



QSIGHT PRESENTS:

AESTHETICS INDUSTRY IMPACT PLAYERS (2025) - THE TOP BRANDS DRIVING CONSUMER DEMAND



In 2024, the Aesthetics industry continued to experience dynamic change fueled by an expanding market of image-conscious consumers. Ongoing innovation from manufacturers and a rising demand for less invasive, more transformative treatments drove advancements in products and services. The industry continues to evolve, empowering millions to look and feel their best with cutting-edge treatments.

Qsight's Aesthetics Industry Impact Players report recognizes the brands that have achieved exceptional success over the past year, leveraging a unique data-driven approach to identify top performers across industry segments. Beyond highlighting growth leaders, the report celebrates the industry's ongoing innovation and adaptability, offering compelling insights into why this space continues to thrive. Join us as we spotlight the standout brands shaping the future of Aesthetics.

Qsight is the premier provider of data-driven insights for the Aesthetics industry. Data for this report was provided by Qsight Sales Measurement, a database built on over \$15 billion worth of transaction records collected from thousands of Aesthetics practices across the U.S., and Qsight Market View, an analytics platform providing fully projected patient spend figures covering the entire U.S. medical Aesthetics industry. Data was also provided by Qsight Tracker, a survey-based database featuring over a decade's worth of intelligence collected from practitioners across multiple U.S. medical sectors, including the Aesthetics industry.

HIGHEST SALES GROWTH - NON-SURGICAL SKIN TIGHTENING (EBD)

BRAND: SOFWAVE™ BY SOFWAVE
VISIT SITE

Key data insights:

- In 2024, Sofwave achieved the highest sales growth among devices in the energy-based device (EBD) market for non-surgical skin tightening
- On a per-practice basis, average Sofwave sales grew by 50% in 2024 among medical aesthetic practices
- Sofwave became the second biggest device in non-surgical skin tightening in 2024 by patient spend across Qsight's sample of aesthetic practices, following Ultherapy by Merz

Commentary

Since its launch in 2019, Sofwave has rapidly emerged as a leading contender in the EBD market for non-surgical skin tightening, achieving remarkable growth in just a few years. Sofwave's success is driven by its innovative approach to skin tightening, effectiveness for all skin types and its FDA approvals for several treatments, including improving fine lines and wrinkles and lifting various areas of the body.

NEW MARKET LEADER - SKIN REJUVENATION & RESURFACING (EBD)

BRAND: BBL® HERO™ BY SCITON

[VISIT SITE](#)

Key data insights:

- BBL HERO is now the leading device in the segment by share of patient spend
- BBL HERO by Sciton increased its share of EBD-based Skin Rejuvenation & Resurfacing spend from 15% to 17% in 2024

Commentary

BBL HERO by Sciton has emerged as a standout device in the EBD category, driving impressive sales growth in the Skin Rejuvenation & Resurfacing segment. Launched in 2020, BBL HERO has quickly made its mark by leveraging BroadBand Light (BBL™) technology to deliver faster, more effective and more comfortable treatments for improving skin tone, texture and overall rejuvenation. Its rapid rise underscores its appeal among both practitioners and patients, delivering versatile treatment options for various skin concerns with minimal downtime.

CONSUMER CONFIDENCE LEADER - PROFESSIONAL GRADE SKINCARE

BRAND: (PLATED)™ SKIN SCIENCE BY RION AESTHETICS

[VISIT SITE](#)

Key data insights:

- In 2024, (plated) Skin Science emerged as the Consumer Confidence Leader in professional-grade skincare, achieving the highest average spend per customer among professional grade skincare brands. Patients invested an average of \$350 annually in its products—a testament to their trust in the brand's efficacy, innovation, and results-driven formulations
- (plated) Skin Science also saw a 5% increase in practice adoption across Qsight's panel of Aesthetics practices, the biggest increase among professional grade skincare brands

Commentary

A rising star in the highly competitive professional grade skincare market, (plated) Skin Science by Rion Aesthetics is notable for being the first topical skincare product to harness the revolutionary benefits of platelet-derived exosomes. Launched in 2022, (plated) Skin Science has quickly gained traction in the Aesthetics industry, aligning with the rising demand for regenerative solutions—particularly exosomes. This success is evidenced by its strong market performance, achieving strong consumer confidence with the highest average investment per patient, among professional grade skincare brands in 2024 according to Qsight customer transaction data.

HIGHEST SALES GROWTH - SKIN REJUVENATION (NON-EBD)

BRAND: HYDRAFACIAL™ BY BEAUTYHEALTH

[VISIT SITE](#)

Key data insights:

- Hydrafacial achieved the highest sales growth among treatments in the non-EBD based Skin Rejuvenation category in 2024
- Hydrafacial held an approximate 20% share of patient spend in the non-EBD Skin Rejuvenation market in 2024, continuing its lead of the segment for several years

Commentary

Hydrafacial is known for its ability to deliver immediate, visible results through its unique Vortex-Fusion™ technology, becoming a staple treatment for hydration, exfoliation and radiance that requires zero downtime. Hydrafacial, known for innovation, recently launched new boosters, offering improved options to help practitioners address specific customer concerns.

HIGHEST PRACTITIONER SATISFACTION - DERMAL FILLERS (HYALURONIC ACID)

BRAND: JUVÉDERM® BY ALLERGAN

VISIT SITE

Key data insights:

- Juvéderm received the highest average satisfaction score among Dermal Filler brands when rated by practitioners in Qsight Tracker
- Juvéderm captured approximately half of all patient spend on hyaluronic acid-based dermal fillers in 2024, according to Qsight Aesthetics transaction data

Commentary

Juvéderm by Allergan remains a dominant force in the dermal filler market, with strong loyalty from both practitioners and patients. Praised for its balance of patient satisfaction, practice profitability, and longevity, Juvéderm stands out as a top choice for Aesthetics professionals. Its ability to address a wide range of facial concerns with clinically proven, long-lasting results has cemented its reputation as a go-to filler. This trust is reflected not only in practitioner ratings but also in patient spending patterns, with Juvéderm accounting for a significant share of the hyaluronic acid-based filler market in 2024.

CONCLUSION

In 2024, the Aesthetics industry witnessed emerging trends including a heightened focus on regenerative solutions and a growing convergence between beauty and holistic health, exemplified by the increasing use of GLP-1 medications. As competition among manufacturers continues to intensify, key growth opportunities will depend on the industry's ability to expand the market by offering less invasive, more effective and more affordable treatments. The brands that will define the future of Aesthetics will be those that successfully anticipate shifting consumer preferences and drive innovation to meet the next frontier of demand. As we enter another exciting year for this dynamic industry, Qsight remains committed to tracking the key players and trends that will shape its future.