

Saudi Arabia Dental Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Saudi Arabia Dental Devices Market size is estimated at USD 438.06 million in 2024, and is expected to reach USD 638.60 million by 2029, growing at a CAGR of 7.83% during the forecast period (2024-2029).

The COVID-19 pandemic had a significant impact on Saudi Arabia's dental devices market. For instance, an article published by BioMed Central Oral Health Journal in April 2021 stated that social disparities were found in emergency dental care-seeking decision-making in Saudi Arabia during the COVID-19 pandemic. The article also reported that an alarming number of people were afraid to seek dental care for life-threatening dental emergencies, such as cellulitis, during the pandemic, due to the fear of contracting the infection. This trend led to a decrease in regular dental visits, thus reducing the demand for dental devices in Saudi Arabia during the pandemic and impacting the growth of Saudi Arabia's dental devices market. However, in the current scenario, with reduced COVID-19 cases and the resumption of various dental and healthcare services, the market is expected to witness significant growth over the forecast period.

The factors driving the growth of the market are the increasing burden of oral diseases and aging population and technological advancements in dentistry.

The increasing burden of oral diseases is driving the growth of the market. For instance, as per the data from Al-Azhar University published in July 2022, the prevalence of dental caries in Saudi Arabia was around 65.24% in a total of 15,319 children in 2021. The data further stated that dental caries is an increasing concern among children and adults in the country. Thus, the increasing prevalence of dental caries is expected to boost the demand for dental devices such as dental lasers, which are expected to increase the market's growth.

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Similarly, another article published by the journal Cureus, in August 2022, stated that the prevalence of edentulism was higher in patients aged more than 65 years, male patients, and non-Saudi citizens. Retained root stumps were most often encountered among the four positive findings on panoramic radiographs. Considering the high frequency of positive radiographic findings in totally edentulous patients (TEP), panoramic radiographs must be routinely obtained for TEP, but caution must be exercised to reduce the effects of radiation. Thus, the increasing prevalence of dental disorders in the geriatric population is leading to an increasing dental diagnosis, thereby driving the growth of the market.

The presence of technological advancements is driving the growth of the market. For instance, the data from the Department of Lecturer of Anatomy in Basic Sciences, Riyadh Elm University, published in August 2021, lasers have created a potentially profitable arena in patient care and well-being and in the field of dentistry and medicine across Saudi Arabia. The data further stated that, recently, the introduction of lasers into contemporary dentistry gave practitioners and patients alike convenience, efficiency, focus, and comfort. Hence, with the advancements in laser technology in dentistry, the market is expected to grow over the forecast period.

Thus, due to the increasing burden of oral diseases and aging population and technological advancements in dentistry, the market is expected to witness significant growth over the forecast period. However, due to the excessive costs involved in health insurance, the growth of the market may slow down over the forecast period.

Saudi Arabia Dental Devices Market Trends

The Prosthodontic Segment is Expected to Have a Significant Market Share During the Forecast Period

Prosthodontics is a specialized branch of dentistry dedicated to making dental prosthetics (artificial teeth) for damaged or missing teeth. Dental and facial issues that require replacing lost teeth and jaw components are the focus of prosthodontics. A prosthodontist is trained in temporomandibular disorders (TMJ/TMD), cosmetic dentistry, dental implants, crowns, bridges, dentures, and more.

The increasing dental problems, like the increasing prevalence of dental caries, are increasing the demand for prosthodontics, thereby driving the growth of this segment. For instance, an article from the National Institute of Health, published in the Journal of Family Medicine and Primary Care in January 2021, reported that teeth loss in Saudi Arabia was majorly associated with dental caries and is highly prevalent in the country. Due to the increasing teeth loss, prosthodontics is gaining considerable attention across dental clinics, which may propel the segment's growth in the coming years.

The increasing number of dentists in the country is fueling the segment's growth. For instance, an article published by the Journal of Healthcare Engineering, published in October 2022, reported that there were a total of 27,181 dental surgeons and 8,022 dental auxiliaries licensed in Saudi Arabia in different specialties as of 2020. The data further stated that there is an increasing number of dentists in the country, which is also fueling the segment's growth.

The same source further stated that the Saudi Board of Prosthodontists accounts for around 4.59% of the total dental specialties that are most common in Saudi Arabia, excluding general dentists. Prosthodontists work in the private sector for a total of 54.72%. Hence, with the high number of prosthodontists in the country, the segment is expected to grow considerably in the coming years.

Thus, the increasing number of dental problems, the rising cases of dental tooth caries, and the rising number of dentists are likely to drive the growth of this segment over the forecast period.

Dental Consumables Segment is Expected to Witness High Growth During the Forecast Period

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The dental consumables include dental implants, biomaterial, crowns and bridges, pin posts and drills, and restorative products. In response to the public's need for more safety, higher quality, and greater openness, healthcare professionals across Saudi Arabia are taking significant steps to improve the treatment provided.

Dental visits increased in Saudi Arabia in recent years, majorly attributed to the efforts of the Ministry of Health to provide free access to dental services in the country and the rising prevalence of oral disorders, thereby increasing the demand for dental consumables. For instance, the data from the BioMed Central Journal published in April 2022 reported that the burden of risk factors associated with lifestyle is increasing in Saudi Arabia, particularly among the young population. This burden is increased by oral illnesses, which account for up to 0.8% of daily-adjusted life years. The two most prevalent oral diseases are dental caries and periodontal disorders. The same source also reported that Saudi Arabia has a relatively high frequency of caries, which is estimated to be approximately 80%. Hence, with the high prevalence of such diseases, there is a growing demand for dental devices, which is augmenting the growth of the segment.

Similarly, data from the Journal of Research in Medical and Dental Science, published in September 2022, reported that the prevalence of tooth loss in Saudi Arabia is around 72%, and the awareness about dental implants in the country is around 77%. Hence, with the high awareness and prevalence of tooth loss, there will likely be growing demand for dental consumables in Saudi Arabia. The same source stated that the growing internet use is creating more awareness about dental health and oral diseases in Saudi Arabia. Thus, such instances are increasing the demand for dental consumables and driving the growth of the market.

As per the data from the Saudi Endodontic Journal published in January 2021, in a survey conducted by the College of Dentistry Riyadh, it was observed that the quality of dental fillings across the Saudi dental colleges is good and there is an increasing focus of dentists on providing high-quality fillings. Thus, high-quality dental consumables are leading to better dental care and increasing their demand, thereby driving the growth of the segment in the country.

Thus, regular dental visits, awareness among the youth to take care of dental health, and the high quality products are driving the growth of the segment.

Saudi Arabia Dental Devices Industry Overview

The Saudi Arabian dental devices market is highly competitive. One of the key factors driving competitiveness among industry players is the rapid adoption of advanced technologies like computer-aided scanners for precise imaging and diagnosis of dental disorders. A prominent number of companies are opting for geographical expansions, strategic collaborations, and partnerships through mergers and acquisitions. Some of the major players are 3M Company, Dentsply Sirona, Dentium Co. Ltd, Planmeca OY, Institut Straumann AG, Watan Surgical Instruments Factory, ZimVie Inc., NAKANISHI INC., Ivoclar Vivadent AG, 3D Systems Inc. (Vertex Dental), and ACTEON Group.

Additional Benefits:

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

Table of Contents:

- 1 INTRODUCTION
- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increasing Burden of Oral Diseases and Aging Population

4.2.2 Technological Advancements in Dentistry

4.3 Market Restraints

4.3.1 Excessive Costs Involved in Health Insurance

4.4 Porter's Five Forces Analysis

4.4.1 Threat of New Entrants

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Bargaining Power of Suppliers

4.4.4 Threat of Substitute Products

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)

5.1 By Product

5.1.1 General and Diagnostic Equipment

5.1.1.1 Dental Lasers

5.1.1.2 Radiology Equipment

5.1.1.3 Dental Chair and Equipment

5.1.1.4 Other General and Diagnostic Equipment

5.1.2 Dental Consumables

5.1.3 Other Dental Devices

5.2 By Treatment

5.2.1 Orthodontic

5.2.2 Endodontic

5.2.3 Periodontic

5.2.4 Prosthodontic

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 3M Company

6.1.2 Dentsply Sirona

6.1.3 Dentium Co. Ltd

6.1.4 Planmeca OY

6.1.5 Institut Straumann AG

6.1.6 Watan Surgical Instruments Factory

6.1.7 ZimVie Inc.

6.1.8 NAKANISHI INC.

6.1.9 Ivoclar Vivadent AG

6.1.10 3D Systems Inc. (Vertex Dental)

6.1.11 ACTEON Group

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