

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

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Report description:

The Global Dental Prosthetics Market size is estimated at USD 8.96 billion in 2024, and is expected to reach USD 12.61 billion by 2029, growing at a CAGR of 7.07% during the forecast period (2024-2029).

COVID-19 is expected to have a significant impact on the dental prosthetics market as due to COVID-19, various dental procedures were canceled or rescheduled along with a decline in the diagnosis and treatment of dental diseases owing to the high influx of COVID-19 patients. For instance, according to a survey study published by the General Dental Council of the United Kingdom in June 2022, about 22% of all respondents to the study reported that they tried to make an appointment since August 2020 but were unsuccessful, and 17% said they had an appointment that was rescheduled or canceled during the previous 12 months. Further, as per the same source, nearly half of the respondents (47%) believed that all dentist offices were open as of October 2021, while that was an improvement over August 2020, when just 19% of respondents believed all dental offices were open, 25% of respondents in both the 2020 (25%) and 2021 (26%) polls said they were unsure about the status of dental offices. This data shows that the emergence of COVID-19 had a significant impact on dental procedures. Hence, COVID-19 is expected to have a significant impact on the studied market. However, with the decreasing cases of COVID-19, the footfall in dental clinics and hospitals is increasing and over the forecast period, the studied market is expected to regain its full growth potential.

The major factors attributing to the market's growth are the global prevalence of accidental injuries and various periodontal diseases due to increased tobacco, chocolates, and junk foods. Dental caries is the most widespread chronic disease across the globe leading to tooth loss resulting in higher demand for dental prosthetics and dentists to meet the needs of significant global public health challenges. For instance, as per a March 2022 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, with almost 10% of the global population affected. Caries of permanent teeth affects an estimated 2 billion

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people worldwide, while caries of primary teeth affect 520 million children. Thus, the increasing prevalence of dental diseases results in tooth loss anticipated to drive the demand for dental prosthetics, thereby boosting the market growth.

In addition, the studies depict that the prevalence of dental caries and other dental diseases is high in the geriatric population which is further expected to boost the market's growth as the population of older people increases around the world. For instance, according to the October 2021 report of the World Health Organization, the population of people of age 60 years and more is expected to increase from 1 billion to 2.1 billion by 2050. As a result, the growing geriatric population is expected to drive the market for dental prosthetics, as these groups are more prone to tooth loss. As a result, the demand for dental prosthetics is expected to increase, boosting growth in the dental prosthesis market over the forecast period.

Furthermore, a growing number of strategic alliances, such as collaborations and partnerships within the major market players, are expected to impact the segment's growth positively. For instance, in May 2021, Western Dental and Orthodontics partnered with the Straumann Group to expand access to dental implants. Straumann intends to provide high-quality dental implants, abutments, and crowns under the Neodent brand for all 333 Western Dental and affiliated offices. Similarly, in January 2021, Nobel Biocare launched Xeal and TiUltra surfaces in the United States. These new surfaces are applied to dental implants and abutments, which optimizes tissue integration at every level. These developments are expected to increase the availability of abutments to the patient population, thereby increasing their adoption in dental procedures and driving the market growth. Thus, all aforementioned factors are anticipated to drive the market growth over the forecast period. However, costly treatment and prosthetics, along with associated severe complications and reimbursement issues, restrain the market growth.

Dental Prosthetics Market Trends

Crown are Expected to Hold a Significant Market Share in the Dental Prosthetics Market Over the Forecast Period

Dental crowns are caps placed over the tooth to reconstruct the tooth's appearance, strength, size, and shape. These are placed over damaged teeth to cover and protect the natural teeth in conditions where fillings no longer help reconstruction. The dental crown segment is mainly driven by the increasing number of patients with tooth decay, unhygienic dental habits, and increased patient awareness regarding dental reconstruction treatments.

The surge in strategic alliances, such as collaborations and partnerships among the industry players, contribute to the segment growth. For instance, in February 2020, Formlabs, and BEGO, partnered to introduce 3D-printed permanent and temporary crowns and bridges for dental patients. This partnership aims to utilize digital dental workflows to provide low-cost and rapid iterative processes to improve clinical outcomes.

Similarly, a rise in product launches is also anticipated to propel segment growth. For instance, in March 2021, Dentsply Sirona introduced CEREC Tessera blocks (Advanced Lithium Disilicate CAD/CAM Blocks), a newer material for posterior and anterior restorations. These blocks shorten the glaze firing time, accelerating the manufacturing process (grinding and firing). Using the CEREC SpeedFire, a crown can be fired in just 4 and 30 seconds, representing much less time than the other glass ceramics used in the manufacturing process. These aforementioned factors drive the growth of the dental caries treatment market for the dental crown segment throughout the forecast period.

North America Region is Expected to Occupy a Major Share in the Market Over the Forecast Period

North America is expected to dominate the overall dental prosthetics market throughout the forecast period. The dominance is due to the rise in prevalence of accidents and sports injuries along with the rise in intake of junk foods, the rapid growth of the geriatric population leading to dental caries resulting in rising the demand for dental implants and prosthetics in the North American region.

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For instance, according to the research study published in July 2021, titled 'Fluoridation cessation and children's dental caries: A 7-year follow-up evaluation of Grade 2 schoolchildren in Calgary and Edmonton, Canada', the prevalence of primary caries in Calgary was higher as compared to Edmonton and the crude deft prevalence of primary caries in Calgary was 64.8% and 55.1% in Edmonton. Similarly, according to the research study published in April 2021, titled 'Self-Reported Dental Caries by Mexican Elementary and Middle-School Schoolchildren in the Context of Socioeconomic Indicators: A National Ecological Study', tooth loss is quite common in the Mexican population, with prevalence ranging between 13.5% and 34.5%. Hence, due to the high prevalence of dental diseases in the region, the demand for dental prosthetics products is expected to increase which is anticipated to boost the market growth in the region. Also, the National Institute of Health article titled Estimates of Funding for Various Research, Condition, and Disease Categories, published in June 2021, reported that an estimated USD 638 million annual research support for dental/oral and craniofacial disease, based on grants, contracts, and other funding mechanisms, was used across the National Institutes of Health in the United States which is further expected to have a positive impact on the growth of the studied market.

The key players actively engaged in strategic planning and new developments to contribute to the market growth. The dental crowns and bridges market manufacturers are currently focusing on mergers and acquisitions to strengthen market existence and expand the customer base. They are also innovating and making new product launches to expand their product portfolio. For instance, in January 2021, Nobel Biocare launched Xeal and TiUltra surfaces in the United States. These new surfaces are applied to dental implants and abutments, which optimizes tissue integration at every level. As dental implants and abutments are reconstruction devices used in dental caries treatment, their advancement may boost the growth of the market.

Furthermore, strategic developments concerning the incorporation of digital technologies in dental care are also expected to supplement the segment growth. For instance, in September 2021, Dentsply Sirona reported the development of its Lucitone Digital Print Denture System. The company plans to expand the digital production of custom tooth arches, including Lucitone Digital Value 3D Economy Tooth and Trial Placement resin, DS Multilayer PMMA Discs for milling premium denture teeth, and the planned 2022 release of Lucitone Digital IPN, a printed premium denture tooth material. Due to the above-mentioned factors, the market is expected to drive swiftly in the forecast period in the North American region.

Dental Prosthetics Industry Overview

The dental prosthetics market is moderately competitive and consists of several major players. Few of the major players currently dominating the market are making acquisitions with other companies to consolidate their global market positions. Others are launching new products with advanced technologies to enhance the fixation processes and cosmetic appearance. Some companies currently dominating the market are BioHorizons Inc, Zimmer Biomet Holdings Inc, Osstem Implant Co Ltd, Nobel Biocare Services AG, and Straumann AG.

Additional Benefits:

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

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