

Worldwide Nanotechnology Dental Implants-- Markets Reach \$8.1 By 2015

LEXINGTON, Massachusetts (March 14, 2009) – WinterGreen Research announces that it has a new study on Worldwide nanotechnology dental implant markets. The 2009 study has 335 pages, 132 tables and figures. Worldwide, dental implants are poised to achieve significant growth as soon as the economy revives, as patients become aware of the health benefits achieved from having viable teeth. Dental implants are in the category of optional surgery and represent the type of consumer spending that is postponed in challenging economic environments.

The companies participating in the dental implant market have found ways to manage infection, providing a higher implant success rate. Implantable devices are more stable in the mouth, permitting fewer dental implant failures.

69% of adults ages 35 to 44 have lost at least one permanent tooth to an accident, gum disease, a failed root canal, or tooth decay. By age 74, 26% of adults have lost all of their permanent teeth. With the number of Americans over 55 growing by 60% in the next 20 years there is plenty of U.S. market opportunity. The baby boomer generation buying power exceeds \$2 trillion in 2009.

DENTAL IMPLANTS



Source: Zimmer.



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The leading six dental implant manufacturers control of the market is based on the need for marketing in this segment, with Nobel Biocare holding the number one market position and Straumann holding a share of almost one-fifth and ranking as the firm number-two player. A large number of small manufacturers earlier accounting for a third of the market have shrunk to 14% of it.

Dental implant market innovations are those that position the vendor companies to meet aesthetic demands and increase clinician productivity. Positioning for profitable business patient care delivery can be challenging for clinicians.

Tooth loss, gum and bone disease affect millions of people worldwide, on every continent, in every age group. Globally, several hundred million people are missing one or more teeth. More than 40 million people are fully edentulous in the Western developed world. These numbers are substantially higher in Asia, Africa and other parts of the world.

Worldwide, weaknesses in the global economy and sagging consumer confidence have led to an unprecedented slowdown in the dental market. Reduced income has kept many patients away from the dentist. People with steady incomes fear losing their jobs and are not spending even if they can afford to. Elective procedures are being postponed.

General practitioners are tending to treat patients in house with conventional alternative treatments, rather than referring them for implant treatment, despite its superiority. Customers are reducing stocks. Dental labs are more hesitant to invest in dental equipment, such as CAD/CAM scanners.

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For 2008 the global dental implant market was 2.3 billion Euros. The market for crowns and bridges is 3 billion Euros. These estimates size the opportunity of the global restorative and esthetic dentistry market. Nobel Biocare is the clear market leader in this market.

The outlook for 2009 is one of a demanding market environment. Deteriorating economic conditions in most markets continue to impact dental implant markets because consumers have less discretionary income. Visibility in economic recovery time remains low.

Nanotechnology Impacts The Dental Implant Market

One of the most active and important current areas of research and application of nanotechnology is in the field of life sciences and healthcare. Many industry and business analysts now expect nanotechnology to revolutionize the pharmaceutical, medical devices, diagnostics and imaging sectors with annual markets of billions of pounds likely within five-ten years.

According to Susan Eustis, lead author of the study, “Nanotechnology has begun to impact the dental implant market in a dramatic manner. By increasing the complexity of the surface topography with the addition of nano-scale calcium phosphate (CAP) crystals new capabilities are available to clinicians. Surface topography plays a determinant role in the bone bonding phenomenon.”

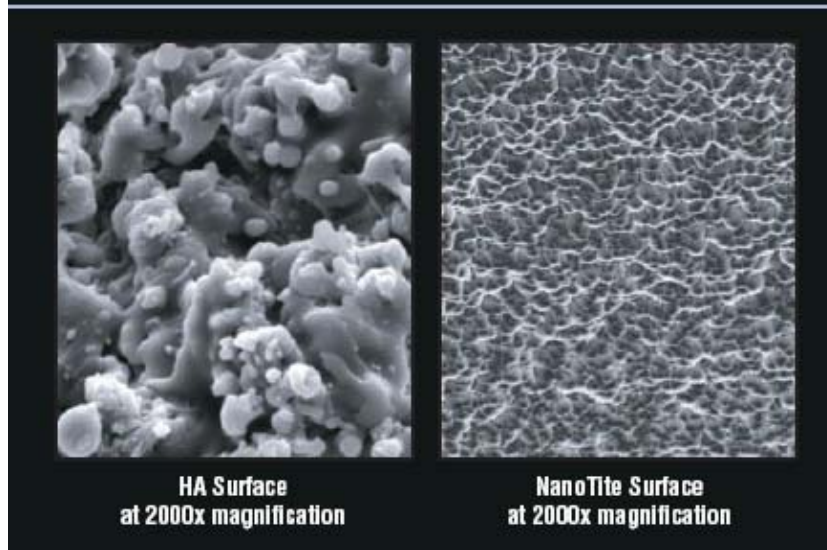
Through a discrete crystalline deposition (DCD™) Process in which nano-scale crystals of calcium phosphate are added to the BioMet 3i OSSEOTITE® Dual Acid Etched Surface, a topographic complexity at the sub-micron scale is established. Changes in the surface improve healing and represent dramatic breakthroughs in technology.



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Biomet NanoTite™ Implant OSSEOTITE® Surface Images



Source: BioMet.

Smaller market participants are active in their national markets and compete mainly on price, with limited investments in R&D, training, education, marketing and sales. In countries like Brazil, Russia and India these companies hold over 50% of the market. With the Internet evolving as a channel, larger participants gain market visibility and strategic advantage on return on investment for the dentist.

Expanding use of dental implants by dental surgeons and general practitioners indicates a growth market as soon as consumer confidence is stabilized.

Markets for dental implants at \$3.4 billion in 2008 are anticipated to reach \$8.1 billion by 2015, growing in response to demand for better teeth worldwide. The technology is achieving a maturity level that makes the implants last longer and work in a more reliable manner, stimulating demand from an aging population. This market is poised for rapid growth as soon as the global economy recovers. The technology is more mature, leading to implants that last longer.



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WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Thompson Financial and Global Information GII Info-Shop.

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