

Intraoral Scanners - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2021 - 2029

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Report description:

The Intraoral Scanners Market size is estimated at USD 401.74 million in 2024, and is expected to reach USD 581.60 million by 2029, growing at a CAGR of 7.68% during the forecast period (2024-2029).

The COVID-19 pandemic contributed largely to transforming the growth of various markets, and the immediate impact of the pandemic is varied. Initially, the outbreak of COVID-19 showed a substantial effect on the intraoral scanner market because patients' visits to dental clinics and hospitals were significantly reduced due to the global social distancing and lockdown measures taken by governments. The SARS-CoV-2 viral transmission in dentistry was anticipated to happen by air, droplets, and touch, according to a paper published in BMC Oral Health in October 2020. Additionally, in March 2020, the American Dental Association (ADA) published recommendations for a dental emergency and non-emergency care. Apart from conditions involving acute pain, infection, or trauma, the removal of teeth that are not showing any symptoms, and restorative dentistry, which includes the treatment of asymptomatic carious lesions and cosmetic dental procedures, are all considered non-emergencies by the American Dental Association (ADA). However, during the COVID-19 pandemic, emergency dental procedures were mentioned with tooth fractures, dental treatment cementation, pericoronitis, etc. Hence, it is observed that the COVID-19 pandemic had a significant impact on the market studied. However, the market has reached pre-pandemic in terms of demand for the intraoral scanner.

Additionally, the significant factors responsible for the growth of the intraoral scanner market include rapid technological advancements, an increase in the geriatric population, and a rise in dental disorders. According to the WHO data published in 2021, oral diseases affected nearly 3.5 billion people, and over 530 million children suffered from caries affecting their primary teeth in 2020. The introduction of intraoral scanners in the dental devices market has modernized the dental practice landscape. These have eliminated the limitations of taking tooth impressions and helped dentists instantly transfer and manipulate data. The

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global geriatric population has increased in recent years.

According to a report published by the United Nations, around 727 million people were 65 years and above in 2020, and the number is expected to reach 1.5 billion by 2050, i.e., about 16% of the global population. Moreover, a positive correlation between the senior population and an increase in incidences of tooth loss and other dental-related disorders is expected to positively impact the market growth.

However, the lack of skilled professionals in developing economies such as India and China and the high cost of intraoral scanners may restrain market growth.

Intraoral Scanners Market Trends

Standalone Intraoral Scanner Segment is Expected to Witness Strong Growth in The Coming Years

Standalone devices are expected to witness promising growth due to the improved workflow of dental professionals in oral scanning procedures and improved outputs of these devices. But, due to the introduction of miniature portable intraoral scanners in the market, incorporating the side-oriented tip in small intraoral scanners has made the buccal surface scans much more accessible, quicker, and more effective. Thus, the enhanced output offered by these devices is expected to fuel the segment's growth. Oral illnesses affect people throughout their lives, causing pain, suffering, disfigurement, and sometimes death. They are a significant health burden for many nations. According to World Health Organization (WHO) oral health data from 2020, an estimated 3.5 billion people worldwide are affected by oral illnesses. More than 530 million kids worldwide get dental caries in their primary teeth (milk teeth).

Additionally, according to data by the CDC published in 2021, about half (46%) of all persons aged 30 or older have gum disease; about 9% of adults have severe gum disease. Additionally, according to the October 2021 Borgen Project, 60% to 80% of kids and 85% to 90% of adults both have dental caries. The market for intraoral scanners is expected to grow due to this increasing demand for dental services.

A new wireless wand with the same speed, precision, and lightness, the i700 wireless intraoral scanner, was also introduced by Medit in April 2021. Therefore, the studied sub-segment is anticipated to rise over the forecast period due to the benefits associated with scanners, the rising demand for scanners, and the growing focus by significant players on developing and marketing improved scanners. Businesses are investing in this sector due to the increasing demand for scanners. The segment is thus anticipated to expand throughout the forecast period due to the benefits associated with scanners and the growing demand for scanners to assess various dental conditions.

North America is Expected to Hold a Significant Market Share During the Forecast Period

North America is estimated to dominate the market, registering high growth. A rise in the geriatric population susceptible to oral disorders, a large number of patients suffering from dental problems, and advanced healthcare infrastructure are the key factors contributing to the expansion of its revenue share. According to the PubMed data published in February 2022, half of the American adults above 35 years of age have periodontitis in one or more teeth which is the more advanced form of periodontal disease that approximately 64.7 million Americans suffer from. With the rising number of dental disorders, the demand in the market is expected to grow.

Additionally, as the US healthcare system develops and dental problems become more well-known, more people are anticipated to visit dentists and hospitals, which will support the expansion of the intraoral scanner market in the region. For instance, in recognition of World Oral Health Day in March 2021, almost 90% of Americans had planned to visit the dentist for various dental

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issues. This indicates that there is an increased awareness about dental health in the country which is augmenting the number of dental visits and ultimately contributing to the market growth.

Due to technological advancements, the key market players in the country are launching new and advanced scanners, which are also expected to have a significant impact on the growth of the studied market in the region. For instance, Intelliscan introduced its Intelliscan 3D intraoral scanner in March 2021. This scanner uses artificial intelligence to make intraoral scanning easier and more user-friendly. Therefore, during the study's forecast period, the aforementioned reasons are anticipated to fuel the expansion of the intraoral scanners market in the region.

Intraoral Scanners Industry Overview

The intraoral scanner market is competitive and consists of several major players. In terms of market share, a few major players dominate the market. Some companies currently dominating the market are 3M, 3 Shape AS, Align Technology Inc., Carestream Dental LLC, Condor, Dentsply Sirona Inc., Straumann, Dentsply Sirona Inc., Guangdong Lanca Medical Device Technology Co. Ltd, and Planmeca Oy.

Additional Benefits:

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

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