Dental Products & Materials

US Industry Study with Forecasts for 2019 & 2024

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Advances will be driven by ongoing growth in the 55-and-older segment, as this is the cohort most likely to require advanced professional dental care, and are likely to retain their natural teeth as they age.

**US demand to rise 3.4% annually through 2019**

Through 2019, demand for dental products and materials is expected to rise 3.4 percent annually to almost $12.7 billion. Advances will be driven by ongoing growth in the 55-and-older population segment, as this is the cohort most likely to require advanced professional dental care. Furthermore, unlike previous generations, the “baby boomers” are more likely to retain their natural teeth and remain active consumers of dental products and ongoing care as they age. Gains will also be spurred by the continuing implementation of the Affordable Care Act, since after 2014 qualified health plans are required to offer pediatric oral healthcare, as well as by the corresponding expansion of Medicaid. Continuing improvement in the economy and in discretionary spending will aid demand for higher-value and nonessential items less likely to be covered by insurance, including implants, veneers, and whitening treatments, as well as aesthetic orthodontia (e.g., lingual braces, ceramic brackets, and clear plastic aligners).

**Repair, restorative types to remain largest segment**

In 2014, professional dental products accounted for 64 percent of total dental product demand. Going forward, repair and restorative products will continue to dominate the professional dental product category. Within this segment, the fastest gains will stem from implants, which are increasingly preferred as a durable, long-term alternative to traditional crowns, bridges, and dentures, particularly in light of growing insurance coverage and ongoing technological advances. However, crowns, a more established and less costly product, will still lead the category with more than half of segment demand in 2019. Cosmetic dental products, a smaller category accounting for only 10 percent of professional product sales in 2014, will achieve the fastest growth, particularly as consumers return to high-end ceramic veneers. In general, technological innovations that make professional products last longer or look more natural will drive value growth. Further gains in professional dental products will be restrained by improved preventative and at-home oral care.

Through 2019, advances in the smaller consumer dental product market will benefit from growing interest in high-value items. For instance, demand in the dominant toothpaste segment will continue to be driven by rising sales of value-added, all-natural formulations, those with an ability to treat dentinal hypersensitivity, and specialty flavors that appeal to children. Lower market penetration for complementary products, such as mouthwash and dental floss, will also provide some opportunities for growth. Further gains will be restrained by an increasingly competitive pricing environment.
Whitening Products

In 2014, sales of whitening products amounted to $221 million, equivalent to six percent of total consumer dental product demand. The share of demand is lower than that exhibited in 2009 and 2004 due to decelerating spending on these products in recent years due to competition from other whitening products such as multipurpose toothpastes and mouthwashes that also offer whitening effects. Although the market’s initial explosion, demand for whitening products remained steady during the 2007-2009 recession. While competition from less expensive private label whitening agents restrained per unit retail costs between 2009 and 2014, in 2014 a settlement was reached in the patent infringement lawsuit brought against Clio USA, Teach Technologies, and Brushpoint Innovations by P&G.

While whitening product sales declined in 2013 and 2014, demand for whitening products is expected to expand one percent annually through 2019 to $232 million, as the share of consumer dental product demand commanded by this product category will continue to fall through the forecast period, reflecting ongoing competition from competitive consumer products and concerns regarding dentin sensitivity as a result of whitening procedures. The fact that over-the-counter items are also less effective than professional whitening products will place a restraining factor on value demand. In addition, consumer whitening products are increasingly facing competition from veneers which, while more expensive and time-consuming, provide a more durable, aesthetic smile and address whitening in addition to other concerns.

This segment includes products designed to lighten tooth shade, such as strips, gels and liquids, and other products (whitening lights, boil-and-bite whitening trays, custom-fitted trays, etc.).

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**TABLE IV-2**

**REPAIR & RESTORATIVE PRODUCT DEMAND BY TYPE**

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident Population (mil persons)</td>
<td>292.8</td>
<td>306.8</td>
<td>318.9</td>
<td>332.0</td>
<td>344.9</td>
</tr>
<tr>
<td>repair &amp; restorative procedures/capita</td>
<td>0.69</td>
<td>0.63</td>
<td>0.60</td>
<td>0.58</td>
<td>0.57</td>
</tr>
<tr>
<td>Repair &amp; Restorative Procedures (mil)</td>
<td>201</td>
<td>194</td>
<td>191</td>
<td>193</td>
<td>195</td>
</tr>
<tr>
<td>units repair &amp; restorative/procedure</td>
<td>1.1</td>
<td>1.2</td>
<td>1.4</td>
<td>1.5</td>
<td>1.6</td>
</tr>
<tr>
<td>Repair &amp; Restorative Products (mil units)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prosthetics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fillings</td>
<td>158.0</td>
<td>168.0</td>
<td>174.0</td>
<td>182.0</td>
<td>190.0</td>
</tr>
<tr>
<td>$/unit</td>
<td>13.8</td>
<td>14.4</td>
<td>16.9</td>
<td>18.7</td>
<td>19.6</td>
</tr>
<tr>
<td>% repair &amp; restorative</td>
<td>62.1</td>
<td>63.5</td>
<td>63.2</td>
<td>63.7</td>
<td>63.7</td>
</tr>
<tr>
<td>Professional Dental Product Demand (mil $)</td>
<td>3170</td>
<td>3466</td>
<td>4355</td>
<td>5275</td>
<td>5970</td>
</tr>
<tr>
<td>Prosthetics</td>
<td>2927</td>
<td>3215</td>
<td>4085</td>
<td>4985</td>
<td>5660</td>
</tr>
<tr>
<td>Fillings</td>
<td>243</td>
<td>251</td>
<td>270</td>
<td>290</td>
<td>310</td>
</tr>
<tr>
<td>Source: The Freedonia Group</td>
<td></td>
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</tbody>
</table>

**CHART VII-1**

**US DENTAL PRODUCT MARKET SHARE, 2014**

($10.7 billion)

- **3M**: 48.2%
- **P&G**: 4.0%
- **Glaxo**: 4.7%
- **3M**: 5.7%
- **51.8%**
- **DENTSPLY**: 6.9%
- **5.2%**
- **Other**: 8.0%
- **10.7%**

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Sample Profile & Table, & Study Coverage

COMPANY PROFILES

Den-Mat Holdings LLC
1017 West Central Avenue
Lompoc, CA 93436
805-346-3700
www.denmat.com

Annual Sales: $80 million (estimated)
Employment: 380 (verified by company, 11/15)

Key Products: adhesives, cements, restorative products, whitening and oral hygiene products, impression and bite registration materials, and impression trays.

Den-Mat Holdings is a leading manufacturer of such minimally invasive dental products as cosmetic restorative dentistry products, biomedical products, whitening toothpastes, and oral rinses. The privately held markets its products in the US and in more than 60 other countries. Den-Mat Holdings is owned by Centre Partners Management LLC (New York, New York) and Mill Street Partners LLC (Los Angeles, California).

The Company’s dental products and materials comprise adhesives, cements, restorative products, whitening and oral hygiene products, and other products for professional and consumer applications. Den-Mat Holdings has a manufacturing facility at its Lompoc, California headquarters site.

Adhesives, Cements, & Restorative Products -- Adhesives from Den-Mat Holdings include the following: BONDLINK coupling agent, which offers superior bonding strength when used with metal; TENURE multipurpose bonding system, which bonds enamel, dentin, porcelain, and metal; TENURE QUIK low-viscosity bonding agent;

TABLE VI-3

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

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental Raw Material Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% chemicals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Chemical Demand</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sorbitol</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Alcohols</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Glycerine</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Saccharin</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Xylitol</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>By Application:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Toothpaste</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mouthwash</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Denture Products</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

STUDY COVERAGE

Dental Products & Materials is a Freedonia study that presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product (professional, consumer) and by raw material. The study also considers market environment factors, examines the industry structure, evaluates company market share and profiles 38 US industry competitors.
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