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Dental Equipment

US Industry Study with Forecasts to **2011 & 2016**

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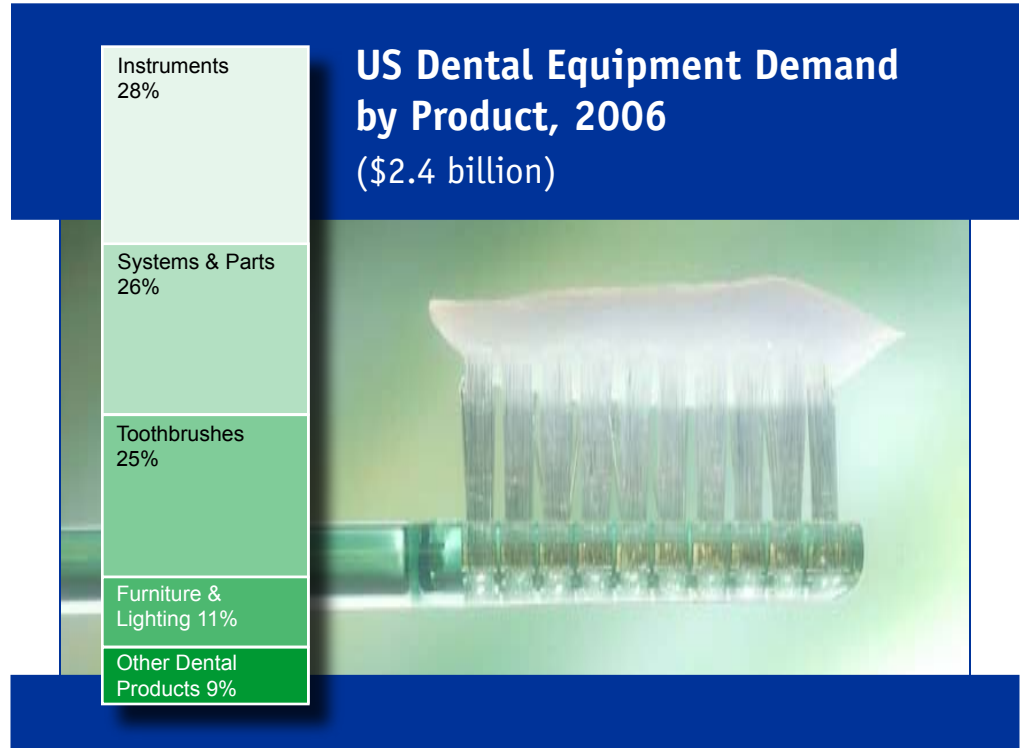
US dental equipment demand will benefit from a strong professional and consumer interest in technology updates, and solid growth in older individuals more likely to require dental procedures.

US demand to reach \$2.85 billion in 2011

Demand for dental equipment (excluding supplies) in the US is forecast to rise 3.8 percent per year to \$2.85 billion in 2011, aided by favorable economic conditions and population trends, as well as a strong interest in technology updates among professionals and consumers alike. Solid growth in the over 50 population will provide opportunities as older individuals are more likely to require dental procedures than other segments of the population. An increase in dental procedures will expand the need for equipment, particularly those items that require relatively frequent replacement such as hand instruments and tools used with hand pieces.

Advanced technology to provide most rapid gains

In general, equipment that features advanced technology, such as lasers, intra-oral cameras, digital radiography and CAD/CAM systems, will provide the most rapid gains. Dentists are seeking higher tech equipment to improve office productivity, expand their procedure capabilities, and attract new patients with a state-of-the-art office appearance. Furniture and lighting are expected to achieve moderate growth, yet benefit from dental chair purchases, as dentists attempt to create comfortable settings for their patients. Lighting will benefit from a shift to higher value-added technologies, such as LED and fiber optics.



Dental offices to remain dominant market and grow the fastest

Markets for dental equipment include a variety of dental professional settings, including dental offices, dental laboratories and dental schools, as well as the general public. Dental offices are, by far, the leading outlet for dental equipment, accounting for 65 percent of total demand in 2006. In addition to gains in the number of dental establishments, growth in dental equipment is influenced by numerous factors, including replacement rates, annual revenues, tax incentives and technological advances. Replacement rates, which vary according to the type of equipment and intensity of use,

can range from single-use (e.g., burs) to roughly 15 years (e.g., dental chairs). A limited number of dental schools, and an outright retraction in the number of existing dental laboratories, compounded with low replacement rates, will restrict growth for dental equipment in these markets.

In the consumer market, gains will be sluggish due to the market maturity of toothbrushes, the dominant product. Outside of toothbrushes, penetration rates for other consumer dental equipment (e.g., tongue cleaners and oral irrigation tools) are much lower, providing opportunities for growth. Nevertheless, consumer use of equipment other than toothbrushes will remain negligible.

Sample Text, Table & Chart

PRODUCTS

CAD/CAM Systems

Demand for dental CAD/CAM (computer-aided design/milling) systems is projected to increase by 10 percent annually through 2016, with the use of CAD/CAM systems in the dentist office a steady increase. A steady increase in the use of CAD/CAM systems is projected to be the same as the increase in the use of CAD/CAM systems in the dentist office.

SAMPLE TEXT

CAD/CAM systems, which typically consist of an imaging unit, a milling unit, can be used in either dental laboratories or dentist offices. Demand for dental CAD/CAM systems in dentist offices with the latter projected to achieve the most growth over the period. The use of CAD/CAM systems in the dentist office a dentist to create customized all-ceramic crowns, bridges or veneers and ceramic blanks in the same visit. This system eliminates the reliance on an outside laboratory, reducing the amount of visit procedure. Increased use of this system is dependent on dentists' initiative in learning to use the equipment. Ceramics that are suitable for this application include leucite, alumina and zirconia. Zirconia ceramic, for example, features excellent stability and biocompatibility, as well as strength levels that are significantly higher than other all-ceramic materials. Several suppliers offer materials for use with CAD/CAM systems, including DENTSPLY International (CERCON), Ivoclar Vivadent (IVOCAR VIVADENT), 3M ESPE (LAVA and PARADIGM) and Vident (VITA).

Sirona Dental Systems is the leading supplier of dental CAD/CAM systems. The company offers both in-laboratory and in-office (or chair-side) types. In-laboratory CAD/CAM systems are sold under the INLAB brand name, while in-office systems are sold under the CEREC brand name. The CEREC CAD/CAM systems are exclusively distributed in North America by Patterson.

TABLE III-7

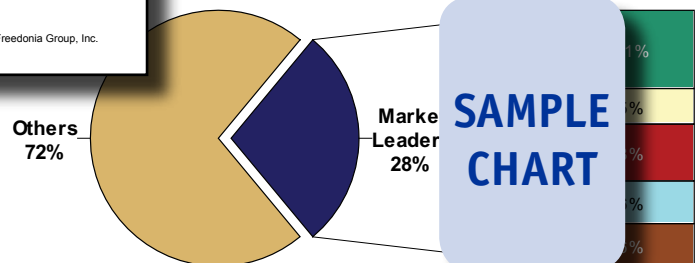
DENTAL SYSTEMS & PARTS DEMAND BY TYPE & MARKET
(million dollars)

Item	1996	2001	2006	2011	2016
Dental Offices (000)	113				
000\$ systems & parts/office	3.5				
Systems & Parts Demand	401				
By Type:					
Imaging Systems	77				
Instrument Delivery Systems	85				
Utility Equipment	67				
CAD/CAM Systems	40				
Intra-Oral Cameras	58				
Other Systems & Parts	74				
By Market:					
Dental Offices	325				
Other Markets	76				
% systems & parts	24.2				
Dental Equipment Demand	1657				

SAMPLE TABLE

CHART V-1

EQUIPMENT MARKET SHARE BY COMPANY, 2006
(\$2.4 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-10
DENTAL UTILITY EQUIPMENT DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Dental Offices (000)	113	117	121	125	126
utility eqpt/office	0.29				
000\$ utility eqpt/office	0.6				
Utility Equipment Demand (000 units)	33				
\$/unit	2030				
Utility Equipment Demand	67				
Compressor	35				
Vacuum	26				
Other Utility Equipment	6				
% utility equipment	16.7				
Systems & Parts Demand	401				

**SAMPLE
TABLE**

COMPANY PROFILES

Midmark Corporation

60 Vista Drive
 Versailles, OH
 937-526-3662
<http://www.midmark.com>

**SAMPLE
PROFILE**

Annual Sales: \$1.2 billion (verify, 4/07)
 Employment: 1,000 (07)

Key Products: operatory equipment, oral surgery products, sterilization centers, sterilizers, air compressors and vacuum pumps, and nitrous oxide and oxygen delivery systems

Midmark Corporation is a privately held manufacturer of such equipment as examination tables, sterilizers, cases, lighting, seating, electrocardiographs and other patient monitors, and dental operatories. The Company's products are primarily marketed to general practice physicians, podiatrists, dermatologists, obstetricians, gynecologists and plastic surgeons, as well as to veterinarians.

The Company's dental equipment includes operatory equipment, oral surgery products, sterilization centers, sterilizers, air compressors and vacuum pumps, and nitrous oxide and oxygen delivery systems. Midmark manufactures dental equipment at facilities in Versailles, Ohio and Orchard Park, New York.

Operatory equipment from Midmark includes chairs, operatories, delivery units and lighting. The Company's chairs encompass the KNIGHT BILTMORE, RITTER 391 and MIDMARK ULTRATRIM lines. An example of Midmark's operatories is the KNIGHT BILTMORE CLASSIC ASEPSIS 21 unit, which includes the BILTMORE

"Demand for dental equipment in consumer settings is forecast to increase 1.7 percent per year to \$610 million in 2011, based on just under one percent annual growth in the US population during the same period. Gains will be sluggish due to the market maturity of toothbrushes, the dominant product in the consumer end user segment. Although toothbrush suppliers will continue to..."

--Section IV, pg. 91

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OTHER STUDIES

Medical & Dental Adhesives & Sealants

Growth in US medical and dental adhesives and sealants will be driven by continuing new product development and increasing acceptance of these materials in surgical and consumer settings. This study analyzes the US market for medical adhesives and sealants to 2011 and 2016 by product (e.g., fibrin, albumin, collagen, cyanoacrylate, acrylic, silicone) and market (internal and external medical, dental). It also considers market environment factors, evaluates company market share and profiles major suppliers.

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

Medical Imaging (Equipment, Agents, Consumables)

US demand for medical imaging products will grow 6% annually through 2010 based on technological advances, aging demographics and changing health care approaches. Equipment will outpace consumables, led by CT scanners and by MRI and PET machines. Radiopharmaceuticals will lead gains among consumables. This study analyzes the \$16 billion US medical imaging product industry to 2010 and 2015 by type and market. It also evaluates company market share and profiles leading competitors.

#2137 12/2006..... \$4400

Cosmeceuticals

US cosmeceuticals demand will grow 8.5% annually, propelled by a stream of new products offering age-defying and other appearance-enhancing benefits. Skin care products will remain dominant while professional products will grow the fastest. BOTOX and hyaluronic acid will lead gains among cosmeceutical chemicals. This study analyzes the \$5.4 billion US cosmeceutical industry to 2010 and 2015 by product and chemical. It also evaluates company market share and profiles leading players.

#2114 10/2006..... \$4400

Biocompatible Materials

US demand for biocompatible materials will grow 6.6% yearly through 2010. Synthetic polymers will remain dominant based on quality, performance and cost advantages in most applications. Ceramics will grow the fastest, driven by improved properties and processing ease. Hyaluronic acid and collagen will pace the natural polymer segment. This study analyzes the \$2.7 billion US biocompatible industry to 2010 and 2015 by material and application. It also evaluates market share and profiles major players.

#2111 09/2006..... \$4400

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