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Dental Products & Materials

US Industry Study with Forecasts for **2012 & 2017**

Study #2313 | March 2008 | \$4500 | 256 pages

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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.

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.

Sample Text, Table & Chart

PRODUCTS

Implants: Demand for dental implants is forecast to increase to \$1.5 billion in 2012, with market volume expected to grow at the same time. Growth will result as more individuals benefit from the benefits of using implants over other restorative options (adhesives and dental cements), since implants are more durable than bridges or dentures. Further promotion of implants to the 45 years old and older segment of the population (the age group where tooth loss occurs).

Implants are generally not covered by insurance, making the high cost of dental materials prohibitive, particularly for individuals on a fixed income. However, it appears a growing number of dental insurance plans are offering at least a portion of the cost associated with implants, making dental products affordable to a greater number of individuals. Limited insurance coverage 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 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.

TABLE III-2

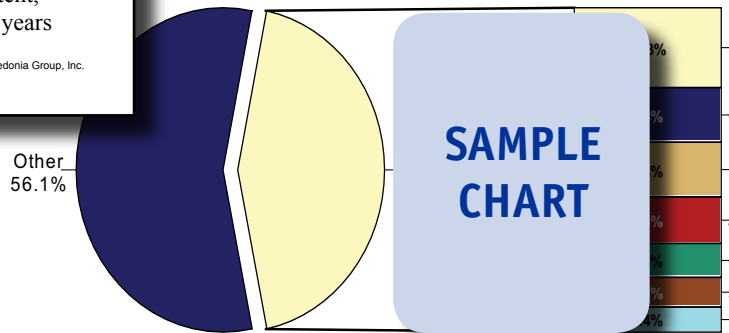
PROFESSIONAL DENTAL PRODUCTS DEMAND BY TYPE (million dollars)

Item	1997	2002	2007	2012	2017
Resident Population (mil persons)	260	265	270	275	279
procedures/capita	1.0	1.0	1.0	1.0	1.0
Dental Procedures (mil)	260	265	270	275	279
\$ professional prdts/procedure	1.0	1.0	1.0	1.0	1.0
Professional Dental Products Demand	260	265	270	275	279
Repair & Restorative	150	150	150	150	150
Orthodontic Appliances	50	50	50	50	50
Process Materials	50	50	50	50	50
Cosmetic	50	50	50	50	50
Preventative	50	50	50	50	50
% professional	46	46	46	46	46
Dental Products Demand	460	460	460	460	460

SAMPLE
TABLE

CHART V-1

DENTAL PRODUCT SALES BY COMPANY, 2007 (\$8.8 billion)

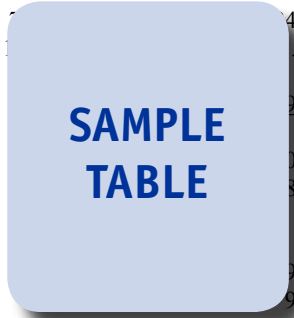


SAMPLE
CHART

Sample Profile, Table & Forecast

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

Item	1997	2002	2007	2012	2017
Dental Raw Materials Demand					45
% ceramic & mineral					1
Ceramic & Mineral Demand					90
By Type:					
Ceramic					95
Silica & Other					85
By Application:					
Professional					95
Consumer					95



COMPANY PROFILES

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

Annual Sales:
 Employment:

Key Products: dental copolymer, impression materials, restorative materials, tooth whitening products, toothpaste, mouthwash

SAMPLE PROFILE

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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"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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OTHER STUDIES

Drug Delivery Systems

US demand for drug delivery systems will grow 10% annually through 2012. Oral types will remain the largest drug delivery category while parenteral, inhalation and implantable systems grow the fastest. Parenteral formulations will eventually surpass oral dosages as the largest product group. This study analyzes the \$80.2 billion US drug delivery system industry, with forecasts for 2012 and 2017 by material, type and application. It also evaluates company market share and profiles leading industry players.

#2294 03/2008..... \$4500

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 defibrillators. Bone cement, tissue 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

Infection Prevention Products & Services

US demand for infection prevention products and services will grow 4% annually through 2011, driven by efforts to combat healthcare-acquired infections. Services will outpace supplies and equipment. Among products, surgical drapes and gowns will remain dominant while waste disposal and sterilization supplies will lead gains. This study analyzes the \$13.8 billion US infection prevention industry, with forecasts for 2011 and 2016 by type and market. It also evaluates market share and profiles major players.

#2234 08/2007..... \$4400

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

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

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