The dental implant market, consisting of implants, abutments, and other devices, in Europe was valued at approximately US$1.6 billion in 2012. Until the end of the year, the market will continue to contract slightly. It is expected to recover, however, and reach a value of just under US$2.3 billion by 2021.

Germany reigns as the largest market, worth over US$300 million in 2012—almost the equivalent of France and Spain combined. Overall, these two countries have the lowest growth rates, with both suffering from either low GDP growth or high unemployment rates along with overall concerns regarding unsustainable national debt levels.

Demand for dental implant treatment continues to be fuelled by the ageing population. The US Census Bureau forecasts that the population aged 65 and older in Europe’s seven key markets will grow at an average compound annual growth rate of approximately 1.5% until 2021, whereas the total population will only grow at approximately 0.3% per year. As people age, their oral health tends to deteriorate, resulting in edentulism, for which implant restoration is increasingly becoming a recommended treatment option.

For most European patients, dental implant procedures are considered elective and need to be paid out-of-pocket by patients. As a result, financial considerations are among the most important factors influencing patients’ decision to undergo these treatments. The unstable economy has resulted in increased patient hesitance to seek dental implant treatment and in higher preference for lower-risk and less-costly traditional procedures and products, such as traditional loading (instead of immediate functional loading) and screw-retained abutments (over cement-retained ones).

Aside from the economy, countries such as Sweden and the Netherlands have experienced drastic shifts due to changes in government reimbursement. In the past year, both countries’ markets have suffered declines due to governments proposing changes to reimbursement. This uncertainty regarding dental implant treatment coverage has fuelled physician and patient reluctance to perform and undergo procedures.

The current dental implant market is defined by a never-ending number of competitors in the marketplace. Competition will become increasingly fierce with the recent merger of DENTSPLY Friadent and Astra Tech Dental to form DENTSPLY Implants, placing the company in direct competition with market leader Straumann for the top spot. While physicians and
Newest developments in the European dental prosthetics and CAD/CAM devices segments

All-ceramic materials expected to gain significant market share

By Dr Kamran Zamanian and Ceren Altintaskei, Canada

The European dental prosthetics and CAD/CAM devices segments are currently experiencing two opposing forces that will determine the future of these segments. On the one hand, the surging demand for dental treatments will drive the popularity of both products and services in dental practices. On the other hand, the economic crisis and new technolo-
gies revitalize the market. New technologies are being developed to meet the needs of modern patients, who are increasingly demanding high-quality treatments at competitive prices. The European dental market is experiencing a significant growth, with all-ceramic and porcelain-fused-to-metal valves becoming more popular thanks to their aesthetic value and durability. In 2012, all-ceramic and porcelain-fused-to-metal restorations accounted for 5 per cent of all crowns and bridges sold in Europe. These materials are expected to grow at a rate of 8 per cent per year, surpassing the growth rate of metal restorations by 2019. All-ceramic and porcelain-fused-to-metal restorations are expected to reach 20 per cent of the market share by 2019. Non-precious metals are expected to replace gold and other precious metals in the future. The increasing demand for all-ceramic restorations is due to their aesthetic value and durability. 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“Patients just do not necessarily want implants, they really want teeth.”

An interview with Nobel Biocare CEO Richard Laube

With a record number of 2,000 participants, dental implant solutions provider Nobel Biocare held its second Global Symposium in the US in June. today international had the opportunity to speak with CEO Richard Laube about the state of his company, business in Europe and the newly launched Foundation for Oral Rehabilitation.

today international: Mr Laube, this is the first Global Symposium you are attending as CEO of Nobel Biocare. Has the event met your expectations?

Richard Laube: The meeting has been a pleasant surprise for us. We were sold out already in April and even had to turn 500 to 600 customers away. On the positive side, this makes it a real special event. We were a little bit nervous about the logistics, but all went very well. Speakers have also been extremely disciplined and very focused in their messages that they wanted to convey. I am only hearing good things from the participants.

You joined Nobel Biocare during turbulent times. What is the state of the company compared to when you took over as CEO in 2011?

It is true that we have been drifting over the years but we are back with patient-focused, clinically relevant and evidence-based innovation. We are in materially better shape today to when I joined the company two years ago. The results from Q1/2013 were a pleasant surprise as we expected the numbers to be lower. We are seeing surprisingly good things in our business and are back in front of that.

One of the things you introduced for this segment in 2012, in part self-inflicted as we were dealing with the tsunami and the negative press on dental implants in the first quarter of 2012. We are actually seeing increasing evidence that we perform better than some of our key competitors. I personally expect us to be out of the water soon and to see relative progress. I estimate we will do at least as good as the market in that region, if not better.

“Our problems in Asia are of the mathematical nature and concern our business in Japan which used to provide 17 per cent of our total business in the region. Difficulties in market conditions or are we dealing with anything more mathematical nature and concern our business in Japan which used to provide 17 per cent of our total business in the region. Difficulties there were in part market inflicted through the tsunami and the negative press on dental implants in 2012, in part self-inflicted as we were a little bit fooled by the positive numbers in prosthetics in the first quarter of that year, not looking at the implants that were actually going down. As we are seeing the implants rebound, I think we will have a good run in the second half of this year.

How does your company intend to return to sustainable growth?

We grow when customers order from us and these customers are starting ordering more when we are doing good things for them in the area of innovation, commercial relationship partnering programmes, as well as in training and the education that we provide to all screws, for example, in a way that is very difficult to replicate by our competition.

Besides new third-party platforms, implant bridges and scanning design centres we presented at IDS in Cologne this year, we are announcing angulated screw channels here in New York. With this subtle but almost revolutionary development, we can now go in by 25 degrees on the cheek site or the tongue site and make access to screw-retained components much easier.

With the DENTSPLY Astra Tech merger and growing competition from manufacturers in Asia, e.g. Korea, the implant market seems to be on the brink of major change. How do you evaluate the development of the market and how is your company positioning itself in the years to come?

We welcome any competition as it is beneficial for patients. Our challenge is to stay ahead and innovate. Implant dentistry is still a field that is emerging rapidly and transforming itself constantly through innovation. Our aspiration is to stay in front of that.

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavour in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because we are talking about patient care in ways that the industry cannot deliver yet. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. 

Richard Laube has been CEO of Nobel Biocare since mid 2011.

With the NobelProcera 2G Scanner and a new open access partnership with 3Shape you have recently consolidated your foothold in dental CAD/CAM. How important has this field become for your company and will we see new products to be introduced for this segment in the future?

CAD/CAM is critical. Patients just do not necessarily want implants, they really want teeth. Our ability to provide them with teeth in complex reconstructions is a huge competitive advantage if you are dealing with anything more than a three- or four-unit bridge. We have a disproportionate market share in what we call complex screw-retained components. We can put together a 12-unit zirconia implant bridge with eight holes for patients’ chins, for example, in a way that is very difficult to replicate by our competition.

With the NobelProcera 2G Scanner we have a disproportionate market share in what we call complex screw-retained components. We can put together a 12-unit zirconia implant bridge with eight holes for patients’ chins, for example, in a way that is very difficult to replicate by our competition.

Since 2011 we have brought three new implants into the market and upgraded our NobelClinician and NobelProcera software platforms.”

Richard Laube, (STS Photo Fred Michon/Andover, MA)