

Brazil Dental Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 85 pages | Mordor Intelligence

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Report description:

Brazil Dental Devices Market Analysis

The Brazil dental devices market was valued at USD 304.36 million in 2025 and estimated to grow from USD 316.56 million in 2026 to reach USD 385.46 million by 2031, at a CAGR of 4.01% during the forecast period (2026-2031). Population aging, a high incidence of permanent caries at 36.80 per 100,000, and swift uptake of digital workflows continue to stimulate equipment demand. Growing foreign investment, such as Osstem's USD 89 million purchase of Implacil De Bortoli, underscores confidence in the Brazil dental equipment market despite macro-economic headwinds. Regulatory modernization by ANVISA around e-labeling and cybersecurity is creating entry barriers that favor suppliers with robust compliance infrastructures. Meanwhile, regional disparities in oral-care access persist, requiring targeted expansion strategies to unlock latent demand in underserved areas.

Brazil Dental Devices Market Trends and Insights

Rising Prevalence of Oral Diseases and an Aging Population

Brazil records one of the world's highest age-standardized permanent caries rates and a 53.16% prevalence of untreated caries among adolescents. Older adults show untreated root-caries prevalence ranging from 8% to 74%, a range that fuels sustained demand for advanced imaging, ergonomic operatories, and geriatric-focused handpieces. The aging segment is expanding faster than the national average, which amplifies restorative and prosthodontic needs. Suppliers are responding with chair units featuring extended back-rest travel and enhanced illumination for complex cases. These products allow practices to manage large

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volumes of elderly patients efficiently, reinforcing growth momentum in the Brazil dental equipment market.

Growing Adoption of Digital Dentistry and CAD/CAM Workflows

Digital uptake accelerated after Dentsply Sirona introduced its Primescan 2 cloud-native scanner in 2024, which operates over any internet-connected device and reduces hardware barriers. Straumann Group reported double-digit growth in intraoral scanners and design software, driven largely by Brazilian demand. Cloud architecture lets clinics in secondary cities bypass costly local servers, promoting broader penetration of digital workflows. CAD/CAM integration is shortening the crown-fabrication cycle to a single visit, which is essential for high-volume practices coping with Brazil's caries burden. Enhanced patient turnaround translates directly into higher chair productivity, strengthening competitive positioning for early adopters in the Brazil dental equipment market.

High Upfront Cost and Limited Reimbursement for Advanced Devices

Brazil's split between the public SUS system and private plans constrains capital budgets for high-end lasers, CBCT, and fully digital operatories. Stringent cost-benefit thresholds slow coverage approvals, especially in lower-income North and Northeast regions. Clinics often extend equipment life cycles beyond optimal intervals, dampening replacement demand despite clinical necessity. Financing innovations alleviate some pressure yet cannot fully offset reimbursement gaps. The result is a slower diffusion curve for premium technologies within the Brazil dental equipment market, particularly outside major capitals.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Dental Tourism Hubs
AI-Driven Chair-Side Diagnostics and Decision Support
Semiconductor-Grade Component Shortages
Delays in Deliveries

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

Segment Analysis

Therapeutic equipment captured 43.02% of Brazil dental devices market share in 2025, underscoring its foundational role in restorative and surgical care. Demand for high-torque handpieces and multi-axis milling units surged as clinics targeted same-day crown delivery. Electrosurgical systems grew in implantology because they reduce intraoperative bleeding, a benefit widely promoted in patient marketing. CAD/CAM platforms now ship with AI-assisted design modules, boosting precision and minimizing remakes. Suppliers bundle maintenance contracts to build sticky revenue streams and to reassure practices concerned about technical complexity.

The broader dental equipment segment is projected to post a 4.08% CAGR through 2031, reflecting strong appetite for imaging and laser technologies. Soft-tissue lasers enable suture-free periodontal therapy while hard-tissue lasers appeal for minimally invasive cavity preparation. Extra-oral panoramic systems migrate to CMOS sensors that halve radiation dosage, meeting ANVISA compliance while improving image clarity. Dental chairs incorporate embedded USB power ports and chair-mounted displays to streamline digital workflows. These innovations collectively strengthen the position of therapeutic and diagnostic devices within the Brazil dental equipment market.

The Brazil Dental Devices Market Report Segments the Industry Into by Product (General and Diagnostics Equipment, Dental Consumables, Other Dental Devices), by Treatment (Orthodontic, Endodontic, Periodontic, Prosthodontic), and by End-User (Hospitals, Clinics, Other End-Users). Get Five Years of Historical Data Alongside Five-Year Market Forecasts.

List of Companies Covered in this Report:

Dentsply Sirona Envista Holdings Corp. Straumann Group GNATUS Equipamentos Odontologicos Alliage S/A (Saude) Planmeca Align Technology Carestream Dental Vatech do Brasil BIOLASE Coltene Brasil EDLO ITM ZimVie S.I.N. Implant System Angelus Dental SDI Derig Implantes do Brasil Bicon Conexao

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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