Patient preference fuelling transition in US$1.6 billion American and European overdenture market

Graeme Fell & Jeffrey Wong, Canada

The transition to fixed-hybrid restorations from removable options is driving sales growth in the US and European overdenture market. While the removable overdenture market is still growing, an increasing number of people are opting for fixed-hybrid restorations. This is a result of patient preference and awareness about the benefits of fixed full-arch restorations, as well as demographic factors. While the shift is occurring across both the US and Europe, some of the more mature markets in each region are seeing lower growth rates.

Trends in total overdenture market

The US and European market for overdentures and implant-supported bridges is poised to experience mid-single-digit growth by 2024, reaching approximately US$2 billion as reported by iData Research. This analysis includes the markets for overdentures (implant-supported, removable implant-supported bar-retained and fixed-hybrid overdentures) and implant-supported bridges (cemented and screw-retained). Market growth is expected to result from the transition to premium fixed-hybrid restorations, which have higher average selling prices than do alternatives. While competitive price cuts and inexpensive solutions are limiting potential market growth, these factors are primarily offset by high unit growth. Market growth is expected to be higher in the US, whereas the more mature European market will experience lower single-digit growth.

Increased marketing and patient awareness fuelling US market

In 2017, the US overdenture market grew notably, largely owing to increasing patient awareness with regard to implant-supported overdentures. Several entities, such as ClearChoice Dental Implant Centers, have widely advertised their services across the US, attracting more patients not only to their companies, but also towards implant-supported restorations in general. Furthermore, laboratory consolidation is occurring throughout the country, absorbing small-scale laboratories that lack the financial means to invest in new technology. With various corporate entities competing for market share in dental implants through advertising, patient awareness is expected to continue increasing.

Demographic factors are also driving the market in the US. In 2017, over 49 million people in the country were estimated to be over 65 years old, accounting for 15.2% of the population. By 2024, this demographic is expected to exceed 17%, reaching 20% by 2050. This age group represents the largest demographic of edentulous patients. Consequently, the growth of the elderly population will result in more potential patients seeking implant-supported full-arch restorations. Furthermore, the rising wealth of retirees, relative to that of previous generations, will increase interest in new technologies and premium products, further pushing this market forward.

Maturing removable implant-supported bar-retained overdenture market in Europe

The European market for implant dentistry is considerably more mature than that of the
US, but will still see growth as a result of demographic factors, economic recovery and the mentioned transition to fixed-hybrid restorations. The European market, particularly in the northern regions, has in the past consisted of a larger share of removable implant-supported bar-retained overdentures than in the US. However, this market is maturing considerably, with removable implant-supported bar-retained overdentures being cannibalised by both implant-supported and fixed-hybrid restorations. This transition has been brought about by both patient and dentist preference.

Further contributing to the maturing market is the decline in the number of fully edentulous patients. While single-unit implant-supported restorations are increasing the demand for crowns, they are concurrently taking market share away from bridges. In turn, partial restorations are taking market share away from full-arch implant-supported restorations. Improvements in dental health will mean fewer and fewer teeth will require replacement. Conversely, Europe is experiencing a marked demographic shift: low birth rates and higher life expectancy are dramatically changing the shape of the population. In 2017, people aged 65 and over were an estimated 19.2% of the overall population, an increase of 0.3% compared with the previous year and an increase of 2.4% compared with ten years earlier. This trend will continue throughout the forecast period. While these two market factors oppose each other, the growth of the elderly population will ultimately result in more potential patients seeking implant-supported full-arch restorations.

Most of the European economies are starting to experience growth after a slow recovery from the European debt crisis. This trend is especially prevalent in western Europe, where Germany, France and the UK saw high gross domestic product growth in 2017. Rising spending habits and patient preference for permanent fixed teeth have driven demand for premium-priced fixed-hybrid restorations. The average selling price for fixed-hybrid overdentures is the highest of all segments; owing to the high number of fixtures required and the more expensive fixed prosthesis. Consequently, increased market penetration of these restorations will buoy the average selling prices of the total market in the face of price competition, driving up market value.

Increasingly competitive implant-supported bar market despite Nobel Biocare’s leading position

Among CAD/CAM manufacturers, Nobel Biocare maintained its leading market share in 2017, despite increased competition across the market. The increasing affordability of CAD/CAM systems has allowed laboratories to enter the CAD/CAM implant-supported bar market in a significant way. This, combined with other competitors expanding their milling capabilities, has resulted in a highly competitive market in the US and Europe. Amidst market consolidation and technological development, attractive pricing and unique solutions will allow competitors to maintain market share.

Editorial note: This article is based on iData Research’s 2018 US market report suite for overdentures and European market report suite for overdentures, which were both published in May. Reference list is available from the publisher.

Graeme Fell is a Research Analyst at iData Research and was the lead researcher for the 2018 US and Europe market report suites for overdentures and implant-supported bridges. His work has included a number of other research projects in other dental and medical device segments.

Jeffrey Wong is the Strategic Analyst Manager at iData Research. He has been involved in numerous dental market research projects over many years and now leads a team involved in that market and many others.

iData Research is an international market research and consulting firm focused on providing market intelligence for the medical device, dental and pharmaceutical industries. More information about the company’s research can be found at https://idataresearch.com/.

Fig. 2: Implant bar market competitive landscape for CAD/CAM manufacturers in US and Europe (2017).