



MEDICAL INSIGHT<sup>®</sup>

## Global Facial Injectables Market Study

November 2016

## i. Methodology

This Facial Injectables Mini Report was compiled from a wide variety of public and proprietary sources. Information was cross-checked against other data, using Medical Insight's proprietary forecasting models, and synthesized into both qualitative and quantitative analyses and projections.

Public sources that were utilized include:

- articles in trade publications, medical journals and regulatory documents
- articles in consumer magazines and newspapers
- company news releases, website information, patent documents, marketing materials and financial filings
- information from trade associations

Proprietary sources that were utilized include:

- Medical Insight's extensive database of industry and product information
- Medical Insight survey data
- industry analyst reports
- exclusive interviews with, and feedback from company executives, researchers, sales representatives, physicians, patients, consultants and other industry experts

## **ii. New in November 2016**

This mini report represents the 14th edition of Medical Insight, Inc.'s Facial Injectables mini-report series. Like its predecessor, which was issued in December 2015, this report contains the latest industry news and updated market forecasts, which take into account recent technology, product, company, regulatory and other developments, as well as an in-depth analysis of the competitive positions of key players selling to both core and non-core aesthetic practices.

In addition to updated qualitative and quantitative product, manufacturer and market information, this report also includes new profiles on Asian suppliers of neurotoxins and dermal fillers.

### iii. Disclaimer

Information in this study has been obtained by Medical Insight, Inc. (Aliso Viejo, Calif.), from sources believed to be reliable. While Medical Insight believes the data provided herein to be accurate, no expressed or implied guarantees regarding accuracy or adequacy are made. Product and corporate data can change very quickly and without notice. The interested reader is encouraged to contact manufacturers directly.

This study is not intended as a substitute for proper due diligence. Although an attempt has been made to provide thorough coverage of the subject matter of this report, no guarantees regarding completeness or thoroughness are made. Medical Insight is not responsible for any errors, omissions or results obtained from use of information provided herein.

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Michael Moretti has served as a medical industry analyst and strategic advisor for more than 20 years. As an industry consultant, Mr. Moretti specializes in strategic business development projects and high-growth, emerging market segments. He provides custom reports and confidential market studies for a variety of clients, including global medical and pharmaceutical companies.

In 1993, Mr. Moretti founded Medical Insight, Inc., the leader in focused aesthetic market research offering comprehensive data on procedure volume and growth, revenue forecasts and new product introductions. Under Mr. Moretti's leadership, Medical Insight publishes global market studies and forecasts for major industry sectors such as facial injectables, cosmeceuticals, body shaping procedures, skin rejuvenation technologies and home-use aesthetic products. Medical Insight also sponsors executive business forums to address scientific developments and market trends for the investment community.

Mr. Moretti is the founder of *Aesthetic TV*<sup>®</sup>, the first and only one-stop online resource for current, reliable information about cosmetic and anti-aging treatments. *Aesthetic TV* offers expert advice for consumers via interviews with the top physicians in the field, and unprecedented access to the latest beauty-enhancing procedures and products created specifically to help people look and feel their absolute best.

Mr. Moretti is also founder and publisher of *THE Aesthetic Guide*<sup>®</sup> – a digital and print publication from Medical Insight featuring in-depth reports on new products, procedures and trends, reaching over 70,000 physicians, industry executives and investment analyst subscribers globally. Special editions of *THE Aesthetic Guide* address the European market and the Asian markets.

In 2007, Mr. Moretti debuted *THE Aesthetic Show*<sup>™</sup>, the first multidisciplinary annual business to business trade show that brings thousands of the highest profile physicians and medical professionals together in Las Vegas to learn about the newest aesthetic procedures, products and technologies in a dynamic, interactive, educational format. For more information please visit: [www.miinews.com](http://www.miinews.com).

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# Section 1 Executive Summary

The market for facial injectables continues to grow strongly, although gains through the foreseeable future will be pressured by rising competition and industry consolidation. In 2015, the total global market for all injectables reached almost \$3 billion.

Through the forecast period, total global sales of neurotoxins are expected to rise by 10.2% per year to reach over \$2.4 billion in 2020. This is higher than the 8.8% CAGR predicted in the prior edition of this report. Through 2020, worldwide sales of dermal fillers are expected to expand by 10.9% per year, on average, from \$1.48 billion in 2015 to nearly \$2.5 billion in 2020. This is in line with the rate of growth predicted in the prior edition of this report.

Close to 11 million cosmetic neurotoxin procedures were performed worldwide in 2015. This includes BOTOX, as well as injections with other neurotoxins such as Ipsen / Galderma's Dysport, Merz's Xeomin and Lanzhou Institute's Hengli. By 2020, the total number of cosmetic neurotoxin procedures (excluding injections for the treatment of migraines, hyperhidrosis, etc.) is expected to exceed 19 million treatments, with strong international growth. Total procedure volume for dermal fillers in 2015 was estimated at 6.3 million treatments. Through 2020, procedure volume will expand to nearly 10 million injections. For both neurotoxins and dermal fillers, average treatment frequency will rise relatively slowly.

**Figure 19**  
**Change in Market Shares of Top Neurotoxin Suppliers, 2015 – 2020**

