

## Market insights summary

# North America aesthetic injectable market

## What's trending and new

### Hybrid fillers set the pace for North American market expansion

- Hybrid fillers, combining hyaluronic acid with biostimulatory agents, are emerging as a fast-growing category in North America, offering both immediate and long-term results, potentially slowing HA filler volumes in the short-term but creating strong opportunities for overall dermal filler market expansion.

### Allergan remains a leader despite challenges in the aesthetics market

- Although Allergan parent company AbbVie has stated that it saw a decline in its aesthetics revenue in 2024 and early 2025, the company continues to prioritize innovation in aesthetics, with a focus on next-generation fillers like HAmonyCa and expanding indications for existing products, reinforcing its position as a key player.
- Due to growing competition in the dermal filler market, Allergan will need to continue to innovate, revise pricing to counter the shift toward less costly alternatives, as well as optimize inventory in response to economic and consumer behavior changes.

### The increased uptake of GLP-1 agonists in North America will boost demand for complementary procedures like aesthetic injectable treatments.

- The widespread use of glucagon-like peptide-1 receptor agonists (GLP-1s) in North America is driving increased demand for injectables and skin-tightening treatments because rapid weight loss leads to facial volume loss and skin laxity.

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

## 2024 North America aesthetic injectable market snapshot

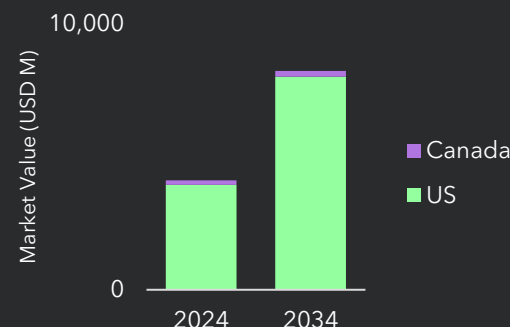
# \$4.1 B

Market revenue

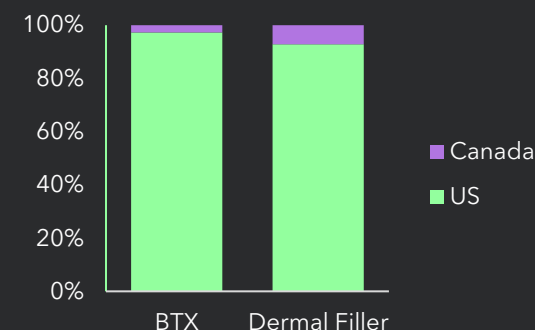
# 7.6%

CAGR ('19-'34)

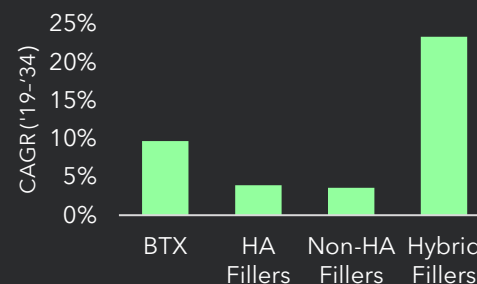
### North America aesthetic injectable market



### North America BTX and dermal filler markets, 2024



### Procedure growth by product type



BTX = Botulinum toxin  
 HA = Hyaluronic acid

### 2024 North America aesthetic injectable competitive landscape

