

Digital Dentistry Market by Product (Intraoral Scanner, Intraoral Camera, Dental CBCT, CAD/CAM), Specialty (Orthodontic, Prosthodontic, Implantology), Application (Therapeutic, Diagnostic), End User (Hospital, Dental Clinic, Labs) & Region - Global Forecast to 2028

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Abstracts

The global digital dentistry market is projected to reach USD 12.2 billion by 2028 from USD 7.2 billion in 2023, at a CAGR of 10.9% during the forecast period. The increased returns on investment for digital dentistry solutions, increasing demand for same-day dentistry, growing outsourcing of manufacturing to labs rise in demand for cosmetic procedures, increased geriatric patient and patient pool for dental treatment.

However, data privacy and security issues and lack of reimbursement for dental procedures are expected to restrain the growth of this market during the forecast period.

“Equipment segment accounted for a larger share of the digital dentistry market”

In 2022, the equipment segment accounted for a larger share of the digital dentistry market. This segment is also estimated to grow at a stable CAGR during the forecast period. Growth in this segment can primarily be attributed to the increased shift toward digitally advanced equipment, quicker treatment rates, and same-day dentistry. Growing adoption of intraoral scanners and 3D printers, in developing nations, is also boosting the market growth. Patient expectations for the best quality treatment and competitive scenario among dental practitioners in developing nation, has triggered them to adopt technologically advanced solutions. This eventually led to improvement in workflow, increased profit margins for dentists, and quicker treatment. Equipment with digital

capabilities allows small-scale businesses to reach greater heights to become mid to large-scale entities. In emerging nations, dental labs and clinics are continuously investing in new or refurbished equipment, to strengthen their position in the highly competitive regions. As per Dental Council of India, nearly 270,000 dentist were registered in 2020. Of which, only 3 to 5% join the government workforce. Thus, India is home to a large number of private clinics and hospitals, that have all the financial capacities to adopt digital equipments, and ultimately influence the market growth.

“The dental laboratories segment will grow at highest CAGR during the forecast period in the end-user segment”

Based on end users, the dental laboratories segment will grow at highest CAGR during the forecast period. Dental laboratories accounted for the largest share of the digital dentistry market in 2022. This is attributed to the increasing demand for dental laboratories and the expansion of existing laboratories due to the growing number of dental procedures required (to replace missing teeth or restorative procedures to retain original size and shape), increasing demand for cosmetic surgeries, and the rising adoption of advanced technologies to develop high-quality dental products.

Dental laboratories are extensively involved in manufacturing and re-fabricating dental prosthetics, crowns, dentures, veneers, and night guards. Dental laboratories utilize advanced methods to produce dental prosthetics such as removable partial dentures, fixed bridges, crowns, and veneers by taking the impression of a patient's oral soft tissue or teeth. Dental labs purchase prefabricated products from manufacturers and re-fabricate them according to patient requirements. The process of fabrication and customization of dental products is expensive and time-consuming. As a result, dental laboratories are widely focusing on 3D printing to develop high-quality dental products with accuracy, speed, and ease.

“Asia Pacific will grow at highest CAGR during the forecast period”

In 2022, Asia Pacific will grow at highest CAGR during the forecast period. Major factors driving the growth of this market are the growing geriatric population, growing dental tourism in major Asian markets such as India, an increasing focus of prominent players on emerging Asian countries, rising dental expenditure (coupled with the rising disposable income), increasing awareness on oral healthcare, and a willingness to spend on dental care to maintain dental aesthetics.

The break-up of the profile of primary participants in the digital dentistry market:

By Company Type: Tier 1 – 30%, Tier 2 – 45%, and Tier 3 – 25%

By Designation: C Level – 25%, Director Level – 30%, Others-45%

By Region: North America – 20%, Europe –25%, Asia Pacific – 30%, Middle East – 15%.

Latin America – 10%

The prominent players in the Digital dentistry market include Dentsply Sirona (US), Envista Holdings Corporation (US), 3M Company (US), Ivoclar Vivadent AG (Switzerland), Planmeca OY (Finland), 3Shape (Denmark), Align Technologies (US), J Morita Corporation (Japan), 3D Systems, Inc. (US), Straumann Group (Switzerland), Stratasys (US), Kulzer (US), Vatech Co. Ltd. (US), Carestream Dental LLC (US), Bego GMBH & Co. KG (Germany),

Research Coverage:

The report analyzes the Digital dentistry market and aims at estimating the market size and future growth potential of this market based on various segments such as product, specialty areas, applications, end users, and region. The report also includes a product portfolio matrix of various digital dentistry manufactured equipment or software available in the market. The report also provides a competitive analysis of the key players in this market, along with their company profiles, product offerings, and key market strategies.

Reasons to Buy the Report

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall digital dentistry market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

This report provides insights into the following pointers:

Analysis of key drivers (inclination towards technologically advanced equipment,

growing cosmetics and quick dental procedures, increased patient pool), restraints (lack of reimbursement for dental procedures), opportunities (rise in DSO activities and consolidation of dental practices), and challenges (shortage of professionals for usage of advanced techniques) influencing the growth of the digital dentistry market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the Digital dentistry market

Market Development: Comprehensive information on the lucrative emerging markets by type, application, end user and region.

Market Diversification: Exhaustive information about new products or product enhancements, growing geographies, recent developments, and investments in the global digital dentistry market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, competitive leadership mapping, and capabilities of leading players like Dentsply Sirona (US), Envista Holdings Corporation (US), 3M Company (US), Ivoclar Vivadent AG (Switzerland), Planmeca OY (Finland), 3Shape (Denmark), Align Technologies (US), J Morita Corporation (Japan), 3D Systems, Inc. (US), Straumann Group (Switzerland), Stratysys (US), Kulzer (US), Vatech Co. Ltd. (US), Carestream Dental LLC (US), Bego GMBH & Co. KG (Germany).

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(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)*

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*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

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