European dental implant market limited by financial uncertainty

Countries in Eastern Europe poised for highest growth

By Carmen Chan, Canada

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...
According to a recently published report, the ageing population and the growing awareness of available dental treatment options will contribute to a strong expansion of the European market for dental biomaterials. Their use will increase significantly alongside dental implant procedures up to 2021. Revenues are expected to grow to over €287 million (US$375 million).

In particular, they expect Geistlich to remain the leader in the bone-graft substitute segment, which continues to generate the greatest revenue in the European dental biomaterial market. With regard to tissue-regeneration products, Straumann continues to be the only significant competitor.

The high price of dental procedures was identified as one of the main factors hindering growth. Owing to economic concerns, patients, especially in countries with a slow market growth such as Italy and Spain, are more likely to cancel or postpone expensive treatments. However, Sweden is expected to experience the fastest growth in dental biomaterials, as dental implant procedures are partially reimbursed in the country.

The report was issued by the Millennium Research Group, a Canadian market intelligence provider. It contains comprehensive data and analysis on the current state of the market for dental biomaterials in France, Germany, Italy, Spain, Sweden, Switzerland and the UK across a ten-year period.

High growth expected for biomaterials in Sweden

Boasted by implant procedures, the overall market will reach €287 million (US$375 million) in 2021.

In particular, they expect Geistlich to remain the leader in the bone-graft substitute segment, which continues to generate the greatest revenue in the European dental biomaterial market. With regard to tissue-regeneration products, Straumann continues to be the only significant competitor.

The high price of dental procedures was identified as one of the main factors hindering growth. Owing to economic concerns, patients, especially in countries with a slow market growth such as Italy and Spain, are more likely to cancel or postpone expensive treatments. However, Sweden is expected to experience the fastest growth in dental biomaterials, as dental implant procedures are partially reimbursed in the country.

The report was issued by the Millennium Research Group, a Canadian market intelligence provider. It contains comprehensive data and analysis on the current state of the market for dental biomaterials in France, Germany, Italy, Spain, Sweden, Switzerland and the UK across a ten-year period.

Carmen Chan is a Senior Market Research Analyst at Millennium Research Group, a global market intelligence provider based in Toronto in Canada.
In order to complete its offer in industry-leading dental equipment and software, Planmeca has recently introduced a full range of open CAD/CAM solutions. From high-precision desktop milling units to sophisticated CAD software and digital impression scanners, they include all tools that are required for open CAD/CAM dentistry, the Finish company said.

According to Planmeca, the quick and accurate digital impression scanner Planmeca PlanScan provides real-time digital impressions from one-tooth to full-arch scans, which can be sent to any dental lab for CAD work. It is also the first unit-integrated impression scanner. Available as a standalone version, the Planmeca PlanScan can also be connected to a laptop, for example. The new open CAD software suite for easy 3-D design, has been integrated in the Planmeca Romexis software as a perfect tool for designing prosthetic works from individual inlays to full-arch bridges and abutments. Final designs can then be sent to Planmeca PlanMill 40, a new 4-axis milling unit designed for glass ceramic and other material works. "Our CAD/CAM solutions are truly unique, as the system is completely open and flexible," explains Mr Jukka Kanerva, Director of Dental care units and CAD/CAM division at Planmeca Oy. "Dentists and laboratories can choose either the entire solution and benefit from the integrated workflow, or just pick the necessary parts and send the open data to their partners."

For dental laboratories, Planmeca also offers a fast and maintenance-free desktop lab scanner for scanning plaster casts with the Planmeca PlanScan Lab. Final designs can be processed with Planmeca PlanMill 50, an accurate 5-axis milling machine designed for dental labs or ordered fast and reliably from Planmeca’s CAD/CAM milling centre PlanEasyMill, which offers a wide range of materials and fast deliveries. “Our CAD/CAM solutions are truly unique, as the system is completely open and flexible," explains Mr Jukka Kanerva, Director of Dental care units and CAD/CAM division at Planmeca Oy. "Dentists and laboratories can choose either the entire solution and benefit from the integrated workflow, or just pick the necessary parts and send the open data to their partners."
EVERX POSTERIOR

With everX Posterior, GC has developed a glass-fibre reinforced composite that is said to provide new options for restoring extensive cavities and preventing crack propagation into filling materials and tooth structure. According to the company, the material meets the growing demand for an economical alternative restorative for extensive cavities and can be used for restoring enamel and dentin when combined with a conventional composite like G-Enamel Posterior.

A special structure with particularly short fibres prevent cracks and fractures that can occur in the filling, one of the main reasons for failure of composite and amalgam restorations. The longevity of everX Posterior restorations is due to its high fracture toughness values that are equal to dentin and almost 100 per cent as high as those exhibited by other composites. In addition, the high bond strength with both the overlaying composite and underlying tooth structure allows reliable restorations, the company said.

everX Posterior is particularly indicated for strengthening direct composite restorations in extensive posterior cavities and as such, enables more extensive defects to be treated immediately and directly chairside. These include restorations of cavities with three or more surfaces, cavities with missing cusps, deep cavities (including class I and II cavities as well as endodontically treated teeth) and cavities remaining after removing amalgam as well as cavities indicated for onlays/indlays. GC said that in order to achieve optimum aesthetics and wear resistance, everX Posterior must be overlaid with a light curing universal composite such as the own G-enamel product family.

The new A-dec 400 is also designed with well-placed mounting locations for the delivery system and support side modules. Therefore, doctors are able to adjust the Radius mount and monitor, light, control, cuspidor, and assistant arm. The front mounting location offers flexibility for limited space, while also providing excellent ergonomics for operators who prefer a side delivery. Aside from mounting locations, doctors are able to choose from A-dec’s three dental light offerings and specify factory installed ancillary lasers that can be integrated into the delivery system and pre-wired for the touchpad controls.

The structure of the new chair exceeds industry standards for strength, rated for a 400-lb. maximum patient load, A-dec said. In addition, the new armrest design gives patients a particularly sturdy and secure grab point. For customizable styling, doctors can choose between sleek seamless upholstery and plush sewn upholstery. A-dec’s wide range of designer color options lend them solving the A-dec 400 chair’s contemporary aesthetic and robust design elements.

A-DEC, USA
www.a-dec.com
BIGMAN AB
Booth A21:20