

Intraoral Scanners Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Modality (Wired Scanner, Wireless Scanner), By Application (Prosthodontics, Orthodontics, Endodontics, Others), By End-User (Dental Hospitals and Clinics, Dental Academic and research institutes, Others), By Region, and By Competition

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Abstracts

Global Intraoral Scanners Market was valued at USD 0.57 billion in 2023 and will see an impressive growth in the forecast period at a CAGR of 10.93% to 2029. Intraoral scanners are advanced dental imaging devices used to capture detailed digital impressions of a patient's teeth, gums, and oral tissues. These scanners have revolutionized the field of dentistry by replacing traditional impression-taking methods, which typically involved using putty-like materials to create physical molds of the patient's dental anatomy. Intraoral scanners use various technologies, including structured light, active triangulation, or confocal microscopy, to capture digital images of the patient's oral cavity in real-time. The scanner's handheld wand is equipped with small cameras and optical sensors that rapidly capture multiple images as it moves throughout the mouth. Intraoral scanners produce highly accurate digital impressions with detailed information about the patient's teeth, soft tissues, and occlusion. The precision of intraoral scanners ensures that dental restorations, prostheses, and orthodontic appliances fit precisely and function optimally within the patient's oral environment.

Continuous technological advancements in intraoral scanning technology drive market

growth. Manufacturers are constantly innovating to improve scanning accuracy, speed, resolution, and ease of use, making intraoral scanners more attractive to dental professionals. The increasing adoption of digital dentistry solutions is a significant driver of the intraoral scanners market. Dental practices and laboratories are transitioning from traditional analog workflows to digital processes, driven by the benefits of improved efficiency, accuracy, and patient experience. Intraoral scanners enhance the patient experience by reducing discomfort associated with traditional impression-taking methods. Dental practices prioritize patient-centric care and strive to adopt technologies that improve patient comfort and satisfaction, thereby driving the adoption of intraoral scanners.

Key Market Drivers

Advancements in Technology

Modern intraoral scanners utilize advanced imaging technology, such as confocal microscopy, structured light, or active triangulation, to capture highly accurate digital impressions of patients' teeth and soft tissues. Enhanced accuracy ensures precise restorations and better treatment outcomes. Advancements in hardware and software have led to faster scanning speeds, reducing the time required to capture digital impressions. Rapid scanning capabilities improve workflow efficiency and patient comfort, allowing dental professionals to complete procedures more quickly. Higher resolution imaging sensors and improved optics enable intraoral scanners to capture detailed and clear images of dental anatomy. Enhanced resolution facilitates the accurate visualization of tooth morphology, surface textures, and soft tissue contours, supporting more precise treatment planning and restoration design.

Some intraoral scanners feature a wider field of view, allowing dental professionals to capture larger areas of the oral cavity in a single scan. A wider field of view improves scan coverage and reduces the need for multiple scans, enhancing workflow efficiency and patient comfort. Manufacturers are designing intraoral scanners with smaller and lighter form factors, improving ergonomics and user comfort during scanning procedures. Compact and lightweight devices are easier to handle and maneuver, reducing operator fatigue and enhancing overall usability. Wireless intraoral scanners eliminate the constraints of cables and allow for greater freedom of movement during scanning procedures. Wireless connectivity improves workflow flexibility and patient comfort, enabling dental professionals to capture digital impressions more efficiently.

Intraoral scanners seamlessly integrate with computer-aided design/computer-aided

manufacturing (CAD/CAM) systems, facilitating the transfer of digital impressions for restoration design and fabrication. Tight integration with CAD/CAM software streamlines the digital workflow, reducing turnaround times and enhancing treatment efficiency. Some intraoral scanners incorporate AI algorithms to assist in image processing, analysis, and quality control. AI-driven features improve scan accuracy, automate certain tasks, and enhance user experience, making intraoral scanning more intuitive and user-friendly. Advanced visualization tools, such as real-time imaging feedback and virtual articulation, provide dental professionals with valuable insights during scanning procedures. Enhanced visualization capabilities help ensure optimal scan quality and enable clinicians to make informed treatment decisions. This factor will help in the development of the Global Intraoral Scanners Market.

Increasing Shift Towards Minimally Invasive Dentistry

Intraoral scanners replace traditional impression materials, such as alginate or polyvinyl siloxane (PVS), which can be messy and uncomfortable for patients. Digital impressions obtained with intraoral scanners are more comfortable for patients and reduce the risk of distortion or inaccuracies associated with traditional impressions. Intraoral scanners capture highly accurate digital impressions of patients' teeth and soft tissues, providing precise data for treatment planning and fabrication of restorations. This accuracy ensures that restorations fit precisely and require minimal adjustments, reducing the need for invasive adjustments or remakes.

Intraoral scanners facilitate the design and fabrication of minimally invasive restorative solutions, such as inlays, onlays, and veneers. These restorations conserve more natural tooth structure compared to traditional crowns or bridges, promoting long-term dental health and preserving the integrity of the dentition. Intraoral scanners enable clinicians to visualize treatment outcomes and simulate proposed restorations digitally before initiating treatment. Digital treatment planning allows for more conservative approaches to treatment, as clinicians can precisely plan the removal of diseased or damaged tooth structure while preserving healthy tooth structure.

Intraoral scanners enhance patient education and engagement by allowing patients to visualize their dental anatomy and treatment options in a digital format. Patients are more likely to accept and adhere to minimally invasive treatment plans when they understand the benefits and implications of the proposed interventions. Intraoral scanners streamline the restorative workflow by eliminating the need for physical impressions, shipping, and manual model work. Digital impressions can be instantly transmitted to dental laboratories or in-house milling machines for fabrication, reducing

turnaround times and enhancing overall treatment efficiency. Minimally invasive dentistry focuses on preserving natural tooth structure and promoting long-term oral health. Intraoral scanners support this goal by facilitating the delivery of conservative, patient-centered care that minimizes the risk of complications and preserves the longevity of dental restorations. This factor will pace up the demand of the Global Intraoral Scanners Market.

Rising Adoption of Digital Dentistry

Dental practices and laboratories are increasingly transitioning from traditional analog workflows to digital processes. Intraoral scanners play a central role in this digital transformation by replacing conventional impression-taking methods with digital impressions, which are more accurate, efficient, and comfortable for patients. Intraoral scanners seamlessly integrate with computer-aided design/computer-aided manufacturing (CAD/CAM) systems, enabling dental professionals to design and fabricate dental restorations digitally. Digital impressions obtained with intraoral scanners serve as the foundation for CAD/CAM workflows, allowing for precise and predictable outcomes in restorative dentistry. Intraoral scanners provide detailed and accurate digital impressions of patients' teeth and soft tissues, facilitating comprehensive treatment planning and communication between dental professionals, patients, and dental laboratories. Digital impressions enable clinicians to visualize treatment outcomes, simulate proposed restorations, and involve patients in the decision-making process more effectively.

Intraoral scanners streamline the restorative workflow by eliminating the need for physical impressions, model work, and shipping of dental casts. Digital impressions can be instantly transmitted electronically to dental laboratories or in-house milling machines for fabrication, reducing turnaround times and enhancing overall treatment efficiency. Intraoral scanners capture highly accurate digital impressions of patients' dental anatomy, ensuring precise and predictable outcomes in restorative and prosthetic dentistry. Digital impressions obtained with intraoral scanners contribute to the fabrication of dental restorations with optimal fit, esthetics, and functional performance. Intraoral scanners contribute to a more positive patient experience by reducing discomfort associated with traditional impression-taking methods and minimizing the need for invasive procedures. Patients appreciate the convenience, comfort, and efficiency of digital impressions obtained with intraoral scanners, leading to higher satisfaction levels and improved overall patient care. This factor will accelerate the demand of the Global Intraoral Scanners Market.

Key Market Challenges

Interoperability and Compatibility

The dental industry features a diverse ecosystem of software platforms, CAD/CAM systems, imaging devices, and dental equipment from various manufacturers. Intraoral scanners need to integrate seamlessly with existing dental software and hardware solutions to ensure efficient workflow management and data exchange. However, achieving interoperability and compatibility across different systems and platforms can be complex due to proprietary formats, protocols, and standards adopted by different manufacturers. The absence of standardized protocols and data formats for intraoral scanners and dental software hinders interoperability and data exchange between different systems. Without uniform standards, dental professionals may encounter compatibility issues when transferring digital impressions, treatment plans, or imaging data between intraoral scanners, CAD/CAM systems, and dental practice management software. Integrating intraoral scanners with existing dental practice management software, electronic health records (EHR) systems, and imaging devices requires careful planning and coordination. Incompatibilities between software versions, operating systems, or hardware configurations may lead to integration challenges, data loss, or workflow disruptions, affecting the efficiency and productivity of dental practices.

Patient Acceptance and Comfort

Some patients may experience discomfort or anxiety during intraoral scanning procedures, particularly if they have a sensitive gag reflex or fear of dental instruments. The presence of a handheld scanning wand inside the mouth can be uncomfortable for some patients, leading to reluctance or apprehension towards undergoing intraoral scans. Patients may perceive intraoral scanning procedures as invasive or intrusive due to the proximity of the scanning wand to oral tissues and the sensation of pressure during scanning. The perception of invasiveness may deter some patients from undergoing intraoral scans, especially if they prefer traditional impression-taking methods or perceive intraoral scanners as unfamiliar or intimidating. Inadequate patient education and communication about the benefits and process of intraoral scanning can contribute to patient reluctance or misunderstanding. Dental professionals need to effectively communicate with patients, address their concerns, and provide reassurance about the safety, comfort, and benefits of intraoral scanning procedures to promote patient acceptance and compliance.

Key Market Trends

Integration with CAD/CAM Systems

Integration with CAD/CAM systems streamlines the digital workflow in dental practices and laboratories by eliminating manual steps, paperwork, and physical models associated with traditional impression-taking methods. Digital impressions captured by intraoral scanners can be directly imported into CAD/CAM software for virtual design and fabrication of restorations, reducing turnaround times and enhancing overall efficiency. CAD/CAM integration enables dental professionals to design precise and custom-fit restorations, such as crowns, bridges, veneers, and inlays/onlays, based on digital impressions obtained with intraoral scanners. Digital design tools offer greater flexibility, accuracy, and control over restoration parameters, allowing clinicians to achieve optimal esthetics, occlusion, and functional outcomes for patients. Intraoral scanners integrated with chairside milling systems enable clinicians to fabricate and deliver same-day restorations directly in the dental office. CAD/CAM technology empowers dentists to design and mill restorations chairside, minimizing patient wait times, eliminating the need for temporary restorations, and enhancing patient satisfaction with efficient, single-visit treatment experiences.

Segmental Insights

Modality Insights

The Wireless Scanner segment is projected to experience rapid growth in the Global Intraoral Scanners Market during the forecast period. Wireless intraoral scanners offer greater mobility and flexibility compared to wired counterparts. They eliminate the need for cumbersome cables and allow dental professionals to move freely around the patient while capturing intraoral scans. This increased mobility enhances workflow efficiency and patient comfort, contributing to the growing demand for wireless scanners. Wireless intraoral scanners contribute to a more positive patient experience by reducing discomfort and anxiety associated with traditional impression-taking methods. Patients appreciate the convenience and freedom of movement afforded by wireless scanners, leading to higher satisfaction levels and improved overall patient care. Wireless intraoral scanners streamline the digital workflow in dental practices by eliminating the constraints of wired connections. Dental professionals can quickly capture intraoral scans without being tethered to a workstation, allowing for greater flexibility and efficiency in treatment planning and communication with patients and dental laboratories.

Application Insights

The Orthodontics segment is projected to experience rapid growth in the Global Intraoral Scanners Market during the forecast period. There has been a growing demand for orthodontic treatments worldwide, driven by factors such as increasing awareness of dental aesthetics, rising disposable incomes, and the desire for improved oral health. Orthodontic procedures, including braces and clear aligners, are becoming increasingly popular among both adolescents and adults seeking to correct dental misalignments and achieve straighter smiles. The orthodontic industry is undergoing a significant transformation with the adoption of digital technologies. Intraoral scanners play a crucial role in digital orthodontics by facilitating the capture of precise digital impressions of patients' teeth and gums. These digital impressions serve as the foundation for the design and fabrication of custom orthodontic appliances, such as clear aligners and orthodontic brackets. Intraoral scanners offer several advantages over traditional impression-taking methods in orthodontics. They eliminate the need for messy impression materials, reduce patient discomfort, and provide more accurate and detailed digital impressions. Orthodontists can use intraoral scanners to monitor treatment progress, plan orthodontic interventions more effectively, and communicate treatment plans with dental laboratories and patients more efficiently.

Regional Insights

North America emerged as the dominant player in the Global Intraoral Scanners Market in 2023. North America, particularly the United States, is home to many leading dental technology companies and research institutions. The region has been at the forefront of technological advancements in dentistry, including intraoral scanning technology. This continuous innovation contributes to the development of state-of-the-art intraoral scanners that attract users worldwide. North America has witnessed a significant uptake of digital dentistry solutions, driven by factors such as a well-developed healthcare infrastructure, a strong emphasis on advanced dental care, and a high level of awareness among both dental professionals and patients. The region's dental practices and laboratories are increasingly embracing digital workflows, which include the integration of intraoral scanners for improved efficiency and patient outcomes. The robust economic environment in North America supports the widespread adoption of advanced dental technologies, including intraoral scanners. Dental practices and institutions in the region often have the financial resources to invest in cutting-edge equipment and software to enhance their services and remain competitive in the market.

Key Market Players

DENTSPLY SIRONA Inc.

3 Shape

Envista Holdings Corporation

Runyes Medical Instrument Co. Ltd

Align Technology Inc.

Planmeca Oy

Guangdong Launca medical device technology Co. Ltd

Densys Ltd.

Neoss AG

Condor Technologies NV

Report Scope:

In this report, the Global Intraoral Scanners Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Intraoral Scanners Market, By Modality:

Wired Scanner

Wireless Scanner

Intraoral Scanners Market, By Application:

Prosthodontics

Orthodontics

Endodontics

Others

Intraoral Scanners Market, By End-User:

Dental Hospitals and Clinics

Dental Academic and research institutes

Others

Intraoral Scanners Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Intraoral Scanners Market.

Available Customizations:

Global Intraoral Scanners market report with the given market data, Tech Sci 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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