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Clear Aligners Market by Material (Polyurethane, Polyethylene Terephthalate Glycol) Type (At-home, In-office) Age Group (Children, Adults) Distribution Channel (Offline, Online) End User (Clinics & Hospitals, Direct-to-customer) - Global Forecast to 2030

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Abstracts

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The global clear aligners market is projected to reach $18.8 billion by 2030, at a CAGR of 19.8% from 2023 to 2030.

Succeeding extensive secondary and primary research and in-depth analysis of the market scenario, the report comprises the analysis of key industry drivers, restraints, challenges, and opportunities. The growth in the clear aligners market is mainly attributed to the rise in the number of patients with malocclusion, product launches by clear aligners companies, technological advancements in dentistry, and increasing demand for aesthetic dentistry. However, the high cost of clear aligners restrains the growth of this market. The growing demand for customized clear aligners is expected to generate growth opportunities for the players operating in this market. However, the lack of awareness about dental health problems among the population and low access to quality dental treatment in emerging countries are challenges for the players operating in this market.

Based on material, in 2023, the polyurethane segment is expected to account for the

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largest share of the market. The adoption of polyurethane for the fabrication of clear aligners is increasing due to its properties, such as high elastomeric characteristics, chemical, abrasion, & heat resistance, and ease of processing. Additionally, the material can withstand bruxism as it is used in clear aligners. It can withstand physical handling, grinding, and biting during the treatment, which further drives people's preference for this material over others.

Based on type, the in-office aligners segment is projected to register the highest CAGR during the forecast period. Factors such as growing support from dental associations for in-office aligners, treatment under the guidance of dental care providers, technological advancements in the fabrication of clear aligners, and reduced risk of oral injuries, such as tooth & gum damage and Temporomandibular Joint (TMJ) disorders, during treatment, are driving the growth of this segment.

Based on distribution channel, in 2023, the offline channel segment is expected to account for the largest share of the global clear aligners market. The offline distribution channels are observed to be more preferred by dentists and OEM manufacturers, as it allows direct interaction between dentists and sales representatives. It helps sales representatives to demonstrate the product details and work to the dentist in depth. This helps dentists provide more effective treatment to their patients, contributing to the large market share of this segment.

Based on end user, the dental hospitals & clinics segment is projected to register the highest CAGR during the forecast period. High patient inflows at hospitals & clinics, a wider range of services and treatments, and fast dental handling are supporting the growth of this segment.

An in-depth analysis of the geographical scenario of the global clear aligners market provides detailed qualitative and quantitative insights about the five major geographies (North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa) along with the coverage of major countries in each region. In 2023, North America is expected to account for the largest share of the clear aligners market, followed by Europe, Asia-Pacific, Latin America, and the Middle East & Africa. The factors supporting the largest share of this market are technological advancements in dentistry, increasing prevalence of malocclusion, and increased dental care spending. Additionally, the presence of key players, well-established dental care infrastructure, and government initiatives for oral care awareness also contribute to the large market share of North America.

The key players operating in the global clear aligners market are Align Technology, Inc. (U.S.), Institut Straumann AG (Switzerland), Dentsply Sirona Inc. (U.S.), 3M Company (U.S.), Envista Holdings Corporation (U.S.), Argen Corporation (U.S.), TP Orthodontics, Inc. (U.S.), Dentrum GMbH & Co.KG (Germany), Dynaflex (U.S.), Angelalign Technology Inc. (China), SmileDirectClub, Inc.(U.S.), G &H Orthodontics (U.S.), Avinent (Spain), DentCare Aligners(India), K Line Europe(Germany), and Clearbite Aligners (Australia).

Scope of the Report:

Clear Aligners Market Assessment, by Material

Polyurethane

Polyethylene Terephthalate Glycol (PETG)

Other Materials

(Other materials majorly include Polycarbonate, Polyvinyl Chloride (PVC), and Polymer Blended Material)

Clear Aligners Market Assessment, by Type

At-Home Aligners

In-Office Aligners

Clear Aligners Market Assessment, by Age Group

Teenagers/children

Adults

Clear Aligners Market Assessment, by Distribution Channel

Offline

Online

Clear Aligners Market Assessment, by End User

Dental Hospitals and Clinics

Dental Laboratories

Direct-to-Consumer (DTC)

Clear Aligners Market Assessment, by Geography

North America

U.S.

Canada

Europe

Germany

U.K.

France

Italy

Spain

Rest of Europe (RoE)

Asia-Pacific (APAC)

China

- Japan
- South Korea
- India
- Rest of Asia-Pacific (RoAPAC)

Latin America

- Brazil
- Rest of Latin America (RoLATAM)

Middle East & Africa

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Note: SWOT analysis is provided for the top 6 companies.

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