INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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Dental Products & Materials

US Industry Study with Forecasts for **2019 & 2024**

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Dental Products & Materials

US Industry Study with Forecasts for ***2019 & 2024***

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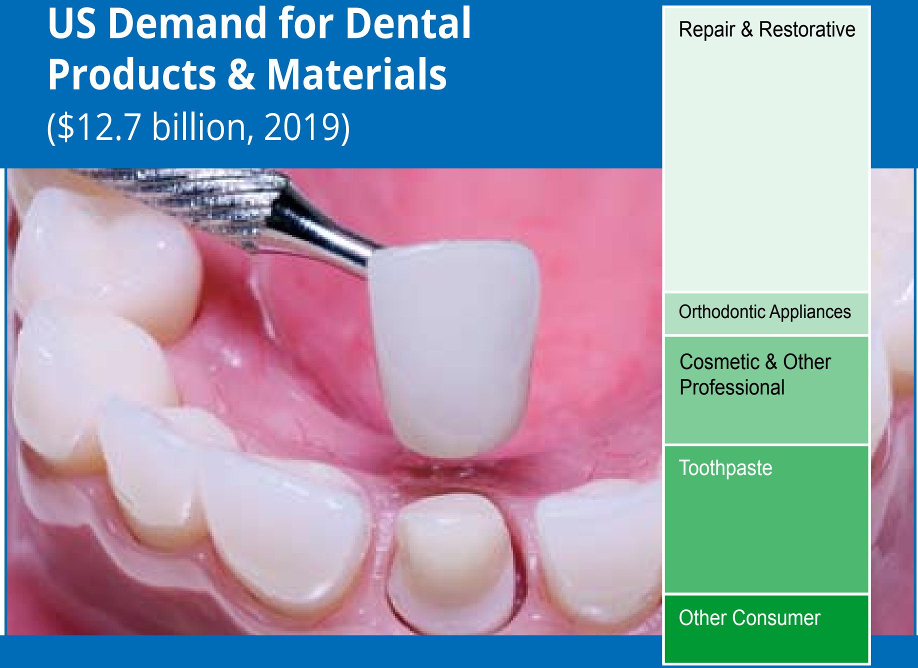
Advances will be driven by ongoing growth in the 55-and-older segment, as this is the cohort most likely to require advanced professional dental care, and are likely to retain their natural teeth as they age.

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).

US Demand for Dental Products & Materials
($12.7 billion, 2019)



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.

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Sample Text, Table & Chart

TABLE IV-2

REPAIR & RESTORATIVE PRODUCT DEMAND BY TYPE

Item	2004	2009	2014	2019	2024
Resident Population (mil persons)					
repair & restorative procedures/capita					
Repair & Restorative Procedures (mil)					
units repair & restorative/procedure					
Repair & Restorative Products (mil units)					
Prosthetics					
Fillings					
$/unit					
Repair & Restorative Products (mil $)					
Prosthetics					
Fillings					
% repair & restorative					
Professional Dental Product Demand (mil $)					

SAMPLE TABLE

Source: The Freedonia Group

CONSUMER PRODUCTS

Whitening Products

In 2014, sales of whitening products amounted to $221 equivalent to six percent of total consumer dental product de share of demand is lower than that exhibited in 2009 and 200 decelerating spending on these products in recent years due t competition from other whitening products such as multipurp toothpastes and mouthwashes that also offer whitening effec the market's initial explosion, demand for whitening product steady during the 2007-2009 recession. While competition f expensive private label whitening agents restrained per unit r between 2009 and 2014, in 2014 a settlement was reached in infringement lawsuit brought against Clio USA, Teach Techn Brushpoint Innovations by P&G.

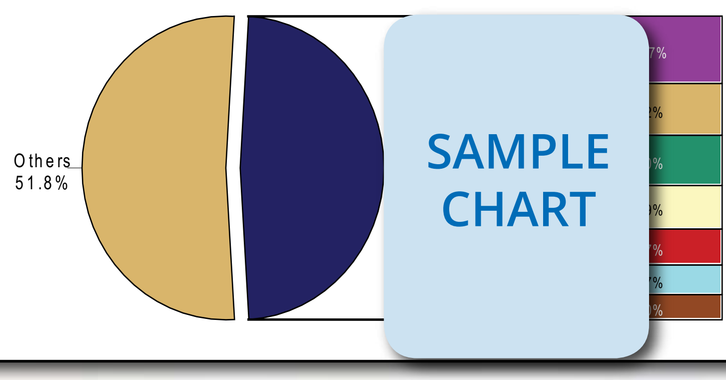
While whitening prod for whitening products is e percent annually through 2019 to $ e of consumer dental product de category will continue to fall throug going competition from competitive consumer products and concerns regarding dentin sensitivity as a result of whitening procedures. The fact that over-the-counter 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.

SAMPLE TEXT

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

CHART VII-1

US DENTAL PRODUCT MARKET SHARE, 2014
($10.7 billion)



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Sample Profile & Table, & Study Coverage

TABLE VI-3

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

Item	2004	2009	2014	2019	2024
Dental Raw Material Demand					
% chemicals					
Chemical Demand					
By Type:					
Sorbitol					
Alcohols					
Glycerine					
Saccharin					
Xylitol					
Other					
By Application:					
Toothpaste					
Mouthwash					
Denture Products					
Other					

Source: The Freedonia Group

SAMPLE TABLE

COMPANY PROFILES

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

Annual Sales:
Employment:

Key Products ing and oral hygiene produ rials, and im- pression trays

SAMPLE PROFILE

Den-Mat Holdings is a leading manufacturer of such minimally invasive dental products as cosmetic restorative dentistry products, bio-medical 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;

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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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Related Studies

Infection Prevention Products & Services

This study analyzes the US infection prevention industry. It presents historical data (2005, 2010, and 2015) and forecasts (2020 and 2025) by type (e.g., protective apparel and textiles, safety-enhanced medical devices, sterilization products and services, disinfectants, infectious waste disposal supplies and services) and market (e.g., hospitals, outpatient facilities, physician and dental offices, nursing homes, life science facilities). The study also examines trends in healthcare and life science infections, evaluates market share, and profiles industry players.

#3403..................April 2016 ....$5400

Medical Adhesives & Sealants

This study analyzes the US medical adhesives and sealants industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., acrylic, cyanoacrylate, silicone, polyethylene glycol, fibrin, collagen, albumin), application (medical, dental) and market (primary care, dental offices, consumer). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors.

#3355................ March 2016...................$5200

Disposable Medical Supplies

US demand for disposable medical supplies will rise 4.2 percent annually to $54.1 billion in 2020. Drug delivery products will remain the largest and fastest growing type, led by safety-enhanced devices for minimally invasive delivery of parenteral and inhalation medicines, and IV solutions. Home healthcare will remain the fastest growing market. This study analyzes the $44.1 billion US disposable medical supply industry, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry players.

#3378............. February 2016.................$5500

Medical Imaging Products

US demand for medical imaging products will rise 5.8 percent yearly to $31.9 billion in 2019. Computed tomography (CT) and magnetic resonance imaging (MRI) products will lead gains, followed by nuclear medicine products. Good prospects also exist for picture archiving and communications systems (PACS) as patient data networks are upgraded. This study analyzes the $24.1 billion US medical imaging industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry participants.

#3315........... September 2015...............$5300

Biocompatible Materials

US demand for biocompatible materials is forecast to increase 4.9 percent annually to $5.6 billion in 2018. Ceramic materials will grow the fastest based on improved nanotechnology compounds for orthopedic implants, spinal fixation devices and dental products. Natural polymers will be the second fastest growing segment, paced by hyaluronic acid. This study analyzes the $4.4 billion US biocompatible materials industry, with forecasts for 2018 and 2023 by product and application. The study also evaluates company market share and profiles industry players.

#3223............ December 2014................$5200

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