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Intraoral Scanners Market Report by Brand (Cadent iTero, 3M ESPE Lava COS, CEREC, E4D, TRIOS, CS, and Others), Type of Modality (Standalone, Portable, and Others), End User (Hospitals, Dental Clinics, and Others), and Region 2024-2032

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Abstracts

The global intraoral scanners market size reached US$ 418.2 Million in 2023. Looking forward, IMARC Group expects the market to reach US$ 795.8 Million by 2032, exhibiting a growth rate (CAGR) of 7.19% during 2024-2032. The rising prevalence of dental disorders, growing demand for digital dentistry, extensive research and development (R&D) activities, and the implementation of supportive government policies are some of the major factors propelling the market.

Intraoral scanners refer to advanced dental tools used for capturing digital impressions of a patient's teeth and oral structures. It is comprised of a handheld wand, optical sensors, light sources, a connectivity module, a processing unit, software, and a user interface. They are widely used for orthodontics, restorative dentistry, prosthodontics, digital impressions, periodontics, and implant dentistry. It provides high accuracy and precision that aids in improving patient experience, saving time, and enhancing treatment planning. Intraoral scanners also facilitate seamless communication and collaboration between dental professionals to improve the quality of treatment.

The rising consumer awareness regarding various product benefits, such as eliminating the need for messy impression materials, reducing patient discomfort, improving accuracy, and providing faster turnaround times for dental restoration, is supporting the market growth. Furthermore, the implementation of supportive reimbursement policies by several governments to encourage dental professionals to adopt advanced technologies, such as intraoral scanners, to improve patient outcomes is contributing to

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the market growth. Moreover, the growing demand for aesthetic dentistry is facilitating product adoption to enable the customization and precise fabrication of dental restorations that provide visually appealing and natural-looking results. Other factors, including the rising geriatric population, the rapid expansion of the healthcare industry, increasing investment in the development of advanced products, and growing dental consciousness among the masses, are anticipated to drive the market growth.

Intraoral Scanners Market Trends/Drivers:
The rising prevalence of dental disorders

Intraoral scanners are used to capture digital impressions of teeth affected by dental caries, which assist dentists in visualizing the extent of decay and precise treatment planning. Furthermore, the widespread product utilization to manage periodontal diseases, such as gingivitis and periodontitis, is acting as another growth-inducing factor. Additionally, increasing product adoption to create digital models of the teeth and jaws facilitates the assessment of tooth alignment, occlusion, and dental arches is propelling the market growth. Moreover, the growing product application in the fabrication of dental prostheses, such as dentures, bridges, and implant-supported restorations, is contributing to the market growth. Besides this, the rising product utilization in endodontic treatments, such as root canal therapy, to aid dentists in precise cleaning, shaping, and filling of the root canal system is providing a boost to the market growth.

The growing demand for digital dentistry

Intraoral scanners are highly advanced equipment that can capture digital impressions of the teeth and oral structures, thus replacing traditional physical impressions. They enhance accuracy, improve patient comfort, and reduce turnaround time. Furthermore, intraoral scanners provide seamless integration with other software and digital tools, which enables the production of customized dental restorations in a shorter timeframe. Additionally, intraoral scanners facilitate the planning and placement of dental implants with optimal accuracy and predictability. Besides this, they enable seamless communication and collaboration between dental professionals, which streamlines the workflow, reduces errors, and improves the overall quality of dental care.

Extensive research and development (R&D) activities

The introduction of wireless and portable intraoral scanners that are user-friendly, eliminates the need for cables, and allows easy integration with computer systems is

positively influencing the market growth. Additionally, the integration of computer-aided design (CAD) systems that enables seamless workflow and allow dental professionals to directly transfer digital impressions to CAD software for the design and fabrication of restorations, such as crowns, bridges, and aligners, is strengthening the market growth. Furthermore, the utilization of artificial intelligence (AI), which provides real-time image analysis, automatic identification of anatomical landmarks, and quality control during the scanning process, is contributing to the market growth. Apart from this, the incorporation of advanced software features to simplify the scanning workflow, facilitate data manipulation, and improve the overall user experience is favoring the market growth.

Intraoral Scanners Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the global intraoral scanners market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on brand, modality, and end user.

Breakup by Brand:

Cadent iTero
3M ESPE Lava COS
CEREC
E4D
TRIOS
CS
Others

The report has provided a detailed breakup and analysis of the market based on the brand. This includes Cadent iTero, 3M ESPE Lava COS, CEREC, E4D, TRIOS, CS, and others.

Cadent iTero is equipped with exceptional scanning technology, such as laser and optical scanning, which delivers highly accurate and detailed digital impressions. Furthermore, it employs an open architecture system, allowing seamless integration with various CAD systems and third-party software. Additionally, Cadent iTero offers a comprehensive digital workflow that encompasses the entire treatment process, which eliminates the need for physical models, plaster casts, and manual data transfer. Apart from this, it features a sleek and ergonomic design, allowing for comfortable handling during intraoral scanning procedures.

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CEREC is widely preferred by dental professionals owing to its reliability, quality, and proven track record. Furthermore, it offers an integrated solution that combines intraoral scanning with computer-aided design and computer-aided manufacturing (CAD/CAM) systems. Moreover, it enables dental professionals to create chairside restorations, such as crowns, veneers, and bridges, within a single visit, thus saving time and increasing patient convenience. Apart from this, CEREC leverages advanced technologies, such as three-dimensional (3D) optical scanning, to capture detailed images of the oral cavity, resulting in improved treatment outcomes and patient satisfaction.

Breakup by Type of Modality:

Standalone
Portable
Others

Standalone dominates the market

The report has provided a detailed breakup and analysis of the market based on the type of modality. This includes standalone, portable, and others. According to the report, standalone represented the largest market segment.

Standalone scanners are designed to be portable and user-friendly. They are compact, lightweight, and highly maneuverable products that allow dental professionals to move freely within the dental clinic and take the scanner to multiple locations. Furthermore, they operate independently without requiring external devices or connections, such as computer towers or carts, which aids in reducing the overall setup cost and investment required by dental practices. Moreover, standalone scanners offer streamlined workflows by simplifying the scanning process, which, in turn, saves time and improves productivity. They are also equipped with user-friendly features, such as touchscreen interfaces and straightforward navigation, which enables dental professionals to quickly master the scanning technique. Apart from this, standalone scanners provide a more comfortable and pleasant experience for patients compared to traditional impression methods.

Breakup by End User:

Hospitals
Dental Clinics

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Others

Dental Clinics hold the largest share in the market

The report has provided a detailed breakup and analysis of the market based on the end user. This includes hospitals, dental clinics, and others. According to the report, dental clinics represented the largest market segment.

Dental clinics are dominating the market as intraoral scanners are widely used to capture precise three-dimensional (3D) impressions of patient's teeth and gums, which improves accuracy, streamlines workflows, and enhances patient comfort. Additionally, they enable dental clinics to enhance treatment planning and communication with patients, which improves patient education, facilitates informed decision-making, and strengthens the patient-clinic relationship. Furthermore, the widespread product utilization to improve workflow within dental clinics by saving time and reducing errors is acting as another growth-inducing factor. Additionally, the seamless product integration with CAD systems to facilitate quick designing and fabrication of dental restorations, such as bridges, crowns, and veneers, is contributing to the market growth. Apart from this, the rising investments by dental clinics in patient-centric treatment approaches are propelling the market growth.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy

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Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

North America exhibits a clear dominance in the market, accounting for the largest intraoral scanners market share

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

North America holds the majority market share as it is home to several leading dental technology companies that continuously innovate and develop advanced intraoral scanners. Along with this, the introduction of highly accurate, fast, and user-friendly intraoral scanning solutions is acting as another growth-inducing factor. Furthermore, the increasing adoption of digital dentistry to improve patient outcomes and streamline workflows is facilitating the demand for intraoral scanners, which allows dentists to capture accurate 3D digital impressions of patients' teeth and gums. Moreover, the presence of a robust dental infrastructure, including well-established dental clinics, dental laboratories, and academic institutions, is supporting the market growth. Besides this, the rising consumer awareness regarding the benefits of intraoral scanners in enhancing patient comfort, increasing compliance, and improving clinical outcomes is strengthening the market growth.

Competitive Landscape:
The leading companies in the market are launching technologically advanced products with improved features and capabilities, such as increased scanning speed, higher accuracy, ease of use, and compatibility with various software platforms. Furthermore, the rising strategic partnerships between several key players, dental technology companies, dental clinics, and education institutions to jointly develop products and undertake co-marketing initiatives are supporting the market growth. Additionally,

aggressive branding and promotional activities by top companies through workshops, webinars, and hands-on training sessions to familiarize dentists and dental staff with the intraoral scanners are positively influencing the market growth. Moreover, several companies are emphasizing customer support and services to build long-term relationships and enhance customer satisfaction.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

3M Company
3Shape A/S
Align Technology Inc.
Carestream Dental LLC
Condor Scan
Densys3D Ltd.
Dentsply Sirona
Guangdong Launca Medical Device Technology Co. Ltd.
Medit Corp.
Midmark Corporation
Planmeca Oy
Straumann AG.

Recent Developments:
In September 2022, 3Shape A/S launched its all-new lineup of TRIOS 5 wireless intraoral scanners that deliver exceptional performance in a compact body with next-level ergonomics, effortless scanning, and improved hygiene.
In November 2022, Align Technology Inc. announced a collaboration with Desktop Lab to manufacture iTero Element Flex, the restorative intraoral scanner designed for Desktop Labs' customers serving general dentists.
In April 2022, Carestream Dental LLC's intraoral scanner business was acquired by Envista Holdings Corporation and will be rebranded as DEXIS.

Key Questions Answered in This Report

1. What was the size of the global intraoral scanners market in 2023?
2. What is the expected growth rate of the global intraoral scanners market during 2024-2032?
3. What are the key factors driving the global intraoral scanners market?

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4. What has been the impact of COVID-19 on the global intraoral scanners market?
5. What is the breakup of the global intraoral scanners market based on the type of modality?
6. What is the breakup of the global intraoral scanners market based on the end user?
7. What are the key regions in the global intraoral scanners market?
8. Who are the key players/companies in the global intraoral scanners market?

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Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

2.1 Objectives of the Study
2.2 Stakeholders
2.3 Data Sources
  2.3.1 Primary Sources
  2.3.2 Secondary Sources
2.4 Market Estimation
  2.4.1 Bottom-Up Approach
  2.4.2 Top-Down Approach
2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

4.1 Overview
4.2 Key Industry Trends

5 GLOBAL INTRAORAL SCANNERS MARKET

5.1 Market Overview
5.2 Market Performance
5.3 Impact of COVID-19
5.4 Market Forecast

6 MARKET BREAKUP BY BRAND

6.1 Cadent iTero
  6.1.1 Market Trends
  6.1.2 Market Forecast
6.2 3M ESPE Lava COS
  6.2.1 Market Trends
  6.2.2 Market Forecast
6.3 CEREC

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6.3.1 Market Trends
6.3.2 Market Forecast
6.4 E4D
6.4.1 Market Trends
6.4.2 Market Forecast
6.5 TRIOS
6.5.1 Market Trends
6.5.2 Market Forecast
6.6 CS
6.6.1 Market Trends
6.6.2 Market Forecast
6.7 Others
6.7.1 Market Trends
6.7.2 Market Forecast

7 MARKET BREAKUP BY TYPE OF MODALITY

7.1 Standalone
7.1.1 Market Trends
7.1.2 Market Forecast
7.2 Portable
7.2.1 Market Trends
7.2.2 Market Forecast
7.3 Others
7.3.1 Market Trends
7.3.2 Market Forecast

8 MARKET BREAKUP BY END USER

8.1 Hospitals
8.1.1 Market Trends
8.1.2 Market Forecast
8.2 Dental Clinics
8.2.1 Market Trends
8.2.2 Market Forecast
8.3 Others
8.3.1 Market Trends
8.3.2 Market Forecast

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9 MARKET BREAKUP BY REGION

9.1 North America
9.1.1 United States
9.1.1.1 Market Trends
9.1.1.2 Market Forecast
9.1.2 Canada
9.1.2.1 Market Trends
9.1.2.2 Market Forecast
9.2 Asia-Pacific
9.2.1 China
9.2.1.1 Market Trends
9.2.1.2 Market Forecast
9.2.2 Japan
9.2.2.1 Market Trends
9.2.2.2 Market Forecast
9.2.3 India
9.2.3.1 Market Trends
9.2.3.2 Market Forecast
9.2.4 South Korea
9.2.4.1 Market Trends
9.2.4.2 Market Forecast
9.2.5 Australia
9.2.5.1 Market Trends
9.2.5.2 Market Forecast
9.2.6 Indonesia
9.2.6.1 Market Trends
9.2.6.2 Market Forecast
9.2.7 Others
9.2.7.1 Market Trends
9.2.7.2 Market Forecast
9.3 Europe
9.3.1 Germany
9.3.1.1 Market Trends
9.3.1.2 Market Forecast
9.3.2 France
9.3.2.1 Market Trends
9.3.2.2 Market Forecast
9.3.3 United Kingdom

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9.3.3.1 Market Trends
9.3.3.2 Market Forecast
9.3.4 Italy
9.3.4.1 Market Trends
9.3.4.2 Market Forecast
9.3.5 Spain
9.3.5.1 Market Trends
9.3.5.2 Market Forecast
9.3.6 Russia
9.3.6.1 Market Trends
9.3.6.2 Market Forecast
9.3.7 Others
9.3.7.1 Market Trends
9.3.7.2 Market Forecast
9.4 Latin America
9.4.1 Brazil
9.4.1.1 Market Trends
9.4.1.2 Market Forecast
9.4.2 Mexico
9.4.2.1 Market Trends
9.4.2.2 Market Forecast
9.4.3 Others
9.4.3.1 Market Trends
9.4.3.2 Market Forecast
9.5 Middle East and Africa
9.5.1 Market Trends
9.5.2 Market Breakup by Country
9.5.3 Market Forecast

10 SWOT ANALYSIS

10.1 Overview
10.2 Strengths
10.3 Weaknesses
10.4 Opportunities
10.5 Threats

11 VALUE CHAIN ANALYSIS

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12 PORTERS FIVE FORCES ANALYSIS

12.1 Overview
12.2 Bargaining Power of Buyers
12.3 Bargaining Power of Suppliers
12.4 Degree of Competition
12.5 Threat of New Entrants
12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

14.1 Market Structure
14.2 Key Players
14.3 Profiles of Key Players
  14.3.1 3M Company
    14.3.1.1 Company Overview
    14.3.1.2 Product Portfolio
    14.3.1.3 Financials
    14.3.1.4 SWOT Analysis
  14.3.2 3Shape A/S
    14.3.2.1 Company Overview
    14.3.2.2 Product Portfolio
  14.3.3 Align Technology Inc.
    14.3.3.1 Company Overview
    14.3.3.2 Product Portfolio
    14.3.3.3 Financials
    14.3.3.4 SWOT Analysis
  14.3.4 Carestream Dental LLC
    14.3.4.1 Company Overview
    14.3.4.2 Product Portfolio
  14.3.5 Condor Scan
    14.3.5.1 Company Overview
    14.3.5.2 Product Portfolio
  14.3.6 Densys3D Ltd.
    14.3.6.1 Company Overview
    14.3.6.2 Product Portfolio
  14.3.7 Dentsply Sirona

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14.3.7.1 Company Overview
14.3.7.2 Product Portfolio
14.3.7.3 Financials
14.3.7.4 SWOT Analysis
14.3.8 Guangdong Launca Medical Device Technology Co. Ltd.
14.3.8.1 Company Overview
14.3.8.2 Product Portfolio
14.3.9 Medit Corp.
14.3.9.1 Company Overview
14.3.9.2 Product Portfolio
14.3.10 Midmark Corporation
14.3.10.1 Company Overview
14.3.10.2 Product Portfolio
14.3.11 Planmeca Oy
14.3.11.1 Company Overview
14.3.11.2 Product Portfolio
14.3.11.3 SWOT Analysis
14.3.12 Straumann AG
14.3.12.1 Company Overview
14.3.12.2 Product Portfolio
14.3.12.3 Financials
14.3.12.4 SWOT Analysis

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List Of Tables

LIST OF TABLES

Table 1: Global: Intraoral Scanners Market: Key Industry Highlights, 2023 and 2032
Table 2: Global: Intraoral Scanners Market Forecast: Breakup by Brand (in Million US$), 2024-2032
Table 3: Global: Intraoral Scanners Market Forecast: Breakup by Type of Modality (in Million US$), 2024-2032
Table 4: Global: Intraoral Scanners Market Forecast: Breakup by End User (in Million US$), 2024-2032
Table 5: Global: Intraoral Scanners Market Forecast: Breakup by Region (in Million US$), 2024-2032
Table 6: Global: Intraoral Scanners Market: Competitive Structure
Table 7: Global: Intraoral Scanners Market: Key Players

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List Of Figures

LIST OF FIGURES

Figure 1: Global: Intraoral Scanners Market: Major Drivers and Challenges
Figure 2: Global: Intraoral Scanners Market: Sales Value (in Million US$), 2018-2023
Figure 3: Global: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 4: Global: Intraoral Scanners Market: Breakup by Brand (in %), 2023
Figure 5: Global: Intraoral Scanners Market: Breakup by Type of Modality (in %), 2023
Figure 6: Global: Intraoral Scanners Market: Breakup by End User (in %), 2023
Figure 7: Global: Intraoral Scanners Market: Breakup by Region (in %), 2023
Figure 8: Global: Intraoral Scanners (Cadent iTero) Market: Sales Value (in Million US$), 2018 & 2023
Figure 9: Global: Intraoral Scanners (Cadent iTero) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 10: Global: Intraoral Scanners (3M ESPE Lava COS) Market: Sales Value (in Million US$), 2018 & 2023
Figure 11: Global: Intraoral Scanners (3M ESPE Lava COS) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 12: Global: Intraoral Scanners (CEREC) Market: Sales Value (in Million US$), 2018 & 2023
Figure 13: Global: Intraoral Scanners (CEREC) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 14: Global: Intraoral Scanners (E4D) Market: Sales Value (in Million US$), 2018 & 2023
Figure 15: Global: Intraoral Scanners (E4D) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 16: Global: Intraoral Scanners (TRIOS) Market: Sales Value (in Million US$), 2018 & 2023
Figure 17: Global: Intraoral Scanners (TRIOS) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 18: Global: Intraoral Scanners (CS) Market: Sales Value (in Million US$), 2018 & 2023
Figure 19: Global: Intraoral Scanners (CS) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 20: Global: Intraoral Scanners (Other Brands) Market: Sales Value (in Million US$), 2018 & 2023
Figure 21: Global: Intraoral Scanners (Other Brands) Market Forecast: Sales Value (in

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Million US$), 2024-2032
Figure 22: Global: Intraoral Scanners (Standalone) Market: Sales Value (in Million US$), 2018 & 2023
Figure 23: Global: Intraoral Scanners (Standalone) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 24: Global: Intraoral Scanners (Portable) Market: Sales Value (in Million US$), 2018 & 2023
Figure 25: Global: Intraoral Scanners (Portable) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 26: Global: Intraoral Scanners (Other Type of Modalities) Market: Sales Value (in Million US$), 2018 & 2023
Figure 27: Global: Intraoral Scanners (Other Type of Modalities) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 28: Global: Intraoral Scanners (Hospitals) Market: Sales Value (in Million US$), 2018 & 2023
Figure 29: Global: Intraoral Scanners (Hospitals) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 30: Global: Intraoral Scanners (Dental Clinics) Market: Sales Value (in Million US$), 2018 & 2023
Figure 31: Global: Intraoral Scanners (Dental Clinics) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 32: Global: Intraoral Scanners (Other End Users) Market: Sales Value (in Million US$), 2018 & 2023
Figure 33: Global: Intraoral Scanners (Other End Users) Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 34: North America: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 35: North America: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 36: United States: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 37: United States: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 38: Canada: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 39: Canada: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 40: Asia-Pacific: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023

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info@marketpublishers.com

Figure 41: Asia-Pacific: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 42: China: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 43: China: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 44: Japan: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 45: Japan: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 46: India: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 47: India: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 48: South Korea: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 49: South Korea: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 50: Australia: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 51: Australia: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 52: Indonesia: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 53: Indonesia: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 54: Others: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 55: Others: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 56: Europe: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 57: Europe: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 58: Germany: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 59: Germany: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 60: France: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 61: France: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032

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Figure 62: United Kingdom: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 63: United Kingdom: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 64: Italy: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 65: Italy: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 66: Spain: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 67: Spain: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 68: Russia: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 69: Russia: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 70: Others: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 71: Others: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 72: Latin America: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 73: Latin America: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 74: Brazil: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 75: Brazil: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 76: Mexico: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 77: Mexico: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 78: Others: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 79: Others: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032
Figure 80: Middle East and Africa: Intraoral Scanners Market: Sales Value (in Million US$), 2018 & 2023
Figure 81: Middle East and Africa: Intraoral Scanners Market: Breakup by Country (in %), 2023
Figure 82: Middle East and Africa: Intraoral Scanners Market Forecast: Sales Value (in Million US$), 2024-2032

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Figure 83: Global: Intraoral Scanners Industry: SWOT Analysis
Figure 84: Global: Intraoral Scanners Industry: Value Chain Analysis
Figure 85: Global: Intraoral Scanners Industry: Porter's Five Forces Analysis

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