The dental implant market, consisting of implants, abutments, and other devices, in Europe was valued at approximately US$1.6 billion in 2012. Until the end of the year, the market will continue to contract slightly. It is expected to recover, however, and reach a value of just under US$2.3 billion by 2021.

Germany reigns as the largest market, worth over US$300 million in 2012—almost the equivalent of France and Spain combined. Overall, these two countries have the lowest growth rates, with both suffering from either low GDP growth or high unemployment rates along with overall concerns regarding unsustainable national debt levels.

Demand for dental implant treatment continues to be fuelled by the ageing population. The US Census Bureau forecasts that the population aged 65 and older in Europe’s seven key markets will grow at an average compound annual growth rate of approximately 1.5% until 2021, whereas the total population will only grow at approximately 0.3% per year. As people age, their oral health tends to deteriorate, resulting in edentulism, for which implant restoration is increasingly becoming a recommended treatment option.

For most European patients, dental implant procedures are considered elective and need to be paid out-of-pocket by patients. As a result, financial considerations are among the most important factors influencing patients’ decision to undergo these treatments. The unstable economy has resulted in increased patient hesitance to seek dental implant treatment and in higher preference for lower-risk and less-costly traditional procedures and products, such as traditional loading (instead of immediate functional loading) and screw-retained abutments (over cement-retained ones).

Aside from the economy, countries such as Sweden and the Netherlands have experienced drastic shifts due to changes in government reimbursement. In the past year, both countries’ markets have suffered declines due to governments proposing changes to reimbursement. This uncertainty regarding dental implant treatment coverage has fuelled physician and patient reluctance to perform and undergo procedures.

The current dental implant market is defined by a never-ending number of competitors in the marketplace. Competition will become increasingly fierce with the recent merger of DENTSPLY Friadent and Astra Tech Dental to form DENTSPLY Implants, placing the company in direct competition with market leader Straumann for the top spot. While physicians and
The European dental prosthetics and CAD/CAM devices segments are currently experiencing two opposing forces that will determine the future of these segments. On one hand, the economic crisis is far from being over. Southern European countries such as Spain, Italy and to some extent France are going through an economic downturn, which is delaying dental restorations and slowing down innovation. On the other hand, the segments are growing at a significant pace owing to technological innovations in restoration materials, CAD/CAM devices such as intra-oral scanners and smaller, but more efficient milling machines. The second trend is expected to trump the first one as countries slowly recover from the economic crisis and new technologies revive the market.

The European dental prosthetics and CAD/CAM devices segments are currently experiencing two opposing forces that will determine the future of these segments. On one hand, the economic crisis is far from being over. Southern European countries such as Spain, Italy and to some extent France are going through an economic downturn, which is delaying dental restorations and slowing down innovation. On the other hand, the segments are growing at a significant pace owing to technological innovations in restoration materials, CAD/CAM devices such as intra-oral scanners and smaller, but more efficient milling machines. The second trend is expected to trump the first one as countries slowly recover from the economic crisis and new technologies revive the market.

The majority of crowns milled from CAD/CAM blocks on chairside systems are made of all-ceramic material. However, most dental restorations are produced by a process that is lengthy and labor-intensive. Laboratories are still the main providers of dental prosthetics. In 2012, zirconia crowns represented over half of the CAD/CAM blocks segment, with the remainder being divided between porcelain and acrylic/composite products. By 2019, porcelain blocks are expected to close the gap, exceeding half of all blocks sold. This trend is consistent with the ever-increasing demand for all-ceramic restorations and the technological developments that make ceramic restorations more resilient and natural-looking than their counterparts.

The future of scanner software lies in open systems that create a scan file that can be sent to any milling centre in the world. Dental Wings is making great strides by providing this open-architecture software and affordable scanners to both laboratories and dentists. Through exclusive partnerships with Straumann and 3MESPE, Dental Wings is aiming at creating compatible global solutions for a variety of stand-alone scanners.

Alongside these rising stars, companies like Sirona, 3Shape, 3MESPE and DeguDent maintain their significant market share in the CAD/CAM systems segment. Sirona is the clear market leader in intra-oral scanners. Even though block prices have remained stable or dropped owing to increasing competition from Asian companies, the double-digit growth in unit sales largely made up for price cuts, as the segment grew by over 10 per cent in 2012. The growth in the CAD/CAM systems segment, particularly chairside systems. Chairside systems come with a milling machine that mills the restorations from blocks. As sales of chairside systems have increased significantly and will continue to do so up to the end of 2019, the blocks segment has followed that demand closely.

The European dental prosthetics and CAD/CAM devices segments are currently experiencing two opposing forces that will determine the future of these segments. On one hand, the economic crisis is far from being over. Southern European countries such as Spain, Italy and to some extent France are going through an economic downturn, which is delaying dental restorations and slowing down innovation. On the other hand, the segments are growing at a significant pace owing to technological innovations in restoration materials, CAD/CAM devices such as intra-oral scanners and smaller, but more efficient milling machines. The second trend is expected to trump the first one as countries slowly recover from the economic crisis and new technologies revive the market.

The majority of crowns milled from CAD/CAM blocks on chairside systems are made of all-ceramic material. However, most dental restorations are produced by a process that is lengthy and labor-intensive. Laboratories are still the main providers of dental prosthetics. In 2012, zirconia crowns represented over half of the CAD/CAM blocks segment, with the remainder being divided between porcelain and acrylic/composite products. By 2019, porcelain blocks are expected to close the gap, exceeding half of all blocks sold. This trend is consistent with the ever-increasing demand for all-ceramic restorations and the technological developments that make ceramic restorations more resilient and natural-looking than their counterparts.

New technologies are beginning to blur the lines that separate different dental restoration materials. Composite materials are becoming more popular, as they combine the most desirable characteristics of their components. New products such as translucent zirconia or hybrid ceramics are promising better value with increased resilience and a more natural look.

Higher demand for these products will drive higher prices for quality dental prosthetics. The price hike will be balanced by increasingly cheaper imports from countries such as China, Taiwan and Morocco. Overall, the dental prosthetics segment in Europe will experience a slight price increase by 2019 owing to better-quality crowns and bridges made of new, more aesthetically pleasing and robust materials.

Intra-oral digital impression-taking scanners are becoming more popular in the European market. Intra-oral digital impression-taking scanners are attracting the attention of more dentists and laboratories alike owing to their ease-of-use, non-invasiveness and reliability. New-generation intra-oral scanners allow dentists to take impressions without the use of toothpaste, which makes the process much faster and less intrusive for patients. Once the impression has been taken, the technician can modify the image as he or she wishes and then send it to a laboratory for milling. The increase in the number of intra-oral scanners in the market is pushing scanner manufacturers to offer open-architecture software that will allow users the freedom to choose the milling centre of their preference. All these aspects of intra-oral scanners make them attractive investments for dental offices and laboratories alike.

Over the next few years, the sales of intra-oral scanners will reach double-digit growth. Dentists will increasingly opt for these scanners instead of chairside systems owing to their affordability and practicality. The prices of these scanners will decrease, making them even more affordable. The average selling price of an intra-oral scanner was a little over £28,000 in 2012, an investment that medium-sized laboratories and dentists can easily afford.

The main competitor in this market is Sirona, which has over 20 years of experience in the intra-oral scanners segment. Its latest product, the CEREC Omnicam, has introduced a new technology with colour scanning, which allows the dental technician to scan the natural colour of the tooth in 3D. A similar product was launched by 3Shape at the 2013 International Dental Show in Cologne. Trios Color can scan and capture the teeth and gingiva quickly, realistically and in great detail. Intra-oral scanners are evidently becoming the new standard at dental practices.

Carmen Chan is a Senior Market Research Analyst at Millennium Research Group, a global market intelligence provider based in Toronto in Canada.
An interview with Nobel Biocare CEO Richard Laube

丰富了OsseoCare平台的第二代软件平台。我们还带来了三款新植入物进入市场，更新了我们的NobelClinician和NobelProcera软件平台。

Richard Laube has been CEO of Nobel Biocare since mid 2011.

“Since 2011 we have brought three new implants into the market and upgraded our NobelClinician and NobelProcera software platforms.”

With a record number of 2,000 participants, dental implant solutions provider Nobel Biocare held its second Global Symposium in the US in June. today international had the opportunity to speak with CEO Richard Laube about the state of his company, business in Europe and the newly launched Foundation for Oral Rehabilitation.

Richard Laube: The meeting has been a pleasant surprise for us. We were sold out already in April and even had to turn 500 to 600 customers away. On the positive side, this makes it a real special event. We were a little bit nervous about the logistics, but all went very well. Speakers have also been extremely disciplined and very focused in their messages that they wanted to convey, I am only hearing good things from the participants.

You joined Nobel Biocare during turbulent times. What is the state of the company compared to when you took over as CEO in 2011?

It is true that we have been drifting over the years but we are back with patient-focused, clinically relevant and evidence-based innovation. We are in materially better shape today to when I joined the company two years ago. The results from Q1/2013 were a pleasant surprise as we expected the numbers to be lower. We are seeing good things in our business and are confident we can keep this momentum going. Since 2011 we have brought three new implants into the market and upgraded our NobelClinician and NobelProcera software platforms. We also announced a new second-generation NobelProcera 2G Scanner and introduced the OsseoCare Pro for iPod.

The size of Nobel Biocare is also much smaller and I learned that even the slightest changes can have a dramatic impact on the whole organisation. Therefore, you have to be thoughtful about every decision you take. On the other hand, things can be done much faster, which gives us an advantage when it comes to innovation, as we are able to work very closely with our researchers and developers. You do not usually get this out of big companies.

Nobel Biocare seems to struggle in Europe and Asia, in particular. Do you consider these problems to be an effect of the current market conditions or are there other reasons for this negative performance?

We had years of struggle in Europe but our figures there have consolidated this year compared to the first quarter of 2012. We are actually seeing increasing evidence that we perform better than some of our key competitors. I personally expect us to be out of the water soon and to see relative progress. I estimate we will do at least as good as the market in that region, if not better.

Our problems in Asia are of mathematical nature and concern our business in Japan which used to provide 17 per cent of our total business in the region. Difficulties there were in part market inflicted through the tsunami and the negative press on dental implants in 2012, in part self-inflicted as we were a little bit fooled by the positive numbers in prosthetics in the first quarter of that year, not looking at the implants that were actually going down. As we are seeing the implants rebound, I think we will have a good run in the second half of this year.

How does your company intend to return to sustainable growth?

We grow when customers order from us and these customers are starting ordering more when we are doing good things for them in the area of innovation, commercial relationship partnering programmes, as well as in training and the education that we provide to all screws, for example, in a way that is very difficult to replicate by our competition.

Besides new third-party platforms, implant bridges and scanning design centres we presented at IDS in Cologne this year, we are announcing angulated screw channels here in New York. With this subtle but almost revolutionary development, we can now go in by 25 degrees on the cheek site or the tongue site and make access to screw-retained components much easier.

Richard Laube. (DTI/Photos Fred Michmershuizen, DTA)

Richard Laube has been CEO of Nobel Biocare since mid 2011.

Patients just do not necessarily want implants, they really want teeth.”

An interview with Nobel Biocare CEO Richard Laube

丰富了OsseoCare平台的第二代软件平台。我们还带来了三款新植入物进入市场，更新了我们的NobelClinician和NobelProcera软件平台。我们也有一个新推出的公告。所有这些综合提供了可能的最令人兴奋的产品线在行业，并提供我们与的机会的领导再次。

我仍然认为我们有很好的稳定性在这个团队中，这非常重要。工作涉及业务关系，你不能失去这种关系，通过改变人。

你一直在为大公司工作，如Nestlé，事情怎么样？

过去的工作经验让我明白，工作在牙科保健中是非常困难的。我们可以使用CAD/CAM做很多事情，但有三个或四个单位的桥梁。

With the NobelProcera 2G Scanner and a new open access partnership with 3Shape you have recently consolidated your foothold in dental CAD/CAM. How important has this field become for your company and will we see new products to be introduced for this segment in the future?

CAD/CAM is critical. Patients just do not necessarily want implants, they really want teeth. Our ability to provide them with teeth in complex reconstructions is a huge competitive advantage if you are dealing with anything more than a three- or four-unit bridge. We have a disproportionate market share in what we call complex screw-retained componentry. We can put together a 12-unit zirconia implant bridge with eight holes for screws, for example, in a way that is very difficult to replicate by our competition.

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the DELTSPY Astra Tech merger and growing competition from manufacturers in Asia, e.g. Korea, the implant market seems to be on the brink of major change. How do you evaluate the development of the market and how is your company positioning itself in the years to come?

We welcome any competition as it is beneficial for patients. Our challenge is to stay ahead and innovate. Implant dentistry is still a field that is emerging rapidly and transforming itself constantly through innovation. Our aspiration is to stay in front of that.

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞

With the Foundation for Oral Rehabilitation (FOR) your company has launched a new endeavor in New York. What role will it play for your business?

I would like FOR to give Nobel Biocare sweaty palms because they are talking about patient care in ways that the industry cannot deliver. FOR is supposed to always be a big step ahead of us providing us with the chance to develop new ideas and open new business opportunities in the future.

Thank you for the interview. ☞