

# **3D Dental Scanners Market Forecasts to 2032 – Global Analysis By Product Type (Intraoral Scanners (IOS), Hand-held Scanners, Cone Beam Computed Tomography (CBCT), Laboratory Scanners, and Other Product Types), Scanner Type, Technology, Application, End User, and By Geography**

<https://marketpublishers.com/r/3335F0B451BAEN.html>

Date: September 2025

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: 3335F0B451BAEN

## **Abstracts**

According to Statistics MRC, the Global 3D Dental Scanners Market is accounted for \$2.15 billion in 2025 and is expected to reach \$5.00 billion by 2032 growing at a CAGR of 12.8% during the forecast period. Three-dimensional dental scanners are innovative tools in modern dentistry that create precise digital images of teeth, gums, and mouth structures. Utilizing laser or optical scanning methods, they replace conventional impressions, making the process quicker, accurate, and more patient-friendly. The captured data produces detailed digital models that aid in diagnosis, treatment planning, and crafting dental solutions like crowns, implants, bridges, and orthodontic devices, ensuring improved accuracy, efficiency, and overall patient experience in dental procedures.

Market Dynamics:

Driver:

Increasing demand for aesthetic and cosmetic dentistry

The growing emphasis on facial aesthetics and smile enhancement is fueling demand for advanced dental imaging solutions. Patients are increasingly opting for cosmetic procedures such as veneers, aligners, and implants, which require precise digital

impressions. 3D dental scanners are becoming essential tools for personalized treatment planning and high-accuracy restorations. Clinics are leveraging these technologies to reduce chair time and improve patient satisfaction. The rise of social media and beauty-conscious consumer behavior is further amplifying interest in digital dentistry. As workflows become more digitized, aesthetic-driven care is emerging as a key growth catalyst for scanner adoption.

Restraint:

Lack of awareness and training

Many dental professionals lack formal training in operating 3D scanners and integrating them into clinical routines. Smaller clinics face challenges in upskilling staff and managing the learning curve associated with CAD/CAM systems. The absence of standardized curricula and certification programs slows down market penetration. Additionally, misconceptions around cost and complexity deter investment in digital tools. Bridging this gap through targeted education and hands-on workshops is critical to unlocking broader market potential.

Opportunity:

Integration of AI and machine learning

Machine learning algorithms are enhancing image interpretation, enabling early detection of oral pathologies and anomalies. Predictive analytics are being used to simulate treatment outcomes and optimize prosthetic designs. Cloud-based platforms are facilitating real-time collaboration between labs and clinics, improving workflow efficiency. Emerging trends include AI-powered scan validation and automated margin detection for crowns and bridges. As regulatory frameworks evolve, AI integration is poised to redefine precision and personalization in digital dentistry.

Threat:

Intense competition and price pressure

Established players are under pressure to differentiate through innovation while maintaining profitability. Price-sensitive regions are favouring budget-friendly models, challenging premium brands to justify value. Rapid technological obsolescence and frequent product upgrades are straining procurement cycles. Distributors and clinics are

negotiating harder on margins, impacting vendor sustainability.

### Covid-19 Impact

The pandemic disrupted routine dental care, delaying elective procedures and reducing scanner utilization in clinics. Supply chain interruptions affected hardware availability and slowed installations across global markets. However, the crisis accelerated digital adoption, with clinics embracing contactless workflows and remote consultations. 3D scanners played a pivotal role in minimizing physical impressions and enhancing hygiene protocols. Regulatory bodies fast-tracked approvals for digital tools to support safe reopening of dental practices. Post-COVID strategies now emphasize resilience, automation, and cloud-based interoperability in dental imaging systems.

The intraoral scanners (IOS) segment is expected to be the largest during the forecast period

The intraoral scanners (IOS) segment is expected to account for the largest market share during the forecast period, due to their central role in chairside diagnostics and restorative workflows. IOS devices offer high-resolution imaging, real-time visualization, and seamless integration with CAD/CAM systems. Their ergonomic design and ease of use are driving adoption among general practitioners and specialists alike. Technological advancements such as wireless connectivity and AI-assisted scanning are enhancing clinical efficiency. The growing demand for same-day dentistry and digital impressions is reinforcing IOS dominance. As scanner accuracy and speed improve, IOS continues to lead the digital transformation in dental practices.

The dental clinics segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the dental clinics segment is predicted to witness the highest growth rate, due to increasing digitization and patient-centric care models. Clinics are investing in 3D scanners to streamline workflows, reduce turnaround times, and improve treatment outcomes. The rise of cosmetic dentistry and orthodontics is boosting demand for precise imaging tools at the clinic level. Integration with cloud-based platforms and digital labs is enhancing operational agility. Emerging trends include subscription-based scanner models and bundled software solutions tailored for small practices. As clinics modernize and expand service offerings, their role in driving scanner adoption becomes increasingly pivotal.

### Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rapid urbanization and expanding dental infrastructure. Countries like China, India, and South Korea are witnessing increased investment in digital healthcare and dental modernization. Government initiatives are promoting domestic manufacturing and technology adoption in oral care. The region is embracing AI-driven diagnostics and mobile scanning units to reach underserved populations. Strategic collaborations between global OEMs and local distributors are accelerating market penetration.

### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to its leadership in dental innovation and digital integration. The U.S. and Canada are at the forefront of adopting AI-enhanced scanners and cloud-based imaging platforms. Regulatory bodies are streamlining device approvals, encouraging faster commercialization of next-gen technologies. Dental service organizations (DSOs) are scaling scanner deployment across multi-location networks. Key developments include interoperability with practice management software and real-time lab collaboration.

### Key players in the market

Some of the key players profiled in the 3D Dental Scanners Market include 3Shape A/S, Shining 3D, Align Technology Inc., Argen Corporation, Dentsply Sirona, Midmark Corporation, Carestream Dental LLC, Dental Wings Inc., Planmeca Oy, BioHorizons IPH, Inc., Medit Corp., GC Corporation, Straumann Group, Vatech Co., Ltd., and Envista Holdings Corporation.

### Key Developments:

In June 2025, 3Shape has partnered with Eon Dental, a full-service clear aligner company, to strengthen Eon's clear aligner workflows with 3Shape's advanced digital solutions. This new strategic partnership reflects both companies' shared goal of driving innovation and making clear aligner treatment more accessible.

In March 2025, DENTSPLY SIRONA Inc. announced that the Company will participate in the Leerink Partners Global Healthcare Conference. Management is scheduled to present on Tuesday, March 11, 2025, at 3:00 pm ET.

## Product Types Covered:

Introduction

Intraoral Scanners (IOS)

Hand-held Scanners

Cone Beam Computed Tomography (CBCT)

Laboratory Scanners

Other Product Types

## Scanner Types Covered:

3D Dental Light Scanners

3D Dental Laser Scanners

## Technologies Covered:

Structured Light Scanners

Laser Scanners

## Applications Covered:

Restorative Dentistry

Orthodontics

Prosthodontics

Diagnostics & Digital Records

Implantology

Other Applications

End Users Covered:

Dental Clinics

Hospitals

Dental Laboratories

Academic & Research Institutions

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

## Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 Technology Analysis
- 3.8 Application Analysis
- 3.9 End User Analysis
- 3.10 Emerging Markets
- 3.11 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants

4.5 Competitive rivalry

## **5 GLOBAL 3D DENTAL SCANNERS MARKET, BY PRODUCT TYPE**

5.1 Introduction

5.2 Intraoral Scanners (IOS)

5.3 Hand-held Scanners

5.4 Cone Beam Computed Tomography (CBCT)

5.5 Laboratory Scanners

5.6 Other Product Types

## **6 GLOBAL 3D DENTAL SCANNERS MARKET, BY SCANNER TYPE**

6.1 Introduction

6.2 3D Dental Light Scanners

6.3 3D Dental Laser Scanners

## **7 GLOBAL 3D DENTAL SCANNERS MARKET, BY TECHNOLOGY**

7.1 Introduction

7.2 Structured Light Scanners

7.3 Laser Scanners

## **8 GLOBAL 3D DENTAL SCANNERS MARKET, BY APPLICATION**

8.1 Introduction

8.2 Restorative Dentistry

8.3 Orthodontics

8.4 Prosthodontics

8.5 Diagnostics & Digital Records

8.6 Implantology

8.7 Other Applications

## **9 GLOBAL 3D DENTAL SCANNERS MARKET, BY END USER**

9.1 Introduction

9.2 Dental Clinics

9.3 Hospitals

9.4 Dental Laboratories

9.5 Academic & Research Institutions

9.6 Other End Users

## **9 GLOBAL 3D DENTAL SCANNERS MARKET, BY GEOGRAPHY**

9.1 Introduction

9.2 North America

9.2.1 US

9.2.2 Canada

9.2.3 Mexico

9.3 Europe

9.3.1 Germany

9.3.2 UK

9.3.3 Italy

9.3.4 France

9.3.5 Spain

9.3.6 Rest of Europe

9.4 Asia Pacific

9.4.1 Japan

9.4.2 China

9.4.3 India

9.4.4 Australia

9.4.5 New Zealand

9.4.6 South Korea

9.4.7 Rest of Asia Pacific

9.5 South America

9.5.1 Argentina

9.5.2 Brazil

9.5.3 Chile

9.5.4 Rest of South America

9.6 Middle East & Africa

9.6.1 Saudi Arabia

9.6.2 UAE

9.6.3 Qatar

9.6.4 South Africa

9.6.5 Rest of Middle East & Africa

## **11 KEY DEVELOPMENTS**

- 11.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 11.2 Acquisitions & Mergers
- 11.3 New Product Launch
- 11.4 Expansions
- 11.5 Other Key Strategies

## **12 COMPANY PROFILING**

- 12.1 3Shape A/S
- 12.2 Shining 3D
- 12.3 Align Technology Inc.
- 12.4 Argen Corporation
- 12.5 Dentsply Sirona
- 12.6 Midmark Corporation
- 12.7 Carestream Dental LLC
- 12.8 Dental Wings Inc.
- 12.9 Planmeca Oy
- 12.10 BioHorizons IPH, Inc.
- 12.11 Medit Corp.
- 12.12 GC Corporation
- 12.13 Straumann Group
- 12.14 Vatech Co., Ltd.
- 12.15 Envista Holdings Corporation

## List Of Tables

### LIST OF TABLES

Table 1 Global 3D Dental Scanners Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global 3D Dental Scanners Market Outlook, By Product Type (2024-2032) (\$MN)

Table 3 Global 3D Dental Scanners Market Outlook, By Intraoral Scanners (IOS) (2024-2032) (\$MN)

Table 4 Global 3D Dental Scanners Market Outlook, By Hand-held Scanners (2024-2032) (\$MN)

Table 5 Global 3D Dental Scanners Market Outlook, By Cone Beam Computed Tomography (CBCT) (2024-2032) (\$MN)

Table 6 Global 3D Dental Scanners Market Outlook, By Laboratory Scanners (2024-2032) (\$MN)

Table 7 Global 3D Dental Scanners Market Outlook, By Other Product Types (2024-2032) (\$MN)

Table 8 Global 3D Dental Scanners Market Outlook, By Scanner Type (2024-2032) (\$MN)

Table 9 Global 3D Dental Scanners Market Outlook, By 3D Dental Light Scanners (2024-2032) (\$MN)

Table 10 Global 3D Dental Scanners Market Outlook, By 3D Dental Laser Scanners (2024-2032) (\$MN)

Table 11 Global 3D Dental Scanners Market Outlook, By Technology (2024-2032) (\$MN)

Table 12 Global 3D Dental Scanners Market Outlook, By Structured Light Scanners (2024-2032) (\$MN)

Table 13 Global 3D Dental Scanners Market Outlook, By Laser Scanners (2024-2032) (\$MN)

Table 14 Global 3D Dental Scanners Market Outlook, By Application (2024-2032) (\$MN)

Table 15 Global 3D Dental Scanners Market Outlook, By Restorative Dentistry (2024-2032) (\$MN)

Table 16 Global 3D Dental Scanners Market Outlook, By Orthodontics (2024-2032) (\$MN)

Table 17 Global 3D Dental Scanners Market Outlook, By Prosthodontics (2024-2032) (\$MN)

Table 18 Global 3D Dental Scanners Market Outlook, By Diagnostics & Digital Records (2024-2032) (\$MN)

Table 19 Global 3D Dental Scanners Market Outlook, By Implantology (2024-2032) (\$MN)

Table 20 Global 3D Dental Scanners Market Outlook, By Other Applications (2024-2032) (\$MN)

Table 21 Global 3D Dental Scanners Market Outlook, By End User (2024-2032) (\$MN)

Table 22 Global 3D Dental Scanners Market Outlook, By Dental Clinics (2024-2032) (\$MN)

Table 23 Global 3D Dental Scanners Market Outlook, By Hospitals (2024-2032) (\$MN)

Table 24 Global 3D Dental Scanners Market Outlook, By Dental Laboratories (2024-2032) (\$MN)

Table 25 Global 3D Dental Scanners Market Outlook, By Academic & Research Institutions (2024-2032) (\$MN)

Table 26 Global 3D Dental Scanners Market Outlook, By Other End Users (2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

## I would like to order

Product name: 3D Dental Scanners Market Forecasts to 2032 – Global Analysis By Product Type (Intraoral Scanners (IOS), Hand-held Scanners, Cone Beam Computed Tomography (CBCT), Laboratory Scanners, and Other Product Types), Scanner Type, Technology, Application, End User, and By Geography

Product link: <https://marketpublishers.com/r/3335F0B451BAEN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/3335F0B451BAEN.html>