

Dental Bone Graft Substitutes Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The dental bone graft substitutes market is expected to witness a CAGR of 6.8% over the forecast period, 2022-2027.

The COVID-19 pandemic has impacted industries worldwide. As all healthcare providers were engaged with COVID-19 management, access was restricted to essential care only, and the temporary closure of dental clinics drastically reduced dental surgeries. For instance, the American Dental Association (ADA) recommended that elective dental procedures be postponed until April 6, 2020, and dental practices should provide emergency-only dental services. Additionally, as per April 1, 2020, update, the ADA advised offices to remain closed to all but urgent and emergency procedures until April 30, at the earliest, owing to increasing COVID-19 cases. As a result, access to dental care was substantially decreased. Moreover, in March 2020, an ADA health policy institute survey indicated that 76% of dental offices surveyed were closed but seeing emergency patients only, 19% were completely closed, and 5% were open but seeing a lower volume of patients. These factors severely impacted dental bone graft substitute manufacturers and their supply chains. Thus, these statistics indicate that the demand for dental bone graft substitutes was reduced during the COVID-19 pandemic.

Furthermore, the significant factors responsible for the market's growth include the rising demand for medical and dental tourism; the increasing burden of dental diseases; and technological advancements in dentistry. The rising burden of dental diseases is driving the market's growth. For instance, according to the World Health Organization (2020), oral diseases affect nearly 3.5 billion people, and over 530 million children suffer from caries of their primary teeth.

To maintain the existing jaw, bone grafting is done before implant placement, which helps with successful implant surgery. Thus, increasing the use of such synthetic and biocompatible grafts in dental procedures ultimately triggers the market's growth. As per a May 2020 published study titled "Global Prevalence of Periodontal Disease and Lack of Its Surveillance," periodontitis was most

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common in older people and populations from high-income countries. The distribution varied significantly between low-income (28.7%), lower-middle (10%), upper-middle (42.5%), and high-income (43.7%) countries. Additionally, according to the International Dental Journal's article titled, "Risk Indicators of Tooth Loss among the Mexican Adult Population: A Cross-Sectional Study," published in February 2021, tooth loss was 57.2% due to tooth decay in Mexico. Hence, owing to the aforementioned factors, the market is expected to witness significant growth in the future.

Additionally, the strategic initiatives taken by the market players are also propelling the growth of the market. For instance, in April 2022, the Aspen Group and ACE Surgical Supply, one of the providers of bone regenerative products, signed a multi-year strategic partnership for dental bone grafting solutions.

Thus, owing to the abovementioned factors, the market is expected to show growth over the forecast period. However, expensive dental procedures and reimbursement issues hinder the market's growth.

Dental Bone Graft Substitutes Market Trends

The Xenograft Segment is Expected to Grow Over the Forecast Period

The xenograft segment is expected to hold a significant market share by type. A xenograft is an organ transplant or a tissue graft to an individual of another species. Xenografts are obtained from pigs (porcine) or cows (bovine) and are prepared for implantation into the human body once thoroughly cleaned and sterilized. Deproteinized bovine bone is the most common source of xenograft materials in dentistry. A few commercially available xenografts are Bio-Oss, Bio-Oss Collagen, and Pepgen-P15, among others. As xenograft are most affordable, the key players in the market are taking initiatives to launch new products.

For instance, in March 2022, Fredun Pharmaceuticals Limited received approval to manufacture Xenografts for various dental and orthopedic surgical appliances from the Central Drugs Standard Control Organisation (CDSCO), India. With this, the company aims to penetrate the dental fraternity across India. Such developments are expected to fuel the development of dental bone graft substitutes for xenografts, thereby boosting the segment's growth.

Additionally, the strategic initiatives taken by the market players are also contributing to the growth of the market. For instance, in September 2021, Neoss signed an agreement with Purgo Biologics and became a key partner and distributor of the Purgo Xenograft product range for dental implant solutions in the German, Swedish, and United Kingdom markets.

Thus, the segment is expected to witness significant growth over the forecast period due to the abovementioned factors.

North America Dominates the Market and Expected to do Same in the Forecast Period

North America is expected to dominate the global dental bone graft substitutes market. The United States is likely to hold a significant market share in the North American region. The major factors contributing to the market's growth are strategic initiatives undertaken by the market players and the growing number of dental visits.

For instance, according to the Centers for Disease Control and Prevention (CDC) data updated in January 2021, 1 in 4 adults between 20-64 years of age suffer from at least one cavity, and almost 57% of adolescents aged 12-19 have had a hole in their permanent teeth. Also, as per December 2020 statistics by the Centers for Disease Control and Prevention (CDC), more than 1 in 4 (26%) adults have untreated tooth decay, and nearly half (46%) of all adults aged 30 years or older show signs of gum disease; and severe gum disease affects about 9% of adults in the United States. These statistics indicate that the percentage of the population visiting dental clinics for examinations contributes to the market's growth.

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Moreover, the growing number of strategic initiatives such as product launches, approvals, acquisitions, mergers, partnerships, and joint ventures are anticipated to boost regional growth. For instance, Dentsply Sirona acquired Datum Dental Ltd., known for innovative dental regeneration products, in January 2021. With this acquisition, Dentsply Sirona promotes the complete OSSIX portfolio, including OSSIX Plus, OSSIX Volumax, and OSSIX Bone, in the United States, Canada, and several other countries.

Thus, the market is expected to witness significant growth over the forecast period due to the abovementioned factors.

Dental Bone Graft Substitutes Market Competitor Analysis

The dental bone graft substitutes market is highly competitive, with several players worldwide. In terms of market share, few significant players currently dominate the market. With the rising patient awareness levels and high prevalence of dental disorders, many regional players are expected to be part of the dental bone graft substitute market over the forecast period. Some of the market's major players are Dentsply Sirona, Johnson & Johnson, Institut Straumann AG, Medtronic PLC, ZIMMER BIOMET, etc.

Additional Benefits:

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

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