Bench-top Dental Autoclaves Market Analysis And Segment Forecasts To 2020

Description: Industry Insights

Introduction of technological advancements such as 3-D milling, 3-D printing and dental lasers is a high impact rendering driver of the dental equipment market. In addition, Increasing awareness and patient empowerment have led to an increase in demand for better dental care facilities at affordable prices. Growing medical tourism and introduction of favorable government initiatives pertaining to medical, surgical and dental equipment are also expected to drive the dental equipment market.

The U.S. government has introduced reforms in its dental equipment and consumables sectors. Implementation of the Comprehensive Dental Reform Act of 2012 is a paradigm reform and is expected to act as a driver for dental equipment market. This act aims to end the looming crisis in oral healthcare in the country by expanding reimbursement options which extends dental health insurance to Americans by including all Medicaid and Medicare beneficiaries under its coverage. Increasing the workforce for providing loans and distributing scholarships among dental hygienists and therapists in order to encourage them to provide services to patients belonging to low income groups. The act provides government funding for research and development in oral healthcare services. Liberal polices of Government related to dental equipment has created opportunities for international dental manufacturers such as Danaher Corporation, Dentsply International and Sirona Dental Systems to establish joint ventures and outsourcing facilities. E.g. In 2011, Danaher Corporation acquired 13 companies as a part of business strategy.

Product Insights

Dental radiology equipment, dental lasers, systems and parts, hygiene maintenance devices laboratory machines and others are the main products of dental equipment market. The dental systems and parts segment emerged as the largest market in 2013 with the revenue share at over 36.0%. However, this segment is expected to grow at the fastest CAGR during the forecast period. Introduction of advanced technologies such as cone beam CT systems and CAD or CAM and rising adoption rates are the factors accounting for its growth.

The CAD or CAM segment dominated the overall systems and parts segment in 2013 owing to its high usage rates especially in dental prostheses such as crown lays, inlays and onlays, dental implant restorations, and orthodontic appliances. Dental radiology equipment market held the second largest market share in terms of revenue in 2013 at over 20.0% followed by dental systems and parts. Dental radiology equipment segment is suited for various applications in procedures such as surgical diagnosis, extra-oral diagnosis (emergency diagnosis) and intra-oral radiographs (precision dentistry).

Regional Insights

North America held the largest market share at over 39% in terms of revenue in 2013. Increasing prevalence of oral diseases such as periodontal disorders in North America is one of the high impacts rendering driver. As per Centers for Disease Control and Prevention (CDC) estimates in 2012, in the U.S. 64.7 million American adults were suffering from periodontal diseases. High prevalence rates of dental caries and dental cosmetic procedures in this region are expected to serve as market drivers. As per the NHANES (National Health and Nutrition Examination Survey), in 2014, 93% of people aged 65 and older and 92% of adults aged between 20 to 64 years had dental caries in permanent teeth. In addition, high market penetration of novel technologies such as dental lasers, sophisticated healthcare infrastructure and high awareness level are expected to boost the market during the forecast period.

The Asia Pacific market is expected to grow at the fastest CAGR of over 7.0% from 2014 to 2020. Increasing demand for dental tourism, growing healthcare expenditure and various Government initiatives such as reduction of customs duty on all dental equipment from 7.5% to 5% in the emerging markets of India and China is expected to drive dental equipment market growth during the forecast period.
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