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Dental Consumables Market Report by Product (Dental Burs, Whitening Material, Dental Biomaterial, Dental Anesthetics, Crowns and Bridges, Dental Implants, and Others), Treatment (Orthodontic, Endodontic, Periodontic, Prosthodontic), Material (Metals, Polymers, Ceramics, Biomaterials), End User (Dental Hospitals and Clinics, Dental Laboratories, and Others), and Region 2024-2032

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Abstracts

The global dental consumables market size reached US$ 30.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 49.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5.2% during 2024-2032. The rising prevalence of dental disorders, aging population, technological advancements in dental procedures, expanding access to dental care services, evolving regulatory standards, and increasing disposable income levels are boosting the market growth.

Dental Consumables Market Analysis:

Major Market Drivers: The rising prevalence of dental disorders, surging geriatric population, continuous technological advancements, etc., are some of the factors driving the market growth. Additionally, there's a growing inclination towards cosmetic dentistry procedures to enhance aesthetics and improve self-confidence. This includes procedures like teeth whitening, dental veneers, and cosmetic orthodontics, all of which require various dental consumables.

Key Market Trends: The growing demand for digital dentistry and biocompatible

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materials, adoption of minimally invasive techniques, and emergence of tele-dentistry are anticipated to propel the market growth. Moreover, regenerative approaches in dentistry, including tissue engineering, are gaining attention for their potential to regenerate damaged dental tissues. Consumables like bioactive materials, growth factor products, and tissue scaffolds support regenerative procedures, such as bone regeneration and periodontal tissue repair, are bolstering the dental consumables market share.

Geographical Landscape: According to the report, North America accounted for the largest market share. The growth of the region is propelled by an aging population, especially in the U.S. and Canada. The increasing awareness among people about oral health, along with the evolution of regulatory standards and guidelines in the dental healthcare sector, positively influences the market growth.

Competitive Landscape: Some of the leading dental consumables market companies are 3M Company, Colgate-Palmolive Company, Dentsply Sirona, Envista Holdings Corporation, Henry Schein Inc., Hu-Friedy Mfg. Co. LLC (Cantel Medical Corporation), Ivoclar Vivadent AG, Nakanishi Inc., Osstem Implant Co. Ltd., Straumann, and Zimmer Biomet, among many others.

Challenges and Opportunities: The escalating cost pressure, regulatory compliance, rigorous competition among manufacturers, and technology complexities are some of the key challenges that the market is facing. However, continuous innovations in digital dentistry, materials science, and manufacturing processes present significant dental consumables market's recent opportunities for growth. Adopting advanced technologies can improve efficiency, precision, and patient outcomes in dental procedures, thereby further driving the industry growth.

Dental Consumables Market Trends:

Rising Prevalence of Dental Disorders

The global dental consumables market is significantly driven by the rising prevalence of dental disorders and a simultaneous increase in awareness about oral health. Tooth decay is one of the most prevalent chronic diseases worldwide. For instance, as per the WHO Global Oral Health Status Report (2022), oral diseases impact about 3.5 billion people globally, with three out of every four affected individuals residing in middle-income countries. An estimated two billion people worldwide suffer from caries of the permanent teeth, while 514 million children suffer from cavities of the primary teeth. Moreover, factors such as poor oral hygiene, consumption of sugary foods and beverages, and inadequate fluoride exposure contribute to the development of caries. The increasing incidence of dental caries necessitates the use of restorative materials like dental composites, amalgam, and glass ionomers, driving the demand for dental consumables. In line with this, as awareness of the importance of oral health continues to grow, more individuals are seeking regular dental check-ups and treatments. For instance, according to the Centers for Disease Control and Prevention, in 2022, 64.1% of adults aged 18 or older reported a dental exam or cleaning. Furthermore, governments across the globe are also taking various initiatives to create awareness regarding oral health. For instance, in May 2024, the Government of India started a National Oral Health Program that aims to improve the determinants of oral health and reduce morbidity from oral diseases. These factors will continue to positively impact the dental consumables market forecast.

Expanding Geriatric Population

The aging population is one of the significant factors augmenting the market growth. The world's population is aging rapidly, with a higher proportion of elderly individuals than ever before. For instance, according to the World Population Prospects 2022, the percentage of adults 65 and older is rising more quickly than the percentage of people under that age. Accordingly, it is anticipated that the proportion of people 65 and older worldwide will increase from 10% in 2022 to 16% in 2050. According to projections, the number of individuals aged 65 years or above across the world will be twice the number of children under age five and almost equivalent to the number of children under 12 years by 2050. This demographic shift is attributed to factors such as increased life expectancy and declining birth rates, which are further bolstering the dental consumables market revenue. In line with this, improved oral hygiene practices, better access to dental care, and advancements in dental treatments have led to a greater retention of natural teeth among older adults. As a result, older individuals are more likely to have their natural teeth later in life than in previous generations. Despite retaining more natural teeth, older adults are still susceptible to age-related dental issues such as periodontal diseases, tooth decay, and tooth loss. Additionally, medical conditions like diabetes and arthritis can exacerbate oral health problems. For instance, according to the report published by the National Library of Medicine in April 2023, periodontal disease is the most prevalent dental disease worldwide, affecting up to 90% of the population. According to cross-sectional studies conducted in the United States alone, up to 80% of adults have had periodontal disease at some point in their lives, and about 50% of persons presently have gingivitis. These factors are stimulating the dental consumables market demand.

Technological Advancements in Dental Procedures

The surging advancement of technology is contributing towards the growth of the market. Computer-aided design/computer-aided manufacturing (CAD/CAM) systems have revolutionized dental restorations. These systems allow for the fabrication of crowns, bridges, and veneers with high precision and efficiency, reducing the need for traditional dental impressions and temporary restorations. For instance, in February 2023, ZimVie launched its RealGuide CAD and Full Suite modules for its digital dentistry software platform. Moreover, intraoral scanners capture detailed digital impressions of the teeth and oral tissues, eliminating the discomfort associated with traditional impression materials. They improve workflow efficiency and accuracy in various dental procedures, including crown and bridge fabrication, orthodontic treatments, and implant planning. This is further propelling the market demand. Besides this, three-dimensional (3D) printing technology enables the production of dental models, surgical guides, and prosthetic components with exceptional precision. It allows for the customization of dental devices according to patient-specific anatomy, enhancing treatment outcomes and patient satisfaction. For instance, in 2023, the US Food and Drug Administration (FDA) approved SprintRay Inc., a leader in 3D printing and digital dentistry, to use High Impact Denture Base, the first denture material with ceramic infusion, for the 3D fabrication and repair of baseplates and full and partial removable dentures. These high-performance denture resins, which are intended to be utilized with High Impact Denture Teeth, revolutionize digital dentistry by utilizing advances in ceramic-infused 3D printing materials that provide robust mechanical qualities. The SprintRay workflow offers a smooth, in-office removable denture fabrication procedure using High Impact Denture resins. These factors are further expected to escalate the market growth.

Dental Consumables Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on product, treatment, material, and end user.

Breakup by Product:

Dental Burs

Whitening Material

Dental Biomaterial

Dental Anesthetics

Crowns and Bridges

Dental Implants

Others

A detailed breakup and analysis of the market based on the product has also been provided in the report. This includes dental burs, whitening material, dental biomaterial, dental anesthetics, crowns and bridges, dental implants, and others.

In the dental burs segment, the need for precise dental procedures, aided by technological advancements and a focus on minimally invasive (MI) dentistry is driving the segment growth. While the demand for whitening material is driven by the need for precise dental procedures, aided by technological advancements and a focus on minimally invasive (MI) dentistry. Furthermore, ongoing innovations in material science are driving the demand for dental biomaterials. Besides this, the increasing need for crowns and bridges is attributed to dental decay prevalence, aging populations, and material advancements.

Breakup by Treatment:

Orthodontic

Endodontic

Periodontic

Prosthodontic

The report has provided a detailed breakup and analysis of the market based on the treatment. This includes orthodontic, endodontic, periodontic, and prosthodontic.

The orthodontic segment is primarily driven by the increasing demand for cosmetic dentistry, with a focus on achieving straighter teeth and improved aesthetics. Rising awareness about the benefits of orthodontic treatments, advancements in clear aligner technologies, and a growing desire for a confident smile are key factors propelling the segment's growth. While the endodontic segment benefits from the rising incidence of dental infections and the need for root canal treatments. Advances in endodontic instruments and techniques, coupled with an aging population retaining their natural teeth, drive the demand for endodontic consumables, making this segment a vital component of the dental consumables market. Also, the periodontic segment is propelled by the increasing prevalence of gum diseases and the growing emphasis on preventive oral care. The prosthodontic segment is driven by the need for dental prosthetics, including dentures, crowns, and bridges. Additionally, advancements in prosthodontic materials and techniques, offering improved aesthetics and durability, contribute to the growth of this segment in the dental consumables market.

Breakup by Material:

- Metals
- Polymers
- Ceramics
- Biomaterials

Metal dominates the market

A detailed breakup and analysis of the market based on the material has also been provided in the report. This includes metals, polymers, ceramics, and biomaterials. According to the report, metals represented the largest segment.

According to the dental consumables market outlook, the metal segment within the dental consumables market is influenced by the surging awareness regarding the durability and strength of metal-based dental consumables, such as crowns, bridges, and implants. Additionally, advancements in materials science and metallurgy have led to the development of high-performance alloys, improving the overall quality and efficacy of metal-based dental products. Furthermore, the growing demand for aesthetic and cosmetic dentistry, where metal-free options may not be suitable, sustains the use of metal-based consumables. The aging population, with a higher likelihood of requiring dental restorations, further propels this segment. Moreover, the need for precision and stability in dental prosthetics, often achieved through metal components, ensures a steady demand. For instance, In January 2024, Eplus3D, a Chinese 3D printer manufacturer, partnered with Scheftner GmbH. The partnership aims to reshape dental and additive manufacturing. By collaborating with Eplus3D, Scheftner, a company that specializes in the creation of medical-grade metal powders for laser powder bed fusion and selective laser melting technologies, aims to enhance its offerings to the dentistry sector.

Breakup by End User:

- Dental Hospitals and Clinics
- Dental Laboratories
- Others

A detailed breakup and analysis of the market based on the end user has also been provided in the report. This includes dental hospitals and clinics, dental laboratories, and others.

The dental hospitals and clinics segment benefits from the increasing prevalence of dental disorders and the growing awareness of oral health. As more people seek dental care, these facilities experience higher patient volumes. Technological advancements in dental procedures and materials also drive the demand, as dental hospitals and clinics strive to offer state-of-the-art treatments, attracting more patients and establishing their expertise in the field. The dental laboratories segment is primarily driven by technological advancements. With the adoption of digital dentistry and 3D printing, dental laboratories can provide highly accurate and customized prosthetics and restorations. This technological edge is a key factor positively influencing the dental consumables market recent price.

Breakup by Region:

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North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest dental consumables market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the dental consumables market report, North America represented the largest segment.

According to the dental consumables market statistics, the North American dental consumables market is propelled by the region's aging population, particularly in the United States and Canada, leading to a sustained demand for dental consumables as older individuals increasingly retain their natural teeth. Moreover, the presence of advanced dental technology and a higher level of awareness about oral health contribute to a thriving market. In line with this, the continuous evolution of regulatory standards and guidelines in the dental healthcare sector influences product innovation and quality. Additionally, the growing emphasis on aesthetic dental treatments and preventive care drives the demand for specialized dental consumables. Furthermore, increasing disposable income levels among North American consumers enable them to invest in premium dental products. For instance, in January 2023, W&H launched a Lexa Plus Class B sterilizer in North America. The new Lexa Plus sterilizer is a pre-vacuum Class B sterilizer that provides more capacity, quick cycles that save energy, automated water filling, connectivity, and traceability, offering complete protection for medical professionals and their patients.

Competitive Landscape:

The competitive landscape of the dental consumables market is characterized by intense rivalry and a multitude of players vying for market share. Companies in this sector employ various strategies to gain a competitive edge. Product innovation remains a key driver, with companies constantly developing and launching new dental consumables to meet evolving customer needs. Additionally, strategic partnerships and collaborations are prevalent, allowing businesses to access complementary technologies and expand their product portfolios. Moreover, mergers and acquisitions are common, enabling companies to consolidate their positions and reach a broader customer base. Market players also focus on cost-efficiency and supply chain optimization to maintain competitiveness. Furthermore, branding and marketing efforts are crucial to establishing a strong market presence. The emphasis on research and development to create more effective and sustainable dental consumables contributes to the fierce competition in this industry. The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

- 3M Company
- Colgate-Palmolive Company
- Dentsply Sirona
- Envista Holdings Corporation
- Henry Schein Inc.
- Hu-Friedy Mfg. Co. LLC (Cantel Medical Corporation)
- Ivoclar Vivadent AG
- Nakanishi Inc.
- Osstem Implant Co. Ltd.
- Straumann
- Zimmer Biomet

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Dental Consumables Market Recent Developments:

May 2024: Dental Innovation Alliance VC Fund I, LP (DIA) made a strategic investment in Pearl, a leading innovator of artificial intelligence (AI) solutions for dentistry.

April 2024: SprintRay, the market leader in dental 3D printing, announced its most significant invention, Midas Digital Press 3D Printer to over 250 dental professionals at 3DNext, a summit in Miami.

January 2024: Eplus3D, a Chinese 3D printer manufacturer partnered with Scheftner GmbH. The partnership aims to transform dental and additive manufacturing.

Key Questions Answered in This Report:

How has the global dental consumables market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global dental consumables market?

What is the impact of each driver, restraint, and opportunity on the global dental consumables market?

What are the key regional markets?

Which countries represent the most attractive dental consumables market?

What is the breakup of the market based on product?

Which is the most attractive product in the dental consumables market?

What is the breakup of the market based on the treatment?

Which is the most treatment in the dental consumables market?

What is the breakup of the market based on material?

Which is the most attractive material in the dental consumables market?

What is the breakup of the market based on end user?

Which is the most attractive end user in the dental consumables market?

What is the competitive structure of the global dental consumables market?

Who are the key players/companies in the global dental consumables market?

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