Dental Products & Materials

US Industry Study with Forecasts for 2012 & 2017

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US demand to grow 4.5% annually through 2012

Demand for dental products (excluding equipment) in the US is forecast to rise 4.5 percent per year to nearly $11 billion in 2012. Solid growth in the over 55 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, individuals such as aging baby boomers and generation Xers are increasingly 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 partially 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.

Professional dental products to stay largest segment, grow the fastest

In 2007, professional dental products accounted for 65 percent of total dental product demand. Professional dental products will grow faster than the consumer segment and comprise two-thirds of demand in 2012. 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, and clear or tooth colored orthodontic appliances and tooth colored veneers will achieve above-average gains. Implants will also achieve strong growth (almost ten percent per year), not only for aesthetic purposes, but also due to their use as an alternative permanent securing method for crowns, bridges and dentures. By 2012, demand for implants will exceed $1 billion.

Toothpaste to remain key in consumer segment

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

Growth in demand will be aided by favorable population trends, continued interest in cosmetic dentistry and a greater perception of oral care as a requirement for good overall health.
PRODUCTS

Implants: Demand for dental implants is forecast to increase at a 9.8 percent per year rate to $1.1 billion in 2012, with market volume reaching 6.5 million units at the same time. Growth will result as more individuals become aware of the benefits of using implants over other securing methods (i.e., denture adhesives and dental cements), since implants can be used to secure crowns, bridges or dentures. Further promoting growth will be increases in the 55 years old and older segment of the population (i.e., the most common age group where tooth loss occurs). Implants are generally not covered by insurance, making the high cost of these materials prohibitive, particularly for individuals on a fixed income. However, it appears a growing number of dental insurance plans are covering at least a portion of the cost associated with implants, making these products affordable to a greater 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 components 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 zirconia are valued in implant construction due to their ability to support osteointegration after being placed in an individuals 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.

TABLE III-2
PROFESSIONAL DENTAL PRODUCTS DEMAND BY TYPE
(million dollars)

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TABLE III-2
PROFESSIONAL DENTAL PRODUCTS DEMAND BY TYPE
(million dollars)
Sample Profile, Table & Forecast

COMPANY PROFILES

Discus Dental Incorporated
8550 Higuera Street
Culver City, CA 90232
310-845-8600
http://www.discusdental.com

Annual Sales: $160 million (estimated)
Employment: 650 (estimated)

Key Products: prophylaxis materials, preventative therapy, impression materials, restoratives, desensitizing gel and tooth whitening products, toothpaste, mouth rinses and breath spray

Discus Dental is a direct manufacturer and seller of professional dental products, including tooth whitening and breath control products, impression and bite registration materials, restorative materials, prescription home fluorides and curing lights. The privately held company also provides education and practice enhancement services, and practice management software. Discus Dental’s production facility is in Culver City, California.

The Company makes such professional dental materials as prophylaxis materials, preventative therapy, impression materials, restoratives, desensitizing gel and tooth whitening products. In addition, Discus Dental manufactures dental products for consumers under the BREATHRX brand name.

Professional Products -- Discus Dental’s prophylaxis materials include PROACTIVE CARE prophylaxis pastes, which are offered in several flavors and grit levels. The Company makes such preventative therapy products as fluoride rinses, toothpastes and gels under the FLUORIDEX brand name. Specific products include FLUORIDEX

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TABLE IV-4
CERAMIC & MINERAL DEMAND IN DENTAL PRODUCTS
BY TYPE & APPLICATION
(million dollars)

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<tbody>
<tr>
<td>Dental Raw Materials Demand</td>
<td>785</td>
<td>895</td>
<td>1725</td>
<td>1615</td>
<td>1845</td>
</tr>
<tr>
<td>% ceramic &amp; mineral</td>
<td>17.8</td>
<td>20.7</td>
<td>15.4</td>
<td>19.8</td>
<td>21.1</td>
</tr>
<tr>
<td>Ceramic &amp; Mineral Demand</td>
<td>140</td>
<td>185</td>
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<td>By Type:</td>
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<td>Consumer</td>
<td>40</td>
<td>50</td>
<td>75</td>
<td>85</td>
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“Ceramic use in the production of dental products is projected to reach $160 million in 2012. Gains will result from the aesthetically pleasing properties of ceramics, which are valued for their opalescent color and translucence. In addition, technological advances that are enhancing ease of use and reducing labor costs during the production process of customized dental products will promote ceramic use in dentistry.”

--Section IV, pg. 128
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**Name**

**Title**

**Company**

**Division**

**Street**

(No PO Box please)

**City/State/Zip**

**Country**

**Phone**

**Fax**

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