

Dental Implants Market - A Global and Regional Analysis: Focus on Material, Design, End User, and Region - Analysis and Forecast, 2024-2034

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Abstracts

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This report will be delivered in 7-10 working days. Introduction of Dental Implants

The global dental implants market, initially valued at \$4.55 billion in 2023, is set to witness substantial growth, projected to surge to \$8.63 billion by 2034, marking a remarkable compound annual growth rate (CAGR) of 6.20% over the period from 2024 to 2034. The dental implants market has shown robust growth in recent years and is poised to continue expanding, though the pace may vary under different conditions. More dentists and patients are embracing implants as the standard of care for missing teeth rather than seeing them as a last resort. Trends of rising implant procedures are reported in Europe and parts of Asia. This reflects greater awareness, more trained implant dentists, and improved long-term success data that give patients confidence.

Market Introduction

The global dental implants market has been experiencing significant growth, fueled by increasing demand for aesthetic and functional tooth restoration solutions. Dental implants, which serve as permanent replacements for missing teeth, have gained widespread adoption due to their superior durability, biocompatibility, and ability to improve oral health compared to traditional bridges and dentures. Additionally, the expanding influence of dental support organizations (DSOs) and private equity investments has led to increased consolidation and scalability in implant procedures, making them more accessible to patients worldwide. With an aging population, rising

disposable incomes, and the increasing adoption of zirconia and titanium-based implants, the market is projected to witness steady growth, particularly in emerging economies where access to dental care is expanding. Additionally, dental infection control plays a critical role in preventing complications associated with implant procedures. As infections can lead to implant failure thus, dental practitioners are increasingly adopting sterilization and infection prevention protocols to moderate risks.

Industrial Impact

The dental implants market has significantly influenced the healthcare landscape, driven by key players such as Straumann Group, Envista (Nobel Biocare), Dentsply Sirona, and ZimVie, Inc. (Zimmer Biomet). These companies have been at the forefront, providing cutting-edge products for dental implants.

Moreover, the market has been further shaped by strategic collaborations, mergers, and R&D investments, which enable companies to expand their global presence and introduce innovative solutions. With the increasing focus on understanding tissue architecture and disease mechanisms, the competitive landscape of the dental implants market is dynamic, with innovation and customer-centric approaches driving differentiation and growth.

Market Segmentation for Dental Implants Market:

Segmentation 1: by Material

Titanium Implants

Zirconium Implants

Titanium Implants Segment to Dominate the Dental Implants Market (by Material)

Based on material, the global dental implants market was led by the titanium implants segment, which accounted for the largest share in 2023 and is expected to reach \$7.59 billion by 2034, registering a CAGR of 6.07% during the forecast period 2024-2034. Titanium implants have long been the standard in dental restoration due to their superior biocompatibility, strength, and high osseointegration success rate, ensuring long-term stability and durability. The rising prevalence of edentulism, particularly among the aging demographic, combined with growing awareness of advanced dental

solutions, has fueled the demand for titanium-based implants. Additionally, recent technological innovations in surface treatments—such as plasma spraying, acid etching, and nano-coatings have significantly enhanced implant integration, improved success rates, and reduced healing times, solidifying titanium implants as a preferred choice for both dental professionals and patients.

Segmentation 2: by Design

Tapered Implants

Parallel-Walled Implants

Tapered Implants Segment to Dominate the Dental Implants Market (by Design)

Based on design, the global dental implants market was led by the tapered implants segment, which accounted for the largest share in 2023 and is expected to reach \$7.38 billion by 2034, registering a CAGR of 6.31% during the forecast period 2024-2034. These implants are preferred for their ability to achieve higher primary stability, making them ideal for immediate loading and cases involving compromised bone density. Their conical shape mimics the natural root structure, facilitating better insertion in anatomically constrained sites, such as narrow ridges or extraction sockets. Additionally, they provide improved engagement with the cortical bone, reducing micromovements and enhancing osseointegration, which is particularly beneficial in challenging clinical scenarios.

Segmentation 3: by End User

Dental Hospitals and Clinics

Dental Support Organizations

Others

Dental Hospitals and Clinics Segment to Dominate the Dental Implants Market (by End User)

Based on end user, dental hospitals and clinics accounted for the largest share in 2023

and are expected to reach \$6.50 billion by 2034, registering a CAGR of 6.30% during the forecast period 2024-2034. A key factor contributing to the market's dominance is the rising incidence of dental conditions, such as edentulism, periodontitis, and tooth decay, which are driving the demand for implant procedures. Dental hospitals and clinics are equipped with state-of-the-art technologies, including computer-aided design/computer-aided manufacturing (CAD/CAM), 3D printing, and guided implant surgery, all of which enhance procedural precision and success rates, thereby attracting a broader patient demographic. Furthermore, these healthcare facilities provide integrated treatment solutions, offering implant placement, prosthetic restorations, and post-operative care, which positions them as the preferred choice for patients seeking comprehensive dental care.

Segmentation 4: by Region

North America

- o U.S.
- o Canada

Europe

- o Germany
- o U.K.
- o France
- o Italy
- o Spain
- o Rest-of-Europe

Asia-Pacific

- o Japan
- o China
- o India
- o Australia
- o Rest-of-Asia-Pacific

Latin America

- o Brazil
- o Mexico
- o Rest of Latin America

Middle East and Africa

In 2023, Europe region dominated the global dental implants market; however, the Asia-Pacific region is expected to register the highest CAGR of 7.33% during the forecast period 2024-2034. Increased prevalence of dental diseases, the aging population, and need for oral health are few factors driving growth of the region. There are high rates of dental caries and periodontal diseases across Europe, especially among children. This results in a growing demand for restorative treatments, including implants, as patients age. Additionally, Europe has one of the world's oldest populations, with over 21% of Europeans aged 65 or older in 2022. This demographic trend increases the prevalence of tooth loss and the need for dental implants and prosthetics.

Recent Developments in the Dental Implants Market

In July 2024, ZimVie received FDA 510(k) clearance and officially launched its GenTek restorative components portfolio in the U.S. This expansion enhances ZimVie's range of genuine prosthetic parts designed for its dental implant systems. The GenTek portfolio aims to provide high-quality, compatible restorative solutions, improving precision and durability for dental professionals

and patients while strengthening ZimVie's position in the market.

In October 2024, Lucence collaborated with the Diagnostics Development Hub (DxD Hub) at A*STAR to adapt its dental implant test, LucenceINSIGHT, for use with alternative sample types. This partnership marked a significant advancement in making cancer screening more accessible. Additionally, they partnered with local hospitals to recruit eligible patients for the study, aiming to extend the reach and impact of their research through the support of respected healthcare partners.

In January 2021, Dentsply Sirona acquired Byte, a direct-to-consumer clear aligner company. This strategic acquisition allows Dentsply Sirona to expand its presence in the fast-growing clear aligner market, competing more aggressively with brands such as Invisalign (Align Technology). The deal aligns with Dentsply Sirona's long-term digital transformation strategy, enhancing its market reach and positioning it as a key player in the evolving clear aligner and teledentistry space.

Demand – Drivers, Challenges, and Opportunities

Market Drivers:

Increasing Dental Implant Procedures: The rising number of dental implant procedures is a key driver for the growth of the dental implants market worldwide. Several factors contribute to this trend, including the increasing prevalence of edentulism (tooth loss), growing patient awareness, advancements in implant technology, and a shift toward more permanent dental solutions. Additionally, technological innovations, such as computer-aided design/computer-aided manufacturing (CAD/CAM), 3D printing, and guided implant surgery, have made implant procedures more precise, efficient, and accessible, reducing surgery time and improving patient outcomes. Additionally, advancements in implant surface treatments, immediate-load implants, and digital dentistry have increased success rates and shortened healing periods, further encouraging adoption.

Market Challenges:

High Cost of Dental Implants and Limited Reimbursement: The high cost of dental implants remains a significant barrier to market growth, limiting accessibility, especially

for patients in middle- and low-income segments. A single-tooth implant can range from \$1,500 to \$6,000, while full-mouth restorations can exceed \$20,000 to \$50,000, depending on materials, surgeon expertise, and geographical location. These costs include implant surgery, abutments, prosthetics, diagnostic procedures, and post-surgical care, making the treatment financially challenging for many patients. Additionally, limited reimbursement policies further restrict affordability. Unlike other dental procedures, implants are often classified as elective or cosmetic treatments and are not fully covered by public or private insurance providers. In countries with universal healthcare systems, such as the U.K. (NHS), Canada, and parts of Europe, insurance typically covers only basic tooth replacement options rather than implants.

Market Opportunities:

Growing Dental Tourism: Dental tourism has emerged as a significant growth driver for the dental implants market, as patients from high-cost regions travel abroad for affordable, high-quality dental care. Countries such as Hungary, Turkey, Mexico, Thailand, and India have become major hubs for dental implant procedures, offering advanced treatments at a fraction of the cost compared to markets such as the U.S., Canada, and Western Europe. This trend is fueled by the rising cost of dental procedures in developed nations, longer waiting times, and limited insurance coverage for implants.

How can this report add value to an organization?

Product/Innovation Strategy: The global dental implants market has been extensively segmented based on various categories, such as material, design, end user, and region.

Growth/Marketing Strategy: Mergers, acquisitions, and product launches accounted for the maximum number of key developments.

Competitive Strategy: The global dental implants market has numerous established players with product portfolios. Key players in the global dental implants market analyzed and profiled in the study involve established players offering products for dental implants.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2023. A historical year analysis has been done for the period FY2021-FY2022. The market size has been estimated for FY2023 and projected for the period FY2024-FY2034.

The scope of this report has been carefully derived based on interactions with experts in different companies across the world. This report provides a market study of upstream and downstream products of the dental implants market.

The market size was estimated and validated using both bottom-up and top-down analyses. The market size for each technology and end user was estimated for the bottom-up approach. These were further added to cumulate the market size of the global dental implants market.

The top-down analysis was conducted to arrive at the market contributions of various segments as defined in the scope.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The market has been mapped based on available dental implants. All the key companies with significant offerings in this field have been considered and profiled in this report.

Primary Research:

The primary sources involve industry experts in dental implants, including the market players offering products and services. Resources such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from the primary sources include:

- validation and triangulation of all the numbers and graphs

- validation of the report's segmentation and key qualitative findings

understanding the competitive landscape and business model

current and proposed production values of a product by market players

validation of the numbers of the different segments of the market in focus

percentage split of individual markets for regional analysis

Secondary Research

Open Sources

Certified publications, articles from recognized authors, white papers, directories, and major databases, among others

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their product portfolio

Gold standard magazines, journals, white papers, press releases, and news articles

Paid databases

The key data points taken from the secondary sources include:

segmentations and percentage shares

data for market value

key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies profiled have been selected based on inputs gathered from primary experts, who have analyzed company coverage, product portfolio, and market penetration.

Some prominent names established in this market are:

Dentsply Sirona

Institut Straumann AG

ZimVie Inc.

Henry Schein, Inc.

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