Executive Summary

Dentistry is the branch of science devoted for maintenance and treatment of teeth, gums, and other soft and hard tissues of oral cavity and adjacent structures. Dental market is bifurcated into two segments: dental consumables and dental equipments. Dental consumables represent the larger segment of the dental care industry. The dental consumables segment includes crowns/bridges, implants, orthodontics, impressive materials, composites, endodontics, adhesives, and cements, while the dental equipment segment is composed of large equipment, such as autoclaves, sterilizers, chairs, communication systems, compressors, cuspidors, and digital imaging systems. Small equipment, including amalgam removal systems, amalgamators, hand piece cleaners, lab equipment, duplicators, and ultrasonic cleaners, also fall into this product segment.

The main drivers of the global dental market include low dental implant penetration rates and increasing elderly population. Global economic development and increasing consumer income are other major factors which are bolstering the dental market. Ongoing mergers and acquisitions, increasing prevalence of CAD/CAM technology and increasing share of emerging markets are the significant trends observed in the dental market.

This report analyzes the development of the "global dental market", with a focus on its segments including: dental consumables and dental equipment. The major market of North America along with emerging market of China is being discussed in the report. The major trends, drivers facilitating growth of the dental market as well as the issues being faced by the industry are being presented in this report. The four major players in the dental industry, Nobel Biocare, Straumann, Dentsply and Zimmer are being profiled in the report highlighting their key financials and strategies for growth.

By combining SPSS Inc.’s data integration and analysis capabilities with our relevant findings, we have predicted the future growth of the industry. We employed various significant variables that have an impact on this industry and created regression models with SPSS Base to determine the future direction of the industry. Before deploying the regression model, the relationship between several independent or predictor variables and the dependent variable was analyzed using standard SPSS output, including charts, tables and tests.
Dentistry is the branch of science devoted to the maintenance and treatment of teeth, gums, and other soft and hard tissues of the oral cavity and adjacent structures.

- The global dental market registered an increase of approximately 7% rising from US$... billion in 2011 to US$... billion in 2012. The dental market which includes dental equipments and dental consumables has reported a strong growth, achieving a CAGR of ...% for the period spanning 2006-2012.

- The dental consumables segment which represents the largest segment of dental care industry accounted for ...% of the market share; whereas, the dental equipment segment accounts for the remaining ...% share as of 2012.

- The preventive segment which involves maintenance of a normal masticating mechanism by fortifying the structures of the oral cavity against damage, coupled with restorative segment which is concerned with the restoration of existing teeth that are defective account for the largest share of ...% each.

The pie chart on the right shows the distribution of the global dental market by segments for the year 2012. The largest share is in the consumables segment, followed by preventive, restorative, prosthetics, and implants. The least share is in the orthodontics segment.

The bar chart on the left illustrates the growth of the global dental market from 2006 to 2012, with an increase of approximately 7% each year.
Dental Implant is a surgical device, used in dentistry to replace one or more missing teeth.

Global dental implant revenues decreased significantly in 2012 to US$... billion from US$... billion in 2011, primarily due to challenging economic conditions in many countries and high treatment costs. However, dental implant market is expected to show strong recovery in 2013 reaching US$... billion.

The dental regeneration products market, valued at US$... million in 2012, is expected to achieve CAGR of ...% during 2012-2016. In this market, bone graft materials (allografts, xenografts and synthetic bone graft substitutes) accounted for ..%, membranes were ..% and tissue regeneration products represented ..% in 2012.

Europe accounts for almost half the global dental implant market with its share of ..%, North America is the second largest region, accounting for ..% share, followed by Asia and rest of the world.
Growth in dental market is mainly driven by increasing ageing population, increasing awareness among people for oral health and technological advancements in the market.

- The global dental market stood at US$... billion in 2012 and is projected to reach US$... billion by 2016, witnessing a CAGR of ...% for the period spanning 2012-2016.

- The elderly population is directly correlated to the dental industry. Poor oral health among older people is quite common resulting in problems like tooth loss and oral diseases. As people live longer there is higher likelihood of experiencing dental problems. Therefore, such population demands much more care and forms the major part of the total consumers of the dental facilities.

- Due to growing awareness about oral healthcare, more and more people are selecting dental implants over dentures as a replacement option for tooth loss.