

Dental Infections Control Market: A Global and Regional Analysis, 2023-2033

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Abstracts

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Global Dental Infections Control Market Overview

The global dental infections control market is projected to experience substantial growth over the forecast period 2023-2033. Moreover, the market value for 2022 was \$1,215.3 million and is expected to reach \$2,445.4 million by 2033, growing at a CAGR of 6.59 % during the forecast period. This growth can be attributed to the rising prevalence of dental problems, along with the increasing government-backed initiatives promoting hygiene, technological advancements, and modernization of equipment. The market includes various consumables and single-use products and equipment for preventing infections in dental settings.

Market Lifecycle Stage

The global dental infections control market is in a growth and expansion stage of the development phase. The recent years have seen improvements and innovations in sterilization equipment (for fast steaming). New technologies and devices that offer faster, more efficient, or more cost-effective infection control could help rejuvenate the market further.

Industry Impact

The global dental infections control market has exerted a significant impact on the dental industry, fundamentally reshaping standards and practices within oral healthcare. Heightened awareness of infection risks has spurred an increased demand for

advanced control solutions, influencing both product development and procedural protocols in dental settings. Stringent regulatory requirements and an escalating emphasis on patient safety have compelled dental practitioners and facilities to invest in innovative infection control technologies and procedures.

In essence, the global dental infections control market has not just supported but catalyzed numerous breakthroughs in infection control and prevention. Its influence continues to grow as the methods become more refined and accessible, promising even more revolutionary findings in the future.

Market Segmentation:

Segmentation 1: by Offering

Consumables and Single-Use Products

Cleaning and Sterilization Products

Unit Water-Line Cleaning Management Products

Saliva Ejectors

Others

Equipment's

Cleaning Monitors

Ultrasonic Cleaning Units

Sterilization Equipment

Consumables and Single-Use Products to Dominate the Global Dental Infections Control Market (by Offering)

Based on offering, the consumables and single-use products segment dominated the global dental infections control market in FY2022. The consumables and single-use segment constitute the prevalent offering type owing to their widespread use in almost

all applications related to the global dental infections control market. Due to the increasing utilization of equipment for infection control in the market, it is anticipated that this segment will continue to witness significant growth in the coming years.

Segmentation 2: by End User

Dental Hospitals and Clinics

Dental Academic and Research Institutions

Dental Laboratories

Dental Hospitals and Clinics Segment to Hold its Dominance in the Global Dental Infections Control Market (by End User)

Based on end user, the dental hospitals and clinics segment accounted for the largest share of the global dental infections control market in FY2022. Dental infection control is a rapidly growing field of dentistry that uses equipment, consumables, and single-use products for infection control and prevention.

Segmentation 3: by Region

North America

Europe

Asia-Pacific

Latin America

Rest-of-the-World

Japan dominated the Asia-Pacific market in 2022, with a share of 29.51%. Moreover, Asia-Pacific is expected to register the highest CAGR of 7.64% during the forecast period 2023-2033. The dental infections control market in the Asia-Pacific (APAC) region is witnessing significant growth, driven by various factors, including increasing demand for the aging population with increasing healthcare needs. This demographic

shift would drive demand for dental infections control procedures.

The economic growth in countries such as China and India is resulting in increased healthcare spending. Patients are increasingly seeking high-quality medical care, including dental infections control services. This presents substantial opportunities for market expansion. Furthermore, technological advancement and adoption are on the rise.

Recent Developments in the Global Dental Infections Control Market

In June 2021, STERIS plc. completed the acquisition of Cantel Medical Corp., a global provider of infection control products and services to dental customers.

In June 2022, Henry Schein Inc. signed an acquisition agreement to acquire the privately held dental distribution company Condor Dental in a transaction that would enhance Henry Schein Inc.'s ability to serve pan-European dental support organizations.

In December 2021, Owens & Minor, Inc. announced the completion of the acquisition of American Contract Systems, which offers sterilization capabilities without the high-volume use of ethylene oxide, enhancing the safety of communities and the environment.

Demand – Drivers, Restraints, and Opportunities

Market Demand Drivers:

Rising Prevalence of Dental Problems: The rising prevalence of dental ailments, such as gum diseases and periodontitis, can lead to tooth loss and infections. As a result, there has been a substantial demand for dental infections control products to uphold oral healthcare, prevent dental infections, and address dental issues. The rise in cases of dental caries and periodontal disease is expected to drive the need for dental infections control products, thereby fostering market growth. The diminished quality of life for those dealing with oral diseases extends to psychological distress and social implications. Additionally, poor oral health can influence educational and career opportunities, creating barriers to personal and economic advancement. Investing in preventive measures for infection control is crucial to mitigating the economic impact of oral diseases.

Market Restraints:

High Initial Costs of Advanced Infection Control Equipment: The high upfront costs may limit the adoption of advanced infection control solutions, especially among smaller dental practices with budget constraints. These costs include the procurement, installation, and integration of technologies designed to ensure the highest standards of infection prevention in dental settings. The purchase of sterilization equipment, such as advanced autoclaves with novel features and technologies, requires a significant initial investment.

Market Opportunities:

Growing Dental Tourism in Emerging Economies: To boost dental tourism, health institutions are running online campaigns showcasing affordable services. They also emphasize personalized care, infection prevention measures, and affordable accommodation, making medical tourism packages attractive to consumers who can consider treatment options along with recreational choices. Due to the increasing prevalence of lifestyle-related diseases and unhealthy diets, dental disorders are on the rise. Diseases such as dental caries are becoming more common, leading to a higher demand for dental restoration procedures. This growing burden of dental issues is driving interest in cosmetic dentistry, creating opportunities for market growth.

How can this report add value to an organization?

Workflow/Innovation Strategy: The global dental infections control market (by offering) has been segmented into detailed segments, including different types of dental infections control equipment, such as cleaning monitors, ultrasonic cleaning units, and sterilization equipment. Moreover, the study provides the reader with detailed consumables and single-use products such as cleaning and sterilization products, unit water-line cleaning management products, saliva ejectors, and others.

Growth/Marketing Strategy: The dental infection control market has been experiencing notable growth driven by increasing awareness of infection risks and stringent regulatory standards. Key market players are adopting strategic initiatives to capitalize on this growth. Product innovation and technological advancements play a pivotal role, with companies focusing on developing advanced infection control solutions that meet or exceed industry standards. These innovations include the integration of smart technologies, enhanced sterilization methods, and eco-friendly disinfectants, catering to

the evolving needs of dental practitioners.

Competitive Strategy: Key players in the global dental infections control market have been analyzed and profiled in the study, including manufacturers involved in acquisitions and strategic collaborations. Market participants are actively engaging in collaborations and partnerships to expand their market presence. This involves forging alliances with dental clinics, hospitals, and healthcare professionals to promote their infection control products and solutions. Additionally, mergers and acquisitions are strategic tools employed to strengthen market positions, acquire new technologies, and broaden product portfolios.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2022. The historical year analysis has been done from FY2020 to FY2021, and the market size has been calculated for FY2022 and projected for the period 2023-2033.

The geographical distribution of the market revenue has been estimated to be the same as the company's net revenue distribution. All the numbers have been adjusted to two digits after decimals for report presentation reasons. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. CAGR is calculated from 2023 to 2033.

The market has been mapped based on different types of products available in the market and based on several indications. All the key manufacturing companies that have a significant number of offerings to the global dental infections control market have been considered and profiled in the report.

In the study, the primary respondent's verification has been considered to finalize the estimated market for the global dental infections control market.

The latest annual reports of each market player have been taken into consideration for market revenue calculation.

Market strategies and developments of key players have been considered for the calculation of sub-segment split.

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 currency conversion rate has been taken from the historical exchange rate of the Oanda website or from the annual reports of the respective company if stated.

Primary Research

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 of the numbers of the various markets for market type

Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

National Center for Biotechnology Information (NCBI), PubMed, Science Direct, World Bank Group, Organisation for Economic Co-operation and Development (OECD), Centers for Disease Control and Prevention (CDC), Global Burden Disease (GBD), and World Health Organization (WHO)

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

Company websites and detailed study of their portfolio

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentations, split-ups, and percentage shares

Data for market value

Key industry trends of the top players in 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

Controlling dental infections involves the systematic implementation of measures and protocols aimed at preventing, managing, and mitigating the spread of infections within dental care settings. This includes stringent adherence to sterilization procedures, the utilization of effective disinfectants, and the maintenance of a hygienic environment to ensure the highest standards of infection prevention and control in dental practices.

The dental infections control market consists of consumables and single-use products and equipment for the management and control of various infections in the dental practice. The dental infections control market includes equipment such as cleaning monitors, ultrasonic cleaning units, and sterilization equipment. It also includes consumables and single-use products, such as cleaning and sterilization products, unit water-line cleaning management products, and saliva ejectors.

Some of the prominent companies in this market are:

3M

Steris, Plc

Dentsply Sirona, Inc

Envista Holding Corporation

3D Dental

Getinge AB

Air Techniques, Inc.

BMS Dental

Young Innovations, Inc.

COLTENE Group

Owens & Minor Inc.

GC Corporation

ASA Dental

A-dec, Inc

Tuttnauer

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable)

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