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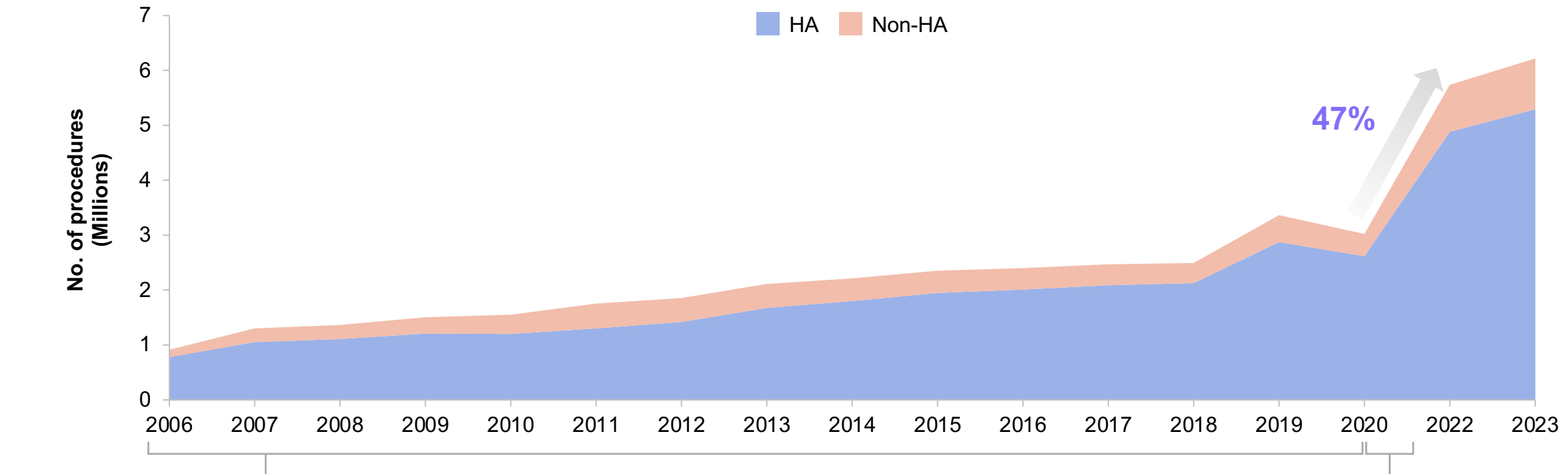


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Current US Dermal Fillers Market Size Shows Steady Growth and Expansion in Recent Years

Market Size (Number of procedures), ASPS 2006 – 2023 procedural statistics report



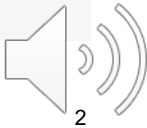
Key Takeaways

Steady growth in dermal filler procedures between 2006 – 2020

47% increase reported between 2020 – 2021 as the dermal filler market expanded with new products and indications

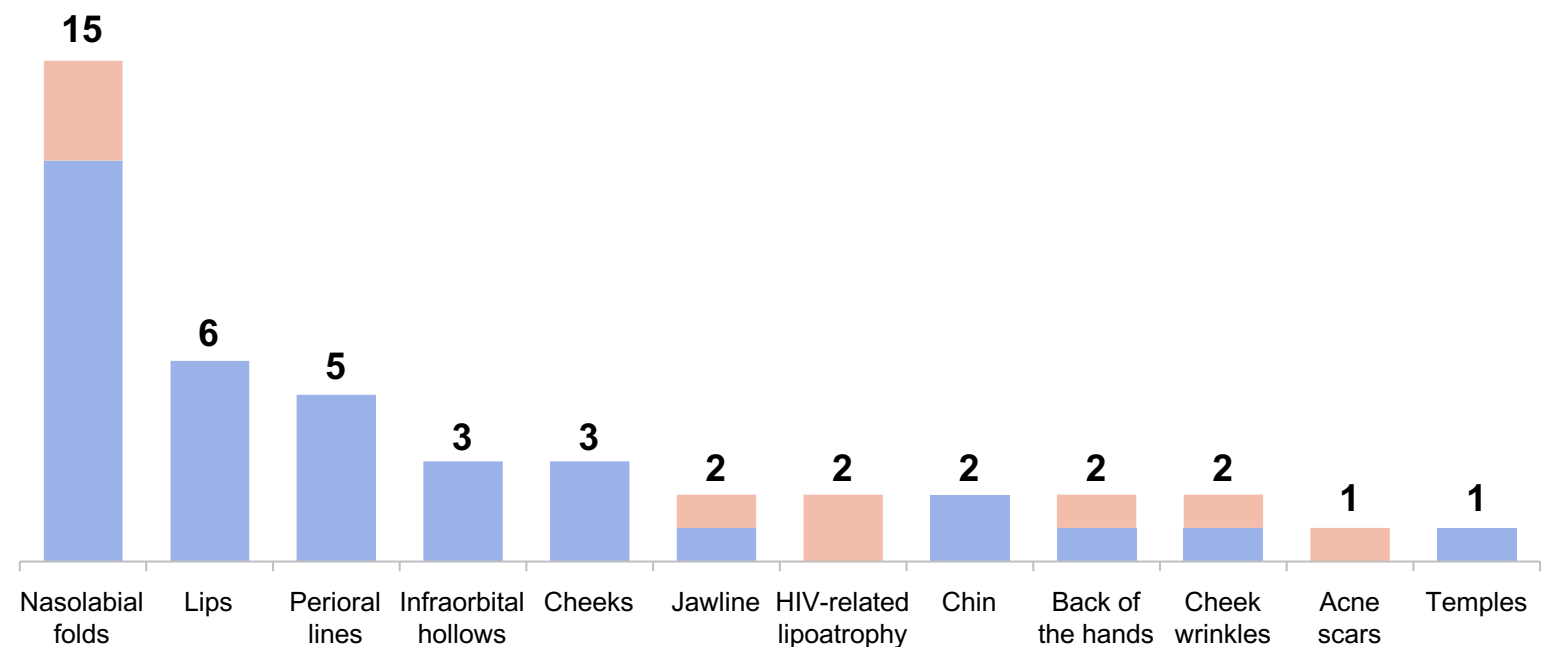
Non-HA dermal filler procedures had a 110% increase between 2020 – 2021 with more demand for biostimulator products

1. All data is sourced from the American Society of Plastic Surgeons (ASPS) procedural statistics reports from 2006 – 2023. Data includes ASPS members as well as non-member dermatologists and otolaryngologists. Non-HA products include Radiesse, Sculptra, Bellafill, and Renuva (post-FDA approval in 2021)

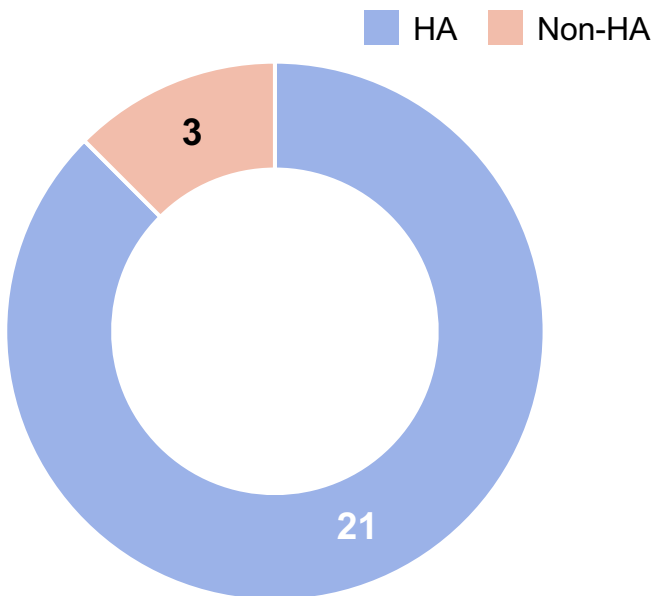


Current Dermal Filler Landscape

Number of products approved per indication

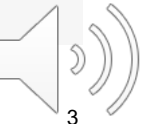


Number of Dermal Fillers FDA-Approved



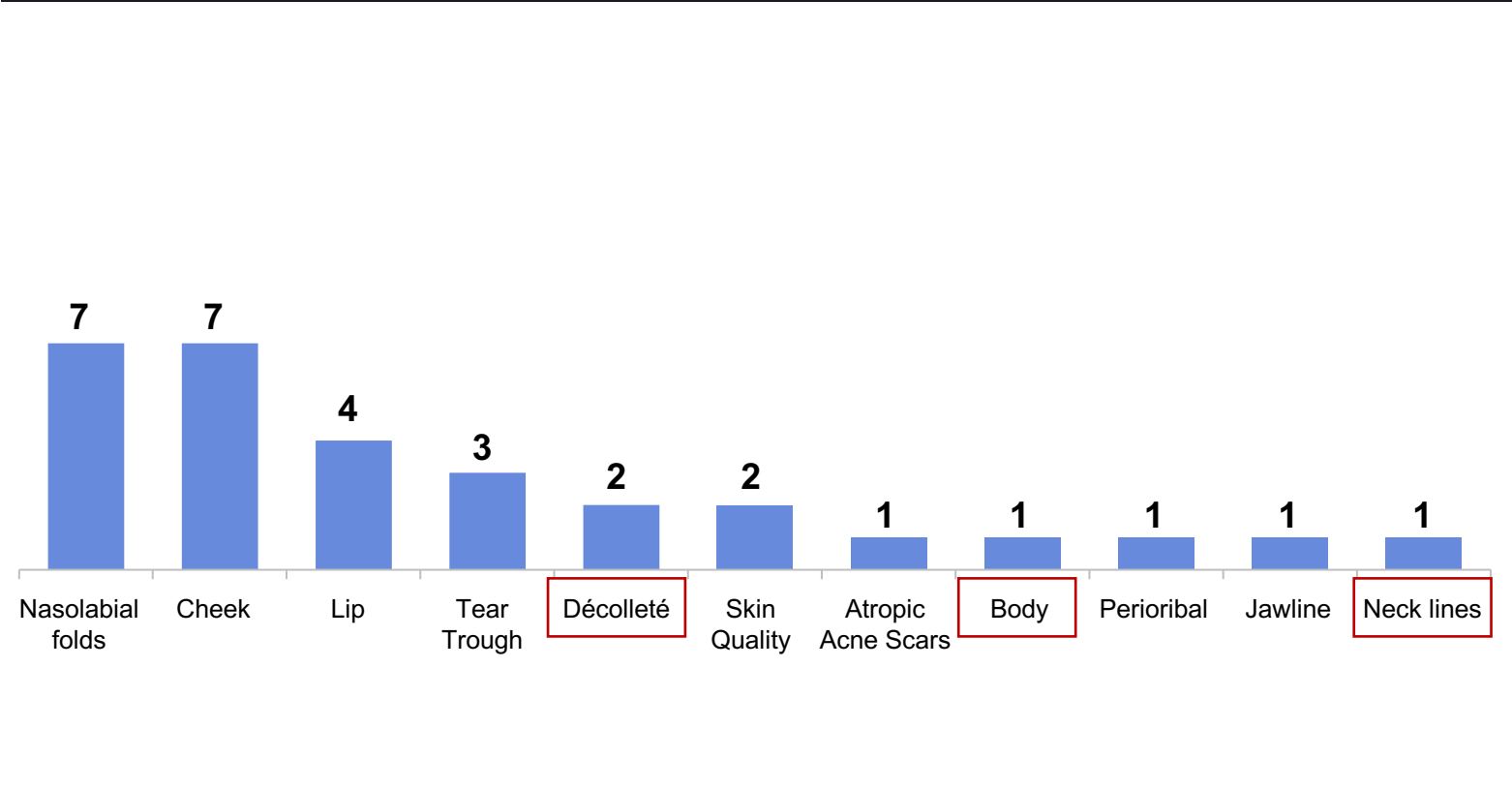
Key Takeaways

- The current US dermal filler market includes 24 different products
- Nasolabial folds is the most common indication in the current US market for dermal fillers followed by lips

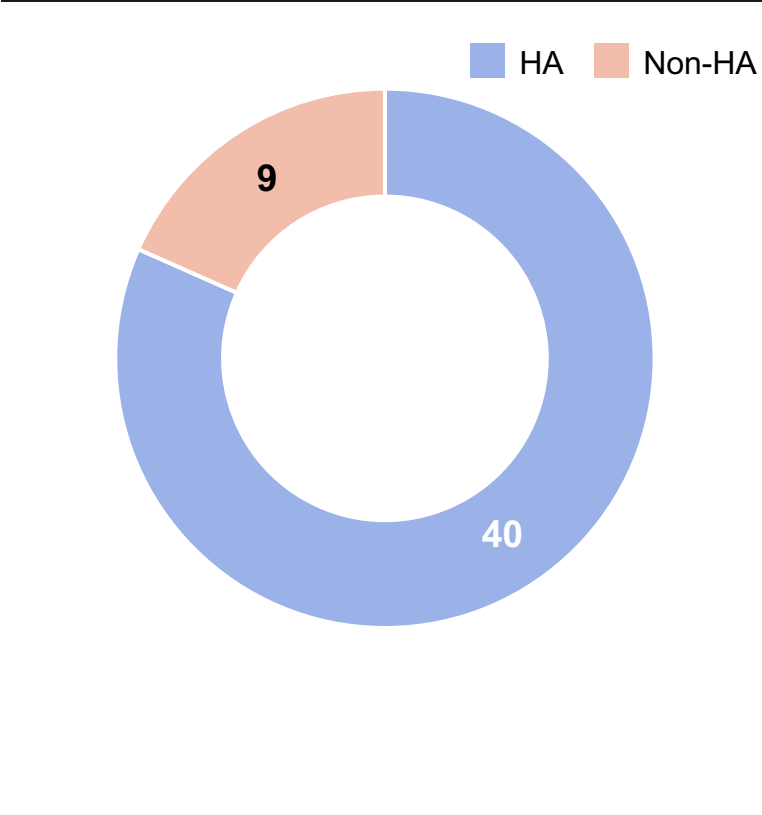


Future Dermal Filler Landscape

Number of indications under investigation or early development



New Dermal Fillers Projected to enter market over the next 10 years



Key Takeaways

With increasing innovations from existing companies and new market entrants in the US, the dermal filler market is projected to expand over the next 10 years with

9 new indications, **including body**
40 anticipated new dermal filler products

1. All data is sourced from clinicaltrials.gov and insights from LCN consulting. June 2025



Growing demand: accelerated research and publications for décolletage treatments

Body aesthetic treatments are becoming increasingly popular^{1,2}



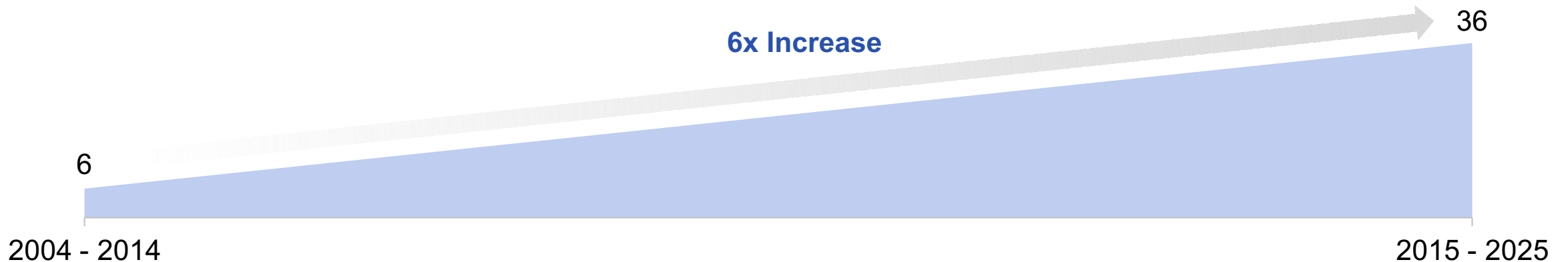
The décolletage area is a growing patient concern, with increasing demand for aesthetic solutions^{1,2}



Over the past decade, the number of publications on aesthetic treatments for the décolletage has increased 6x compared to the period from 2004 to 2014³



Number of Décolletage Aesthetic Treatment Publications



1. Research and Markets. Body Augmentation Fillers Report, 2024. (<https://www.researchandmarkets.com/reports/6032681/body-augmentation-fillers-market-product>)

2. Grand View Research. Body Augmentation Fillers Market Analysis, 2024. (<https://www.grandviewresearch.com/industry-analysis/body-augmentation-fillers-market-report>)

3. Pubmed search for 'Décolletage'. Conducted July 21, 2025



Unmet need: Addressing deeper wrinkles in décolletage area

Key Takeaways

A few treatment modalities exist for the décolletage area (topicals, chemical peels, laser treatments), but only address fine lines and pigmentation



With increasing demand for correction of deeper wrinkles in the décolletage area, there are no treatments currently approved and available in the US

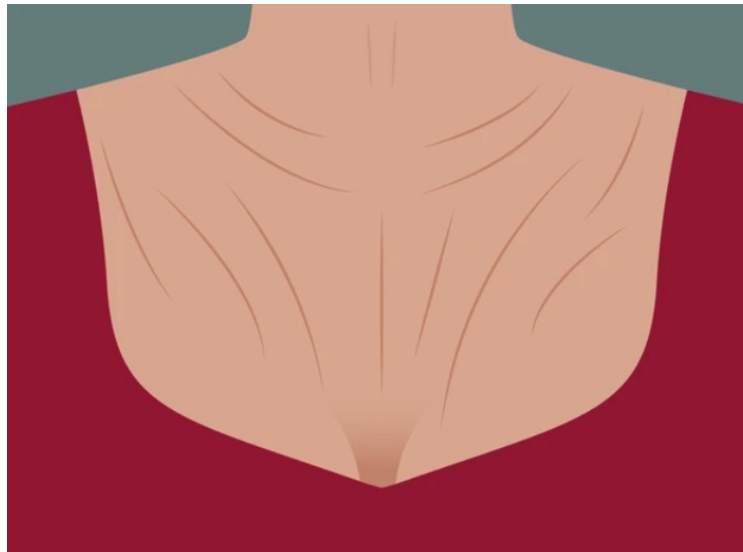


Dermal fillers address that unmet need and are currently under investigation



Fine lines & pigmentation

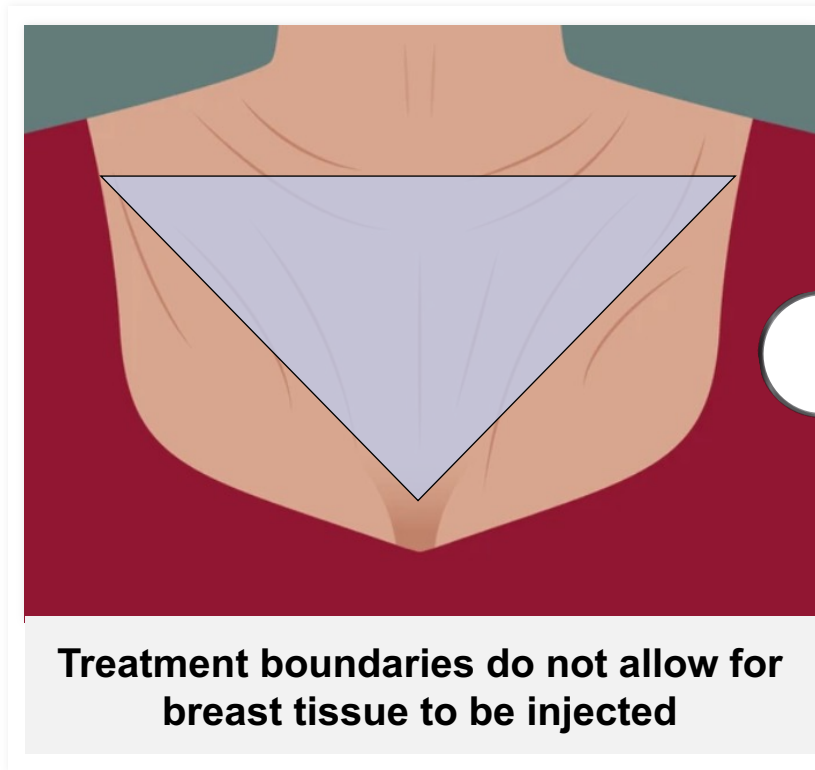
- Topicals
- Chemical peels
- Laser treatments








Deeper wrinkles

- Dermal Fillers

Anatomical Considerations for the Decolletage Area



Anatomical Considerations

-  Goal is to treat wrinkles in the decolletage area, not the breast tissue
-  Investigational studies require palpating and assessing the region to distinguish treatment boundaries and avoiding breast tissue
-  Low risk of vascular compromise due to relatively safe area with no terminal circulation
-  Very low risk of thoracic cavity penetration with thin needles used with dermal fillers
-  Dermal fillers injected more superficially in the skin in the decolletage area for correction of wrinkles

Key Takeaways

✓ The decolletage treatment area is distinguished from breast tissue upon physical exam and the area is safe to inject




✗ The breast tissue is not injected

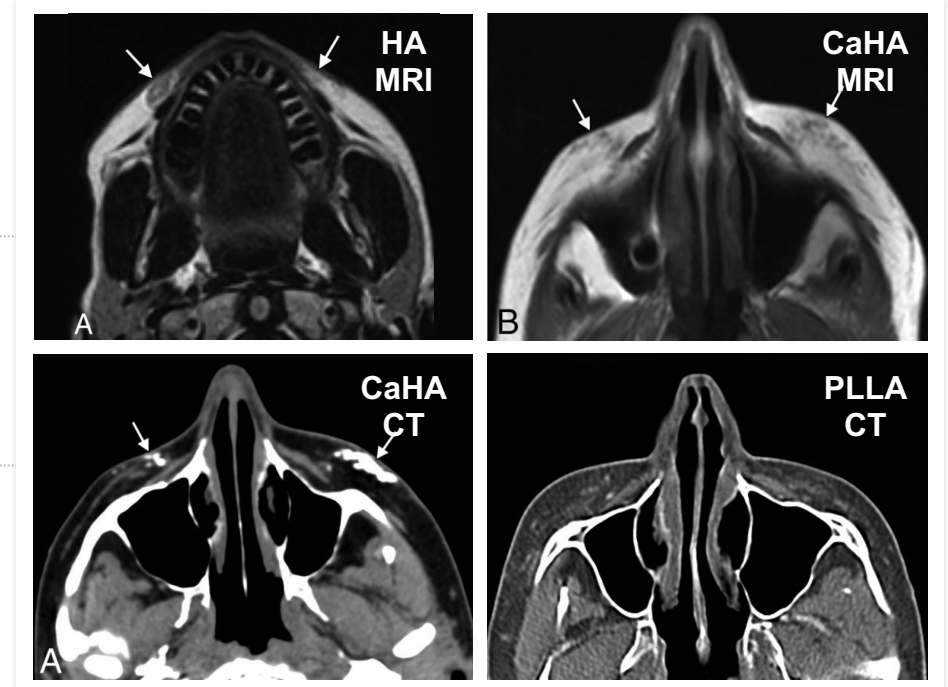


Diagnostic imaging considerations

Dermal fillers are readily identifiable on imaging modalities and do not compromise signal integrity

These are not permanent implants and imaging signals will go away over time as the body gradually metabolizes the product

	Hyaluronic Acid (HA):	Calcium Hydroxyapatite (CaHA):	Poly-L-Lactic Acid (PLLA):
 MRI¹	Low appears similar to water	High intensity microcalcifications	Soft spots with surrounding fat
 X-RAY/CT¹	Low-density opaque signal	High intensity microcalcifications	Subtle soft tissue foci
 Ultrasound²	Anechoic (dark spots) or hypoechoic (brighter dark spots)	ill-defined heterogenous hyperechoic mass-like deposits on a hypoechoic background	



Imaging from Ginat DT, Schatz CJ. AJNR Am J Neuroradiol. 2013 Aug;34(8):1488-95.

1. Ginat DT, Schatz CJ. AJNR Am J Neuroradiol. 2013 Aug;34(8):1488-95.

2. Schelke L, Lowrey N, Mojallal A, et al.. Dermatol Surg. 2024 Oct 1;50(10):946-952.



Potential complications: Dermal filler migration



No literature to support dermal filler migration after correction of décolletage wrinkles

- Less risk of product migration due to the lack of mechanical movement in this area



More superficial injections in the décolletage does not allow for filler migration into deeper areas of the skin (i.e., breast tissue)¹

- Dermal filler migrates towards the path of least resistance (i.e. needle track)
- Small volumes of dermal filler are used per injection site in décolletage region (decreases risk)
- Microparticles of CaHA and PLLA do not migrate due to their biophysical properties



Breast augmentation case: One case of HA filler migration into lymph node after breast augmentation after large volume was used²



Migration has been reported in facial treatments with HA fillers³

- Likely due to unique anatomy of the face and poor injection technique
- The unique décolletage anatomy combined with superficial injection of product pose minimal migration risk in this area

1. Schelke L, Lowrey N, Mojallal A, et al.. *Dermatol Surg*. 2024 Oct 1;50(10):946-952.

2. Trignano E, Baccari M, Pili N, Serra PL, Rubino C. Complications after breast augmentation with hyaluronic acid: a case report. *Gland Surg*. 2020 Dec;9(6):2193-2197

3. Jordan DR, Stoica B. Filler Migration: A Number of Mechanisms to Consider. *Ophthalmic Plast Reconstr Surg*. 2015 Jul-Aug;31(4):257-62.

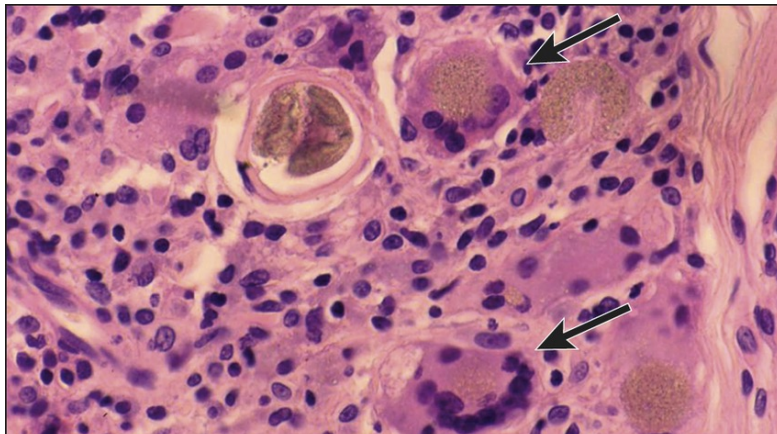


Potential complications: Nodules and inflammatory reactions

Although rare, adverse events such as nodule formation, inflammatory reactions, or infections can occur¹

- Usually are temporary reactions that resolve over time or can be treated

These complications are typically acute, easily distinguished by clinical presentation, and should not mimic or suggest any breast disease or malignancy



Biopsy of CaHA nodule
CaHA microspheres easily identified by pathology

Image from Holzapfel AM, Mangat DS, Barron DS.
Arch Facial Plast Surg. 2008 Sep-Oct;10(5):335-8

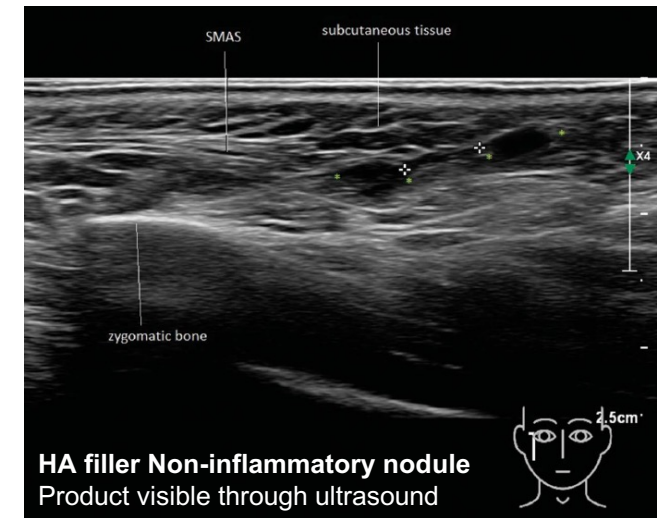
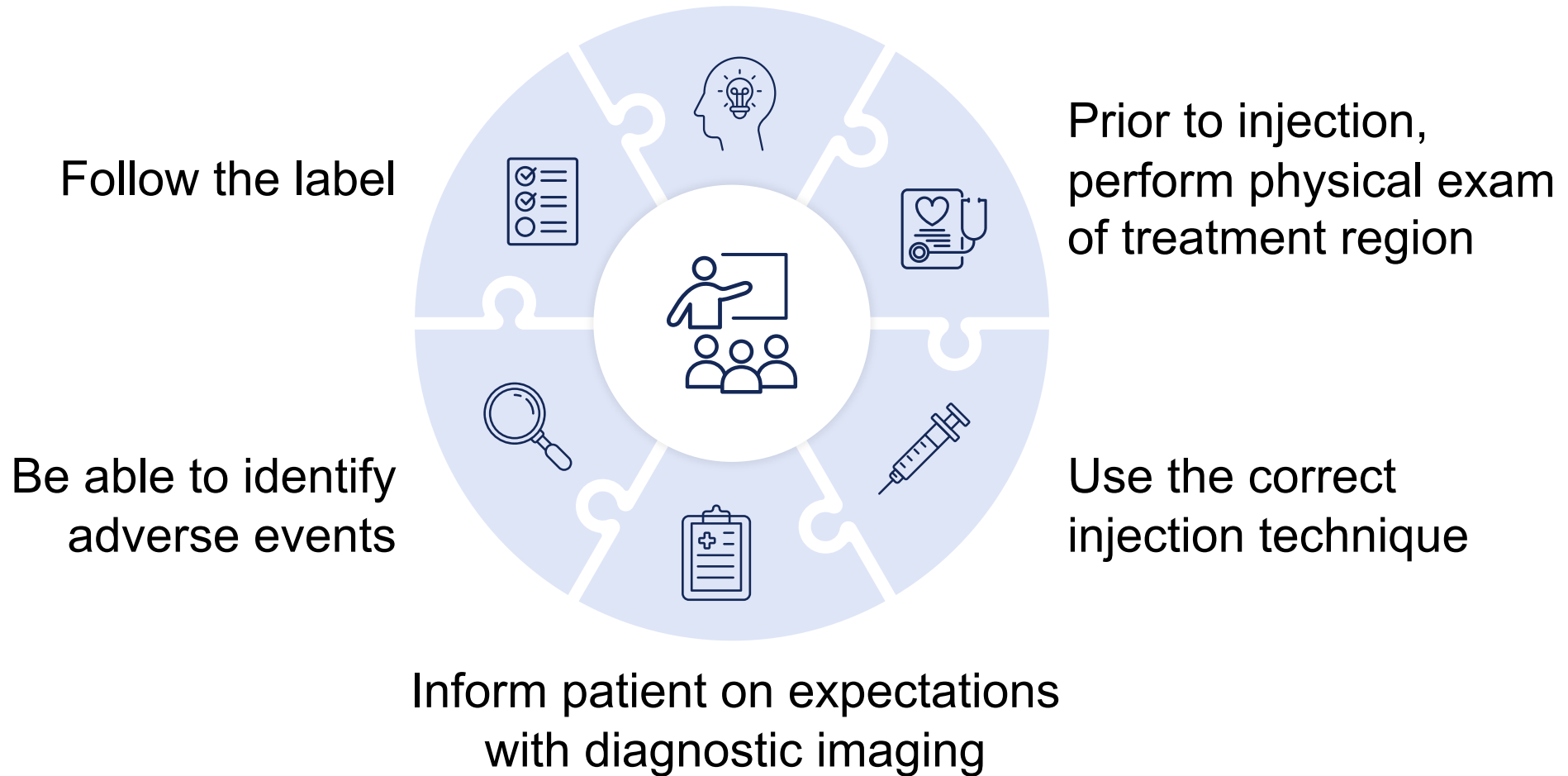


Image from Schelke LW, Decates TS, Cartier H,
et al. Dermatol Surg. 2023 Jun 1;49(6):588-595.

Training Considerations

Know anatomical considerations



Thank You

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