Global Dental Market (Restoratives, Implants, Prosthetics, Orthodontics, Endodontics, Equipment): Industry Analysis & Outlook

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(2016-2020)
Executive Summary

- Oral health is an essential component of health throughout life. Poor oral health and untreated oral diseases and conditions can have a significant impact on quality of life. They can affect the most basic human needs, including the ability to eat and drink, swallow, maintain proper nutrition, smile, and communicate. In spite of all the advancements in the field of oral health, numerous people suffer from various oral diseases such as tooth loss, oral mucosal lesions and oropharyngeal cancers.

- A number of dental disorders take shape from a slight tooth ache, cavity, and ulcer to a more serious oral cancer. They are classified into 5 different categories: Mucosal disorders, dental and periodontal infections, oral and pharyngeal cancers, injuries and developmental disorders. Dental treatment depends on the stage of the disease and the level of damage to the affected teeth. These treatments can be segmented into 3 major categories: Specialties comprising of implants, endodontics and orthodontics; Prosthetics which comprise of artificial teeth, denture bases, crown & bridges and CAD/CAM; and Chair side Consumables, which consists of restorative and preventives.

- The dental market is one of the most attractive segments of the healthcare industry. It incorporates diagnosis, treatment & prevention of diseases of the teeth, gums and supporting bones. This market can be segmented into two broad categories: dental consumables and dental equipments. Dental consumables consist of preventive, restorative, implants, prosthetics, orthodontics and endodontics.

- The market growth has been sluggish as an aftermath of global recession, but it has been observed that post 2013, market started accelerating. This growth trend is expected to continue, primarily due to rise in aging demographics, increasing GDP per capita, increased oral awareness and rising global healthcare expenditure. In spite of positive future market landscape, the growth has been hindered by costly treatment, stringent regulatory norms, lack of awareness and unstable global economic conditions.
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 the global dental market.

- In 2015, the global dental market was recorded at US$... billion and is expected to reach nearly US$... billion by the end of 2020, growing at a CAGR of ...%, spanning from 2015 to 2020.
- In 2015, Europe and the US together accounted for nearly ...% revenue share of the overall dental market. Asia and Latin America showed robust growth but remained highly underpenetrated and accounted for ...% and ...% revenue shares, respectively for the given year.
- As of 2015, both preventives and restoratives accounted for ...% each of the overall market revenue. These segments were further followed by large equipments, implants and prosthetics with ...%, ...% and ...% revenue shares, respectively for the given year.
Global dental implant market consists of dental implants and abutments along with supporting tools or instruments. After the downturn during 2009 recession, the dental implants market growth remained sluggish with growth rate limited to single digits only.

- As of 2015, the global dental implant market generated revenue worth US$... billion, compared to US$... billion in 2014, depicting an increase of ...% in the annual growth rate.
- In 2015, dental implant market continued to follow the upward trend in terms of revenue. Regionally, this growth was led by the Europe, Middle East and Africa, which together accounted for ...% of the global implant market revenue. These were followed by North America and Asia Pacific with ...% and ...% revenue shares, respectively.
- The consolidated results of the forecasts propose that the global dental implant market will grow at a CAGR of ...%, spanning from 2016 to 2020 and will reach nearly US$... billion by the end of 2020.
Technological advancements in dental imaging methodologies, rising demand for imaging modalities in oral disease treatments, increasing need for efficiency and effectiveness in medical procedures, and rise in research activities in the imaging technologies field are some of the major drivers for the global dental imaging market.

- As of 2015, global dental imaging market generated revenue worth US$... billion, representing an increase of ....% in the annual revenue, compared to US$... billion in 2014.

- As of 2015, higher awareness, rapid technological advancements and increasing demand for cosmetic dentistry have made the US, one of the largest individual regional markets for dental imaging, accounting for massive ....% of the revenue share. It was followed by Germany, France, Italy, Spain, the UK and Brazil with ...%, ....%, ...%, ....%, ....% and ..% revenue shares, respectively.

- The consolidated results of the forecasts suggest that the market will reach US$.... billion by the end of 2020, growing at a CAGR of ...% spanning from 2016 to 2020.