of the condition. The rapid and effective results offered by excimer laser therapy not only improve physical symptoms but also enhance patient quality of life. High patient satisfaction rates associated with excimer laser treatments lead to higher compliance, repeat sessions, and positive word-of-mouth referrals, reinforcing its dominance in the market. These factors collectively contribute to the growth of this segment.

Regional Insights

North America emerged as the dominant in the global Dermatology Excimer Laser market in 2023, holding the largest market share in terms of value. North America, particularly the United States and Canada, boasts a highly advanced healthcare system characterized by state-of-the-art medical facilities and a concentration of dermatology specialists. These facilities are equipped with the latest technology, including excimer lasers, making it easier for dermatologists to adopt and utilize these systems effectively. Patients in North America have greater access to specialized dermatology clinics and treatment centers, which often provide a wider range of advanced treatment options, including excimer laser therapy. This access encourages the adoption of excimer lasers for various dermatological conditions, driving growth in the market. The robust

healthcare infrastructure facilitates a high patient volume for dermatological treatments. The increasing incidence of skin disorders, coupled with rising aesthetic concerns, leads to more patients seeking treatment options. This high demand for effective solutions, such as excimer lasers, ensures that dermatology practices remain profitable and can justify investments in advanced technologies.

The prevalence of skin disorders such as psoriasis, eczema, vitiligo, and skin cancer in North America is significant. According to estimates, approximately 7.5 million Americans suffer from psoriasis alone. This high incidence drives demand for effective treatment options, including excimer laser therapy. As the population ages, the prevalence of skin disorders typically increases. The aging demographic in North America often leads to a rise in conditions such as actinic keratosis, skin cancers, and other dermatological issues that require advanced treatment modalities like excimer lasers. Public awareness campaigns and education regarding skin health and available treatment options have heightened the demand for dermatological services. This has led to an increase in patients seeking professional care for skin disorders, further propelling the market for excimer lasers.

North America is home to numerous leading medical device manufacturers and research institutions that are heavily invested in developing and improving dermatological technologies, including excimer lasers. This commitment to innovation has resulted in advanced laser systems with enhanced efficacy and safety profiles. The competitive landscape in North America has led to a diverse range of excimer laser products available for various applications, including psoriasis, vitiligo, and cosmetic treatments. This variety ensures that healthcare providers can select the most suitable technology for their practice, driving further adoption. North American consumers are increasingly prioritizing aesthetics, leading to a higher demand for non-invasive and minimally invasive cosmetic procedures. Excimer lasers, known for their effectiveness in skin rejuvenation, scar treatment, and pigmentation correction, align perfectly with this trend, bolstering their market presence.

Key Market Players

Ra Medical Systems Inc.

Shenzhen GSD Tech Co., Ltd.

Alma Lasers Ltd.

STRATA Skin Sciences, Inc.

The Daavlin Company

Fotona d.o.o.

Beijing Sincoheren S&T Development co., Ltd

Lumenis Be Ltd.

Hologic, Inc.

DEKA Research & Development Corp.

Report Scope:

In this report, the Global Dermatology Excimer Laser Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Dermatology Excimer Laser Market, By Product:

Tabletop Excimer Lasers

Hand-held Excimer Lasers

Trolley Mounted Excimer Lasers

Dermatology Excimer Laser Market, By Application:

Psoriasis

Vitiligo

Atopic Dermatitis

Allergic Rhinitis

Alopecia Areata

Others

Dermatology Excimer Laser Market, By End User:

Hospitals

Dermatology Clinics

Plastic Surgery Centers

Dermatology Excimer Laser Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. DERMATOLOGY EXCIMER LASER MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Tabletop Excimer Lasers, Hand-held Excimer Lasers, Trolley Mounted Excimer Lasers)
 - 5.2.2. By Application (Psoriasis, Vitiligo, Atopic Dermatitis, Allergic Rhinitis, Alopecia Areata, Others)

- 5.2.3. By End User (Hospitals, Dermatology Clinics, Plastic Surgery Centers)
- 5.2.4. By Region
- 5.2.5. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA DERMATOLOGY EXCIMER LASER MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By Application
 - 6.2.3. By End User
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Dermatology Excimer Laser Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product
 - 6.3.1.2.2. By Application
 - 6.3.1.2.3. By End User
 - 6.3.2. Canada Dermatology Excimer Laser Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Application
 - 6.3.2.2.3. By End User
 - 6.3.3. Mexico Dermatology Excimer Laser Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Application
 - 6.3.3.2.3. By End User

7. EUROPE DERMATOLOGY EXCIMER LASER MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product
 - 7.2.2. By Application
 - 7.2.3. By End User
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Dermatology Excimer Laser Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product
 - 7.3.1.2.2. By Application
 - 7.3.1.2.3. By End User
 - 7.3.2. United Kingdom Dermatology Excimer Laser Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Application
 - 7.3.2.2.3. By End User
 - 7.3.3. Italy Dermatology Excimer Laser Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Application
 - 7.3.3.2.3. By End User
 - 7.3.4. France Dermatology Excimer Laser Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Application
 - 7.3.4.2.3. By End User
 - 7.3.5. Spain Dermatology Excimer Laser Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Product

7.3.5.2.2. By Application

7.3.5.2.3. By End User

8. ASIA-PACIFIC DERMATOLOGY EXCIMER LASER MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

8.2.2. By Application

8.2.3. By End User

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Dermatology Excimer Laser Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Product

8.3.1.2.2. By Application

8.3.1.2.3. By End User

8.3.2. India Dermatology Excimer Laser Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Product

8.3.2.2.2. By Application

8.3.2.2.3. By End User

8.3.3. Japan Dermatology Excimer Laser Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Product

8.3.3.2.2. By Application

8.3.3.2.3. By End User

8.3.4. South Korea Dermatology Excimer Laser Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Product

8.3.4.2.2. By Application

8.3.4.2.3. By End User

8.3.5. Australia Dermatology Excimer Laser Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Product

8.3.5.2.2. By Application

8.3.5.2.3. By End User

9. SOUTH AMERICA DERMATOLOGY EXCIMER LASER MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Product

9.2.2. By Application

9.2.3. By End User

9.2.4. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Dermatology Excimer Laser Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Product

9.3.1.2.2. By Application

9.3.1.2.3. By End User

9.3.2. Argentina Dermatology Excimer Laser Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product

9.3.2.2.2. By Application

9.3.2.2.3. By End User

9.3.3. Colombia Dermatology Excimer Laser Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By Application

9.3.3.2.3. By End User

10. MIDDLE EAST AND AFRICA DERMATOLOGY EXCIMER LASER MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By Application

10.2.3. By End User

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Dermatology Excimer Laser Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Product

10.3.1.2.2. By Application

10.3.1.2.3. By End User

10.3.2. Saudi Arabia Dermatology Excimer Laser Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Product

10.3.2.2.2. By Application

10.3.2.2.3. By End User

10.3.3. UAE Dermatology Excimer Laser Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product

10.3.3.2.2. By Application

10.3.3.2.3. By End User

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Recent Developments

12.2. Product Launches

12.3. Mergers & Acquisitions

13. GLOBAL DERMATOLOGY EXCIMER LASER MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

14.1. Ra Medical Systems Inc.

14.1.1. Business Overview

14.1.2. Product & Service Offerings

14.1.3. Recent Developments

14.1.4. Financials (If Listed)

14.1.5. Key Personnel

14.1.6. SWOT Analysis

14.2. Shenzhen GSD Tech Co., Ltd.

14.3. Alma Lasers Ltd.

14.4. STRATA Skin Sciences, Inc.

14.5. The Daavlin Company

14.6. Fotona d.o.o.

14.7. Beijing Sincoheren S&T Development co., Ltd

14.8. Lumenis Be Ltd.

14.9. Hologic, Inc.

14.10. DEKA Research & Development Corp.

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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