

Digital Dentistry - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The digital dentistry market is projected to register a CAGR of 9.2% during the forecast period.

COVID-19 has impacted the growth of the digital dentistry market owing to the cancellations of the dental procedures during the initial phase of the pandemic. For instance, according to an article published in the International Journal of Environmental Research and Public Health in July 2021, various private dental practices in Germany were shut down to avoid the spread of coronavirus infection. This has impacted the demand for digital dentistry during the pandemic. However, with the released restrictions and resumed dental treatment centers the studied market has witnessed significant growth and is expected to grow over the forecast period.

Factors such as the increasing focus on digital dentistry and the growing geriatric population are boosting the market growth.

The rising prevalence of dental and oral diseases among the population raises the demand for effective intraoral scanners and digital devices early to detect and measure the depth of the condition, hence propelling the market growth. For instance, as per the data from Al-Azhar University published in July 2022, it was observed that the prevalence of dental caries in Saudi Arabia was around 65.24% in a total of 15,319 children during the year 2021.

The rising focus of the companies on developing digital workflows and digital platforms, as well as growing collaboration with other tech companies are also expected to fuel the market growth over the forecast period. For instance, in September 2022, 3Shape TRIOS 5 Wireless, a completely new, state-of-the-art intraoral scanner was launched to help dentistry to go digital with dentistry. Also, in May 2022, Dentsply Sirona launched a cloud-based DS Core digital dentistry platform, which was designed to enhance digital workflows with benefits for dentists, dental labs, and patients globally, by collaborating with Google Cloud.

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Furthermore, the growing geriatric population is contributing to the rising demand for dental prosthetics which is supporting the market growth as prosthetics are developed with the help of 3D printing technology. For instance, a wide range of medical sectors finds 3D printing attractive as it makes precise production simpler and makes it possible to design complicated geometries that are customized to a patient. It also saves time and money by reducing human labor. Therefore, the reduction in cost and increasing benefits of 3D printing technologies are expected to boost the adoption of 3D printing of dental prosthetics, hence boosting the market growth.

Hence, owing to the aforementioned factors such as the increasing aging population, and the high burden of dental and oral diseases among the population, the studied market is expected to grow over the forecast period. However, the high cost associated with implementation is likely to impede the growth of the digital dentistry market over the forecast period.

Digital Dentistry Market Trends

Hospitals are Expected to Witness Significant Growth Over the Forecast Period

The hospital segment is expected to witness significant growth in the market over the forecast period owing to the factors such as the rising use of dental procedures to treat various dental cavities and the growing adoption of the new technologies in hospitals.

Research studies have provided insight into the new approach to improving dental care post-pandemic. For instance, according to an article published in the International Journal of Public Health, in February 2022, about 80% of dentists accepted preventive advice and adapted it to fit the nature and specifics of each dental procedure. This is expected to increase the adoption of various cloud-based digital dentistry services in the dental premises that allows the easy upload of cone beam computed tomography (CBCT), and intraoral scans used for designing plans for implant surgery, and surgical guides, which in turn is anticipated to fuel the segment growth.

Furthermore, the rising company activities in developing digital workflows and solutions raise the adoption and installation of digital dentistry products in hospitals enabling dentists to provide customized products. This is anticipated to fuel the segment's growth. For instance, in February 2022, DENTSPLY SIRONA Inc launched a series of innovations, Medical-Grade 3D Printing Solution, which is designed to enhance digital workflows with benefits for dentists, dental labs, and patients globally, by collaborating with Google Cloud.

Moreover, the growing initiatives to launch digital dentistry clinics are also expected to increase the demand for digital workflows and solutions which in turn is anticipated to augment the segment's growth. For instance, in November 2021, Dr. Mohan Atluri launched a state-of-the-art digital dentistry clinic in an area of 6,000 square ft. at Filmnagar. The facility has a computer-aided manufacturing unit and computer-aided design unit that help experts conduct difficult dental treatments more quickly, effectively, and properly.

Therefore, owing to the aforementioned factors, the studied segment is anticipated to grow over the forecast period.

North America is Expected to Have the Significant Market Share Over the Forecast Period

North America is expected to witness significant growth in the digital dentistry market over the forecast period owing to the factors such as advancements in technology for dental care in the region, and an increase in product launches, supported by the rising burden of dental disorders, which are expected to increase the demand for dental services in the region.

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The rising burden of oral diseases among the population is the key factor increasing the demand for dental devices and services, hence increasing the focus of hospitals and other dental clinics to adopt digital dentistry platforms and software. For instance, as per an article published in Medicine Journal, in June 2021, it has been observed that the prevalence of non-cavitated lesions among the children was 38.0%, cavitated lesions were 43.4% in permanent dentition and 50.6% of school children had poor oral hygiene. In addition, as per the same source, low brushing frequency and poor dental hygiene was the main factor responsible for dental caries among Mexican children.

Moreover, collaborations and partnerships are other factors responsible for the growth of the market in the region. For instance, in April 2022, CAD-Ray entered into a partnership by selling TRIOS intraoral scanners to 3Shape, Inc. This partnership would increase CAD-Ray's position as the fastest-growing and most trusted distributor, supporter, and educator of CAD/CAM technology. Also, in March 2021, Intelliscan launched an artificial intelligence-enabled intraoral scanner, Intelliscan 3D, that includes stunning realistic color, clear margin lines, and is powder-free. The Intelliscan 3D Cloud streamlines workflows enabling dentists and dental laboratory technicians to quickly send and obtain high-quality digital impressions for a full range of indications, including dental implants, crown and bridge restorations, clear aligners, and much more. Such partnerships increase the presence of key players in the region, which increases market growth.

Therefore, owing to the aforementioned factors, the studied market is anticipated to grow over the forecast period.

Digital Dentistry Industry Overview

The digital dentistry market is fragmented and consists of several small and large players. The companies are engaged in developing technologically advanced systems as well as adopting key strategies such as collaborations, partnerships, new product launches and other initiatives to withhold their market position. Some of the key companies in the market are PLANMECA OY, Ivoclar Vivadent, J. MORITA CORP., Midmark 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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