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Global Dual-cure Universal Adhesive Market Growth 2026-2032

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Abstracts

The global Dual-cure Universal Adhesive market size is predicted to grow from US$ 86.14 million in 2025 to US$ 129 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 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

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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

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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.

LP Information, Inc. (LPI) ' newest research report, the “Dual-cure Universal Adhesive Industry Forecast” looks at past sales and reviews total world Dual-cure Universal Adhesive sales in 2025, providing a comprehensive analysis by region and market sector of projected Dual-cure Universal Adhesive sales for 2026 through 2032. With Dual-cure Universal Adhesive sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Dual-cure Universal Adhesive industry.

This Insight Report provides a comprehensive analysis of the global Dual-cure Universal Adhesive landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Dual-cure Universal Adhesive portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Dual-cure Universal Adhesive market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dual-cure Universal Adhesive and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Dual-cure Universal Adhesive.

This report presents a comprehensive overview, market shares, and growth opportunities of Dual-cure Universal Adhesive market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Self-Etch

Total-Etch

Selective-Etch

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Segmentation by Packaging Specifications:

4ml

5ml

6ml

Others

Segmentation by Application:

Hospital

Dental Clinic

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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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

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Chunlizhengda Medical Instruments

Key Questions Addressed in this Report

What is the 10-year outlook for the global Dual-cure Universal Adhesive market?

What factors are driving Dual-cure Universal Adhesive market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Dual-cure Universal Adhesive market opportunities vary by end market size?

How does Dual-cure Universal Adhesive break out by Type, by Application?

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