

Intraoral Scanners Market By Brand (Cadent iTero, 3M ESPE Lava COS, CEREC, E4D, TRIOS, CS, OTHERS), By End User (Hospitals, Dental Clinics, Others): Global Opportunity Analysis and Industry Forecast, 2024-2035

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Abstracts

The intraoral scanners market was valued at \$969.4 million in 2023 and is estimated to reach \$2,816.4 million by 2035, exhibiting a CAGR of 9.3% from 2024 to 2035. Intraoral scanners are digital devices that capture detailed images of the inside of a patient's mouth. This handheld device uses optical or laser technology to scan teeth and surrounding tissues, producing high-resolution digital impressions that aid in diagnostics, treatment planning, and fabrication of dental restorations such as crowns, bridges, and aligners. Intraoral scanners streamline dental workflows, improve patient comfort, and enhance accuracy, reducing errors associated with physical molds. Their digital outputs are compatible with computer-aided design and manufacturing (CAD/CAM) systems, allowing dentists and dental labs to create customized solutions efficiently. This technology is rapidly replacing traditional dental impressions with a fast, non-invasive alternative.

The major factors that drive the growth of intraoral scanners market include increase in demand for precision in dental procedures, rise in prevalence of oral health problems, and technological advancements in intraoral scanners. For instance, according to the Centers for Disease Control and Prevention (CDC) 2024 Oral Health Surveillance Report, the prevalence of edentulism among adults increased from 1.2% at 35–49 years to 5.9% at 50–64 years, 11.4% at 65–74 years, and 19.7% at 75 years or older. Among adults 65 years or older, edentulism is more prevalent, highlighting a growing population requiring restorative dental care. Increase in demand for effective and precise dental interventions fuels the adoption of intraoral scanners, which enhance the accuracy of

diagnostics and treatment planning, driving market growth.

Traditional impression techniques often result in inaccuracies, leading to the need for retakes and additional time in dental clinics. Intraoral scanners provide a digital solution that captures high-resolution images of a patient's oral cavity, significantly improving accuracy and efficiency in treatment planning. In addition, technological advancements in intraoral scanners further boosts market growth. The development of more sophisticated intraoral scanners, characterized by improved speed, portability, and user-friendliness, has made them more desirable and popular among dental practitioners. Modern scanners use advanced imaging technologies, such as 3D imaging and enhanced software algorithms, which facilitate seamless integration with computer-aided design and manufacturing (CAD/CAM) systems. This integration allows quicker turnaround times for restorations, making the workflow more efficient and enhancing patient satisfaction.

Technological progress plays a crucial role in boosting the widespread adoption of intraoral scanners. Moreover, rise in emphasis on minimally invasive procedures in dentistry propels the demand for intraoral scanners, thereby contributing toward market growth. As patients increasingly prefer treatments that minimize discomfort and recovery time, dental professionals are adopting digital scanning technologies that support minimally invasive techniques. Intraoral scanners enable dentists to create accurate digital impressions without the need for traditional molds, reducing patient discomfort and enhancing the overall experience.

However, the high initial cost associated with acquiring advanced intraoral scanning technology restricts market growth. Many dental practices, particularly smaller ones, struggle to invest in such expensive equipment, which limits market penetration and adoption of intraoral scanners. In addition, the cost of maintenance and frequent software updates put financial pressure on dental practices, making them less likely to invest in intraoral scanners and slowing adoption of intraoral scanners thereby restricts the market growth. On the other hand, increasing demand for digital dentistry solutions and high growth potential in emerging countries provides an opportunity for the market growth. As dental professionals increasingly recognize the benefits of digital workflows, including enhanced accuracy, improved patient experience, and streamlined processes, the adoption of intraoral scanners is expected to rise.

The intraoral scanners market is segmented into brand, end user, and region. On the basis of the brand, it is classified into Cadent iTero, 3M ESPE Lava COS, CEREC, E4D, TRIOS, CS, and others. On the basis of end user, the market is categorized into

hospitals, dental clinics, and others. Region-wise, the market is studied across North America (U.S., Canada, and Mexico), Europe (Germany, France, UK, Italy, Spain, and rest of Europe), Asia-Pacific (Japan, China, India, Australia, South Korea, and rest of Asia-Pacific), and LAMEA (Brazil, South Africa, Saudi Arabia,

Rest of LAMEA). The major companies profiled in the report include 3Shape A/S, Condor Technologies NV, Dentsply Sirona Inc., densys3D, Envista Holdings Corporation, Midmark Corporation, Guangdong Launca Medical Device Technology Co., Ltd., Institut Straumann AG, Planmeca Oy, and Align Technology, Inc. The key players operating in the market have adopted product launch, acquisition, and agreement as their key strategy to expand their product portfolio. For instance, in January 2024, Condor Technologies announced a breakthrough in dental scanning technology with the introduction of a new tray-based dental scanner, developed in partnership with Invis'Art. This innovative scanner represents a novel approach to in-mouth scanning, aiming to enhance the efficiency and ease of capturing digital dental impressions. The company is also exploring strategic partnerships to facilitate market entry for this new product.

Key Benefits for Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the intraoral scanners market analysis from 2023 to 2035 to identify the prevailing intraoral scanners market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the intraoral scanners market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global intraoral scanners market trends, key players, market segments, application areas, and market growth strategies.

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Average Selling Price Analysis / Price Point Analysis

Expanded list for Company Profiles

Historic market data

Key player details (including location, contact details, supplier/vendor network etc. in excel format)

Key Market Segments

By Brand

TRIOS

CS

OTHERS

Cadent iTero

3M ESPE Lava COS

CEREC

E4D

By End User

Hospitals

Dental Clinics

Others

By Region

North America

U.S.

Canada

Mexico

Europe

Germany

France

UK

Italy

Spain

Rest of Europe

Asia-Pacific

Japan

China

Australia

India

South Korea

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

3Shape A/S

Align Technology, Inc.

Condor Technologies NV

densys3D

Dentsply Sirona Inc.

Envista Holdings Corporation

Guangdong Launca Medical Device Technology Co. Ltd

Institut Straumann AG

Midmark Corporation

Planmeca Oy

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