

Orthodontics Market - Analysis of Market Size, Share & Trends for 2019 – 2020 and Forecast to 2027

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Abstracts

The global Orthodontics market is expected to grow at a CAGR of 10.9% from 2020 to reach USD 7,216.0 million by 2027. The growing number of dentists, increasing prevalence of malocclusion, and growing awareness about advanced orthodontic treatments are the key factors driving the growth of this market. In addition, adoption of advanced imaging modalities and treatment planning software are further expected to increase the number and quality of orthodontic treatments which in turn will drive the market growth.

Rising Number of Dentists and Clinics Fuel the Growth of Global Orthodontics Market
In recent years, number of dentists has increased across the globe and with the growing number of dentists; number of clinics has also increased. For instance, the number of dentists in the U.S. working in general practices increased from 150,235 in 2012 to 156,992 in 2017. Similarly, number of dentists working in orthodontic practices increased to 10,658 in 2017 from 10,355 in 2012 (Source: American Dental Association). Similarly, the number of dentists in Germany increased from 65,929 dentists in 2007 to 69,863 in 2015. Around 5% of the total dentists in Germany are specialized in orthodontics (Source: German Dental Association) with additional 1,500 and 2,100 dentists receiving their dental approbation every year.

A similar trend is observed in emerging countries as well. For instance, in India, every year nearly 12,000 to 15,000 new dental practices start in the country. According to Dentists Money Digest Magazine, there were more than 29,000 dental care delivery organizations in China in 2014 which is expected to increase to more than 42,000 organizations by 2020. Thus, the rising number of dentists and a growing number of dental clinics is expected to drive the adoption of orthodontic products.

Increasing Prevalence of Malocclusion drives the Market Growth

Malocclusion is one of the most prevalent oral pathologies, next only to dental caries and periodontal disease and usually ranked third among worldwide public health dental disease priorities. Epidemiological studies on occlusion and malocclusion help in orthodontic treatment planning and evaluation of dental health services.

According to a study published by International Journal of Indigenous Health, the prevalence of malocclusion (less than acceptable occlusion) among all 12- to 59-year-old Canadians was 24.0%. In European and American studies, the prevalence of orthodontic treatment ranges from 10 to 35%. According to a study published by Nature, pooled malocclusion prevalence was 45.50% among pre-schoolers in mainland China from 1988 to 2017. The prevalence of malocclusion in India has been observed to be ranging from 20% to 43%. Thus, an increasing prevalence of malocclusion patients will require orthodontic treatments which will drive the adoption of orthodontic products.

Increasing Awareness about Advanced Orthodontic Treatments is Catching the Attention!

Dentistry including orthodontics is constantly changing and evolving to cater to unmet needs of both dentists and patients. Technological innovations are crucial for the advancement of the art and science of clinical dentistry. Skeletal anchorage systems, 3D imaging and virtual treatment planning, 3D surface scanning, CAD-CAM bracket customization, and robotic wire bending are the few recent advances in field of orthodontics.

Thus, growing adoption of advanced techniques along with increasing programs for advance orthodontics have led to increased orthodontic treatments which are expected to drive the growth of this market.

Removable Braces Segment Dominates Orthodontics Market and Witness Highest Growth during Forecast Period

Removable braces accounted for largest share of orthodontics market. Currently, around 27 clear aligner products are available in the market. More than 12-15 companies are offering clear aligners for orthodontic treatment across the globe. In recent years, the number of orthodontic treatments with clear aligners has increased across the globe. This is primarily attributed to growing awareness of aesthetics and an increase in demand for orthodontic treatments for the same.

Children and Teen Dominates the Global Orthodontics Market, by Patient

Children and teen considered in the study are people below age of 19 years.

Orthodontic treatment is usually only started after most of the child's adult teeth have started to come through. The prevalence and severity of malocclusions in children are of great relevance for orthodontic prevention.

Furthermore, over the past few years, the overall diagnosis rate for malocclusions and treatment rate has increased significantly in the emerging countries. This has led to a rapid growth in number of orthodontic procedures performed in these countries. For instance, the total number of orthodontic cases in China increased from between 0.4-0.5 million in 2014 to 1-1.1 million cases in 2017, with a majority of the cases among teen populations. Similar trends are observed in other emerging countries as well.

Asia Pacific: Fastest Growing Regional Market

Asia Pacific is expected to register the fastest growth for orthodontics market during the forecast period. Several factors, such as increasing number of dentists, large pool of patients seeking orthodontic treatment, and increasing prevalence of malocclusion is expected to drive the growth of orthodontic products in APAC region. Increasing disposable income and growing awareness on oral health are further expected to drive the growth of this regional segment.

Key Players

The report includes competitive landscape based on extensive assessment of the key strategic developments adopted by leading market participants in the industry over the past 4 years (2018-2021). The key players profiled in the global orthodontics market research report are

Align Technology Inc. (US)
3M Company (US)
DanaHER Corporation (US)
G&H Orthodontics (US)
Straumann AG (Switzerland)
Dentsply Sirona Inc (US)
Ultradent Products, Inc. (US)
Great Lakes Orthodontics Ltd. (US)
DB Orthodontics (UK)
Dental Morelli Ltda. (Brazil)
DENTAURUM GmbH & Co. (Germany)
TP Orthodontics Inc. (US), among others.

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