

Global Clear Aligner Market: Analysis By Treatment Cases, By Procedure (Doctor-Directed, and Direct-to-Consumer), By Age Group (Adult and Teen), By End-User (Standalone, Group Practices, Hospitals, and Other End-User), By Material Type (Polyurethane, Plastic Polyethylene Terephthalate Glycol, Poly-vinyl Chloride, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global clear aligner market was valued at US\$5.56 billion in 2023. The market value is expected to reach US\$18.63 billion by 2029. Clear aligners are orthodontic devices that are transparent, plastic forms of dental braces used to adjust teeth. Clear aligners are a new alternative to traditional metal braces. They're made of clear, thin plastic that goes over the teeth and gradually shifts them into place.

The factors such as the growing patient population suffering from malocclusions, rising technological advancements in dental treatment, and escalating awareness about dental hygiene coupled with the growth of beauty standards are expected to drive the overall market growth in the forecasted period. The market is expected to grow at a CAGR of approx. 22% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Procedure: The report provides the bifurcation of the market into two segments based on the procedure: Doctor-Directed and Direct-to-Consumer. In 2023, the doctor-directed procedure held the share in the market, whereas the direct-to-consumer is

expected to be the fastest growing segment owing to the benefits such as ease of operation, affordable prices, and the convenience of having no mandatory in-office visits.

By Age Group: The report further provided the segmentation based on the age group: Adult and Teen. The adult segment held the highest share in the market. The market's expansion is aided by the increasing awareness among adults regarding malocclusion and associated problems with this disease. Moreover, the treatment of malocclusion among adults with a clear aligner is expected to increase in the forecasted period due to the more benefits provided by clear aligners over traditional methods.

By End-User: The report provides an analysis of the market based on end-users: Standalone, Group Practices, Hospitals, and Other End-User. The standalone segment is expected to be the highest growing segment in the forecasted period owing to the benefits such as a wider range of dental treatments, shorter wait times, specialist and quality service, and high adoption of the most recent technology and high-quality materials for both diagnostics and treatment.

By Material Type: The report provides the glimpse of the clear aligner market based on the following material type: Polyurethane, Plastic Polyethylene Terephthalate Glycol, Poly-vinyl Chloride, and Others. Polyurethane clear aligners are witnessing increased usage due to their flexibility and durability. These aligners can be customized to specific patient needs, providing a comfortable fit. On the other hand, poly-vinyl chloride clear aligners are gaining popularity due to their affordability and ease of production.

By Treatment Cases: The report also provides a glimpse of clear aligner treatment cases. The number of treatment cases globally is expected to increase due to innovative headways coupled with the development of customized clear aligners, rising disposable incomes of the general population, etc. The treatment cases have been further analyzed based on regions: The US, Asia Pacific, Europe, and the Rest of the World. The US had the highest number of clear aligner treatment cases in 2023.

By Region: The report provides insight into the clear aligner market based on the regions namely North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. North America held the major share in the market, owing to the growing availability of advanced dental care infrastructure and the availability of robust payment options. Within North America, the US is leading the market. The US clear aligner market is further analyzed based on treatment cases, age group (Adult and Teen), and end-user (Standalone, Group Practices, Hospitals, and Others). Europe held a second

highest share in the global clear aligner market. According to an article, The State of Oral Health in Europe published by the Platform for Better Oral Health, over 50% of the European population suffers from some form of periodontitis and over 10% have severe disease, with prevalence increasing to 70-85% of the population aged 60- 65 years of age. An increase in the incidence of periodontitis would support the growth of the clear aligner market in Europe.

Market Dynamics:

Growth Drivers: The global clear aligner market has been growing over the past few years, due to factors such as rapid urbanization, increasing GNI per capita, increasing health spending, rising teenage population, escalating demand for aesthetics enhancement, increasing treatment rate, rising prevalence of dental malocclusion, and many other factors. The global malocclusion rate has been increasing over the past few decades, likely due to a change in diet habits (higher mix of delicate and soft food), the higher prevalence rate of dental decay, and higher adoption of bottle-feeding and lower breastfeeding rates. The rising prevalence of malocclusion cases is positively affecting the demand for the clear aligner and hence, boosting the market growth.

Challenges: However, the market growth would be negatively impacted by various challenges such as clear aligner restriction, undersupply of orthodontists and dentists, limited insurance coverage for orthodontic treatments, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as technological advancements, increasing involvement of private medical institutions, involvement of CAD/CAM technology, growing dental tourism, etc. In some countries, dental care is often not included in an affordable care act that was intended to make insurance cheap for nationals with lower incomes. Thus, people from developed countries are going for dental treatment to other countries such as Thailand and Mexico. Thus, the growing dental tourism is expected to stimulate the demand for clear aligners in the coming years.

Impact Analysis of COVID-19 and Way Forward:

In 2020, the global clear aligner sales have been weak and thus, the market declined in the initial period of the year 2020. However, as the countries reopened, the global clear aligner market witnessed the trend of a strong sales rebound. This is attributable to the gradual reopening of dental and orthodontists' practices and patient volumes rebounding quickly. Moreover, orthodontists began to employ professional platforms for

“tele-orthodontics” as a substitute for in-person regulation of their patients’ orthodontic treatment. Tele-orthodontics has increased the demand for clear aligners and this trend is expected to positively influence the market in the post-COVID era too.

Competitive Landscape:

The global clear aligner market is consolidated. The key players in the global clear aligner market are:

Align Technology, Inc.
Envista Holdings Corporation
Dentsply Sirona Inc.
Straumann Group
Henry Schein, Inc.
3M Company
Angelalign Technology, Inc.
Danaher Corporation
Argen Corporation
Scheu Dental GmbH
3Shape
Great Lakes Dental Technologies

Some of the strategies among key players in the market are product launches, mergers, acquisitions, and collaborations. For instance, in 2023, Angelalign Technology Inc. and Medit Corporation announced a software integration. With Medit’s IOS and Angelalign Technology Inc.’s intuitive iOrtho™ treatment planning software and aligners, clinicians gain access to a streamlined, efficient, and highly accurate workflow. Also, Angelalign Technology Inc. and 3Shape have announced a global strategic partnership aimed at strengthening both companies’ dedication to digital orthodontics globally. The partnership enables Angel Aligner’s clinicians around the world, when using 3Shape scanners, to effortlessly upload patient images to Angel Aligner’s cloud-based digital orthodontic platform with a simple click of a button. At the same time, 3Shape’s orthodontic clients worldwide stand to gain seamless access to Angel Aligner’s comprehensive clear aligner solutions, streamlining their workflows. Moreover, In 2022, Align Technology was the major shareholder in the global clear aligner market.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Clear Aligner: An Overview

2.1.1 Introduction to Clear Aligner

2.1.2 Conditions Treated by Clear Aligner

2.1.3 Advantages and Disadvantages of Clear Aligner

2.2 Clear Aligner Segmentation: An Overview

2.2.1 Clear Aligner Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Clear Aligner Market: An Analysis

3.1.1 Global Clear Aligner Market: An Overview

3.1.2 Global Clear Aligner Market by Value

3.1.3 Global Clear Aligner Market by Penetration Rate

3.1.4 Global Clear Aligner Market by Procedure (Doctor-Directed, and Direct-to-Consumer)

3.1.5 Global Clear Aligner Market by Age Group (Adult and Teen)

3.1.6 Global Clear Aligner Market by End-User (Standalone, Group Practice, Hospitals, and Other End-User)

3.1.7 Global Clear Aligner Market by Material Type (Polyurethane, Plastic Polyethylene Terephthalate Glycol, Poly-vinyl Chloride, and Others)

3.1.8 Global Clear Aligner Market by Region (North America, Europe, Asia Pacific, Latin America, and Middle East & Africa)

3.2 Global Clear Aligner Market: Treatment Cases Analysis

3.2.1 Global Clear Aligner Market by Treatment Cases: An Overview

3.2.2 Global Clear Aligner Market by Treatment Cases

3.2.3 Global Clear Aligner Market Treatment Cases by Region (The US, Asia Pacific, Europe, and the Rest of the World)

3.3 Global Clear Aligner Market: Procedure Analysis

3.3.1 Global Clear Aligner Market by Procedure: An Overview

3.3.2 Global Doctor-Directed Clear Aligner Market by Value

3.3.3 Global Direct-to-Consumer Clear Aligner Market by Value

3.4 Global Clear Aligner Market: Age Group Analysis

- 3.4.1 Global Clear Aligner Market by Age Group: An Overview
- 3.4.2 Global Adult Clear Aligner Market by Value
- 3.4.3 Global Teen Clear Aligner Market by Value
- 3.5 Global Clear Aligner Market: End-User Analysis
 - 3.5.1 Global Clear Aligner Market by End-User: An Overview
 - 3.5.2 Global Clear Aligner Standalone Market by Value
 - 3.5.3 Global Clear Aligner Group Practices Market by Value
 - 3.5.4 Global Clear Aligner Hospital Market by Value
 - 3.5.5 Global Clear Aligner Other End-User Market by Value
- 3.6 Global Clear Aligner Market: Material Type Analysis
 - 3.6.1 Global Clear Aligner Market by Material Type: An Overview
 - 3.6.2 Global Polyurethane Clear Aligner Market by Value
 - 3.6.3 Global Plastic Polyethylene Terephthalate Glycol Clear Aligner Market by Value
 - 3.6.4 Global Poly-vinyl Chloride Clear Aligner Market by Value
 - 3.6.5 Global Others Clear Aligner Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 North America Clear Aligner Market: An Analysis
 - 4.1.1 North America Clear Aligner Market: An Overview
 - 4.1.2 North America Clear Aligner Market by Value
 - 4.1.3 North America Clear Aligner Market by Region (The US, Canada, and Mexico)
 - 4.1.4 The US Clear Aligner Market by Value
 - 4.1.5 The US Clear Aligner Market by Age Group (Adult and Teen)
 - 4.1.6 The US Adult Clear Aligner Market by Value
 - 4.1.7 The US Teen Clear Aligner Market by Value
 - 4.1.8 The US Clear Aligner Market by End-User (Standalone, Group Practice, Hospitals, and Other End-User)
 - 4.1.9 The US Clear Aligner Standalone Market by Value
 - 4.1.10 The US Clear Aligner Group Practices Market by Value
 - 4.1.11 The US Clear Aligner Hospital Market by Value
 - 4.1.12 The US Clear Aligner Other End-User Market by Value
 - 4.1.13 The US Clear Aligner Market by Treatment Cases
 - 4.1.14 Canada Clear Aligner Market by Value
 - 4.1.15 Mexico Clear Aligner Market by Value
- 4.2 Europe Clear Aligner Market: An Analysis
 - 4.2.1 Europe Clear Aligner Market: An Overview
 - 4.2.2 Europe Clear Aligner Market by Value
 - 4.2.3 Europe Clear Aligner Market by Region (Germany, The UK, France, Spain, Italy,

and Rest of the Europe)

4.2.4 Germany Clear Aligner Market by Value

4.2.5 The UK Clear Aligner Market by Value

4.2.6 France Clear Aligner Market by Value

4.2.7 Spain Clear Aligner Market by Value

4.2.8 Italy Clear Aligner Market by Value

4.2.9 Rest of Europe Clear Aligner Market by Value

4.2.10 Europe Clear Aligner Market by Treatment Cases

4.3 Asia Pacific Clear Aligner Market: An Analysis

4.3.1 Asia Pacific Clear Aligner Market: An Overview

4.3.2 Asia Pacific Clear Aligner Market by Value

4.3.3 Asia Pacific Clear Aligner Market by Region (China, India, and Rest of the Asia Pacific)

4.3.4 China Clear Aligner Market by Value

4.3.5 China Clear Aligner Market by Age Group (Adult and Teen)

4.3.6 China Adult Clear Aligner Market by Value

4.3.7 China Teen Clear Aligner Market by Value

4.3.8 India Clear Aligner Market by Value

4.3.9 Rest of Asia Pacific Clear Aligner Market by Value

4.3.10 Asia Pacific Clear Aligner Market by Treatment Cases

4.3.11 Asia Pacific Clear Aligner Market Treatment Cases by Region (China and Rest of the Asia Pacific)

4.3.12 China Clear Aligner Market by Treatment Cases

4.4 Latin America Clear Aligner Market: An Analysis

4.4.1 Latin America Clear Aligner Market: An Overview

4.4.2 Latin America Clear Aligner Market by Value

4.5 Middle East & Africa Clear Aligner Market: An Analysis

4.5.1 Middle East & Africa Clear Aligner Market: An Overview

4.5.2 Middle East & Africa Clear Aligner Market by Value

5. IMPACT OF COVID-19

5.1 Impact of COVID-19 on Global Clear Aligner Market

5.2 Impact of COVID-19 on Dental Practices

5.3 Response of Industry

5.3.1 Rising Focus on Increasing Digital Treatment Options

5.4 Post COVID-19 Impact on Global Clear Aligner Market

6. MARKET DYNAMICS

6.1 Growth Drivers

- 6.1.1 Rapid Urbanization
- 6.1.2 Rising Purchasing Power
- 6.1.3 Increasing Healthcare Expenditure
- 6.1.4 Rising Children and Teenage Population
- 6.1.5 Escalating Demand For Aesthetics Enhancement
- 6.1.6 Increasing Treatment Rate
- 6.1.7 Rising Prevalence of Dental Malocclusion

6.2 Challenges

- 6.2.1 Clear Aligner Restriction
- 6.2.2 Undersupply of Orthodontists and Dentists
- 6.2.3 Limited Insurance Coverage For Orthodontic Treatments

6.3 Market Trends

- 6.3.1 Technological Advancements
- 6.3.2 Increasing Involvement Of Private Medical Institutions
- 6.3.3 Involvement of CAD/CAM Technology
- 6.3.4 Growing Dental Tourism

7. COMPETITIVE LANDSCAPE

7.1 Global Clear Aligner Players by Market Share

7.2 Global Clear Aligner Market: Competitive Scenario

- 7.2.1 Doctor-Directed Clear Aligner Market
- 7.2.2 Increased Competition in DTC Clear Aligner Space in Future

7.3 China Clear Aligner Players by Market Share

8. COMPANY PROFILES

8.1 Align Technology, Inc.

- 8.1.1 Business Overview
- 8.1.1 Operating Segments
- 8.1.3 Business Strategy

8.2 Envista Holdings Corporation

- 8.2.1 Business Overview
- 8.2.2 Operating Segments
- 8.2.3 Business Strategy

8.3 Dentsply Sirona Inc.

- 8.3.1 Business Overview

- 8.3.2 Operating Segments
- 8.3.3 Business Strategy
- 8.4 Straumann Group
 - 8.4.1 Business Overview
 - 8.4.2 Operating Regions
 - 8.4.3 Business Strategy
- 8.5 Henry Schein, Inc.
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segments
 - 8.5.3 Business Strategy
- 8.6 3M Company
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
 - 8.6.3 Business Strategy
- 8.7 Angelalign Technology, Inc.
 - 8.7.1 Business Overview
 - 8.7.2 Revenue by Business Lines
 - 8.7.3 Business Strategy
- 8.8 Danaher Corporation
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategy
- 8.9 Argen Corporation
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 Scheu Dental GmbH
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy
- 8.11 3Shape
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 Great Lakes Dental Technologies
 - 8.12.1 Business Overview
 - 8.12.2 Business Strategy

List Of Figures

LIST OF FIGURES

- Figure 1: Conditions Treated by Clear Aligner
- Figure 2: Advantages and Disadvantages of Clear Aligner
- Figure 3: Clear Aligner Segmentation
- Figure 4: Global Clear Aligner Market by Value; 2019-2023 (US\$ Billion)
- Figure 5: Global Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 6: Global Clear Aligner Market by Penetration Rate; 2020-2029 (Percentage, %)
- Figure 7: Global Clear Aligner Market by Procedure; 2023 (Percentage, %)
- Figure 8: Global Clear Aligner Market by Age Group; 2023 (Percentage, %)
- Figure 9: Global Clear Aligner Market by End-User; 2023 (Percentage, %)
- Figure 10: Global Clear Aligner Market by Material Type; 2023 (Percentage, %)
- Figure 11: Global Clear Aligner Market by Region; 2023 (Percentage, %)
- Figure 12: Global Clear Aligner Market by Treatment Cases; 2023-2029 (Million)
- Figure 13: Global Clear Aligner Market Treatment Cases by Region; 2023 (Percentage, %)
- Figure 14: Global Doctor-Directed Clear Aligner Market by Value; 2019-2023 (US\$ Billion)
- Figure 15: Global Doctor-Directed Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 16: Global Direct-to-Consumer Clear Aligner Market by Value; 2019-2023 (US\$ Billion)
- Figure 17: Global Direct-to-Consumer Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 18: Global Adult Clear Aligner Market by Value; 2019-2023 (US\$ Billion)
- Figure 19: Global Adult Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 20: Global Teen Clear Aligner Market by Value; 2019-2023 (US\$ Billion)
- Figure 21: Global Teen Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 22: Global Clear Aligner Standalone Market by Value; 2019-2023 (US\$ Billion)
- Figure 23: Global Clear Aligner Standalone Market by Value; 2024-2029 (US\$ Billion)
- Figure 24: Global Clear Aligner Group Practices Market by Value; 2019-2023 (US\$ Billion)
- Figure 25: Global Clear Aligner Group Practices Market by Value; 2024-2029 (US\$ Billion)
- Figure 26: Global Clear Aligner Hospital Market by Value; 2019-2023 (US\$ Million)
- Figure 27: Global Clear Aligner Hospital Market by Value; 2024-2029 (US\$ Billion)
- Figure 28: Global Clear Aligner Other End-User Market by Value; 2019-2023 (US\$

Million)

Figure 29: Global Clear Aligner Other End-User Market by Value; 2024-2029 (US\$ Million)

Figure 30: Global Polyurethane Clear Aligner Market by Value; 2019-2023 (US\$ Billion)

Figure 31: Global Polyurethane Clear Aligner Market by Value; 2024-2029 (US\$ Billion)

Figure 32: Global Plastic Polyethylene Terephthalate Glycol Clear Aligner Market by Value; 2019-2023 (US\$ Million)

Figure 33: Global Plastic Polyethylene Terephthalate Glycol Clear Aligner Market by Value; 2024-2029 (US\$ Billion)

Figure 34: Global Poly-vinyl Chloride Clear Aligner Market by Value; 2019-2023 (US\$ Million)

Figure 35: Global Poly-vinyl Chloride Clear Aligner Market by Value; 2024-2029 (US\$ Million)

Figure 36: Global Others Clear Aligner Market by Value; 2019-2023 (US\$ Million)

Figure 37: Global Others Clear Aligner Market by Value; 2024-2029 (US\$ Million)

Figure 38: North America Clear Aligner Market by Value; 2019-2023 (US\$ Billion)

Figure 39: North America Clear Aligner Market by Value; 2024-2029 (US\$ Billion)

Figure 40: North America Clear Aligner Market by Region; 2023 (Percentage, %)

Figure 41: The US Clear Aligner Market by Value; 2019-2023 (US\$ Billion)

Figure 42: The US Clear Aligner Market by Value; 2024-2029 (US\$ Billion)

Figure 43: The US Clear Aligner Market by Age Group; 2023 (Percentage, %)

Figure 44: The US Adult Clear Aligner Market by Value; 2019-2023 (US\$ Billion)

Figure 45: The US Adult Clear Aligner Market by Value; 2024-2029 (US\$ Billion)

Figure 46: The US Teen Clear Aligner Market by Value; 2019-2023 (US\$ Million)

Figure 47: The US Teen Clear Aligner Market by Value; 2024-2029 (US\$ Billion)

Figure 48: The US Clear Aligner Market by End-User; 2023 (Percentage, %)

Figure 49: The US Clear Aligner Standalone Market by Value; 2019-2023 (US\$ Million)

Figure 50: The US Clear Aligner Standalone Market by Value; 2024-2029 (US\$ Billion)

Figure 51: The US Clear Aligner Group Practices Market by Value; 2019-2023 (US\$ Million)

Figure 52: The US Clear Aligner Group Practices Market by Value; 2024-2029 (US\$ Million)

Figure 53: The US Clear Aligner Hospital Market by Value; 2019-2023 (US\$ Million)

Figure 54: The US Clear Aligner Hospital Market by Value; 2024-2029 (US\$ Million)

Figure 55: The US Clear Aligner Other End-User Market by Value; 2019-2023 (US\$ Million)

Figure 56: The US Clear Aligner Other End-User Market by Value; 2024-2029 (US\$ Million)

Figure 57: The US Clear Aligner Market by Treatment Cases; 2023-2029 (Million)

- Figure 58: Canada Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 59: Canada Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 60: Mexico Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 61: Mexico Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 62: Europe Clear Aligner Market by Value; 2019-2023 (US\$ Billion)
- Figure 63: Europe Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 64: Europe Clear Aligner Market by Region; 2023 (Percentage, %)
- Figure 65: Germany Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 66: Germany Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 67: The UK Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 68: The UK Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 69: France Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 70: France Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 71: Spain Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 72: Spain Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 73: Italy Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 74: Italy Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 75: Rest of Europe Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 76: Rest of Europe Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 77: Europe Clear Aligner Market by Treatment Cases; 2023-2029 (Million)
- Figure 78: Asia Pacific Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 79: Asia Pacific Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 80: Asia Pacific Clear Aligner Market by Region; 2023 (Percentage, %)
- Figure 81: China Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 82: China Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 83: China Clear Aligner Market by Age Group; 2023 (Percentage, %)
- Figure 84: China Adult Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 85: China Adult Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 86: China Teen Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 87: China Teen Clear Aligner Market by Value; 2024-2029 (US\$ Billion)
- Figure 88: India Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 89: India Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 90: Rest of Asia Pacific Clear Aligner Market by Value; 2019-2023 (US\$ Million)
- Figure 91: Rest of Asia Pacific Clear Aligner Market by Value; 2024-2029 (US\$ Million)
- Figure 92: Asia Pacific Clear Aligner Market by Treatment Cases; 2023-2029 (Million)
- Figure 93: Asia Pacific Clear Aligner Market Treatment Cases by Region; 2023 (Percentage, %)
- Figure 94: China Clear Aligner Market by Treatment Cases; 2023-2029 (Million)
- Figure 95: Latin America Clear Aligner Market by Value; 2019-2023 (US\$ Million)

Figure 96: Latin America Clear Aligner Market by Value; 2024-2029 (US\$ Million)

Figure 97: Middle East & Africa Clear Aligner Market by Value; 2019-2023 (US\$ Million)

Figure 98: Middle East & Africa Clear Aligner Market by Value; 2024-2029 (US\$ Million)

Figure 99: Impact of Covid-19 on Dental Practices in the US; March 2020 (Percentage, %)

Figure 100: Global Urban Population as Share of Total Population; 2021-2030 (Percentage, %)

Figure 101: Global GDP Per Capita at Current Prices; 2018-2023 (US\$ Thousand)

Figure 102: The US National Health Expenditure Per Capita; 2022-2030 (US\$ Thousand)

Figure 103: Global Children and Teenage Population; 2019-2023 (Billion)

Figure 104: Global Clear Aligner Players by Market Share; 2023 (Percentage, %)

Figure 105: China Clear Aligner Players by Market Share; 2023 (Percentage, %)

Figure 106: Align Technology, Inc. Net Revenues by Segment; 2022 (Percentage, %)

Figure 107: Envista Holdings Corporation Sales by Segment; 2022 (Percentage, %)

Figure 108: Dentsply Sirona Inc. Net Sales by Segment; 2022 (Percentage, %)

Figure 109: Straumann Group Revenue by Product Category; 2022 (Percentage, %)

Figure 110: Henry Schein, Inc. Net Sales by Segment; 2022 (Percentage, %)

Figure 111: 3M Company Net Sales by Segments; 2022 (Percentage, %)

Figure 112: Angelalign Technology, Inc. Revenue by Business Lines; 2022 (Percentage, %)

Figure 113: Danaher Corporation Sales by Segment; 2022 (Percentage, %)

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