

Dental Autoclave - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Dental Autoclave Market size is estimated at USD 313.39 million in 2024, and is expected to reach USD 363.30 million by 2029, growing at a CAGR of 3% during the forecast period (2024-2029).

The COVID-19 pandemic has been affecting the growth of various sectors since its outbreak. It also created a financial burden on the global economy and negatively impacted the operations of non-COVID-19 patients in hospitals and dental clinics across the world. For instance, as per research by RAND Corporation, Arlington, US, in September 2020, nearly half of the respondents (46.7%) reported delaying going to the dentist or receiving dental care due to the COVID-19 pandemic. Among them, 74.7% reported delaying a check-up, 12.4% reported delaying care to address something bothering them, and 10.5% reported delaying care to get planned treatment. However, due to the rising number of COVID-19 cases, government associations also worked toward reducing the COVID-19 impact. For instance, as per the Guidance for Industry and Food and Drug Administration Staff released in March 2020 by the US Food and Drug Administration (USFDA), it became necessary to maintain an adequate supply of sterilizers, disinfectant devices, and air purifiers that can facilitate the rapid turnaround of sterilized or disinfected medical equipment and help reduce the risk of viral exposure for patients and health care providers to SARS-CoV-2 during the COVID-19 pandemic. The US Food and Drug Administration believes the guidance will help address these urgent public health concerns by helping increase the availability of sterilizers, disinfectant devices, and air purifiers during this public health emergency.

Moreover, the significant factors responsible for the growth of the dental autoclave market include increasing incidences of dental disorders and dental cosmetic surgeries, rising patient awareness of the levels of sterilization, and government initiatives involving hygiene policy and sanitization.

An increase in the number of oral health problems, such as cavities, malocclusion, fractured, loosened, and knocked out teeth,

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pulpitis, and impacted teeth, and dental prosthetic surgical treatments are leading to an increase in the number of patients visiting hospitals and dental clinics. These incidences have increased the conditions for extreme sterilization, thereby driving the dental autoclave market. Moreover, major oral health problems, such as dental carries and growing patient awareness levels, are propelling the market growth worldwide. For instance, as per a March 2020 update by the World Health Organization (WHO), it is estimated that oral diseases affect nearly 3.5 billion people worldwide and severe periodontal (gum) disease, which may result in tooth loss, is also very common, affecting almost 10% of the global population. As per the same source, oral cancer (cancer of the lip or mouth) is one of the three most common cancers in some countries in Asia-Pacific.

Moreover, advancements in cosmetic dental surgeries, the rising prevalence of post-treatment infections, and a growing number of dental visits have generated the demand for advanced sterilization techniques, promoting autoclaves as a cost-effective sterilization tool. For instance, in September 2020, Midmark launched an updated Midmark M3 steam sterilizer for speed, simplicity, and compliance in instrument processing.

However, a lack of awareness about dental hygiene in developing countries and the high cost of dental autoclaves are expected to restrain the market growth over the forecast period.

Dental Autoclave Market Trends

Automatic Dental Autoclave Segment Expected to Account for a Major Market Share During the Forecast Period

An automatic dental autoclave is a sterilizer wherein the sterilization process begins with the assistance of a catch. Upon pressing the catch, water begins streaming into the chamber, the pointer light is turned on, and cleansing occurs. The programmed autoclave debilitates itself after the disinfection happens with the right boundaries. After this interaction, the drying cycle begins naturally and finishes, and the clinical gear is ready to be utilized. This market segment is expected to grow at the fastest rate during the forecast period due to its capability to provide quick and error-free results. Automatic autoclaves offer several advantages over manual and semi-automatic autoclaves, such as ensuring quicker results, being user-friendly, and offering enhanced failure detection. These factors are expected to propel the segmental growth of the market. A fully automatic dental autoclave sterilizes instruments and maximizes the efficiency of instrument cleaning. For example, automatic dental autoclaves, like Elara 11D, Midmark m11 Ultraclave, Miniclave 21E, Lina autoclave, etc., have been launched by key market players at a competitive price, which is expected to drive the segment's growth.

In September 2020, Midmark Corp. launched its new Sterilizer Data Logger and released the updated Midmark M3 Steam Sterilizer. Both offer enhanced speed, simplicity, and compliance for instrument processing. The data logger will automatically record and store a sterilizer's physical and mechanical performance records. The company also announced its 2020 Sterilizer Promotion to ensure that caregivers have access to simple-to-use sterilization and cleaning equipment that helps effectively reduce the transmission of infectious diseases.

Moreover, as per the World Health Organization's (WHO) March 2020 update, in most high-income countries, dental treatment averages 5% of total health expenditure and 20% of out-of-pocket health expenditure. Additionally, the high demand for sophisticated dental services, such as dental surgeries, is expected to fuel segmental growth.

North America Expected to Hold Significant Market Share in the Forecast Period

North America is expected to gain a major share of the dental autoclave market during the forecast period due to the increase in application rates, a rise in patient awareness about oral health, technologically developed healthcare infrastructure, and an increase in healthcare expenditure. The North American region is estimated to be a potential segment for the dental autoclave market, as it generates most revenues from this region because of comparatively higher health expenditure, high patient

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awareness levels, and a large number of dental procedures. 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 cavity in their permanent teeth. Furthermore, as per the 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 US. Moreover, increasing government initiatives for monitoring and implementing dental equipment sterilization may propel market growth.

According to the International Dental Journal's article titled, 'Risk Indicators of Tooth Loss among Mexican Adult Population: A Cross-Sectional Study,' published in February 2021, the prevalence of tooth loss was 57.2% due to tooth decay in Mexico. The study also reported that it is similar to the data reported in low- and middle-income countries. Such a high prevalence of tooth decay and loss generates a need for the sterilization of dental instruments and is expected to drive market growth.

Hence, owing to the aforementioned factors, the dental autoclave market is expected to show considerable growth in the region over the forecast period.

Dental Autoclave Industry Overview

The dental autoclave market is moderately competitive and consists of several major players. In terms of market share, a few of the major players are currently dominating the market. Some of the key players in the market are Tuttnauer, Getinge AB, MELAG Medizintechnik GmbH & Co. KG, Midmark Corp., W&G Dentalwerk, Euronda, Dentsply Sirona, Mocom, Coltene Holding, and Shinva Medical Instrument Co. Ltd.

Additional Benefits:

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

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