

Global Dual-cure Universal Adhesive Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dual-cure Universal Adhesive market size is expected to reach \$ 133 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

In 2025, global Dual-cure Universal Adhesive production reached approximately 2.2 million units, with an average global market price of around US\$40 per unit.

Dual-cure Universal Adhesive is a resin-based dental bonding material that combines both light-curing and chemical self-curing mechanisms while being compatible with multiple tooth substrates, restorative materials and bonding techniques. Its key advantage is that it can polymerize rapidly under a dental curing light and continue curing chemically in deep or shaded areas where light penetration is limited. Therefore, it is particularly suitable for bonding crowns, bridges, inlays, onlays, posts, zirconia restorations, ceramic restorations, metal restorations and resin cement systems. The formulation typically contains resin monomers such as Bis-GMA, UDMA and HEMA, functional acidic monomers such as MDP, photoinitiators, chemical initiators, solvents, stabilizers and coupling agents. It can support total-etch, self-etch or selective-etch techniques and form both micromechanical interlocking and chemical bonding with enamel, dentin, composite resin, ceramics, zirconia and metals. Overall, dual-cure universal adhesive combines the broad material compatibility of universal adhesives with the deep-curing reliability of dual-cure systems, making it a valuable adhesive category for complex indirect restorations and high-strength bonding procedures.

The upstream of the Dual-cure Universal Adhesive industry mainly consists of suppliers of medical resin monomers, functional acidic monomers, photo/chemical initiators, solvents, coupling agents, nano-fillers and medical packaging materials. Key raw

materials include resin monomers such as Bis-GMA, UDMA, HEMA and TEGDMA, functional adhesive monomers such as 10-MDP and 4-META, photoinitiators such as camphorquinone and TPO, chemical initiator systems such as peroxide/amine systems, solvents such as ethanol, acetone and water, silane coupling agents, stabilizers and trace fillers. Representative raw material suppliers include Evonik, BASF, Mitsubishi Chemical, Kuraray, Solvay, Merck KGaA, Shin-Etsu Chemical and 3M's materials business. The midstream consists of dental adhesive and restorative material manufacturers responsible for dual-cure system design, multi-substrate bond validation, adhesive-resin cement compatibility, clinical evaluation, regulatory registration, filling, packaging and distribution. Representative companies include 3M, Dentsply Sirona, Ivoclar, Kuraray Noritake Dental, GC Corporation, Tokuyama Dental, BISCO, VOCO, Shofu. Downstream customers mainly include dental hospitals, dental departments of general hospitals, private dental clinics, dental chains, dental laboratories, chairside CAD/CAM centers, orthodontic institutions and dental consumable distributors. Applications cover all-ceramic crowns, zirconia crowns, veneers, inlays, onlays, posts, root canal restorations, resin cement bonding, implant-supported restorations and complex repair procedures. Overall, upstream materials determine curing reliability and material compatibility, midstream manufacturers determine system capability and clinical validation, while downstream demand is driven by indirect restoration, aesthetic dentistry, implant restoration and digital restorative workflows.

The Dual-cure Universal Adhesive market is currently moving toward premiumization and system-based development, representing a technically advanced and clinically valuable segment within dental adhesive materials. At present, conventional light-cure universal adhesives remain the mainstream, but with the increasing use of all-ceramic, zirconia, post-and-core, implant-supported and deep indirect restorations, dual-cure universal adhesives that can provide reliable curing in areas with limited light access are receiving greater attention. Product trends are moving toward low film thickness, improved moisture tolerance, MDP-containing formulations, multi-substrate compatibility, reduced post-operative sensitivity, deeper integration with resin cement systems and simplified clinical workflows. Key drivers include growth in aesthetic and indirect restorations, higher penetration of zirconia and all-ceramic materials, wider adoption of chairside CAD/CAM, increasing implant restoration cases, dentists' focus on bonding reliability in complex restorations, and clinics' need to reduce failures and improve long-term success rates. Major restraints include high product prices, workflows that remain more complex than ordinary universal adhesives, limited compatibility between different brands of resin cements and adhesives, remaining clinical technique sensitivity, high regulatory and R&D costs, and limited demand for dual-cure functionality in routine shallow restorations. Overall, dual-cure universal

adhesives will increasingly serve complex indirect restorations and premium restorative dentistry, with competition focusing on curing reliability, material compatibility, system-based solutions and simplified clinical operation.

This report studies the global Dual-cure Universal Adhesive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dual-cure Universal Adhesive and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Dual-cure Universal Adhesive that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dual-cure Universal Adhesive total production and demand, 2021-2032, (K Units)

Global Dual-cure Universal Adhesive total production value, 2021-2032, (USD Million)

Global Dual-cure Universal Adhesive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Dual-cure Universal Adhesive consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Dual-cure Universal Adhesive domestic production, consumption, key domestic manufacturers and share

Global Dual-cure Universal Adhesive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Dual-cure Universal Adhesive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Dual-cure Universal Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Dual-cure Universal Adhesive market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Solventum, Dentsply Sirona, Ivoclar Vivadent, Kuraray Noritake, Shofu, Voco, Bisco, Kerr Dental, GC Corporation, Coltene, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Dual-cure Universal Adhesive market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Dual-cure Universal Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dual-cure Universal Adhesive Market, Segmentation by Type:

Self-Etch

Total-Etch

Selective-Etch

Global Dual-cure Universal Adhesive Market, Segmentation by Packaging Specifications:

4ml

5ml

6ml

Others

Global Dual-cure Universal Adhesive Market, Segmentation by Application:

Hospital

Dental Clinic

Others

Companies Profiled:

Solventum

Dentsply Sirona

Ivoclar Vivadent

Kuraray Noritake

Shofu

Voco

Bisco

Kerr Dental

GC Corporation

Coltene

Kulzer

Prime Dental Manufacturing

Tokuyama Dental

Pentron

DMG America

Ultradent

Pulpdent

Sun Medical

Huge Dental

Dentex

Chunlizhengda Medical Instruments

Key Questions Answered:

1. How big is the global Dual-cure Universal Adhesive market?
2. What is the demand of the global Dual-cure Universal Adhesive market?
3. What is the year over year growth of the global Dual-cure Universal Adhesive market?
4. What is the production and production value of the global Dual-cure Universal Adhesive market?
5. Who are the key producers in the global Dual-cure Universal Adhesive market?
6. What are the growth factors driving the market demand?

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