

NEW

## US industry forecasts for 2012 &amp; 2017

# Dental Products & Materials

Study # 2313

March 2008

\$4500

## US demand to rise nearly 5% annually through 2012

Demand for dental products (excluding equipment) in the US is forecast to rise nearly five percent per year to \$12 billion in 2012, aided by favorable population trends, as well as a continued interest in cosmetic dentistry applications. A greater number of individuals are viewing oral care as a requirement for good overall health, providing added opportunities for a variety of dental products, such as mouthwash/dental rinses.

Solid growth in the over 50 population will provide opportunities, as older individuals are more likely to require repair and restorative dental products, such as crowns, bridges or dentures, than other segments of the population. In addition, more individuals, such as aging baby boomers and generation Xers, are more likely to engage in cosmetic procedures, such as whitening or veneers, in order to maintain a youthful appearance.

In general, consumers are becoming more aware of the benefits of cosmetic dental procedures in part due to aggressive marketing. Cosmetic procedures are also becoming increasingly important to dental professionals as these treatments are highly profitable and allow practitioners to avoid interaction with insurance companies, since cosmetic procedures are typically excluded from coverage. The continued introduction of advanced over-the-counter dental products will also provide opportunities through the forecast period.



## Cosmetic dental products, implants among best growth opportunities

In 2007, professional dental products accounted for 67 percent of total dental product demand. The professional dentistry industry continues to evolve from a focus on repair (or “drill and fill”) procedures to a focus on aesthetics, due in part to the falling incidence of tooth decay as well as greater profit opportunities. As a result, cosmetic dental products such as ceramic fillings, clear or tooth colored orthodontic appliances and veneers will achieve above-average gains. Implants will also achieve strong growth, not only for aesthetic purposes, but also due to their use as an alternative permanent securing method for crowns, bridges and dentures.

## New dental products to drive consumer market

Growth in the smaller consumer market for dental products will continue to be below average due to market maturity, although there will be pockets of healthy growth opportunities. In general, new product development is critical to gains in market value. For example, toothpaste demand grew in the mid-1990s, spurred by the introduction of tartar control toothpaste, and more recently tooth whitening formulations have provided growth momentum. Suppliers of both toothpaste and mouthwash will continue to provide innovative or improved products, such as those with whitening agents, natural ingredient formulations, antimicrobial additives, odor fighting action and intense and more varied flavor offerings.

## Study coverage

*Dental Products & Materials* is a new Freedonia industry study available for \$4500. This study presents historical demand data for 1997, 2002 and 2007, as well as forecasts for 2012 and 2017 by professional and consumer dental product and raw material. The study also assesses market environment factors including regulatory issues and the macroeconomy; provides an overview of competitive strategies, industry structure and recent merger and acquisition activity; profiles leading suppliers (e.g., Church & Dwight, Colgate-Palmolive, DENTSPLY International, GlaxoSmithKline, Procter & Gamble) and evaluates company market share data.

Copyright 2008 The Freedonia Group, Inc.

Visit our NEW and IMPROVED website at [www.freedoniagroup.com](http://www.freedoniagroup.com)

# Dental Products & Materials

## TABLE OF CONTENTS

### Introduction

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

- General
- Population & Household Trends
- Macroeconomic Outlook
- Consumer Spending Trends
- Dental Care Spending Outlook
- Dental Services Payment Trends by Source
- Dental Care Provider Trends
- Dental Patient Activity & Procedures
- Cosmetic Dentistry Outlook
- Dental Equipment & Supply Trends
- Regulatory Issues
- Historical Market Trends
- International Activity

### PRODUCTS

- General
- Professional
  - Repair & Restorative Products
    - Prosthetics
    - Fillings
  - Orthodontic Appliances
    - Metal
    - Other
  - Cosmetic Products
    - Veneers
    - Whitening Products
  - Process Materials
    - Adhesives & Cements
    - Impression Materials
    - Bone Grafting/Tissue Regeneration Materials
    - Other Process Materials
  - Preventative Products
    - Pit & Fissure Sealants
    - Prophylaxis Paste
    - Fluoride Treatments
    - Other Preventative Products
- Consumer
  - Toothpaste
    - Formulation
    - Market Share
  - Mouthwash/Dental Rinses
    - Formulation
    - Market Share
  - Denture Products
    - Adhesives
    - Cleaners
    - Other Denture Products
  - Whitening Products
    - Whitening Strips
    - Whitening Gels/Liquids
  - Dental Gum

### RAW MATERIALS

- General
- Metals
- Chemicals
- Ceramics & Minerals
  - Ceramics
  - Silica & Other
- Polymers

### INDUSTRY STRUCTURE

- General
- Market Share
- Acquisitions, Divestitures & Industry Restructuring
- Licensing & Related Cooperative Agreements
- Marketing & Distribution
- Manufacturing
- Research & Development

### Company Profiles

## LIST OF TABLES & CHARTS

### EXECUTIVE SUMMARY

1 Summary Table

### MARKET ENVIRONMENT

- Population by Age Group
- Macroeconomic Indicators
- Consumer Income & Personal Consumption Expenditures
- Dental Care Expenditures
- Cht Dental Products Demand Per Capita, 1997-2007
- Dental Services Payments by Source
- Dental Care Providers & Establishments
- Dental Patient Activity & Procedures
- Cosmetic Dental Procedures
- Dental Equipment & Supplies Demand
- Dental Products Market Trends, 1997-2007
- Cht Global Dental Products Demand, 2007

### PRODUCTS

- Dental Products Demand by Segment
- Professional Dental Products Demand by Type
- Cht Professional Dental Products Demand by Type, 2007
- Repair & Restorative Products Demand by Type
- Prosthetics Demand by Type
- Cht Prosthetics Demand by Type, 2007
- Crown & Bridge Demand by Type
- Denture Demand
- Dental Implant Demand
- Filling Demand by Type
- Metallic Filling Demand
- 10 Composite Filling Demand

- Ceramic Filling Demand
- Amalgam Filling Demand
- Orthodontic Appliance Demand
- Metal Orthodontic Appliance Demand
- Other Orthodontic Appliance Demand
- Cosmetic Dental Products Demand
- Dental Veneer Demand
- Professional Whitening Products Demand
- Dental Process Materials Demand by Type
- Preventative Dental Products Demand by Type
- Pit & Fissure Sealant Demand
- Prophylaxis Paste Demand
- Fluoride Treatment Demand
- Other Preventative Products Demand
- Consumer Dental Products Demand by Type
- Cht Consumer Dental Products Demand by Type, 2007
- 26 Toothpaste Demand
- Cht Toothpaste Market Share by Company, 2007
- 27 Mouthwash/Dental Rinse Demand
- Cht Mouthwash/Dental Rinse Market Share by Company, 2007
- 28 Denture Products Demand
- 29 Denture Adhesive Demand
- 30 Denture Cleaner Demand
- 31 Other Denture Products Demand
- 32 Consumer Whitening Products Demand
- 33 Whitening Strips Demand
- 34 Consumer Whitening Gels/Liquids Demand
- 35 Dental Gum Demand

### RAW MATERIALS

- Dental Products Raw Material Demand
- Metal Demand in Dental Products by Type & Application
- Chemical Demand in Dental Products by Type & Application
- Ceramic & Mineral Demand in Dental Products by Type & Application
- Polymer Demand in Dental Products by Application

### INDUSTRY STRUCTURE

- Products of Selected US Dental Product Suppliers
- US Dental Product Sales by Company, 2007
- Cht US Dental Product Sales by Company, 2007
- 3 Selected Acquisitions & Divestitures
- 4 Selected Cooperative Agreements

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

**SAMPLE PAGE**  
Explanations that support each table's numbers and projections

**COMPANY PROFILES**  
Profiles for 45 competitors such as Church & Dwight, Colgate-Palmolive, DENTSPLY International, GlaxoSmithKline and Procter & Gamble

**PRODUCTS**

**Implants:** Demand for dental implants is projected to reach \$1.5 billion in 2012, up from \$1.1 billion in 2007. Growth will continue to accelerate as implants overtake dentures (due to population aging and promotion of dental care), since implants are generally more expensive than dentures. The population of individuals with dental implants are generally younger than those with dentures. Dental insurance plans are covering at least a portion of the cost of dental implants, making these products affordable to a larger number of individuals. Limiting gains will be a trend toward improved oral care, resulting in a lower incidence of tooth decay among all age groups.

Implants generally consist of three parts: anchor, sleeve and screw. These materials are placed directly into the jaw bone and are designed to replace the root of a missing tooth and provide an anchor for a crown, bridge or denture. Titanium is the most commonly used raw material; however, implants can also be produced with titanium alloys that may contain zirconia. Titanium and other metals such as zirconium are valued in implant construction due to their ability to support osteointegration after being placed in an individual's jaw. Due to market demand for metal-free dental products, however, suppliers are looking at alternative implant materials. Nobel Biocare, for example, is in the process of developing a ceramic implant that provides the same performance as a titanium implant. As of 2008, the product was undergoing clinical tests in Europe.

Implants primarily compete with bridges, and to a lesser extent, dentures. The average useful lifespan of an implant is nearly 20 years (bridges, in comparison, last an average of seven years before they need to be readjusted). Implant lifespans have increased substantially over the past 20 years, primarily due to an improved screening process that verifies that prospective patients have good general health, good bone structure and good oral hygiene habits. Implant suppliers

Copyright 2007 The Freedonia Group, Inc.

**RAW MATERIALS**

Silica and peroxide are commonly used in whitening agents in toothpastes and whitening products (silica is discussed in the Ceramics and Minerals section). While silica is the most common whitening agent consumed in the dental products market, chemical whitening agents are used in professional and consumer whitening products. In at-home professional whitening gels, for example, hydrogen peroxide is used at a 10 percent to 20 percent concentration.

Cellulose gum finds use in toothpaste and denture cleaners. It offers cellulose gum under the CEKOL brand name. It is used in monopersulfate compounds, whose major application is in denture cleaners. Denture cleaners contain 25 percent OXONE, which is used to remove food and other organic stains.

**SAMPLE TEXT**  
Data illustrated with the aid of more than 60 tables and charts

TABLE IV-3

CHEMICAL DEMAND IN DENTAL PRODUCTS BY TYPE & APPLICATION (million dollars)

Item	1997	2002	2007	2012	2017
Dental Raw Materials Demand					
% chemicals					
Chemical Demand					
By Type:					
Sorbitol					
Glycerine					
Alcohols					
Saccharin					
Other					
By Product:					
Mouthwash					
Toothpaste					
Denture Cleanser					
Other					

**SAMPLE TABLE**  
Historical data for 1997, 2002 and 2007 as well as Freedonia forecasts to 2012 and 2017

Copyright 2007 The Freedonia Group, Inc.

## Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end-users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

## Order Information

To order fill out the coupon below and mail to The Freedonia Group, or place your order by phone **toll free (800) 927-5900 (US)** or **(440) 684-9600**, or by fax **(440) 646-0484**, or by e-mail at **info@freedoniagroup.com**

## Free Handling and Shipping

There is **NO** charge for handling and UPS shipping in the US. Expect delivery in 3 to 5 days. Outside the US, Freedonia provides free airmail service. If you require express delivery, Freedonia provides this to you at cost.

## Save Fifteen Percent

If you order three (3) different titles at the same time, you can receive a discount of 15%. **If your order is accompanied by a check, you may take a 5% cash discount** (discounts do not apply to corporate use licenses).

## Credit Card Orders

You may charge your order to either **American Express, MasterCard** or **Visa**. Please include your credit card account number, expiration date and your signature.

## Orders Outside of the US

Checks must be paid in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfer instructions please contact our customer service department at **info@freedoniagroup.com**. Or you may use a credit card.

## Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2,300 you receive unlimited use of an electronic version (PDF) of the study. Place it on your Intranet, e-mail it to coworkers around the world, or print it as many times as you like! Order it today.

## Online Access

The complete text and tables from our studies and reports can be purchased at our website **www.freedoniagroup.com** and through major commercial online hosts.

# Other Titles from The Freedonia Group

## Implantable Medical Devices

US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the \$27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

#2255..... 10/2007.....\$4500

## Medical & Dental Adhesives & Sealants

US demand for medical and dental adhesives and sealants will rise 7.6% annually through 2011, driven by continuing new product development and increasing acceptance in surgical and consumer settings. Opportunities are expected for cyanoacrylate, polyethylene glycol and various plasma and protein types. This study analyzes the US market for medical adhesives and sealants, with forecasts for 2011 and 2016 presented by product and market. It also evaluates company market share and profiles major suppliers.

#2201 ..... 05/2007.....\$4400

## Disposable Medical Supplies

US demand for disposable medical supplies will grow 4.9% annually through 2011. Best prospects include dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; tissue sealants for wound closure; and daily contact lenses. This study analyzes the US disposable medical supply industry, with forecasts for 2011 and 2016 presented by product, market and raw material. It also evaluates company market share and profiles industry competitors.

#2196..... 05/2007.....\$4500

## Dental Equipment

US demand for dental equipment will grow 3.8% annually through 2011, aided by favorable population trends and strong interest in technology updates. In general, advanced equipment such as lasers, intra-oral cameras, digital radiography and CAD/CAM systems will lead gains. Dental offices will remain the largest market and grow the fastest. This study analyzes the \$2.4 billion US dental equipment industry to 2011 and 2016 by product and market. It also evaluates market share and profiles major players.

#2179..... 04/2007.....\$4400

## Nanotechnology in Health Care

US demand for nanotechnology medical products will grow 17.5% annually through 2011, driven by the critical need for new or improved therapies and diagnostics. The greatest short-term impact will be in cancer and central nervous system disorders, followed by orthopedic nanoimplants. This study analyzes the \$23.6 billion US nanotech medical product industry to 2011, 2016 and 2021 by material, product and application. The study also reviews product development activities and profiles major players.

#2168..... 02/2007.....\$4500

Need analysis on a topic not covered by Freedonia Industry Studies? Call Customer Service for details on **Freedonia Custom Research**

## ORDER FORM

[Click here to purchase online](#)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Division: \_\_\_\_\_

Street: \_\_\_\_\_  
(no PO Box please)

City/State/Zip: \_\_\_\_\_

Country: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

e-mail: \_\_\_\_\_

## TITLE

### Dental Products & Materials

## PRICE

**\$4500**

Corporate Use License (add to study price) + \$2300

Additional Print Copies @ \$500 each

Total (including selected options): \$ \_\_\_\_\_

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company  American Express  MasterCard  Visa

\_\_\_\_\_  
Credit Card #

\_\_\_\_\_  
MONTH YEAR

\_\_\_\_\_  
Expiration Date

Signature: \_\_\_\_\_

A-E - 2313

**The Freedonia Group, Inc.** 767 Beta Drive Cleveland, OH 44143-2326 USA **website:** [www.freedoniagroup.com](http://www.freedoniagroup.com)  
**phone:** 800-927-5900 (US) or 440-684-9600 **fax:** 440-646-0484 **e-mail:** [info@freedoniagroup.com](mailto:info@freedoniagroup.com)