Global Dental Industry: Focus on Dental Implant Segment

Description: The dental implant market is a part of the dental industry that is characterized as a large under-penetrated market globally. Worldwide, the dental market is dominated by the US, Europe and Japan, which collectively accounts for more than 80% of the global revenue. In the recent years, increasing aging population coupled with rising awareness for oral health, high esthetics and improved dental treatments have boosted the growth of this segment. Although, the tooth restoration market is highly under-penetrated globally, the market is expected to sustain a double digit growth on account of the rising edentulous population worldwide.

In the last few years, the implant industry has moved from the use of conventional materials (onlays, inlays, crowns, bridges, and partial or full dentures) to all-ceramic, individualized products based on CAD/ CAM techniques. In addition, the demand for fast and minimally invasive procedures, good esthetics and long lasting results has resulted in companies increasing their investments in research and development and in the launch of new and innovative products. Thus, high precision scanners, chairside equipment, surgery planning systems and software offer substantial growth opportunities.

Geographically, in terms of revenue, Europe and the US account for more than three-fourth of the market due to favorable demographic and socio-cultural factors. The Asia Pacific and Latin American region offers huge growth potential on account of their large populations, rising per capita incomes and a growing middle class. In Europe, countries such as Italy, Sweden and Switzerland have a higher dental implant penetration rate when compared to the more mature and developed markets of the UK and France.

Nobel Biocare and Straumann are regarded as the global leaders in the dental implant industry with the five major dental implant manufacturers accounting for around two-thirds of the total worldwide market. However, in the past four to five years, increase in regional implant manufacturing companies has resulted in intense competition as well as consolidation in the global dental industry.

The report analyzes the various segments of the dental implant industry and assesses market opportunities available for the players. The drivers, trends and challenges for the industry have also been analyzed. It focuses on the growth of this industry in the different regions of the world and discusses about few emerging markets, namely China and India. Further, the report highlights the positioning and strategies of top global implant manufacturers – Nobel Biocare, Straumann and Dentsply Inc.

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