Dermal Filler Market: Clinics and Hospital Pharmacies Most Popular Distribution Segment: North America and Europe Industry Analysis and Opportunity Assessment, 2016-2026

Description: Dermal fillers are implants classified as medical devices by US FDA and are used in aesthetic procedures such as anti-aging, aesthetic corrections and facial contours. Dermal fillers are used for anti-aging practices for removal of wrinkles and folds in nasolabial, volume loss in chin and cheek area, lines and wrinkles around eye. Dermal fillers considered in the report include absorbable dermal fillers and non-absorbable dermal fillers depending upon their bio-degradability after injecting inside the dermal area below skin.

Based on the material used, there are five types of dermal fillers considered in the report which include hyaluronic acid (HA) based, poly-l-lactic acid (PLLA) based, calcium hydroxylapatite (CaHA) based, collagen based and polymethylmethacrylate (PMMA) based. Among those five types considered first four are absorbable while PMMA is non-absorbable.

All the absorbable fillers are ingredients naturally present in the body and hence get broken down after certain period of time (3 to 24 months). The absorbable fillers may be animal derived, plant derived, bacteria derived or chemically derived. The non-absorbable fillers are chemically derived and last for up to five years. The quantity required for achieving the desired result varies, depending on type of filler and application area.

In terms of revenue, the North America and Europe dermal filler market is projected to register a CAGR of 6.4% during the forecast period and is expected to be valued at US$ 2,800.4 Mn by the end of 2026.

Rising demand for non-invasive aesthetic procedures and an increasing ageing population is driving the growth of the North America and Europe dermal filler market

Growth of North America and Europe dermal filler market is primarily driven by reasons such as aging population, increasing expenditure by public and private sources on healthcare, rising demand for non-invasive aesthetic procedures, introduction of novel application areas beside anti-aging like treatment of HIV induced facial lipoatrophy and enhancement of dorsal area of hand are expected to drive the North America and Europe dermal filler market. However, higher cost associated with the dermal filler procedure, patch up or re-injection needed for achieving the desired facial rejuvenation for absorbable dermal fillers and some post procedure complications associated with dermal fillers like bruising, redness and granulation are some factors expected to hamper growth of the North America and Europe dermal filler market over the forecast period.

Market segmentation

By Product type
- Absorbable
- Non-Absorbable

By Ingredient
- Hyaluronic Acid
- Poly-L-Lactic Acid
- Calcium Hydroxylapatite
- Polymethylmethacrylate
- Collagen

By Distribution Channel
- Retail Pharmacies and Drug Stores
- Clinics and Hospital Pharmacies
- Online Pharmacies

By Region
Absorbable dermal filler product type segment dominated the North America and Europe dermal filler market in 2015.

Absorbable filler product type segment is expected to witness relatively higher growth in terms of value in the North America and Europe dermal filler market over the forecast period. Also, in terms of revenue share, absorbable dermal filler product type segment dominated the North America and Europe dermal filler market in 2015 and is expected to continue its dominance throughout the forecast period.

Hyaluronic acid material type segment is expected to register a high CAGR during the forecast period.

In terms of revenue share, hyaluronic acid material type segment dominated the North America and Europe dermal filler market in 2015 and is expected to maintain traction by 2026 end, registering a high CAGR as compared to other segments.

Clinics and hospital pharmacies distribution segment is the most popular and has a higher revenue share.

Based on distribution channel, the market is segmented into retail pharmacies and drug stores, clinics and hospital pharmacies and online sales. Currently, clinics and hospital pharmacies distribution segment accounts for relatively higher revenue share, followed by retail pharmacies and drug stores.

North America is expected to be the dominant regional market by 2016 end.

The North America and Europe dermal filler market is segmented into three major regions: North America, Western Europe and Eastern Europe. In terms of value, North America is expected to be the dominant regional market by 2016 end, and is expected to register a CAGR of 6.5% over the forecast period. Western Europe is expected to be the fastest growing market in terms of revenue growth in the North America and Europe dermal filler market, registering a CAGR of 6.8% over the forecast period. Eastern Europe dermal filler market is expected to witness a CAGR of 5.1% over the forecasted period.

Key market players are focusing on expanding their geographic reach to enhance their market share.

Some key players in the North America and Europe dermal filler market included in this report are Allergan Plc., Galderma Pharma S.A., Sinclair Pharma S.A., Anika Therapeutics Inc., Merz Pharma GmbH & Co. KGaA, Suneva Medical Inc., Teoxane Laboratories Inc., Prollenium Medical Technologies Inc., Laboratoires Vivacy S.A., Adoderm GmbH. Key players are focusing on establishing distribution agreements to increase their geographic reach. Moreover, companies are targeting small and local manufacturers of dermal fillers to increase their product portfolio and strengthen their geographic footprint. Also, new applications such as fillers for enhancement of dorsal area of hand and paralysed vocal cords treatment are influencing companies to adopt new strategies to enhance market share. The top companies dominating the North America dermal filler market are Allergan Plc., Galderma S.A, and Merz Pharma GmbH & Co. KGaA, who collectively contribute around 85% of the market.
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