

# **Non-Surgical Cosmetic Procedures Market Size, Share and Growth Outlook 2026: By Procedure, By Gender, By End User, Companies to 2034**

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## **Abstracts**

The global Non-Surgical Cosmetic Procedures Market size is forecast to increase from \$41.03 Billion in 2026 to \$100.43 Billion in 2034 at a CAGR of 11.84% between 2026 and 2034.

The Non-Surgical Cosmetic Procedures market report provides detailed analysis and outlook of Non-Surgical Cosmetic Procedures segments including By Procedure (Botulinum Toxin (Botox), Dermal Fillers, Non-surgical Skin Tightening, Chemical Peels, Non-surgical Fat Reduction, Laser Hair Removal, Photo Rejuvenation), By Gender (Female, Male), By End User (Hospitals and Specialty Clinics, Medspas and Aesthetic Centers, Traditional Spas, Healthcare Professionals-Owned Clinics) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

### **Non-Surgical Cosmetic Procedures Industry Overview**

#### **Personalized Aesthetic Treatments Are Redefining Non-Surgical Cosmetic Care**

The non-surgical cosmetic procedures industry continues to expand as consumers increasingly seek minimally invasive aesthetic solutions that deliver natural-looking results with limited downtime. Advances in injectable treatments, regenerative skincare, collagen-stimulating technologies, and personalized aesthetic planning are transforming treatment approaches across dermatology and aesthetic medicine. Patients are moving away from dramatic cosmetic alterations and toward subtle enhancements that preserve facial individuality while addressing signs of aging. This shift is encouraging clinics, manufacturers, and practitioners to adopt comprehensive treatment strategies that

combine injectables, skincare, and regenerative technologies to achieve balanced and long-lasting outcomes.

### Natural-Looking Results and Full-Face Approaches Are Driving Market Evolution

One of the most significant industry trends is the growing preference for holistic aesthetic treatment planning. Galderma reinforced this movement through its 'Wake Up to Restylane' campaign, promoting personalized hyaluronic acid treatment plans designed to deliver refreshed and natural outcomes. Industry experts across major aesthetic conferences have similarly highlighted a shift toward ultranatural results, with practitioners increasingly favoring conservative injection techniques and collagen-stimulating approaches over aggressive volumization strategies. Complementing this trend, Allergan Aesthetics released consumer research showing rising demand for proactive aging management and comprehensive full-face treatment plans rather than isolated procedure-based interventions. These developments indicate a broader industry transition toward personalized, prevention-oriented aesthetic care.

### Integrated Skincare and Regenerative Aesthetics Strengthen Clinical Outcomes

The industry is increasingly combining professional procedures with evidence-based skincare and regenerative treatment protocols. Galderma expanded this strategy through the launch of the ALASTIN Signature Practices program, recognizing dermatology and plastic surgery clinics that integrate advanced peri-procedural skincare into patient treatment pathways. This approach reflects growing clinical recognition that skincare, recovery management, and tissue health are critical components of successful aesthetic outcomes. As patients seek more sophisticated and individualized treatment experiences, providers are increasingly adopting integrated care models that combine injectables, regenerative technologies, skincare regimens, and long-term maintenance programs. These developments highlight how personalization, regenerative aesthetics, and comprehensive treatment planning are reshaping the non-surgical cosmetic procedures industry.

### Non-Surgical Cosmetic Procedures Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Non-Surgical Cosmetic Procedures market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include-

AbbVie Inc., Merz Pharma GmbH & Co. KGaA, Bausch Health Companies Inc. (Solta Medical), Cutera, Inc., Cynosure Lutronic, Alma Lasers Ltd., Galderma, Anika Therapeutics, Inc., Hologic, Inc., Lumenis Be Ltd.. The Non-Surgical Cosmetic Procedures market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Non-Surgical Cosmetic Procedures industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Non-Surgical Cosmetic Procedures Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Non-Surgical Cosmetic Procedures companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Non-Surgical Cosmetic Procedures markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Non-Surgical Cosmetic Procedures Market Competitive Benchmarking and Company Analysis

Leading companies in Non-Surgical Cosmetic Procedures industry include- AbbVie Inc., Merz Pharma GmbH & Co. KGaA, Bausch Health Companies Inc. (Solta Medical),

Cutera, Inc., Cynosure Lutronic, Alma Lasers Ltd., Galderma, Anika Therapeutics, Inc., Hologic, Inc., Lumenis Be Ltd.. The Non-Surgical Cosmetic Procedures market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Non-Surgical Cosmetic Procedures Markets in 2026 and beyond-  
Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Non-Surgical Cosmetic Procedures market remains one of the strongest-performing segments in the country.

The US Non-Surgical Cosmetic Procedures Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Non-Surgical Cosmetic Procedures market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Non-Surgical Cosmetic Procedures industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Non-Surgical Cosmetic Procedures markets

Canada's strong Non-Surgical Cosmetic Procedures sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The

Canadian Non-Surgical Cosmetic Procedures market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Non-Surgical Cosmetic Procedures Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Non-Surgical Cosmetic Procedures market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Non-Surgical Cosmetic Procedures population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Non-Surgical Cosmetic Procedures industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Non-Surgical Cosmetic Procedures market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Non-Surgical Cosmetic Procedures sales through 2034

France Non-Surgical Cosmetic Procedures companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were

651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

**UK Non-Surgical Cosmetic Procedures Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain**

Small high-need consumer segments remain key priority of Non-Surgical Cosmetic Procedures distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or £280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was £49 billion (14.1%) and voluntary health insurance was £9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

**China Non-Surgical Cosmetic Procedures Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years**

China Non-Surgical Cosmetic Procedures market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Non-Surgical Cosmetic Procedures industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Non-Surgical Cosmetic Procedures industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

**India Non-Surgical Cosmetic Procedures Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India**

Indian Non-Surgical Cosmetic Procedures market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Non-Surgical Cosmetic Procedures market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

## Middle East and Africa Non-Surgical Cosmetic Procedures Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

## Non-Surgical Cosmetic Procedures Market Segmentation

### By Procedure

#### Botulinum Toxin (Botox)

Dermal Fillers

Non-surgical Skin Tightening

Chemical Peels

Non-surgical Fat Reduction

Laser Hair Removal

Photo Rejuvenation

By Gender

Female

Male

By End User

Hospitals and Specialty Clinics

Medspas and Aesthetic Centers

Traditional Spas

Healthcare Professionals-Owned Clinics

Leading Companies in Non-Surgical Cosmetic Procedures Industry (2026)

AbbVie Inc.

Merz Pharma GmbH & Co. KGaA

Bausch Health Companies Inc. (Solta Medical)

Cutera, Inc.

Cynosure Lutronic

Alma Lasers Ltd.

Galderma

Anika Therapeutics, Inc.

Hologic, Inc.

Lumenis Be Ltd.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,  
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,  
Other Africa

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Laser Hair Removal

Photo Rejuvenation

#### By Gender

Female

Male

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Lumenis Be Ltd.

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