Growing CAD/CAM abutment adoption vs increasingly popular discount implants

The various countries in the Asia Pacific region are all expected to demonstrate an increasing demand for dental implant treatments as a result of growing consumer awareness, the ageing population, growing accessibility (such as through the National Health Insurance Service coverage in South Korea), as well as greater product availability and other influencing factors. Traditionally, premium implant companies have dominated the dental implant market globally. However, in recent years, discounted implants have become increasing popular, especially in the Asia Pacific region.

The growth of the discount implant segment will emerge at the expense of the premium segment and as a result is set to limit market growth for dental implant fixtures by lowering the market’s overall average selling price (ASP). In contrast, the final abutment market is set to experience an increasing ASP owing to the growing adoption of CAD/CAM abutments in the place of stock abutments. While commoditisation of stock abutments has greatly depressed the ASP of the final abutment market, growing adoption of CAD/CAM abutments is set to stimulate the final abutment market by pulling the ASP upwards.

Therefore, the dental implant market is set to grow in all four countries included in the Asia Pacific region in this report, namely Australia, South Korea,
In the Asia Pacific dental implant market, consumer awareness, cultural tendencies and domestic regulations vary greatly. South Korea represents the most highly developed dental implant market as a result of being home to a number of global leading dental implant companies. This in turn has led to a high level of consumer awareness and early accessibility to a variety of dental implant products. However, the dental implant market in South Korea is also highly discount dominant and led by domestic implant producer OSSTEM PLANT and as a result demonstrated the lowest regional dental implant ASP of US$86 in 2014.

In contrast, the Australian market remains highly dominated by leading premium implant companies, which collectively held over 70 per cent of the domestic market. Consequently, Australia demonstrated the highest percentage of discount implants — 4.4 per cent of the overall units in the Australian market.

The Japanese and Chinese markets for dental implants are also dominated by premium companies. In recent years, OSSTEM PLANT has had a significant impact on the Chinese market, however, especially as a result of the training programme offered by the company’s Advanced Dental Implant Research and Education Center. All segments of the dental implant market in China are expected to demonstrate double-digit annual growth. However, the discount market is set to grow far more dramatically throughout the forecast period. By 2021, discount implant fixtures are set to represent over 50 per cent of the overall units in the Chinese dental implant market.

The shift towards discount implants in Japan is expected to be far less dramatic, especially owing to cultural barriers that limit the success of Korean dental implant companies. The premium implant segment is expected to remain the dominant dental implant market throughout the forecast period. Unit representation of discount implants is expected to increase slightly from 11.5 per cent currently to 14.6 per cent by 2021.

The growing acceptance of discount implants has been driven by Korean companies. The regional market leader, OSSTEM PLANT, held a 21.9 per cent share of the total dental implant market for the Asia Pacific region in 2014. The company has invested significantly in marketing efforts, which has led to the growing popularity of its products. Throughout the forecast period, OSSTEM PLANT and other discount implant companies, such as MegaGen, Dentium and Neobiotech, are expected to capitalise on the growing popularity of discount implants. In contrast, premium implant companies, such as Straumann and Nobel Biocare, are expected to face increasing competitive pressures, especially in China and Australia.

**Conclusion** Overall, the dental implant market, including fixtures and abutments, is set to grow at a compound annual growth rate of 11.5 per cent for the Asia Pacific region. The unit growth will far outweigh the ASP effects, and the dental implant market will grow to reach a higher penetration ratio for the overall Asia Pacific region.
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The floor plan and exhibitors list are subject to change. Last update was 22 July, 2015.
HKIDEAS 2015—Scientific programme

Friday, 7 August

9:30–10:30
Periodontal medicine: A New Frontier for Periodontology, Hall 5F (Parallel Session A)
Speaker: Prof. Mark Bartold

Photodynamic Therapy for Periodontitis, Hall 5G (Parallel Session B)
Speaker: Prof. Michael Wilson

9:30–12:45
2nd Cross-Strait Forum on Dental Service for the Elderly, Meeting Room

New Trends in Oral Health Care for the Elderly in Taiwan
Speaker: Prof. Chun-pin Lin

The Development of Geriatric Dentistry in Hong Kong
Speaker: Dr Frankie So

10:30–11:15
Break

11:15–12:45
Managing Dentin Hypersensitivity to Improve Quality of Life, Hall 5F (Parallel Session A)
Speaker: Prof. Liang-lin Seow

Towards Functional Foods for Oral Health Care: Isolation, Identification and Evaluation of Food Components with Anti-caries and/or Anti-gingivitis Activities, Hall 5G (Parallel Session B)
Speaker: Prof. Michael Wilson

12:45–14:15
Lunch Break

14:15–15:45
Digital dentistry: CAD/CAM, Meeting Room
Speaker: Dr Myung-ho Maeng

15:45–16:30
Break

Saturday, 8 August

9:30–10:30
Local and General Risk Factors for Implant Failure—Prevention of Early and Late Complications, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

Conservative, conventional and unconventional endodontics, Hall 5G (Parallel Session B)
Speaker: Dr Patrick Tseng

11:30–12:45
Augmentation procedures: Simple and predictable?, Hall 5G (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

Conservative, conventional and unconventional endodontics, Hall 5G (Parallel Session B)
Speaker: Dr Patrick Tseng

12:45–14:15
Lunch Break

14:14–15:45
Simplifying Root Canal Preparation—The Next Generation, Meeting Room
Speaker: Dr Patrick Tseng

15:45–16:30
Break

16:30–18:00
Implant in the Aesthetic Zone—Socket Preservation, Staged Approach or Immediate Implants?, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

14:15–15:45
Challenges in Modern Implant Practice: The Multidisciplinary Team Approach, Hall 5F (Parallel Session A)
Presenters: Dr Alfred Lau & Prof. Nikos Mattheos

Restorations Utilizing Bulk Filling Technique, Hall 5G (Parallel Session B)
Speaker: Prof. Chooi-Gait Toh

15:45–16:30
Break

16:30–18:00
Clinical Challenges and Solutions, Hall 5F (Parallel Session A)
Speakers: Dr. Jeffrey Chang, George Pelokos & Edmond Pow

Monitored Anaesthesia Care in the Dental Clinic, Hall 5G (Parallel Session B)
Speakers: Dr. John Low

Sunday, 9 August

9:00–10:00
Meeting the Challenges of Infection Prevention and Infection Control in Clinical Dentistry, Hall 5F (Parallel Session A)
Speaker: Professor Laurence Walsh

10:30–11:15
Break

11:15–12:45
Meeting the Challenges of Infection Prevention and Infection Control in Clinical Dentistry, Hall 5F (Parallel Session A)
Speaker: Prof. Laurence Walsh

Tough Class III Malocclusions Made Easy, Hall 5G (Parallel Session B)
Speaker: Dr John Lin

12:45–14:15
Lunch Break

14:15–15:45
Implant Treatment of the Periodontally Compromised Patient, Hall 5F (Parallel Session A)
Speaker: Prof. Saso Ivanovski

15:45–16:30
Implant in the Aesthetic Zone—Socket Preservation, Staged Approach or Immediate Implants?, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

Dentist Role in Snoring and Sleep Apnea, Hall 5G (Parallel Session B)
Speaker: Dr Derek Mahony
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