

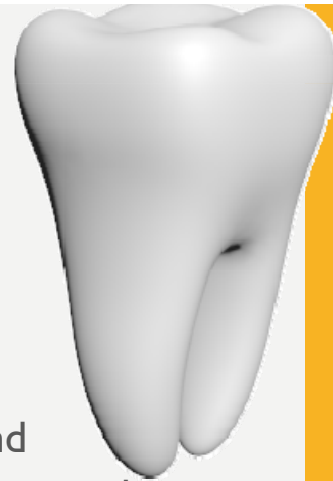


Dental Restorative Market Analysis and Forecast Through Geographical and Product Segmentation (2017-2021)

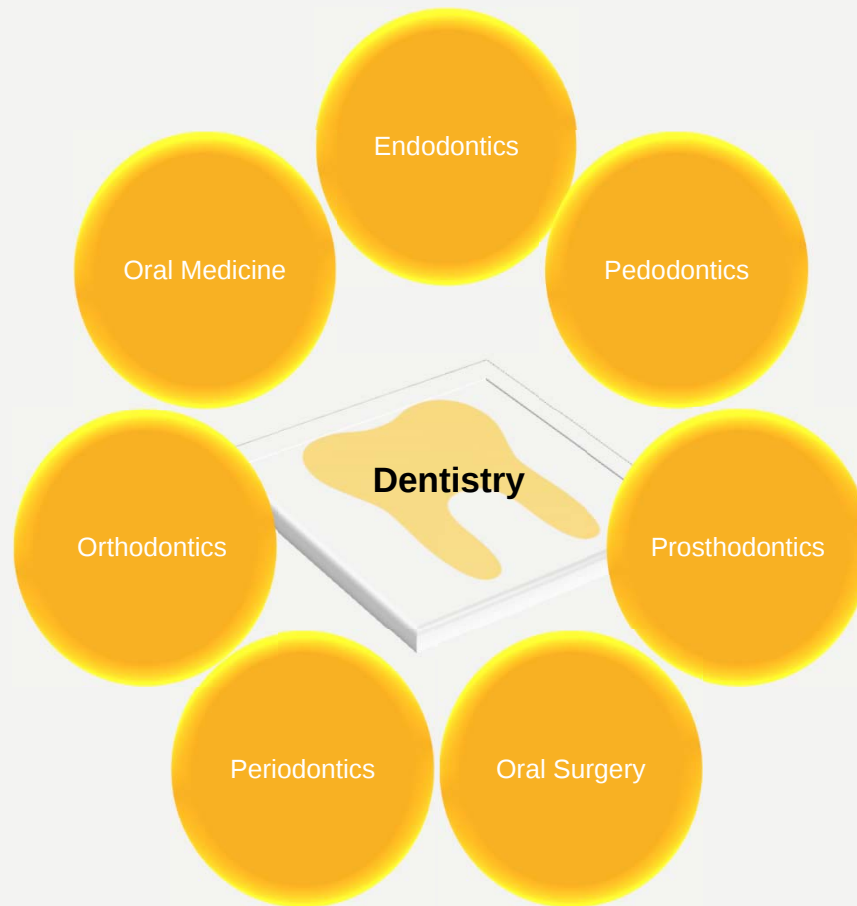
Presented by:
Dr. Apurva Varma
MBA HM20
Roll No- 0260

INTRODUCTION

Dentistry is a branch of medicine that is involved in the study, diagnosis, prevention, and treatment of diseases, disorders and conditions of the oral cavity, commonly in the dentition but also the oral mucosa, and of adjacent and related structures and tissues, particularly in the maxillofacial (jaw and facial) area. Although primarily associated with teeth, the field of dentistry or dental medicine is not limited only to teeth but includes other aspects of the craniofacial complex including the temporomandibular and other supporting structures.



DENTISTRY IS DIVIDED INTO 7 MAJOR BRANCHES:



Dental restoration

A dental restoration or dental filling is a dental restorative material used to restore the function, integrity and morphology of missing tooth structure. The structural loss typically results from caries or external trauma. It is also lost intentionally during tooth preparation to improve the aesthetics or the physical integrity of the intended restorative material. Dental restoration also refers to the replacement of missing tooth structure that is supported by dental implants.



OBJECTIVE

To assess global dental restoration market and forecast through various segments for year 2017-2021

METHODOLOGY

It is a descriptive exploratory study taking into account a detailed picture of the market by way of study, synthesis, and summation of data from multiple sources. Various facets of the market with a particular focus on identifying the key industry influencers have been identified. The data thus presented is comprehensive, reliable, and the result of extensive research, both primary and secondary.

Primary research

- Manufacturers/Suppliers
- Channel partners
- Industry experts
- Strategic decision makers

Secondary research

- Company's internal repository
- Industry journals and periodicals
- Government bodies
- Annual reports of key stakeholders



Dental Cements

- Broadly utilized material
- Cost-viable, Strong and durable
- Silvery-grey appearance restricts its usage to posterior teeth

Dental Amalgam

- GIC widely used
- Thin film thickness
- Moisture tolerant
- Fluoride discharge, can have a remineralization impact

- Aesthetic solutions
- Volumetric and morphologic stability
- Physical compatibility with the surrounding tooth structure
- Biocompatibility

Dental Composites

Dental Ceramics

- Dual role of strength and aesthetics
- Easier customization
- Intraoral stability and wear resistance

- Thin layer that protects from the influx of bacteria and irritants from restorative procedures.

Dental Liners

MARKET DRIVERS

- Increasing prevalence of dental caries
- Increasing road accident cases
- Mass digitization of dentistry

MARKET CHALLENGES

- High cost of cosmetic dental procedures coupled with lack of insurance
- Changing behavior of patients in utilizing dental treatment
- Altering laws and regulations

MARKET TRENDS

- Increasing demand for advanced cosmetic dental procedures
- Increasing public awareness towards availing dental treatment
- Continuous improvement in technology

Competitive Landscape

Number of companies	20+
Competitive factors	Pricing factors, quality of manufacturing, innovation and technology, partnerships
Key end-users	Hospitals, clinics, research centres
Key notable participants	3M ESPE AG, GC Corporation, Dentsply Sirona and Ivoclar Vivadent.
Market share of Tier I companies	65%
Distribution structure	Direct sales and distributors

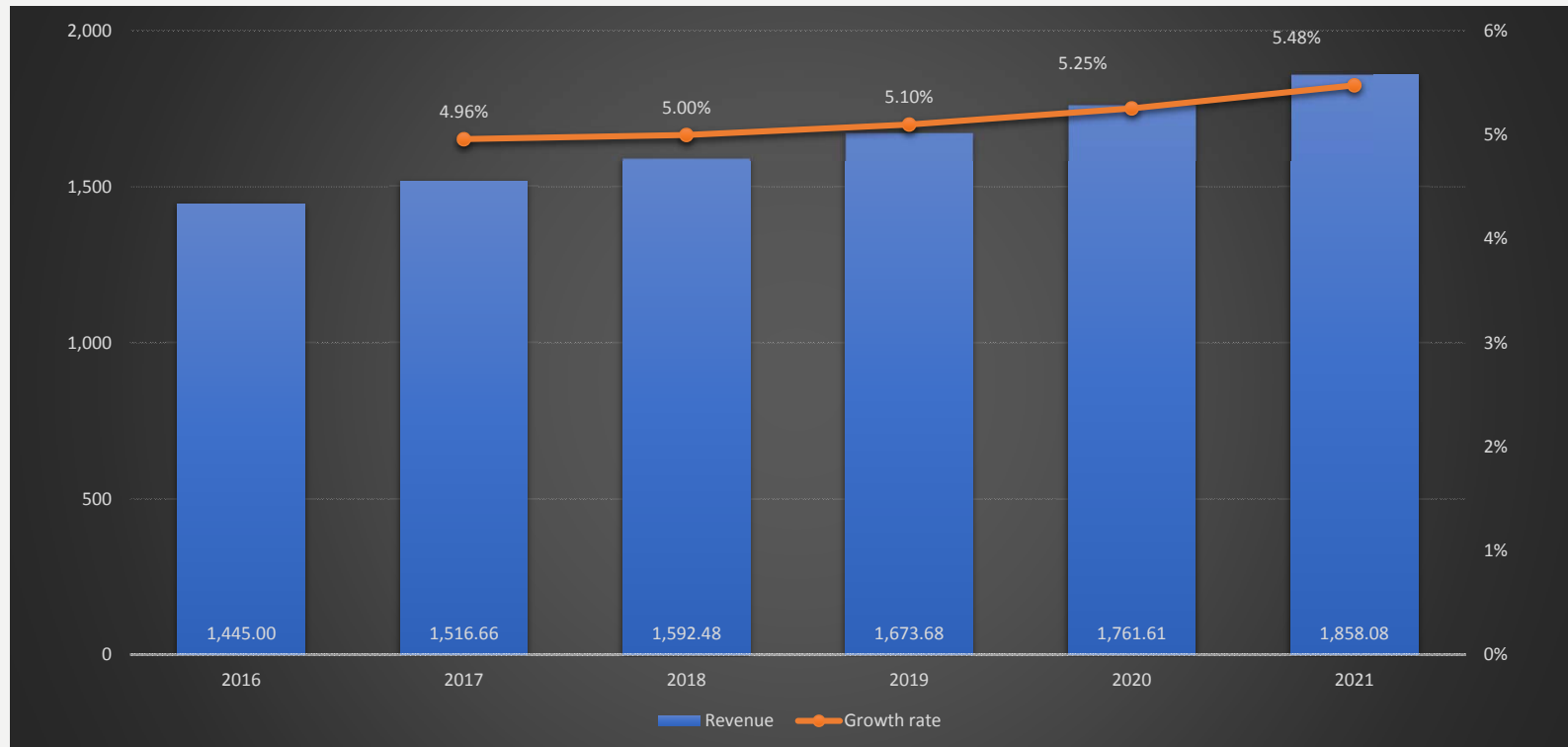
	Products	R&D strength	Future strategy
3M ESPE AG	Cements, composites, liners	\$1.8 billion spent in 2015	Innovation Organic growth through acquisition
GC Corporati on	Cements, composites	Good amount of revenue generation allotted to R&D	Collaboration with organizations, like dental schools and associations
Ivoclar Vivadent	Amalgam, cements, composites, ceramics	Has a dedicated team of around 170 experts in their R&D department	Continuous innovation Has its own subsidiaries in 24 countries which enables them to operate more effectively
Dentsply Sirona	Amalgam, composites, cements, liners	Spends \$125 million annually to advanced dentistry	Dentsply Sirona Academy educates over 350,000 professionals annually M&A for technology and product development

3M is the leader with a wide range of products for dental restoration, expanded geographic footprint as well as increased focus on innovation and organic growth strategy.

RESULTS

The Global dental restoration market size in 2016 is estimated at \$1445 million which is expected to reach at \$1858.08 million at a CAGR of 5.16% during the forecasted period.

Global dental restoration market 2017-2021 (\$ million)

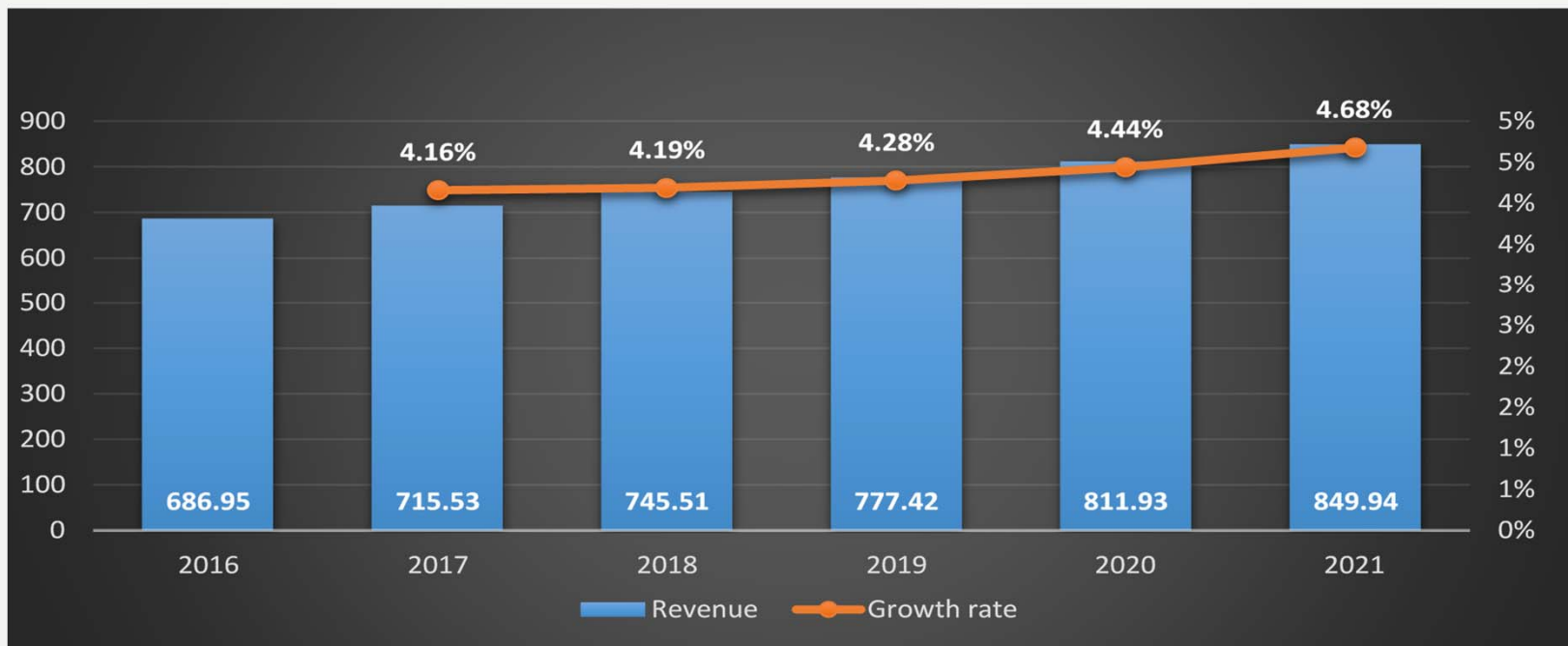


GEOGRAPHICAL SEGMENTATION

Americas

The market is expected to grow from \$686.95 million in 2016 to \$849.94 million in 2021 at a CAGR of 4.35% and it accounts for 47.54% of global dental restorative materials market share.

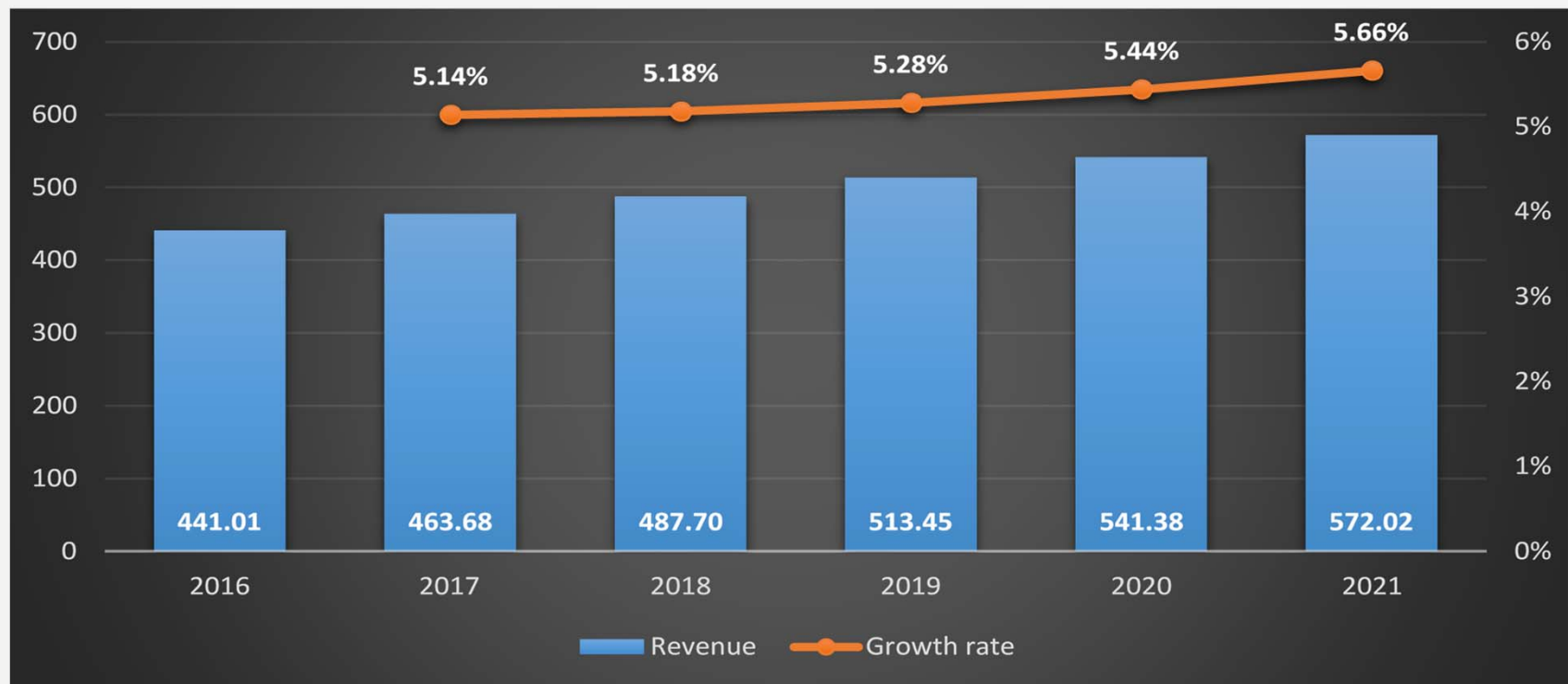
Global dental restoration market in Americas 2017-2021 (\$ millions)



Europe Middle East & Africa (EMEA)

The market is expected to grow from \$441.01 million in 2016 to \$572.02 million in 2021 at a CAGR of 5.34% and it accounts for 30.52% of global dental restorative materials market share.

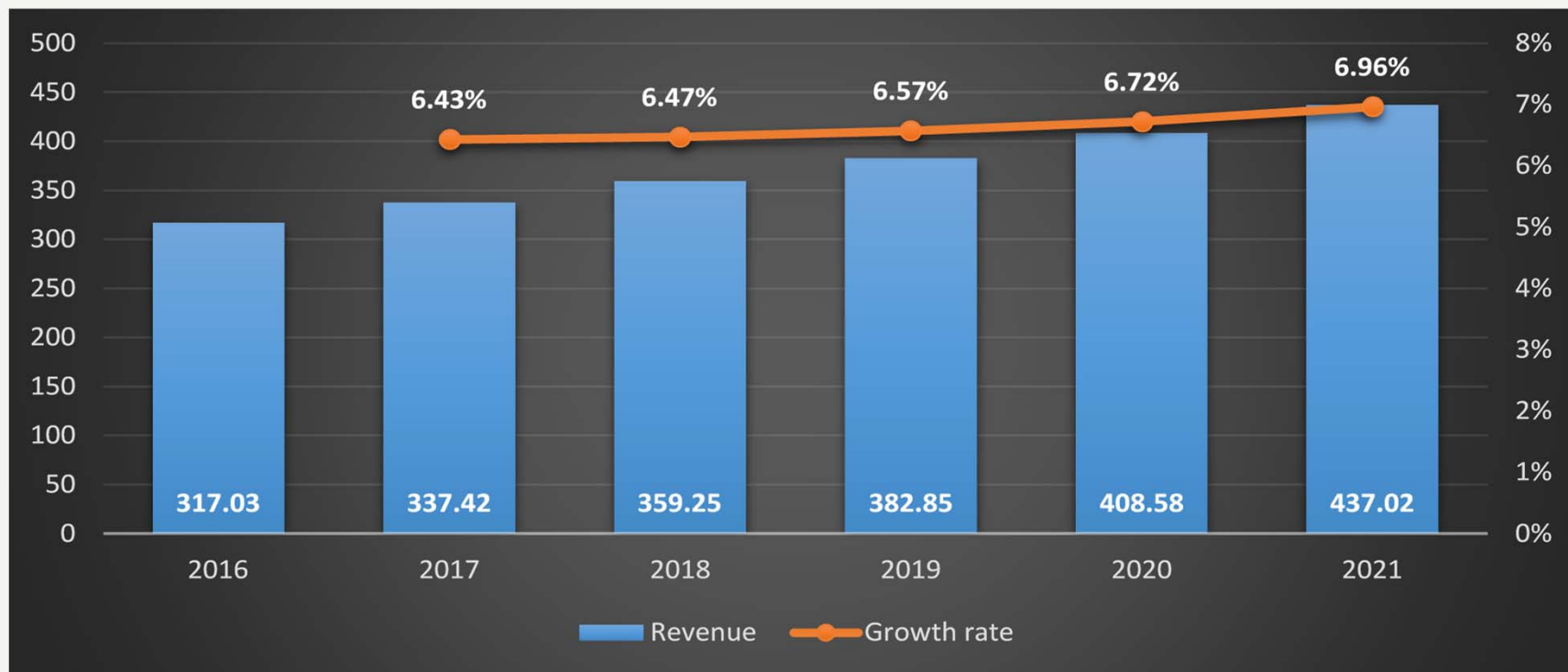
Global dental restoration market in EMEA 2017-2021 (\$ millions)



Asia Pacific (APAC)

The market is expected to grow from \$317.03 million in 2016 to \$437.02 million during the forecasted period at a CAGR of 6.63% which is fastest among all regions. It accounts for 21.94% of global dental restorative materials market share.

Global dental restoration market in APAC 2017-2021 (\$ millions)

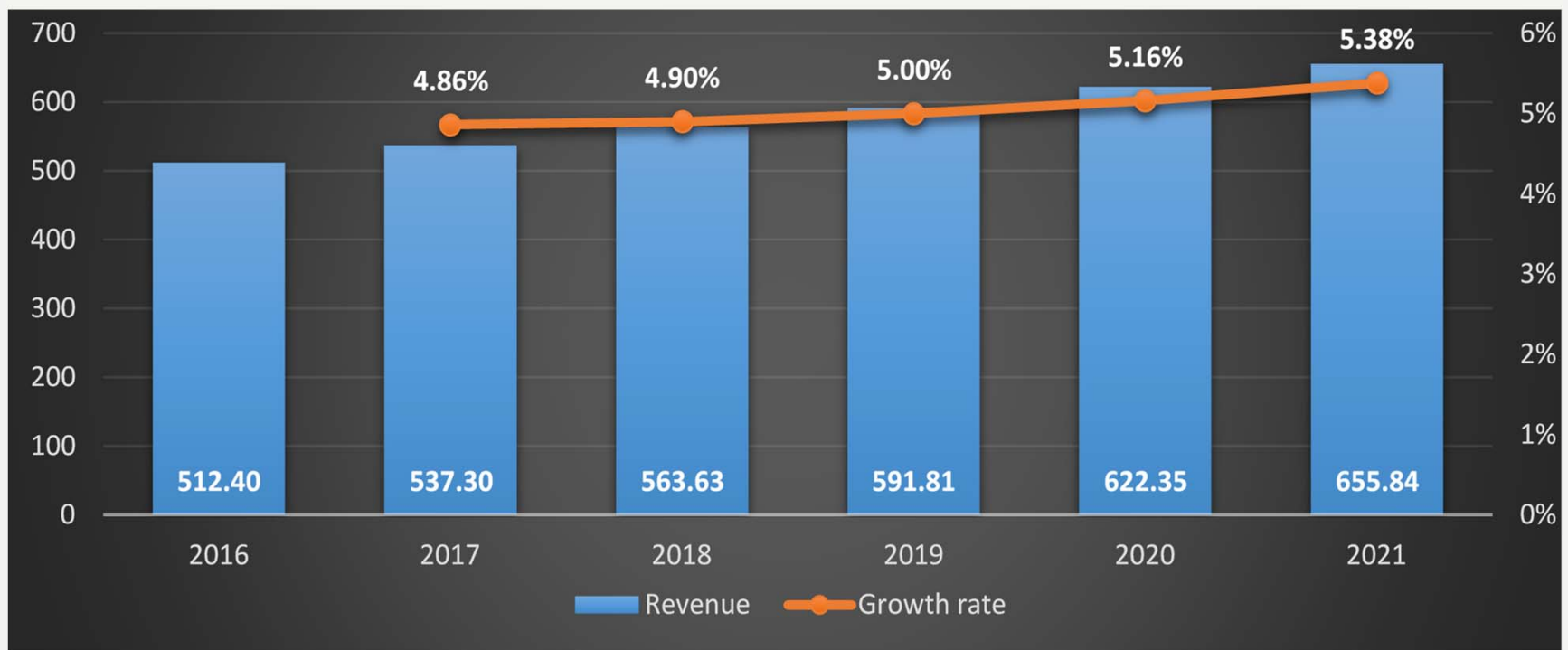


PRODUCT SEGMENTATION

Dental amalgam

The market is expected to grow from \$512.40 million in 2016 to \$655.84 million in 2021 at a CAGR of 5.06%.

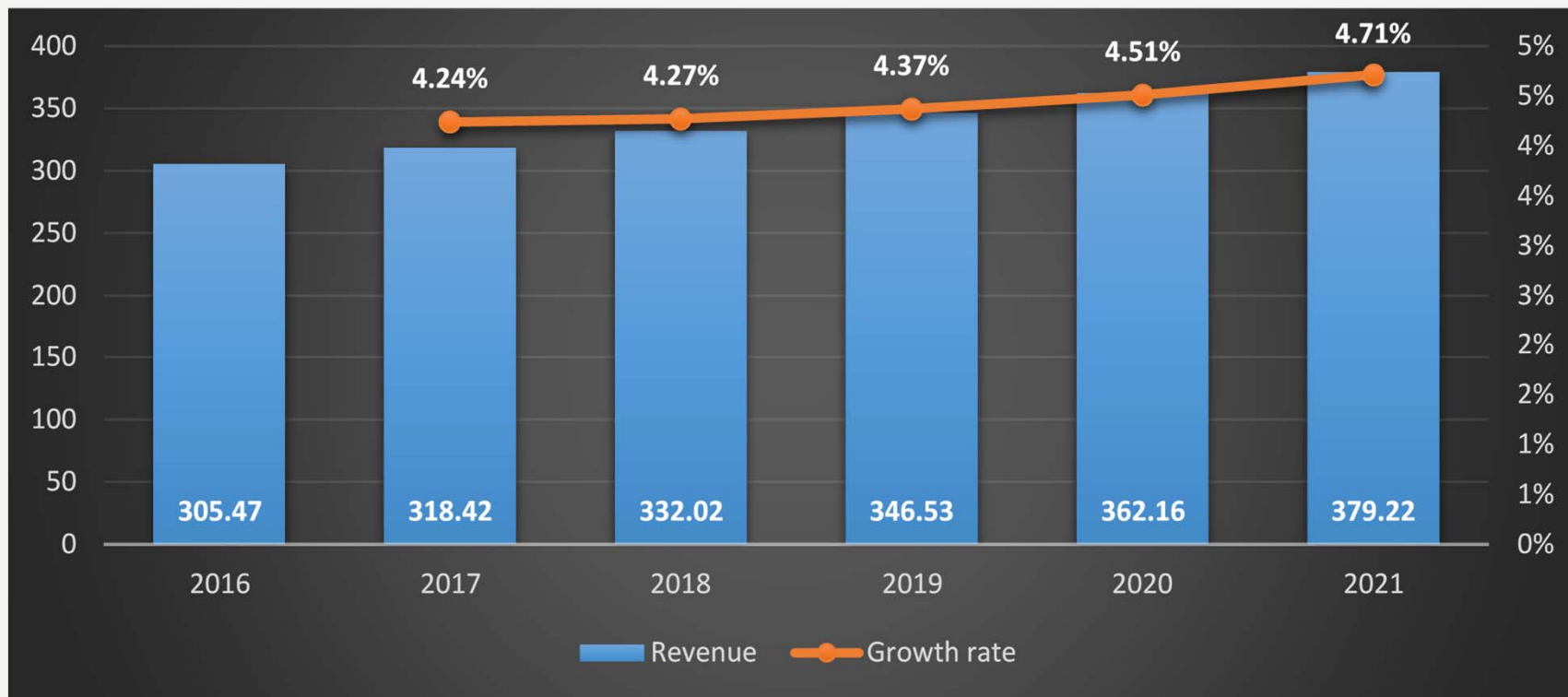
Dental amalgam market size and forecast (\$ million)



Dental cements

Market share of dental cements was \$305.47 million in 2016 which is expected to reach at \$379.22 million during the forecasted period at a CAGR of 4.42%.

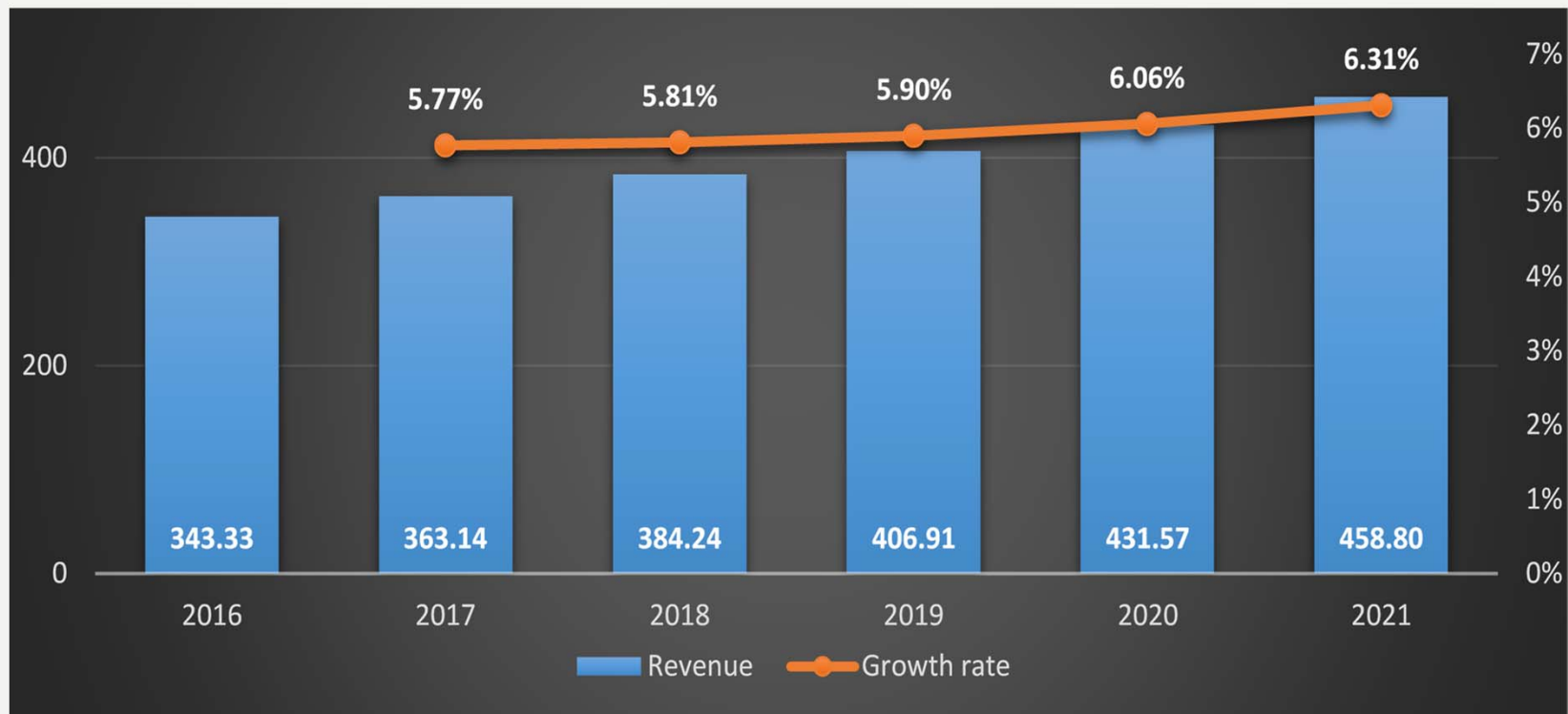
Dental cements market size and forecast (\$ million)



Dental composites

Market share of dental composite was \$343.33 million in 2016 which is expected to reach at \$458.80 million during the forecasted period at a CAGR of 5.97%.

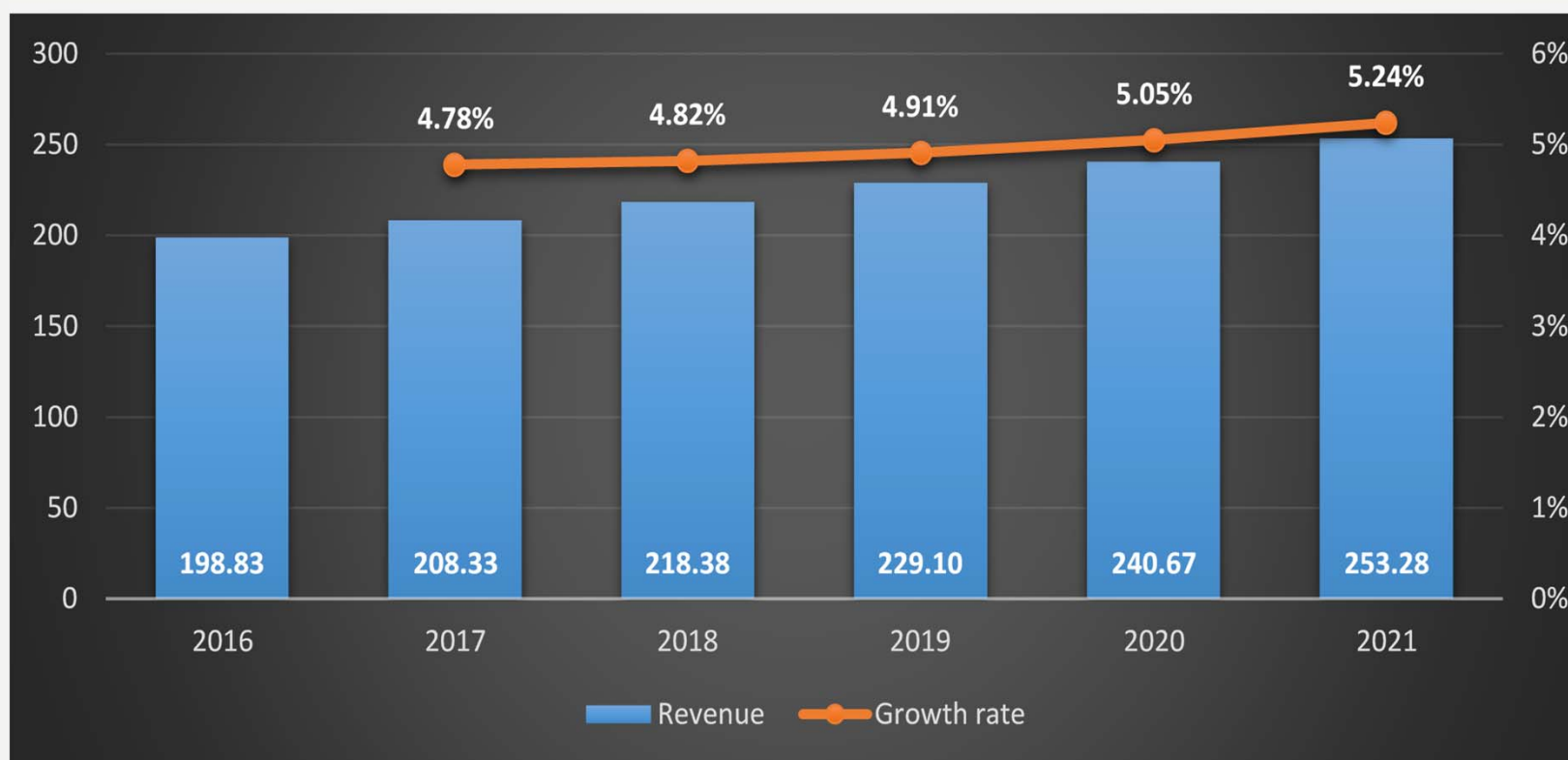
Dental composites market size and forecast (\$ million)



Dental ceramics

Market share of dental composite was \$198.83 million in 2016 which is expected to reach at \$253.28 million during the forecasted period at a CAGR of 4.96%.

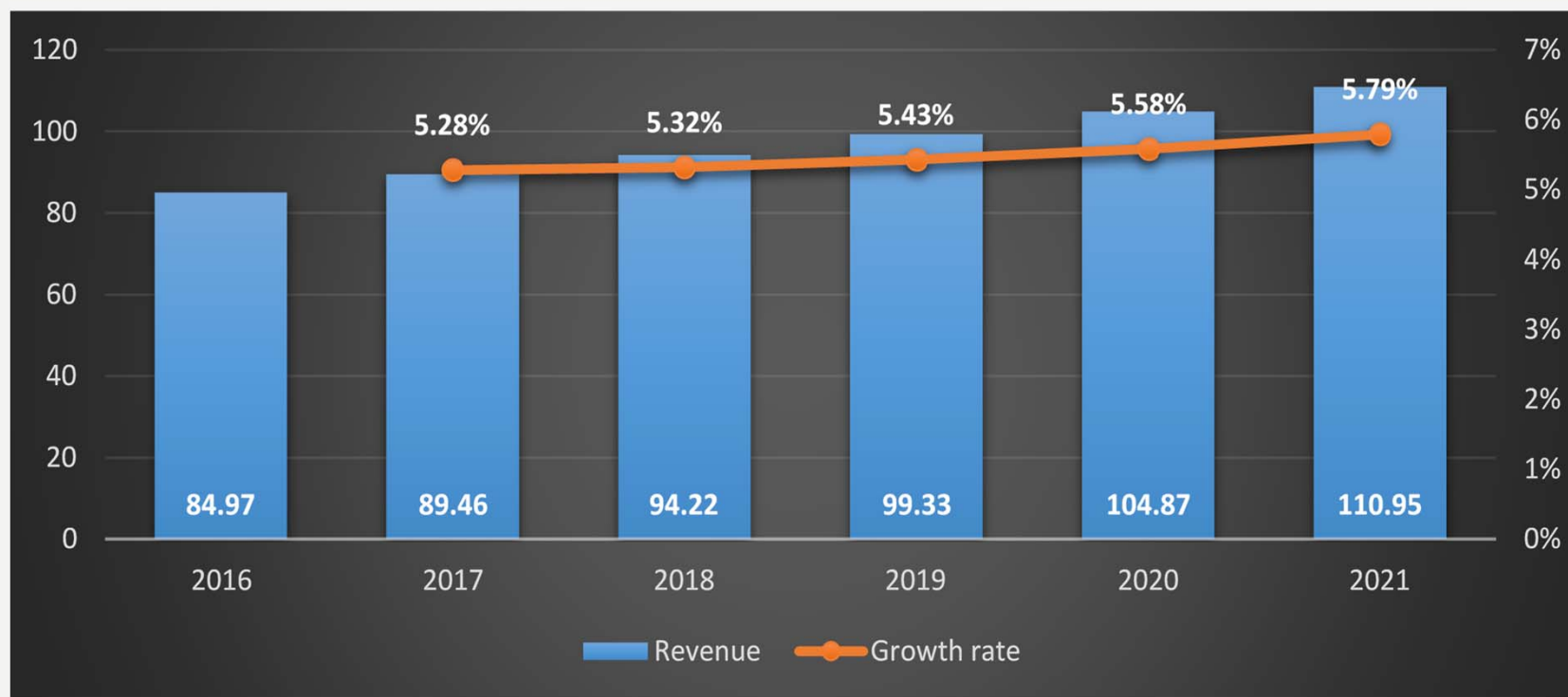
Dental ceramics market size and forecast (\$ million)



Dental liners

Market share of dental liners was \$84.97 million in 2016 which is expected to reach at \$110.95 million during the forecasted period at a CAGR of 5.48%.

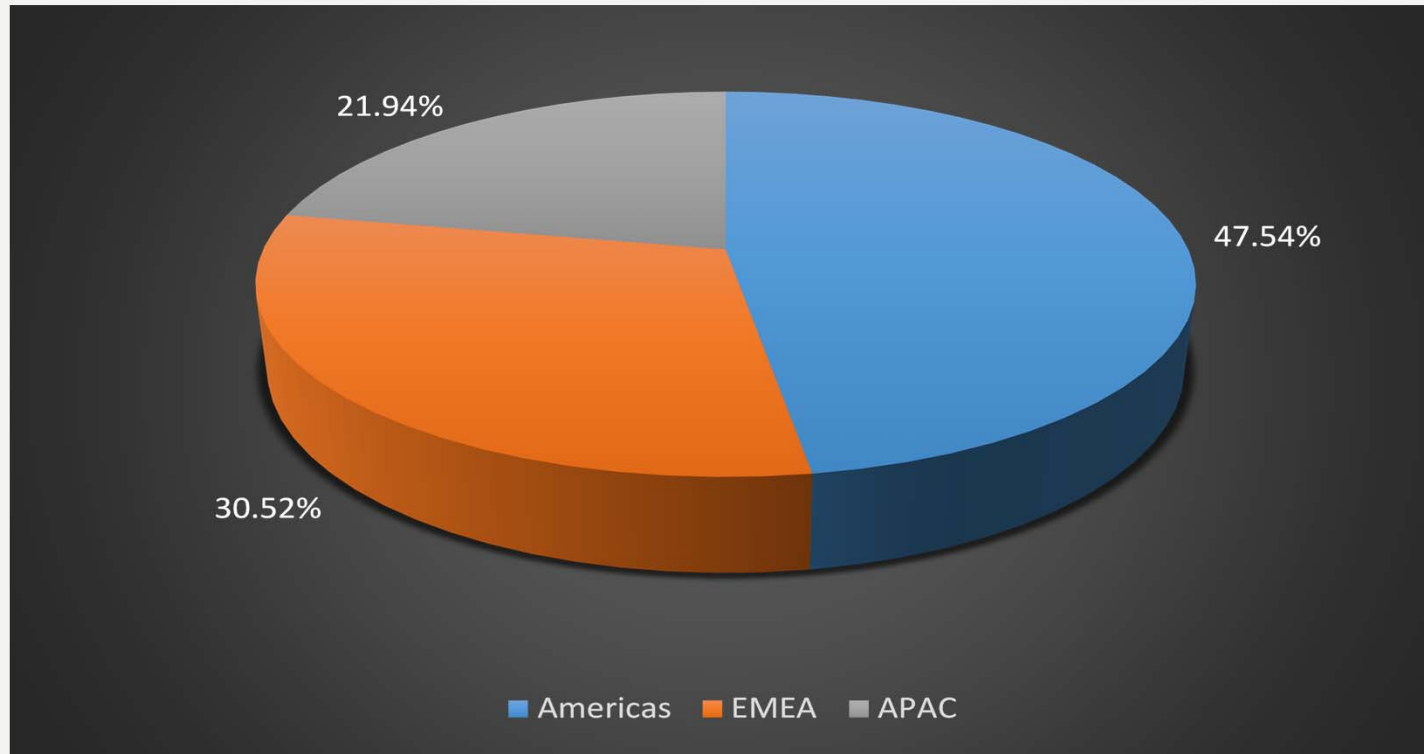
Dental liners market size and forecast



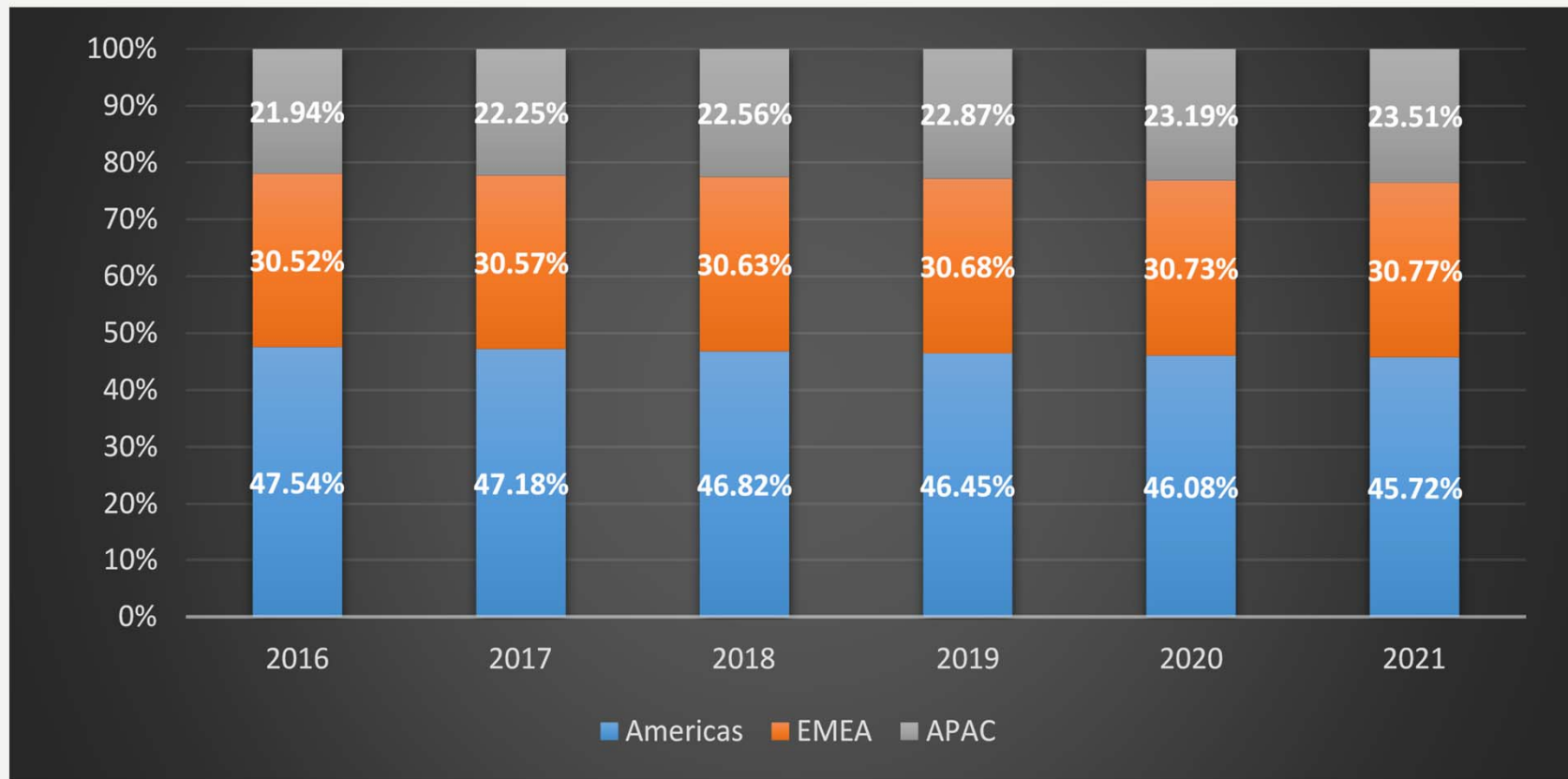
CONCLUSION

In 2016, the Americas dominated the global dental restorative material market with a share of 47.54% followed by EMEA (30.52%) and APAC (21.94%).

Global dental restoration market geographic segmentation (2016) (%)

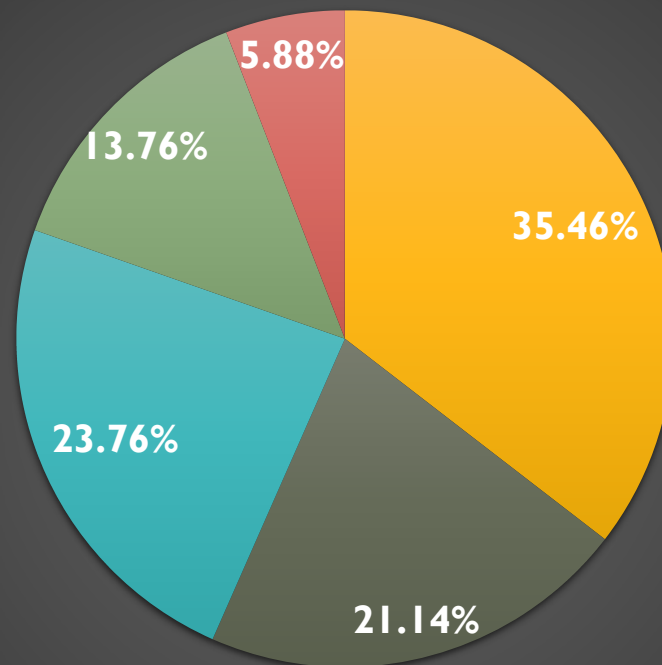


Global dental restoration market geographic segmentation 2016-2021



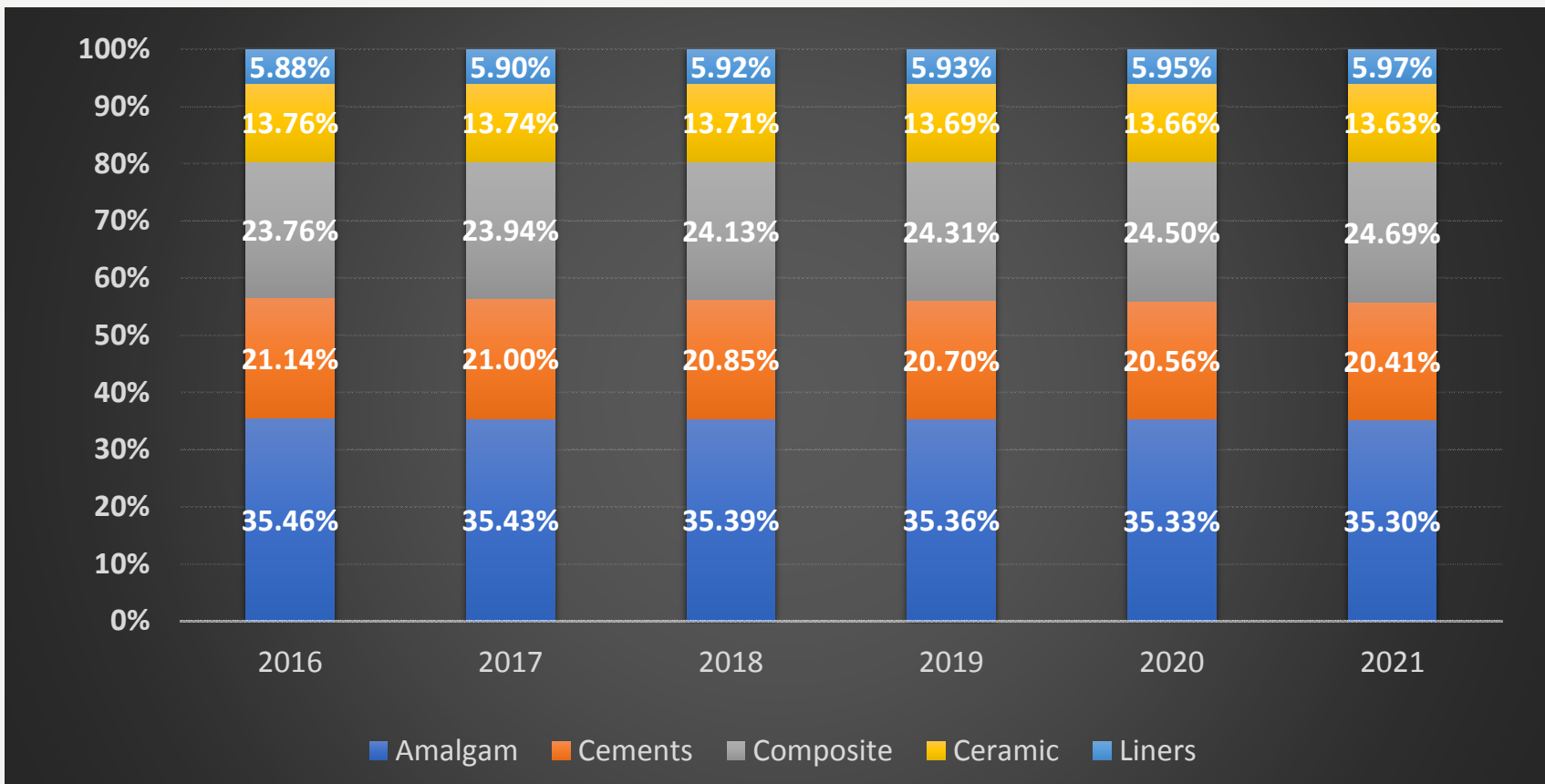
Five products have been identified under dental restorative market namely dental amalgam, dental cements, dental composite, dental ceramics and dental liners.

Global dental restoration market product share 2016 (%)



■ Amalgam ■ Cements ■ Composite ■ Ceramic ■ Liners

Global dental restorative product segmentation 2016-2021 (%)



Thank You