

Market insights summary

Latin America aesthetic injectable market

What's trending and new

1. Hybrid fillers set the pace for Latin American market expansion

- Hybrid fillers, a newer category combining hyaluronic acid (HA) with bio-stimulatory agents, are reshaping the Latin American dermal filler market. Positioned alongside HA and non-HA fillers, they are gaining traction due to their ability to deliver both immediate and long-term aesthetic results.
- Although still in early adoption, hybrid fillers are expected to grow rapidly driven by both conversion from traditional filler users and new demand, potentially slowing HA filler volumes in the short term but offering a strong opportunity for brands to lead innovation and secure early market share.

2. Large aesthetic competitors dominate the competitive filler market

- Galderma continues to lead the Latin American HA filler market with its trusted Restylane portfolio—which was the first HA filler on the market—and strong safety profile, reinforced by recent U.S. FDA approvals for Restylane Defyne, Eyelight, and Sculptra, highlighting its innovation and global credibility.
- Allergan remains a strong player in the dermal filler market in Latin America. However, in its 2024 annual report, Allergan noted that its JUVÉDERM Collection faced global headwinds due to price increases, shifting consumer preferences, and customer inventory destocking amid economic uncertainty.

Access more insights and data in the [report](#).
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2024 Latin America aesthetic injectable market snapshot

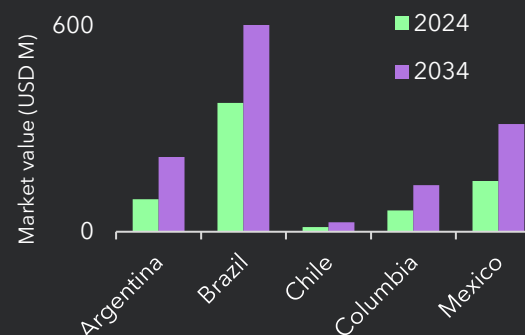
\$694M

Market revenue

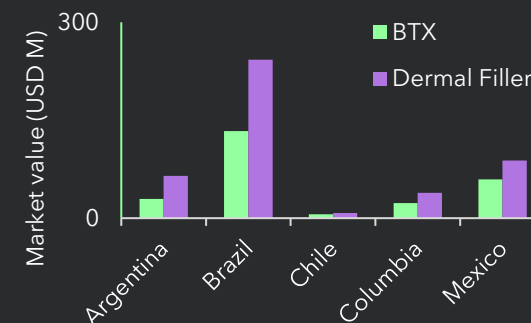
7.7%

CAGR ('19-'34)

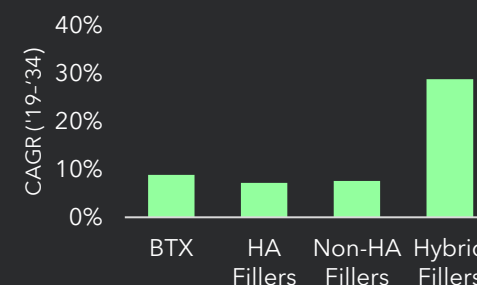
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Latin America BTX vs dermal filler markets, 2024



Procedure growth by product type



BTX = Botulinum toxin
 HA = Hyaluronic acid

2024 Latin America aesthetic injectable competitive landscape

