

Europe Dental Infections Control Market By Offering (Consumables & Single-Use Products and Equipment), By End User (Dental Hospitals & Clinics, Dental Academic & Research Institutions, Dental Laboratories), By Country, Competition, Forecast and Opportunities, 2020-2030F

<https://marketpublishers.com/r/EE3EAE4F4BE4EN.html>

Date: January 2025

Pages: 133

Price: US\$ 4,000.00 (Single User License)

ID: EE3EAE4F4BE4EN

Abstracts

Europe Dental Infections Control Market was valued at USD 400.33 Million in 2024 and is expected to reach USD 613.10 Million by 2030 with a CAGR of 7.32% during the forecast period. The Europe Dental Infections Control Market is primarily driven by the increasing awareness of oral hygiene and the growing prevalence of dental infections. Rising demand for advanced dental procedures and infection control solutions is spurred by a focus on patient safety and infection prevention. Strict regulations and guidelines for dental practices regarding sterilization and disinfection are further boosting market growth. The surge in dental tourism across Europe also contributes to the need for effective infection control measures. Advancements in dental technology, such as sterilization equipment and disposable infection control products, are improving the efficiency and effectiveness of dental practices. The aging population, which is more prone to dental issues, also plays a key role in expanding the demand for dental infection control products and services.

Key Market Drivers

Increasing Prevalence of Dental Infections

The rising prevalence of dental infections across Europe is one of the most prominent drivers for the dental infections control market. Factors like unhealthy dietary habits,

poor oral hygiene, and a lack of awareness regarding dental care have led to a significant rise in conditions such as cavities, gum disease, tooth decay, and oral infections. These issues often require professional dental care, such as fillings, root canals, and extractions, all of which present opportunities for infection transmission. As patients seek dental treatment for these conditions, dental clinics and practitioners must adhere to stringent infection control practices to ensure patient safety. According to a study published in National Library of Medicine, It is estimated that 13% of adults visit a dentist for dental infections or toothaches within a span of four years, and in the United States, approximately 1 in every 2,600 individuals is hospitalized due to dental infections. More than 20% of the population suffers from untreated dental caries, while 75% have had at least one dental restoration. Periodontal disease is also widespread, affecting an estimated 35% of Americans between the ages of 30 and 90. Additionally, the occurrence of dental caries is significantly influenced by socioeconomic factors. Untreated caries are over 2.5 times more common among those living below the poverty line (41.9%) compared to those living at 200% or more above the federal poverty level (16.6%). The prevalence of dental caries fluctuates throughout an individual's life, with 90% of adults and 42% of children aged 6 to 19 showing signs of caries. Interestingly, the rate of untreated dental caries tends to be lower in adolescents aged 12 to 19 when compared to younger children aged 5 to 11.

The increasing focus on oral health by both public health initiatives and educational campaigns has heightened the awareness of dental infections and the need for preventive care. In turn, this has led to a surge in demand for infection control products, including sterilizers, disinfectants, personal protective equipment (PPE), and advanced cleaning tools for dental instruments. This growing prevalence of dental infections is consequently pushing the market toward more advanced infection control solutions to mitigate the spread of bacteria and viruses during dental procedures.

Advancements in Dental Technology and Infection Control Equipment

Technological advancements have significantly impacted the dental industry, particularly in the domain of infection control. Innovations in sterilization techniques, such as autoclaves, UV sterilizers, and steam sterilizers, have made the process of disinfecting dental instruments faster, more efficient, and highly effective in eliminating harmful pathogens. The rise of disposable dental products such as gloves, masks, sterilization pouches, and bibs has contributed to reducing the risk of cross-contamination in dental clinics. The introduction of touchless disinfection systems, air purifiers, and antimicrobial surface coatings for dental equipment has further enhanced the level of infection control in dental environments. The adoption of these technologies

ensures that dental practitioners can deliver safe, high-quality care while maintaining a sterile clinical environment. The market for dental infection control products is being shaped by such technological improvements, as dental practices seek to integrate the most efficient, cutting-edge solutions available to minimize infection risks during treatments.

Regulatory Standards and Guidelines for Infection Control

In Europe, regulatory standards and guidelines play a crucial role in ensuring the implementation of effective infection control practices. The European Union (EU) and various national health agencies set stringent regulations that mandate the use of sterilization and disinfection methods in dental clinics. For example, the EU's Medical Device Regulation (MDR) and the World Health Organization's (WHO) infection prevention protocols for healthcare settings have established clear guidelines for managing infection risks in dental care. These regulations emphasize the importance of sterilizing dental instruments, maintaining hygiene standards, and using appropriate infection control products. Dental professionals are required to follow strict protocols for cleaning and disinfecting dental equipment, chairs, and surfaces to prevent the spread of infections between patients. Failure to comply with these regulations can lead to serious health risks, legal repercussions, and damage to a dental practice's reputation. As a result, dental clinics are increasingly investing in high-quality, compliant infection control products to meet these regulatory standards. This demand for regulated infection control solutions is driving the growth of the European market.

Rising Awareness about Oral Hygiene and Infection Prevention

Public awareness about the importance of oral hygiene has risen significantly in recent years, and this has had a direct effect on the demand for dental infection control solutions. The connection between oral health and overall health, especially in relation to conditions such as heart disease, diabetes, and stroke, has become widely acknowledged. This heightened awareness has led to a greater focus on preventive care and early detection of oral health issues. According to a study titled, "The impact of oral health status on COVID-19 severity, recovery period and C-reactive protein values", the dental section of the questionnaire was analyzed by a team of dentists who were unaware of the results from the COVID-19 severity section, which was analyzed by a separate group of physicians. This approach ensured that proactive measures were taken to reduce any potential bias. A total of 464 participants submitted responses, but only 308 were included in the study. The remaining 156 respondents were excluded based on the established criteria: 4 participants were under 19 years old,

18 were over 55 years old, 30 were smokers, 34 were severely obese, 3 were pregnant, 63 had comorbidities, and 4 either failed to complete the questionnaire or did not provide consent.

As more patients are becoming proactive in addressing dental problems, they are also placing higher expectations on dental professionals to provide a safe, hygienic environment during their treatments. With patients becoming more knowledgeable about the risks of dental infections, they are increasingly concerned about infection prevention measures in dental settings. This, in turn, has driven dental professionals to adopt better infection control practices and invest in products like disinfectants, sterilizers, and PPE to safeguard their patients. As dental clinics seek to meet these heightened expectations, the demand for dental infection control solutions continues to rise, contributing to the market's growth.

Aging Population and Increased Susceptibility to Dental Infections

Europe's aging population is a key factor driving the demand for dental infection control products. As people age, they are more likely to experience dental issues such as periodontal disease, tooth decay, and gum infections. Age-related factors such as reduced saliva production, chronic conditions, medications, and weakened immune systems make older adults more susceptible to oral infections. According to a study, "Research hotspots and trends of oral health in older adults from 2013 to 2023: A bibliometric and visual analysis", the WHO Global Oral Health Status Report indicated that the global average prevalence of edentulism among individuals aged 60 and older was 22.7%, meaning nearly one-quarter of people over 60 had lost all of their teeth. A study conducted in Saudi Arabia with 892 participants aged 60 and above revealed a much higher rate of missing teeth, reaching 78.69%, with gum disorders contributing to 74.21% of cases. In China, data from the Fourth National Oral Health Survey showed that the oral health rate for middle-aged and older populations was below 15%. Within this group, the prevalence of dental caries was alarmingly high at 98%, and 86.1% of individuals aged 65 to 74 had missing teeth.

Many elderly individuals undergo invasive dental procedures, such as implants and root canals, which carry an increased risk of infection. The aging population's higher demand for dental care creates a growing need for effective infection control products in dental clinics. With elderly patients requiring more frequent and complex treatments, dental professionals are investing in infection control technologies to ensure that their patients are protected during dental procedures. This demographic shift is expected to drive the demand for infection control solutions and contribute to the market's

expansion.

Key Market Challenges

High Cost of Advanced Infection Control Technologies

One of the primary challenges faced by dental clinics in Europe is the high cost of advanced infection control technologies. While innovations in sterilization equipment, air filtration systems, and personal protective equipment (PPE) improve safety and reduce infection risks, they can be prohibitively expensive for many small and medium-sized dental practices. These practices may struggle to afford the initial investment in cutting-edge sterilization machines, advanced disinfection systems, and disposable products that adhere to the highest standards of hygiene. Although these technologies reduce the risk of infection and help in compliance with regulatory standards, the high upfront and maintenance costs can strain the financial resources of dental practices, leading to slower adoption, particularly in less affluent areas. In some cases, this can delay the integration of essential infection control measures, potentially exposing patients to higher risks of infection. The high costs associated with state-of-the-art infection control equipment are therefore a barrier that many dental practices face in improving infection control.

Challenges in Achieving Consistent Infection Control

Maintaining consistent infection control standards across all dental procedures and patient interactions is an ongoing challenge for dental clinics in Europe. While sterilization procedures for dental instruments are well-defined, ensuring the consistent application of infection control protocols in every aspect of dental care remains difficult. Factors such as human error, variations in training, and differences in staff experience can lead to inconsistent practices and potential lapses in infection prevention. For example, even with state-of-the-art sterilization equipment, lapses in the proper handling or storage of sterile instruments, improper cleaning of dental chairs, or insufficient disinfection of high-touch surfaces can lead to the spread of infections. Certain dental procedures may carry a higher risk of infection transmission, requiring additional precautionary measures. Achieving the level of consistency required for infection control across all staff members and procedures is an ongoing challenge for dental clinics, making it difficult to guarantee complete safety for patients.

Key Market Trends

Surge in Cosmetic and Dental Tourism

Dental tourism in Europe has grown significantly, driven by factors such as affordable treatment options, advanced dental care, and high-quality services. Countries such as Hungary, Poland, and Turkey have become popular destinations for dental tourists from around the world, particularly those seeking cosmetic dental procedures like teeth whitening, implants, and orthodontics. In August 2020, the government of Portugal introduced a travel insurance program for international tourists. This scheme covers medical, surgical, hospital, and pharmaceutical expenses, aimed at supporting the tourism industry during the COVID-19 pandemic and ensuring a safe experience for visitors. The growing influx of inbound tourists is having a positive impact on the market's expansion. As dental clinics cater to international patients, they must adhere to the highest standards of infection control to meet the expectations of both local and foreign patients. Dental tourists are often more conscious of the risks associated with infection and are increasingly seeking clinics with established infection control measures in place. This has driven European dental clinics to invest in the latest sterilization technologies, personal protective equipment, and cleaning protocols to ensure the safety of both local and international patients. The growing popularity of dental tourism, therefore, plays a significant role in boosting the demand for dental infection control products, leading to growth in the market.

Increased Dental Procedures and Surgeries

The growing number of dental procedures and surgeries is another factor driving the dental infections control market. As the demand for cosmetic, restorative, and surgical dental treatments increases, so does the need for infection control solutions. Procedures such as dental implants, extractions, and orthodontic surgeries are invasive and carry a higher risk of infection. To mitigate these risks, dental professionals must ensure that their instruments, equipment, and clinic environments meet the highest standards of hygiene and sterilization. The rise in cosmetic dentistry and minimally invasive procedures has led to more frequent use of infection control measures, such as sterilizing dental tools, using disposable equipment, and applying surface disinfectants. As the volume of dental procedures increases, so does the need for infection control solutions, further driving market growth.

Segmental Insights

Offering Insights

Based on the Offering, Consumables & Single-Use Products have been dominating over Equipment. The primary reason for this dominance is the increasing emphasis on maintaining high standards of hygiene and patient safety, particularly in dental settings. Dental practices have increasingly adopted single-use products as part of their infection control protocols, driven by the need to prevent cross-contamination and the spread of infections. These consumables, such as gloves, masks, sterilization pouches, barriers, and wipes, are considered essential for ensuring that dental procedures are conducted in a safe and hygienic environment. Their relatively low cost, convenience, and ability to prevent direct contact with patients make them an indispensable part of day-to-day dental practice operations. The growing concern for patient safety, coupled with stringent regulations surrounding infection prevention and control, has further accelerated the demand for consumables and single-use products. In Europe, infection control is a critical aspect of healthcare regulations, and dental practices must adhere to strict guidelines to prevent the spread of diseases like hepatitis, HIV, and other viral and bacterial infections. As such, single-use products provide a reliable and effective solution for managing infection risks, especially in high-contact areas such as dental instruments, work surfaces, and the use of personal protective equipment.

The Consumables & Single-Use Products segment, particularly, has experienced substantial growth due to the increasing number of dental procedures being performed across Europe. With the rising awareness about hygiene standards in dental care, both practitioners and patients are more conscious of the risks associated with reusable dental products, making disposable products more attractive. The COVID-19 pandemic heightened concerns about infection control, prompting even greater reliance on single-use products, which offer a more secure and hygienic alternative to reusing dental materials.

End User Insights

Based on the End User, Dental Hospitals & Clinics dominate the landscape, primarily due to their large-scale operations, higher patient volumes, and stringent regulatory requirements related to infection control. Dental hospitals and clinics are at the forefront of infection control as they handle a wide variety of procedures that require the utmost attention to hygiene and sterilization standards. These institutions serve as critical centers for both routine and specialized dental treatments, making infection prevention protocols a priority to protect patients and healthcare workers from potential infections, such as viral, bacterial, and fungal diseases.

Dental hospitals and clinics are governed by strict regulatory bodies that enforce

guidelines for infection control. This has led to an increased demand for advanced infection control products, including consumables, sterilization equipment, disinfectants, and personal protective equipment (PPE). As these healthcare facilities handle numerous patients daily, including those with complex dental needs, there is an inherent risk of cross-contamination. The heightened awareness of infection control standards, particularly post-COVID-19, has resulted in dental hospitals and clinics incorporating the latest technologies and practices to ensure a sterile environment for both patients and practitioners.

The demand for dental infection control solutions in these settings is driven by the need to comply with national and international standards, such as those set by the European Dental Association (EDA) and World Health Organization (WHO). Hospitals and clinics must regularly sterilize equipment, sanitize treatment areas, and follow hygiene practices to minimize the risk of cross-contamination. This includes the use of high-quality autoclaves for sterilization, disinfectants for surfaces, and single-use consumables for various dental procedures. Given their high patient turnover and the range of procedures performed, dental hospitals and clinics consistently require a steady supply of dental infection control products, which strengthens their position as the leading segment in the market.

Country Insights

Germany holds a dominant position, primarily due to its advanced healthcare infrastructure, stringent regulations, and significant healthcare expenditure. Germany's robust dental healthcare sector, coupled with a growing emphasis on patient safety and hygiene, has led to an increasing demand for dental infection control products and services. As one of the largest and most technologically advanced markets in Europe, Germany boasts a highly developed healthcare system, ensuring that infection control measures are strictly adhered to across dental hospitals, clinics, and academic institutions.

The German dental sector is renowned for its high standards in both preventive and restorative dental care, making infection control a top priority. This commitment to dental hygiene is reinforced by comprehensive regulations from bodies like the German Dental Association (BZgK) and the Robert Koch Institute, which advocate for stringent infection control protocols. These regulations drive dental institutions in Germany to implement advanced sterilization techniques, use high-quality personal protective equipment, and maintain sterile environments during dental procedures. The growing awareness of the risks of dental infections and the need for infection control, particularly

following the COVID-19 pandemic, has fueled the demand for infection control products in the country.

The German market is home to a large number of dental hospitals and clinics, which play a crucial role in driving the demand for dental infection control products. As these healthcare facilities manage a high patient turnover and provide a range of procedures, including routine check-ups, surgeries, and cosmetic treatments, infection control practices are essential to ensure the safety of both patients and practitioners. The adoption of automated sterilization equipment, single-use consumables, and disinfectants is widespread in these facilities, further boosting the demand for dental infection control solutions.

Key Market Players

Steris, Plc

Getinge AB

BMS Dental

Coltene/Whaledent GmbH + Co. KG

Asa Dental S.p.A.

Carl Martin GmbH

SciCan GmbH

NSK United Kingdom Ltd

HMI Co., Ltd.

Alpro Medical GmbH

Report Scope:

In this report, the Europe Dental Infections Control Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

Europe Dental Infections Control Market By Offering (Consumables & Single-Use Products and Equipment), By End...

below:

· Europe Dental Infections Control Market, By Offering:

Consumables & Single-Use Products

Equipment

· Europe Dental Infections Control Market, By End User:

Dental Hospitals & Clinics

Dental Academic & Research Institutions

Dental Laboratories

· Europe Dental Infections Control Market, By Country:

Germany

France

United Kingdom

Italy

Spain

Russia

Poland

Bulgaria

Finland

Portugal

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe Dental Infections Control Market.

Available Customizations:

Europe Dental Infections Control Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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