Europe has some of the most highly penetrated markets for dental implants in the world, including Italy, Germany and Spain, but it also contains regions with considerably under-developed markets, such as France and the UK. A shift in consumer preferences will be a key characteristic of the European market in the future, in both the dental implant fixture market and final abutment market. Although the shifts will contrast one another, they will both have a significant impact on the market in terms of overall pricing, the competitive landscape and technological innovation.

Historically, premium dental implant companies have dominated in Europe, but have recently faced increased competition from the value and discount brands. A growing prevalence of local manufacturers and an increasingly cost-sensitive consumer demographic will contribute to overall price depreciation and the declining presence of premium implants in the future.1

Region-specific growth of the premium segment is highly reliant on the prevalence of domestic, lower cost dental implant brands. In countries such as Italy, Germany and Spain, there is a plethora of local value and discount dental implant companies that have emerged to cater to the growing cost sensitivity expressed by dentists. Within these regions, the premium segment of the market has lost significant market share and is exhibiting far lower growth relative to the past. It is expected that this trend will continue to spread throughout Europe, as consumer preferences shift towards lower cost products. Several competitors in the German and Italian implant markets have been particularly successful at capitalising on the shift in consumer preferences and now represent the top leading implant brands in those regions, both in terms of volume and revenue.2

Premium implant companies have acknowledged the impact of value and discount brands on the market, not only through discount pricing, but also through acquisitions and strategic investments. In April 2015, Straumann increased its ownership of Neodent, a leading value implant manufacturer from Latin America, to 100 per cent in order to strengthen its product portfolio and maintain a competitive position in both the premium and value segments.3 Straumann has also invested in a number of value and discount brands that cater to the European market, including Biodenta, Medentika, Megagen and Anthogyr. These investments are supplemented by Instradent, Straumann’s business platform established in 2014, which currently provides distribution for Neodent and Medentika, ensuring significant cost savings for the company’s product portfolio.4

Premium implant companies have traditionally been controlled by the stock abutment or prefabricated abutment segment. Although the majority of stock abutments lack many benefits associated with patient-individualised solutions found within the custom-cast abutment and CAD/CAM abutment segments, they still provide a relatively simple and cost-efficient solution in most implant procedures. The segment is expected to continue experiencing price erosion, owing to increasing pricing pressures from local, low-cost and generic manufacturers.5 Another recent development within the stock abutment segment also contributing to price depreciation is the introduction of Ti-base abutments.

Ti-base abutments, also known as titanium bases or titanium interfaces, are a recent innovation within the stock abutment market that are a cost-effective alternative to traditional CAD/CAM abutments, since they are intended for in-house or independent milling machine use. Examples include Straumann’s Variobase and Nobel Biocare’s Universal Base, which give dentists the option of placing a cement-retained or screw-retained restoration. Ti-base abutments also allow dentists to choose between a hybrid abutment and a hybrid abutment crown (a combination of an abutment and a monolithic crown). The presence of Ti-base abutments has grown rapidly across most regions in Europe and it is expected to become the predominant stock abutment type in the near future. The cost-effective nature and flexibility of options offered with Ti-base abutments will help maintain the position of the total stock abutment segment in the overall market. Stock abutments currently represent over 50 per cent of the total final abutment volume in the majority of markets across Europe, but this share is expected to steadily decrease.6

Recent improvements in production capability and technological innovation have made CAD/CAM abutments significantly more affordable than in the past. CAD/CAM abutments are now relatively comparable in price to custom-cast abutments and are more easily accessible, especially in regions where manufacturing laboratories with CAD/CAM production are in greater abundance. Furthermore, CAD/CAM zirconia abutments are primarily required in cases in which aesthetic outcomes are of higher priority, such as the anterior region of the mouth.1 CAD/CAM abutments are expected to continue to experience double-digit growth, and the expanding market share of the segment will limit ASP of the overall abutment market, since it carries a price premium relative to stock abutments and custom-cast abutments.1

Consolidation and emerging players in the competitive landscape

In addition to investments in value and discount companies, the market for dental implants has been distinguished by consolidation among the top competitors. Most recently, Denply-Sirona was established after the merger of DENTSPLY Sirona and SDS, bringing together two of the world’s leading implant companies, Zimmer Dental and Biomet. Although the premium implant company acquired ASTRA TECH in 2011 and announced the acquisition of MIS in June 2016, the majorities of both companies are now owned by private equity funds, reflecting the growing market for surgical companies.7 The premium implant company Mineral Biomet (MB) is a research laboratory with a focus on high-quality implant solutions, which are sold to dental laboratories.8

Other notable developments in the European market for dental implants include the increased uptake of ceramic materials, growing presence of implant companies in the biomaterials space and rising demand that have been able to secure a notable market share from the premium implant market. Companies include BioHorizons, CAMLOG, Global D, Medentis medical, Sweden & Martina and regional manufacturers.9

Shifting consumer preferences and positive uptake of CAD/CAM technology

Artur Kim and Dr Kamran Zamanian, iData Research, discuss current developments in the European dental implant market.

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Dr Kamran Zamanian is President, CEO and founding partner of iData Research. He has spent over 20 years working in the market research industry.

Editorial note: A list of references is available from the publisher.