

Invisible Orthodontics Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The invisible orthodontics market is projected to register a CAGR of 12.5% during the forecast period.

The COVID-19 pandemic adversely affected the global orthodontics market in 2020. The revenue of orthodontic companies declined substantially during the first two quarters of 2020. Due to the government actions taken to limit the spread of the pandemic, companies experienced a decline in customer demand globally. Moreover, demand from end users was affected by dental associations' guidelines to perform only emergency procedures.

The increasing prevalence of dental diseases and rising awareness regarding cosmetic and restorative dentistry across the globe are driving the growth of the market. Combining tooth ailment techniques with tooth whitening and other cosmetic dentistry techniques, such as smile makeovers, dental veneers, enamel chipping, and composite edge bonding procedures to improve the symmetry and aesthetics of smile are being used with invisible orthodontics, thereby positively impacting the market growth. According to statistics published by the British Dental Association, 2021, in the United Kingdom, tooth whitening was the most desirable dental treatment, with 41% of people opting for it. In 2020, 19% of the population was looking for cosmetic dental work, as reported by Oral Health Foundation. Moreover, the increasing adoption of invisible orthodontics among young people and changes in the lifestyle of people to adopt invisible orthodontics instead of traditional braces are likely to drive the market growth over the forecast period.

Another factor boosting the growth of the orthodontics market is the adoption of new technologies such as computer-aided design (CAD) technology. This aids in providing customizable teeth alignment and facilitates the correct placement of aligners and braces. Increasing healthcare infrastructure, along with extensive research and development (R&D) activities to produce high-quality and more cost-effective variants, are projected to drive the market further.

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Manufacturers are maintaining a steady supply chain of orthodontics products with dentists and offering new technologies that have increased the use of invisible braces. Applications of machine learning, artificial intelligence, and robots in the orthodontics field for more precision are growing. Conversely, the innovation in new technologies acts as an opportunity for market players. For instance, in February 2021, Henry Schein Orthodontics, in partnership with Grin, launched a new Remote Consultation feature that provides orthodontists with a cost-effective alternative virtual solution to time-consuming initial consults.

However, the high cost of invisible orthodontics that makes its affordability a concern for patients and the risks associated with invisible orthodontics procedures, gum disease, or cavities during treatment is likely to challenge the market's growth.

Invisible Orthodontics Market Trends

Clear Aligners Anticipated to Witness Significant Growth in the Market

The clear aligners segment is expected to dominate the market during the forecast period. The rising prevalence of malocclusions and growing demand for customized invisible aligners are propelling the market's growth. According to the World Health Organization (WHO), malocclusion is the third most common dental disease. Furthermore, increasing adoption of invisible orthodontics, especially among young people, is likely to drive market growth. The clear aligners have several advantages over traditional braces, such as maintaining oral hygiene, less frequent visits to dentists, and wearing comfort, which was possible due to the customized clear aligners made using computer-aided designs technology, which has increased their usage. The companies are increasing their focus on developing new and affordable products for patients. For instance, in September 2020, Align Technology announced the launch of Invisalign Stackables, which is used in Invisalign clear aligners to assist patients in personalizing their aligners.

North America Expected to Hold Significant Market Share

North America is anticipated to dominate the orthodontics market throughout the forecast period. Factors such as the rising prevalence of dental disease, an increasing geriatric population that require timely dental check-ups, and a well-established healthcare system are expected to be the major factors propelling the growth of the market in the region. Additionally, the American Dental Association is keen on spreading awareness among people regarding the importance of oral health and hygiene, which is likely to drive market growth. Furthermore, the rising adoption of cosmetic dentistry procedures and 3D printing technologies is supporting the growth of the invisible orthodontics market in North America.

The high prevalence of malocclusion and dental caries are propelling the growth of the orthodontics market globally. According to statistics published by the National Library of Medicine, 2020, titled "Worldwide Prevalence of Malocclusion in the Different Stages of Dentition," in the United States, the prevalence of malocclusion was 53%, which was much lower than the prevalence rate in Africa (81%) and Europe (72%). Dental caries are becoming common among young people. According to data published by the National Center for Biotechnology Information, 2020, in the United States, more than 90% of adults have experienced dental caries in their lifetime, and approximately 32% of them have untreated decay. In 2020, 63% of adults aged 18 years and above had dental visits in the previous year, as reported by the Center for Disease Control and Prevention.

Moreover, the treatment of dental caries is expensive. According to the World Health Organization, dental caries treatment is the fourth most expensive among therapeutic costs for all diseases. Dental coverage is offered as a part of some health plans but not all of them. The expenditure on dental health has fallen as compared to the previous year. According to American Dental Associations, 2020, national dental expenditures decreased by 1.8%, from USD 145 billion in 2019 to USD 142.4 billion in 2020.

Invisible Orthodontics Market Competitor Analysis

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The invisible orthodontics market is highly fragmented and competitive. Market players are focusing on new product launches, product innovations, and geographical expansion to strengthen their market share. Some of the key players operating in the market include Align Technology Inc., The 3M Company, Envista Holdings (Ormco), Dentsply Sirona, and American Orthodontics Corporation.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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