

## Market insights summary

# Middle East aesthetic injectable market

## What's trending and new

### 1. Hybrid fillers are redefining the dermal aesthetics landscape in the Middle East

- This innovative category of hybrid fillers—combining the immediate volumizing effects of hyaluronic acid (HA) with the long-term benefits of bio-stimulatory agents—is emerging as a powerful alternative to traditional HA and non-HA fillers.
- Though still in the early stages of market penetration, hybrid fillers are poised for exponential growth. Driven by a shift among existing filler users and a surge in new demand, this category is set to reshape consumer preferences. While this evolution may momentarily temper HA filler volumes, it opens a strategic window for brands to lead with innovation, differentiate their offerings, and capture early market share in a rapidly expanding segment.

### 2. Innovation and portfolio strength fuel growth in Middle East aesthetics

- In 2024, Allergan led the Middle East aesthetic injectable market, supported by strong brand loyalty and a broad BTX and filler portfolio. However, industry sources noted that the company faced challenges following the October 2024 launch of the revamped Allē loyalty program, which faced mixed feedback regarding its complexity and perceived reduced benefits.
- In 2024, Galderma saw strong growth across all injectable aesthetics lines, reinforcing its leadership in the sector. Holding the second-largest market share with its Restylane range of products, the company benefited from early entry into the dermal filler market and a strong safety profile. Future growth may be driven by new indications like chin fillers and opportunities for product bundling across its broad aesthetics portfolio.

**Access more insights and data in the [report](#).**  
**[Speak to our team](#) to see how we can power your innovation.**

## 2024 Middle East aesthetic injectable market snapshot

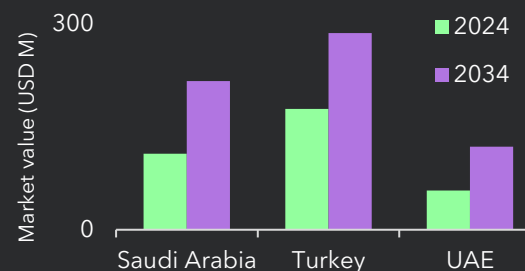
# \$344M

Market revenue

# 7.1%

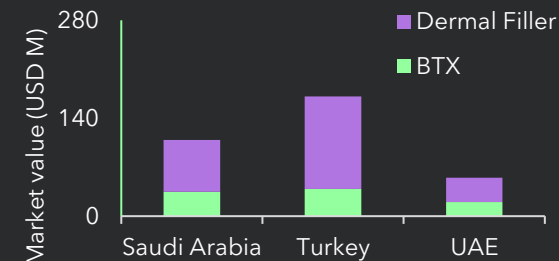
CAGR ('19-'34)

### Middle East aesthetic injectable market by country

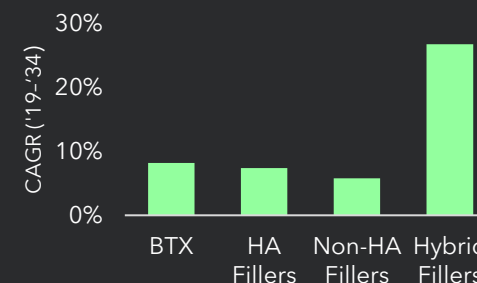


UAE = United Arab Emirates

### Middle East BTX vs dermal filler markets by country, 2024

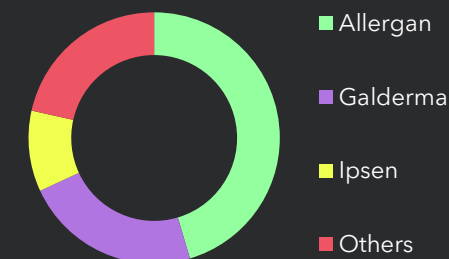


### Procedure growth by product type



BTX = Botulinum toxin  
 HA = Hyaluronic acid

### 2024 Middle East aesthetic injectable competitive landscape



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