Dental Implants & Prosthetics (Implants, Crowns & Bridges, Dentures, Abutments) Market - Current Trends, Opportunities & Global Forecasts To 2018

Description: The global dental implants and prosthetics market is estimated to be worth $6,401.5 million by 2013. The global market is segmented by implants, prosthetics, and geography. The dental implants market is classified by materials into Titanium and Zirconium. Titanium market is further analyzed by stages and by connectors. The prosthetics market covers the Crowns and Bridges, dentures, and abutments. The crowns and bridges market is further analyzed by materials. The report also discusses the key market drivers, restraints, and opportunities of the global market and its sub-markets.

The market is mainly driven by the rising edentulous population, increasing adoption of advanced dentistry in the developed countries, increase in disposable incomes, and increasing awareness of dental care. However, the economic slowdown and limited reimbursement inhibits the growth of the market to a certain extent.

Titanium implants and crowns and bridges will continue to drive and dominate the market. Furthermore, all-ceramics crowns and bridges are also expected to drive the growth of the crowns and bridges market. The introduction of the computer-aided design/computer-aided manufacturing (CAD/CAM) technology has drastically reduced the treatment time. Crowns designed through CAD/CAM often fit better when compared to traditionally designed crowns and they are also available at lower costs than traditional crowns. These factors will drive the market for all-ceramic crowns across the world.

There is an increasing demand for CAD/CAM all-ceramic restorations due to their superior aesthetics and improved fitting. The CAD/CAM technology has the potential to lower production costs. More than 20% of all prosthetic elements were produced by CAD/CAM in 2012. Though the majority of prosthetic elements are still made manually, the use of CAD/CAM prosthetic elements continues to increase due to the advantages of the CAD/CAM technology over conventional technologies. Therefore, this is an exciting market for dental players to invest in.

By 2018, Europe will continue to drive and dominate the dental implants and prosthetics market. The market share of this region will decrease slightly to 40.1%, primarily due to the increase in demand for dental implants and prosthetics in Asia-Pacific and in some Latin American countries. The growth of the Asian market will primarily be driven by China and India. This is mainly attributed to the rising disposable incomes, increasing focus of major players, and the ongoing development of these economies.

However, low awareness levels and lack of proper distribution channels in this region restrains the growth of this market to a certain extent. The North American market is expected to grow at a higher pace than Europe mainly due to lower penetration and the high adoption rate of advanced dentistry. However, the high cost of dental solutions as compared to emerging countries inhibits the growth of the North American market to a certain extent.

The major players in this market include Nobel Biocare Holdings AG (Switzerland), Straumann (Switzerland), Dentsply International (U.S.), Zimmer Dental (U.S.), Biomet 3i (U.S.), BioHorizons, Inc. (U.S.), Ivoclar Vivadent AG (Liechtenstein), and 3M Company (U.S.).

Straumann (Switzerland) and Nobel Biocare (Switzerland) were the leading players, together accounting for around 35% to 40% share in the global dental implants market in 2012. Straumann has a broad product portfolio in the premium segment of the industry and offers a wide range of implants that are priced at multiple levels. The company has a strong network of wholly owned subsidiaries, located in Europe, North America, Asia-Pacific, and South America. The company strategically concentrates on agreements and collaborations with other stakeholders to strengthen its marketing capabilities in the dental implants market. It also aims to improve the process of developing products from single-tooth restorations to edentulous cases through innovation, computerized design, and automated manufacturing of implants and tooth restorative solutions.
Despite the competitive pressure by local players, the key contributors are still expected to retain their leading positions in the global market. This is primarily supported by continuous investments by these companies in research and development and also by their strong global presence. Therefore, the top three companies are expected to maintain their leading positions with around 50% share of the dental implants industry in the next few years.

Features and Benefits

- Market Penetration: Comprehensive information on product portfolios offered by top players in this market. The report analyzes the market by products, materials, and across all regions.

- Product Development/Innovation: Detailed insights on the upcoming trends, research and development activities, and new product launches in the market.

- Market Development: Comprehensive information of the lucrative emerging markets by product, functionality, and geography.

- Market Diversification: Exhaustive information of new products, growing regions, recent developments, and investments in the market.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, products, distribution networks, manufacturing capabilities, and SWOT analyses of the leading players in the market.

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