HKIDEAS: Shaping the future of oral health

A welcome message by HKDA Vice President and Chairman of the Organising Committee of the HKIDEAS 2015, Dr Nelson Wong

The Hong Kong Dental Association is proud to present the Hong Kong International Dental Expo and Symposium (HKIDEAS) 2015 which will be held on 7–9 August 2015. It will be a continuation of our commitment to foster advancement and exchange of knowledge and skills in dentistry.

It is now the fifth time we host HKIDEAS since it was launched in 2010. The theme of this year’s Congress is “Shaping the Future of Oral Health.” We are honoured to have attracted once again prominent figures from the field who will deliver stimulating lectures for the three-day scientific programme that will cover the latest trends in various specialties in dentistry, ranging from best clinical practices, aesthetics, implantology to endodontics, periodontics and other areas of interest.

Alongside the scientific programme, the trade exhibition offers a perfect opportunity for manufacturers and dealers to showcase their latest state-of-the-art products and devices to all the participants. We also believe the great diversity of attractions in Hong Kong will impress every participant, giving them memorable and interesting experiences.

I sincerely look forward to seeing you at the HKIDEAS 2015. Your participation will make this event another outstanding success.

Growing CAD/CAM abutment adoption vs increasingly popular discount implants

The various countries in the Asia Pacific region are all expected to demonstrate an increasing demand for dental implant treatments as a result of growing consumer awareness, the ageing population, growing accessibility (such as through the National Health Insurance Service coverage in South Korea), as well as greater product availability and other influencing factors. Traditionally, premium implant companies have dominated the dental implant market globally. However, in recent years, discounted implants have become increasingly popular, especially in the Asia Pacific region.

The growth of the discount implant segment will emerge at the expense of the premium segment and as a result is set to limit market growth for dental implant fixtures by lowering the market’s overall average selling price (ASP). In contrast, the final abutment market is set to experience an increasing ASP owing to the growing adoption of CAD/CAM abutments in the place of stock abutments. While commoditisation of stock abutments has greatly depressed the ASP of the final abutment market, growing adoption of CAD/CAM abutments is set to stimulate the final abutment market by pulling the ASP upwards.

Therefore, the dental implant market is set to grow in all four countries included in the Asia Pacific region in this report, namely Australia, South Korea,
Japan and China, despite varying pricing trends.

In the Asia Pacific dental implant market, consumer awareness, cultural tendencies and domestic regulations vary greatly. South Korea represents the most highly developed dental implant market as a result of being home to a number of global leading dental implant companies. This in turn has led to a high level of consumer awareness and ease accessibility to a variety of dental implant products. However, the dental implant market in South Korea is also highly discount dominant and led by domestic implant producer OSSTEM IMPLANT and as a result demonstrated the lowest regional dental implant ASP of US$86 in 2014.

In contrast, the Australian market remains highly dominated by leading premium implant companies, which collectively held over 70 per cent of the domestic market. Consequently, Australia demonstrated the highest dental implant fixture ASP in the region at US$345 in 2014. An increasing number of general practitioners are being trained in dental implant procedures in Australia, and general practitioners have been observed to be more cost sensitive relative to specialists. As a result of a growing number of general practitioners in the market, consumer preferences are shifting towards discounted solutions. Discount implant companies from the US and South Korea have recently been gaining market share in Australia. Throughout the forecast period, the premium segment of the market is expected to grow at a far lower annual growth rate relative to the discount and value segments in Australia. By 2021, it is expected that discount implants will represent 43 per cent of the overall units in the Australian market.

The Japanese and Chinese markets for dental implants are also dominated by premium companies. In recent years, OSSTEM IMPLANT has had a significant impact on the Chinese market, however, especially as a result of the training programme offered by the company’s Advanced Dental Implant Research and Education Center. All segments of the dental implant market in China are expected to demonstrate double-digit annual growth. However, the discount market is set to grow far more dramatically throughout the forecast period. By 2021, discount implant fixtures are set to represent over 50 per cent of the overall units in the Chinese dental implant market.

The shift towards discount implants in Japan is expected to be far less dramatic, especially owing to cultural barriers that limit the success of Korean dental implant companies. The premium implant segment is expected to remain the dominant dental implant market throughout the forecast period. Unit representation of discount implants is expected to increase slightly from 11.5 per cent currently to 14.6 per cent by 2021.

The growing acceptance of discount implants has been driven by Korean companies. The regional market leader, OSSTEM IMPLANT, held a 21.9 per cent share of the total dental implant market for the Asia Pacific region in 2014. The company has invested significantly in marketing efforts, which has led to the growing popularity of its products. Throughout the forecast period, OSSTEM IMPLANT and other discount implant companies, such as Megagen, Dentium and Neobiotech, are expected to capitalise on the growing popularity of discount implants. In contrast, premium implant companies, such as Straumann and Nobel Biocare, are expected to face increasing competitive pressures, especially in China and Australia.

Emphasis on CAD/CAM

In the dental implant market, the final abutment market is undergoing an opposing pricing trend relative to dental implant fixtures. CAD/CAM abutments are being increasingly utilised in the place of cheaply produced stock abutments. CAD/CAM development has been relatively rapid in the Asia Pacific region in recent years. A growing number of CAD/CAM milling centres have emerged to produce CAD/CAM abutments for the dental implant market. The overall region is set to demonstrate significant growth in the CAD/CAM segment for final abutments. In contrast to the dental implant fixture market, where discount products are gaining share, the overall final abutment market is set to demonstrate an increasing ASP CAD/CAM final abutments are relatively more expensive than stock abutments, which have traditionally dominated the market. The shift towards CAD/CAM abutments is set to be most significant in China. For the overall region, units of CAD/CAM abutments are set to grow at a compound annual growth rate of 22.1 per cent. By 2021, CAD/CAM abutments are forecast to represent 31.6 per cent of the overall abutment units in Asia Pacific.

Conclusion

Overall, the dental implant market, including fixtures and abutments, is set to grow at a compound annual growth rate of 11.5 per cent for the Asia Pacific region. The unit growth will far outweigh the ASP effects, and the dental implant market will grow to reach a higher penetration ratio for the overall Asia Pacific region.
The DTI publishing group is composed of the world’s leading dental trade publishers that reach more than 650,000 dentists in more than 90 countries.
HKIDEAS Hong Kong 2015—Floor plan

Registration: Hall 5F&G Concourse, Level 5, Phase 1, HKCEC
Exhibition: Hall 5G, Level 5, Phase 1, HKCEC

*The floor plan is subjected to change without prior notice.*
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Friday, 7 August

9:30–10:30
Periodontal medicine: A New Frontier for Periodontology, Hall 5F (Parallel Session A)
Speaker: Prof. Mark Bartold

Photodynamic Therapy for Periodontitis, Hall 5G (Parallel Session B)
Speaker: Prof. Michael Wilson

9:30–12:45
2nd Cross-Strait Forum on Dental Service for the Elderly, Meeting Room
New Trends in Oral Health Care for the Elderly in Taiwan
Speaker: Prof. Chun-pin Lin

The Development of Geriatric Dentistry in Hong Kong
Speaker: Dr Frankie So

10:30–11:15

Break

11:15–12:45
Managing Dentin Hypersensitivity to Improve Quality of Life, Hall 5F (Parallel Session A)
Speaker: Prof. Liang-lin Seow
Towards Functional Foods for Oral Health Care: Isolation, Identification and Evaluation of Food Components with Anti-caries and/or Anti-gingivitis Activities, Hall 5G (Parallel Session B)
Speaker: Prof. Michael Wilson

12:45–14:15
Lunch Break

14:15–15:45
Challenges in Modern Implant Practice: The Multidisciplinary Team Approach, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas
Restorations Utilizing Bulk Filling Technique, Hall 5G (Parallel Session B)
Speaker: Dr Myung-ho Maeng

15:45–16:30
Break

Saturday, 8 August

9:30–10:30
Augmentation procedures: Simple and predictable?, Hall 5G (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

Conservative, conventional and unconventional endodontics, Hall 5G (Parallel Session B)
Speaker: Dr Patrick Tseng

9:30–12:45
Local and General Risk Factors for Implant Failure—Prevention of Early and Late Complications, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

12:45–14:15
Lunch Break

14:14–15:45
Implant Design, Length, Diameter—Real Innovation or Common Sense?, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

14:15–15:45
Simplifying Root Canal Preparation—The Next Generation, Meeting Room
Speaker: Dr Patrick Tseng

15:45–16:30
Break

16:30–18:00
Implant in the Aesthetic Zone—Socket Preservation, Staged Approach or Immediate Implants?, Hall 5F (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

Dentist Role in Snoring and Sleep Apnea, Hall 5G (Parallel Session B)
Speaker: Dr Derek Mahony

Sunday, 9 August

9:00–10:00
Meeting the Challenges of Infection Prevention and Infection Control in Clinical Dentistry, Hall 5F (Parallel Session A)
Speaker: Prof. Laurence Walsh

10:30–11:15
Break

11:15–12:45
Meeting the Challenges of Infection Prevention and Infection Control in Clinical Dentistry, Hall 5F (Parallel Session A)
Speaker: Prof. Laurence Walsh

12:45–14:15
Lunch Break

14:15–15:45
Clinical Challenges and Solutions, Hall 5F (Parallel Session A)
Speakers: Drs Jeffrey Chang, George Polakos & Edmond Fox

15:45–16:30
Implant Treatment of the Periodontally Compromised Patient, Hall 5F (Parallel Session A)
Speaker: Prof. Saso Ivanovski
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