

Global Dental Implants Market - Focused Insights 2024-2029

Market Report | 2024-11-26 | 161 pages | Arizton Advisory & Intelligence

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Report description:

The global dental implants market is expected to grow at a CAGR of 4.85% from 2023 to 2029.

RECENT VENDORS ACTIVITIES

- In 2023, Henry Schein, Inc. acquired S.I.N. Implant System, a prominent manufacturer of dental implants based in Brazil. This acquisition significantly broadened Henry Schein's product range and expanded its footprint geographically, thereby strengthening its competitive position in the market.
- Straumann Group continues to strengthen its position in the global dental market. In recent years, they have acquired various companies, including Anthogyr, a French dental implant manufacturer, and ClearCorrect, which provides clear aligner solutions. These acquisitions have bolstered Straumann's capabilities in both traditional and digital orthodontics.
- In December 2022, ProSmile launched SmartArches Dental Implants in the U.S., offering a broad range of affordable and reliable implant services, including both single implants and full-mouth reconstructions. Initially operating from four locations in Pennsylvania and New Jersey, SmartArches plans to expand to eight states by the end of 2023, making their services more widely accessible across the country.

KEY TAKEAWAYS

- **Market Growth:** The global dental implants market was valued at USD 4.42 billion in 2023 and is expected to reach USD 5.88 billion by 2029, growing at a CAGR of 4.85% during the forecast period.
- **By Design Type:** The tapered dental implants segment accounted for the largest market share, the growth is driven by the increasing adoption of tapered implant designs, which offer enhanced functionality and ease of placement.
- **By Cost:** The non-premium dental implants segment shows the highest growth of 5.68%, due to increasing adoption of value-based and discounted dental implants by price-sensitive consumers.
- **By Material:** The metal dental implants segment holds the largest market share, the growth is driven due to their excellent biocompatibility and mechanical properties.

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- By End-User: The dental clinic segment holds the most significant segmental share, due to the evolving patient expectations, and the demand for accessible care.
- By Geography: The European region accounted for the largest market share of over 35%. The market's growth is mainly due to increasing awareness of dental implants and growing demand for these advanced dental solutions.
- Growth Factor: The global dental implants market is set to grow due to a rise in the edentulous patient population and high demand for non-premium dental implants.

MARKET OPPORTUNITIES & DRIVERS

Precision Implant Placement Using 3D Technology

The field of dental implantology is witnessing a paradigm shift with the integration of 3D technology, particularly in the precision placement of dental implants. This technological advancement not only enhances the accuracy of implant positioning but also significantly improves patient outcomes. By leveraging 3D imaging and planning software, dental professionals can now visualize the patient's anatomy in unprecedented detail, allowing for more informed decision-making during the implant procedure. 3D imaging technologies, such as Cone Beam Computed Tomography (CBCT), provide comprehensive views of dental and skeletal structures. This imaging method allows for the accurate assessment of bone density, volume, and the spatial relationship between anatomical landmarks, such as nerves and sinuses. With this detailed information, dentists can create customized surgical plans that minimize risks and optimize implant placement. As a result, the likelihood of complications is reduced, and the overall success rates of implant surgeries are significantly enhanced.

Rise in Edentulous Patient Population

The increasing population of edentulous patients-individuals who have lost one or more teeth-poses significant challenges and opportunities within the dental healthcare landscape. Various factors contribute to the rising prevalence of edentulism, including aging demographics, poor oral hygiene, lifestyle choices, and the prevalence of chronic diseases such as diabetes and osteoporosis. As the global population continues to age, particularly in developed countries, the incidence of tooth loss is expected to rise, creating an urgent need for effective dental solutions. One of the primary drivers of the increasing edentulous population is the aging baby boomer generation. This demographic shift means that a larger segment of the population is reaching an age where tooth loss becomes more common due to natural wear and tear, periodontal disease, and other health-related issues. The rising number of edentulous patients also presents significant opportunities for the dental industry. With advancements in dental technology, such as dental implants, mini-implants, and innovative prosthetic options, practitioners can offer more effective and aesthetically pleasing solutions for tooth replacement. The shift towards minimally invasive techniques and digital dentistry is enabling more patients to benefit from these advancements, making tooth replacement more accessible and less daunting.

High Demand for Non-Premium Dental Implants

The demand for non-premium dental implants is growing as more patients seek affordable solutions for tooth replacement. Rising dental care costs and economic uncertainty are making patients more price-sensitive, leading them to opt for cost-effective implants that still provide quality and functionality. Greater awareness of dental health and the risks of untreated edentulism, such as jawbone loss, is also driving demand. Additionally, an aging population, particularly among baby boomers experiencing tooth loss, is contributing to the rise in demand for budget-friendly dental implants.

INDUSTRY RESTRAINTS

Lack of Reimbursement Coverage for Dental Implants

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A major barrier to the widespread use of dental implants is the lack of adequate insurance coverage. Many insurers categorize implants as cosmetic procedures, making them ineligible for reimbursement. As a result, patients often face the full financial burden, with implant costs ranging from \$3,000 to \$5,000 per tooth. While basic dental procedures are usually covered, implants are seldom included in standard plans. This limits access for many, despite implants' health benefits, such as preventing bone loss and restoring oral function. The perception of implants as elective, rather than essential, continues to hinder coverage.

SEGMENTATION INSIGHTS

INSIGHTS BY DESIGN TYPE

The global dental implants market by design type is segmented into tapered dental implants (apically tapered dental implants and fully tapered dental implants) and parallel-walled dental implants. The tapered dental implants segment accounted for the largest market share. The tapered dental implants market is experiencing significant growth, surpassing the parallel-walled dental implants market. This rise is largely driven by the increasing adoption of tapered implant designs, which offer enhanced functionality and ease of placement, especially in cases of small tooth loss. Tapered implants closely mimic the natural root form of teeth, allowing for a more intuitive fixture. This makes them particularly attractive to both patients and dental professionals, contributing to their rising popularity. In addition to their ease of placement, tapered dental implants are highly effective in preventing bone loss, a critical concern for dental implant patients. This, combined with their high success rates, is leading to greater adoption of these implants in clinical practice.

By Design Type

- Tapered Dental Implants
- Apically Tapered Dental Implants
- Fully Tapered Dental Implants
- Parallel Walled Dental Implants

INSIGHTS BY COST

The global dental implants market by cost is categorized into premium dental implants and non-premium dental implants (value-based dental implants and discounted dental implants). The non-premium dental implants segment shows significant growth, with the fastest-growing CAGR of 5.68% during the forecast period. The growth is largely driven by the increasing adoption of value-based and discounted dental implants by price-sensitive consumers, particularly in developing countries. One of the main reasons for this growth is the affordability of non-premium implants, which provide patients with a cost-effective alternative to expensive dental implant treatments. Since dental implantation is a costly procedure in both developed and developing regions, patients are actively seeking more affordable options. This trend is further boosting the overall dental implants market, as more patients opt for these implants to meet their dental care needs. In addition to price sensitivity, dental tourism is playing a significant role in the expansion of the non-premium dental implant market. Regions such as Latin America, EMEA, and APAC are experiencing increased demand for these affordable implants due to the lower incomes of their populations.

By Cost

- Premium Dental Implants
- Non-premium Dental Implants
- Value-based Dental Implants
- Discounted Dental Implants

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INSIGHTS BY MATERIAL

Based on the material, the metal dental implants segment holds the largest share of the global dental implants market. Metal dental implants, particularly those made from titanium alloys, have become the standard in modern dentistry due to their excellent biocompatibility and mechanical properties. Titanium-based implants are highly valued for their strength-to-weight ratio, malleability, and low density, making them a reliable choice for long-term implantation. In addition to these physical properties, titanium has an inherent ability to osseointegrate, which means that it can bond directly with the bone, forming a stable and permanent foundation for dental prosthetics. This unique characteristic is one of the primary reasons titanium is widely used in dental implants, enabling the implants to remain functional for many years without impacting a patient's health.

By Material

- Metal Dental Implants
- Ceramic Dental Implants

INSIGHTS BY END-USER

Based on the end-user, the dental clinics segment dominates and has the largest share of the global dental implants market. Dental clinics worldwide are experiencing significant changes, shaped by technological advancements, evolving patient expectations, and the demand for accessible care. In many regions, the rise of private dental clinics and solo practices is contributing to market growth, particularly in developing and emerging countries. These clinics offer personalized dental care, which is increasingly preferred by patients seeking tailored treatments. In addition to offering personalized service, large dental clinics are forming strategic partnerships with dental implant vendors. These collaborations allow vendors to expand their distribution networks while providing clinical training to dental professionals. Another notable trend is the emergence of mobile dental clinics, particularly in developing countries where access to dental care is limited. Mobile clinics, such as India's MobiDent, DialDent, and Dentistico, offer affordable and accessible dental care at patients' doorsteps, often utilizing online booking platforms. These initiatives address the increasing demand for convenient care and help overcome geographical barriers to treatment.

By End-Users

- Dental Clinics
- Dental Laboratories
- Hospitals
- DSOs
- Dental Academic Institutions

GEOGRAPHICAL ANALYSIS

The European region accounted for the largest market share of over 35% in the global dental implants market. The dental implants market in Western Europe is experiencing robust growth, driven by several key factors that are expected to continue during the forecast period. One of the primary drivers is the increasing awareness of dental implants as an effective solution for dental care. As patients become more informed about the benefits of implants, there is a growing demand for these advanced dental solutions. This awareness is complemented by the improved healthcare infrastructure in the region, which facilitates access to dental care and encourages patients to seek treatment. The economic conditions in Western Europe further support the dental implants market. The region boasts one of the highest per capita healthcare expenditures globally, with countries like Switzerland, Norway, the Netherlands, and Germany leading in healthcare spending. This high level of investment in healthcare

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not only enhances e-health services but also ensures that patients have access to cutting-edge dental technologies, including advanced dental implant products.

By Geography

- Europe
 - o Spain
 - o Germany
 - o Italy
 - o France
 - o UK
 - o Russia
- North America
 - o US
 - o Canada
- APAC
 - o South Korea
 - o China
 - o Japan
 - o Australia
 - o India
- Latin America
 - o Brazil
 - o Argentina
 - o Mexico
 - o Columbia
- Middle East & Africa
 - o Iran
 - o Turkey
 - o Israel

COMPETITIVE LANDSCAPE

The global dental implants market report consists of exclusive data on 37 vendors. The market is characterized by intense competition, driven by the presence of numerous global, regional, and local players offering a wide range of products and solutions. The competitive landscape is shaped by factors such as innovation, pricing, product quality, technology advancements, and customer support, with companies vying to differentiate themselves in an increasingly crowded market. Straumann, Dentsply Sirona, Zimmer Biomet, Henry Schein, Envista, Dentium, and Osstem Implant are some of the key vendors and these large multinational corporations dominate the market, while smaller regional players also compete by offering cost-effective or specialized solutions. Over the past decade, there has been significant consolidation in the industry through mergers and acquisitions (M&As). Leading companies have pursued strategic acquisitions to expand their product portfolios, improve operational efficiencies, and enter new markets.

Key Vendors

- Straumann
- Dentsply Sirona
- Zimmer Biomet

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- Henry Schein
- Envista
- Dentium
- Osstem Implant

Other Prominent Vendors

- A.B. Dental Devices
- Adin Dental Implant Systems
- Alpha Dent Implants
- Avinent
- BEGO
- Bicon
- Biotech Dental
- Bredent medical
- CeraRoot
- Cortex Dental Implants Industries
- CeramTec
- Dentatus
- Dyna Dental
- Glidewell Laboratories
- Southern Implants
- Thommen Medical
- Spiraltech Dental Implants
- Sweden & Martina
- TAV Dental
- VITA Zahnfabrik
- TBR Implants Group
- T-Plus Implant Tech
- TRI Dental Implants
- Z-Systems
- Zest Dental Solutions
- MegaGen
- Blue Sky Bio
- Keystone Dental Group
- NucleOSS
- Argon Medical Productions & Vertriebs GmbH & Co. KG

KEY QUESTIONS ANSWERED:

- 1.□What are the latest trends in the global dental implants market?
- 2.□How large is the global dental implants market?
- 3.□Which design has the largest share of the global dental implants market?
- 4.□Which region has the largest market share of the global dental implants market?
- 5.□Who are the key players in the global dental implants market?

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