

## **Italy Dental Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 70 pages | Mordor Intelligence

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### **Report description:**

Italy Dental Devices Market Analysis

The Italian dental equipment market size reached USD 354.28 million in 2024 and is forecast to climb to USD 445.13 million by 2030, expanding at a 3.95% CAGR between 2025-2030. Growth is underpinned by a rapidly ageing population, widening adoption of digital workflows and ongoing consolidation among distributors, yet moderated by persistent reimbursement gaps. Implant-based restorative demand is surging as 24% of residents are already 65 years or older, while clear aligners, chair-side CAD/CAM and dental lasers are reshaping treatment protocols in clinics that can finance the necessary capital equipment. Competitive intensity is rising as global multinationals and niche Italian manufacturers race to embed AI, cloud connectivity and 3D printing into integrated ecosystems that lower per-procedure times and boost practitioner profitability. At the same time, the North-South income divide dictates starkly different purchasing power, compelling suppliers to tailor pricing models, training packages and financing options across regions.

Italy Dental Devices Market Trends and Insights

Rapid implant demand from Italy's 65-year cohort

Italy's age structure is reshaping the Italian dental equipment market. With 24% of citizens now 65 years or older-and projections pointing to 37% by 2050-the volume of edentulous and partially edentulous patients is rising sharply. Titanium implants still dominate owing to their 94.7% success rate in compromised bone, yet zirconia systems are the fastest-growing due to superior

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aesthetics and biocompatibility. Manufacturers are consequently engineering implant kits with shorter drilling sequences, antibacterial coatings and packaging that streamlines surgery in geriatric patients with systemic comorbidities. Affluent seniors show willingness to pay premium prices for fixed restorations that improve mastication and social interaction, encouraging clinics to invest in dedicated implantology suites and cone-beam CT scanners. The ripple effect extends to auxiliary consumables such as surgical guides produced on in-office 3D printers, further enlarging equipment revenue pools.

#### Chair-side CAD/CAM uptake in private clinics

Digital impression systems have crossed the 60% adoption threshold in well-capitalised northern practices, cutting clinical chair-time by up to four hours and laboratory work by seven hours per case. The Italian dental equipment market benefits as workflow efficiency lifts per-procedure profitability 15-20%, offsetting system prices that can exceed EUR 100,000. Cosmetic dentistry is the beachhead segment: same-day crowns and veneers reduce patient visits and amplify word-of-mouth referrals. Vendors differentiate through mill accuracy, AI-driven margin detection and cloud collaboration features that enable remote design by lab technicians. Bundled financing, subscription-based updates and certified training help dentists overcome the steep learning curve while guaranteeing manufacturers recurring revenue.

#### Nationwide e-health record integration of dental imaging

Italy's alignment with European e-Health strategies is pushing dental images into the central electronic health record. Compatible intraoral scanners, DICOM-native CBCT units and AI triage software are gaining traction, with early pilots demonstrating 27% higher caries detection accuracy and reduced diagnostic variability. Interoperability has shifted from a differentiator to a requirement in tenders issued by health regions. Digital-ready practices attract more referrals because general physicians and specialists can instantly review periodontal charts and implant plans. Manufacturers emphasise secure cloud platforms, HL7 interfaces and automated encryption to address GDPR obligations, thereby positioning their systems as future proof assets in the Italian dental equipment market.

Other drivers and restraints analyzed in the detailed report include:

Dental tourism growth / Reimbursement issues for oral care / Shortage of digital-dentistry skilled staff in South /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Dental equipment captured 39.50% of 2024 revenue, yet dental consumables represent the fastest-expanding component at a 3.23% CAGR to 2030 as implant cylinders, biomaterials and clear-aligner foils gain prominence. Diagnostic imaging and laser devices are advancing in tandem, driven by practitioner demand for minimally invasive techniques that accelerate healing and improve aesthetics. The integration of 3D printers for surgical guides is blurring the boundary between equipment and consumables, creating hybrid revenue streams that reinforce vendor lock-in. Over the forecast period, AI-assisted cameras and augmented-reality microscopes are expected to widen the premium tier, sustaining steady replacement cycles.

In parallel, the Italian dental equipment market size for CAD/CAM solutions is set to expand as chair-side units allow single-session restorations. Therapeutic lasers are positioned for mid-single-digit growth as periodontists adopt erbium and Nd:YAG wavelengths for non-surgical pocket decontamination. Vendors that pair hardware with cloud design services maximise recurring income and simplify workflow adoption for smaller clinics. Consumables will continue to outpace equipment in percentage terms, yet hardware sales remain the primary engine for value creation as diagnostic accuracy and surgical precision assume centre stage in an ageing society.

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The Report Covers Italy Dental Devices Market and the Market is Segmented by Product (General and Diagnostics Equipment, Dental Consumables, and Other Dental Devices), by Treatment (Orthodontics, Endodontics, Periodontics, and Prosthodontics), and by End User (Hospitals, Clinics, and Other End Users). The Market Provides the Value (in USD Million) for the Above-Mentioned Segments.

List of Companies Covered in this Report:

Dentsply Sirona / Cefla / Straumann Group / Carestream Dental / Align Technology / Vatech Co. Ltd. / Sweden & Martina SpA / Zirkonzahn SRL / Mectron SpA / Ivoclar Vivadent / 3 Shape / Zimmer Biomet Dental / Anthos / Dental Art S.p.A. / Bien-Air Dental SA / Durr Dental SE / ATS Dental SRL / Eurodent SpA /

Additional Benefits:

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

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## 23 GC Corporation

## 24 3Shape A/S

## 25 Zimmer Biomet Dental

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26 Coltene Holding AG

27 Durr Dental SE

28 NSK Nakanishi Inc.

29 Bien-Air Dental SA

30 Fona Dental s.r.o.

31 ATS Dental SRL

32 Eurodent SpA

33 Sirona Digital Dentistry (legacy)

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