

Dental Cad Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The dental CAD market is expected to witness a CAGR of 8.5% over the forecast period (2022-2027)

Dental services are of increased focus during the current COVID-19 pandemic as dental procedures are considered one of the most potent sources of viral transmission. According to a study published in BMC Oral Health, titled 'COVID-19 transmission risk and protective protocols in dentistry: a systematic review' in October 2020, the SARS-CoV2 viral transmission in dentistry was expected to occur through air, droplets, and contact. Additionally, the American Dental Association (ADA) issued guidance for a dental emergency and non-emergency care in March 2020. As per ADA, Orthodontic procedures apart from those conditions with acute pain, infection, trauma, removal of asymptomatic teeth, and restorative dentistry, including treatment of asymptomatic carious lesions and aesthetic dental procedures, were categorized as non-emergency. However, tooth fractures, dental treatment cementation, pericoronitis, etc., were listed under emergency dental procedures during the COVID-19 pandemic. Thus, owing to the ongoing COVID-19 pandemic and the high risk of viral transmission through dental procedures, the dental CAD market is expected to be impacted during the pandemic.

The increasing burden of oral diseases and oral cancer, globally, is the major factor bolstering the growth of the dental CAD market. For instance, according to the World Health Organization update in March 2022, 3.5 billion people are estimated to have oral diseases across the globe.

Additionally, the rising geriatric population and an increasing number of dental clinics and practitioners providing large-level dental care services are the other factors driving the growth of the dental CAD market. According to the United Nations' World Ageing Population, in 2020, approximately 727 million persons were aged 65 years or above, globally, and this number is expected to double to 1.5 billion in 2050. Oral health is directly linked to aging due to the interactions of biological, behavioral, and socioeconomic factors, and thus, results in the declination of oral health among the geriatric population. As the geriatric population is expected to witness an increasing trend in the coming years, globally, the demand for dental procedures is also expected to surge, which, in turn, leads to the healthy growth of the dental CAD market over the forecast period.

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In addition, rising product launches in the dental CAD industry are further expected to drive the market growth, due to the rise in adoption. For instance, in March 2021, the AI-enabled Intraoral 3D scanner from INTELLISCAN 3D has been released. Using an advanced motion sensing function, the scanner can be operated hands-free and can save scans from the wand, eliminating the need to touch the laptop and reducing cross-contamination risk.

However, the high cost of the procedures and lack of proper reimbursement policies are likely to hamper the growth of the dental CAD market.

Dental CAD Market Trends

The Scanners Sub-Segment within Component Segment is Expected to Hold Significant Share in Dental CAD Market Over the Forecast Period

The Scanners sub-segment is expected to hold a major share and is expected to do the same over the forecast period.

The Scanners sub-segment is expected to grow rapidly, due to the use of intra-oral scanners and open architecture solutions. Intraoral scanners are the most widely used scanners to capture direct optical impressions in dentistry. Most dentists use highly advanced intra-oral scanners to take impressions of the teeth at high speed. Moreover, most dental CAD system manufacturers are shifting toward open architecture, as the software can be used in collaboration with any milling unit. Due to the increased demand for scanners, companies are investing in this segment. Some of the companies offering intraoral scanners are Kavo Kerr, 3Shape, Planmeca, Dental Wings Inc., and Carestream, among others.

According to the research article published in the Journal of Healthcare Engineering, titled 'Studying the Optical 3D Accuracy of Intraoral Scans: An In Vitro Study' in February 2020, intraoral scanners provide digital impressions, which helps in the reduction of discomfort among patients. Also, intraoral scanners are time-efficient and aid in simplifying dental procedures, thereby, eliminating the need for plaster models and improving the communication between dental technicians and patients.

Additionally, in April 2021, Medit launched the i700 wireless intraoral scanner, a newly designed wireless wand with the same speed, accuracy, and lightness. Thus, with the advantages associated with the scanners, the increased demand for scanners, and the growing focus by key players in the development and commercialization of advanced scanners, the studied sub-segment is expected to grow over the forecast period.

Therefore, the above-mentioned factors are expected to drive this segment growth over the forecast period.

North America Holds a Significant Share in the Dental CAD Market and is Anticipated to Continue the Same Over the Forecast Period

North America holds a major share in the dental CAD market and is expected to witness the same growth over the forecast period.

The growing burden of dental diseases and the availability of sophisticated healthcare infrastructure, along with the increasing adoption of advanced dental treatment procedures, are major factors driving the growth of the dental CAD market in North America. According to the American Cancer Society, in 2022, approximately 54,000 American population are estimated to be diagnosed with oral cavity or oropharyngeal cancer, and nearly 11,230 of these people are estimated to die of oral cancers in the United States.

Also, according to the American Dental Association (ADA) estimates, there are 10,658 orthodontists currently practicing in the

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United States, which translates to about 3.27 orthodontists per every 100,000 people. This increased number of visits to dental care centers creates demand for dental products and drives the market growth in this region due to the rise in the adoption of dental CAD scanners and machines. Thus, the growing burden of dental disorders is expected to propel the studied market growth in the region.

Furthermore, the technological advancements in intraoral scanners and CAD provide multiple benefits, ranging from safety to improved treatment outcomes. There has been a growing inclination of the American population toward dental CAD, as tooth repair procedures can be completed in less than a day, and no further or repetitive dental appointments may be required. Additionally, in April 2020, Align Technology Inc., completed the acquisition of exocad Global Holdings GmbH, which is one of the major players in the dental CAD/CAM software market. Such acquisitions are expected to rise in adoption of software for dental CAD, driving the market growth in this region.

Furthermore, in November 2021, Exocad launched the ChairsideCAD 3.0 a CAD software designed for chairside, single-visit dentistry in North America. Such product launches is expected to propell the market growth in this region.

Thus, the increasing number of dental problems and technological advancements are expected to increase the growth of the dental CAD market in North America.

Dental CAD Market Competitor Analysis

The dental CAD market is moderately competitive, and the major players are focused on expanding their business in different areas by adopting various market strategies, such as partnerships, collaborations, acquisitions, and mergers, along with investment in R&D activities and new product launches. Some of the major players in the Dental CAD market include Dentsply Sirona, Align Technology Inc., Zimmer Biomet, 3Shape, Planmeca, Envista Holdings Corporation, and Carestream Dental LLC, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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