

MARKET REPORT



Endodontic Devices Market, By Products Type (Hand pieces, Apex Locators, Endodontic Motors, Endodontic Scalers, Endodontic Lasers, Machine Assisted, Obturation System, Access Preparation, Shaping and Cleaning, and Obturation Materials), By End Use (Hospitals, Clinics, Dental Academic & Research Institutes), and By Geography (EU, NA, APAC, LATAM, and MEA) - Analysis, Size, Share, Trends, & Foreca

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Endodontic Devices Market, By Products Type (Hand pieces, Apex Locators, Endodontic Motors, Endodontic Scalers, Endodontic Lasers, Machine Assisted, Obturation System, Access Preparation, Shaping and Cleaning, and Obturation Materials), By End Use (Hospitals, Clinics, Dental Academic & Research Institutes), and By Geography (EU, NA, APAC, LATAM, and MEA) – Analysis, Size, Share, Trends, & Foreca

REPORT HIGHLIGHT

Endodontic devices market was valued at USD 1.62 billion by 2019, growing with 4.3% CAGR during the forecast period, 2020-2026.

Endodontic Devices are used by the dental professional practitioners for the treatment of various dental disorders. These devices consist of various surgical instruments, and consumables used for the treatment of patients to perform a root canal and Endodontic tools are used in the cleaning, shaping the teeth as well as mechanical debridement of the root canal in the deep length of the apical foramen. Endodontic procedures require high professional skills as it should be handled with care and precision hence require the right equipment for efficient and positive outcomes. Recently many machine-assisted, rotary tools and electric motor-assisted endodontic devices are available with additional features & facilities. The facilities include adjustable temperature settings, refillable cartridge, precise torque control, quick heating elements, and variable power settings knobs as well as a fast and continuous flow of filling material via a gun.

Market Dynamics

The increasing prevalence of dental & oral disorders, the government supports as well as rising medical tourism for such non-communicable disorders are major factors boosting the growth of the global endodontic devices market. According to the report of the Global Burden of Disease in 2017, oral diseases have been affected by approximately 3.5 billion people globally. This is primarily due to untreated conditions of teeth decay, rising tobacco consumption, as well as more than 530 million children, suffer from primary teeth dental caries. This rise in the disease has boosted the demand for the endodontic devices market during the forecast period.

Moreover, technological advancements with revolutionized endodontic devices using the cordless technology, next-generation adaptive motion technology for endodontic instrument motors. In addition, rising government initiatives and supports to conduct campaigns are likely to create lucrative growth opportunities in the worldwide market during the forecast period. For instance, in September 2019, Kerr Endodontic has been launched the new, cordless elements named IC obturation system. Conversely, high risk of root fracture as well as some side effects associated with endodontic devices is predicted to impede the market growth in the coming future. However, it is noted that advanced technology offers safe, secure, and promising in the treatment of oral disorders can create the demand for this market during the forecast period.

Product Types Takeaway

In terms of products, the worldwide endodontic devices market is categorized into instruments and consumables. Of these, the instruments accounted for the majority of the market share in 2019. This is mainly due to the growing demand for such instruments in hospitals and dental clinics. The use of endodontic motors instrument in these facilities is increasing to take care of patients suffering from dental disease and to carry out the root canal process. In addition to this, increasing the use of advanced and innovative Nickel-Titanium (NiTi) based instruments would, in turn, further boost the segment growth. This instrument segment is broadly categorized into endodontic scalers, machine-assisted obturation systems, handpieces, apex locators, endodontic motors, and endodontic lasers.

On the other side, the consumables segment is projected to grow with a promising growth rate during the future period. This segment is further divided into shaping and cleaning (files & shapers, and irrigation solutions & lubricants), access preparation (burs, and drills), and obturation materials (plastic, metals, cement & pastes-calcium phosphates, and mineral trioxide aggregate).

End-User Takeaway

By end-users, the global market is categorized into dental hospitals & clinics and dental academics & research institutes. The hospitals accounted for the largest market share in 2019 and are anticipated to grow exponentially during the forecast period. This growth is primarily owing to the increased number of visits to hospital visits due to rise in the dental disorders and growing dental care. Dental treatment awareness is a growing concern in the geriatric populations. In addition, dental clinics are mostly preferred by patients for cleaning of teeth and other treatment procedures like a root canal, etc in developed countries. This is expected to drive the clinic's segment growths in the coming future.

Regional Takeaway

Regionally, the overall market is divided into North America, Middle East & Africa, Asia Pacific, Latin America, and Europe. The North America endodontic devices market registered the majority of the market share in 2019 owing to the rising geriatric population. As per the Administration for Community Living (ACL), in North America, the geriatric population above 65 groups was increased from 37.2 million in 2006 to 49.2 million in 2016 with a 33% rise. The organization has also stated that the geriatric population is projected to reach 100 million by 2060. It is analyzed that the dental disorder is higher in the elderly population due to certain health-related issues like tooth loss, teeth cavities, etc. Thus, the aging population is considered to be one of the most important driving factors for the growth of the North American market. In addition to this, factors such as technological advancements for diagnosis & treatment of dental disorders, rising awareness about dental care, coupled with the availability of government & private funding are fuelling the regional market growth.

On the flip side, the Asia Pacific is anticipated to be the fastest-growing region throughout the forecast. The growth is attributed to the growing prevalence of clinical disorders such as oral cancer due to an increase in the consumption of tobacco, and alcohol. Furthermore, rising medical tourism and the evolution of 3D printed implantation of teeth are also contributing to the regional market demand.

COVID-19 Impact

The endodontic devices market is adversely affected due to the sudden outbreak of COVID-19 all over the globe. The Endodontic devices are specially used by the dental healthcare professionals and as per the World Health Organization (WHO) guidelines, the COVID-29 virus can spread through any medium by face-to-face communication, sneezing and these dental professional have consistent exposure to body fluids such as blood and saliva predispose dental care workers and are being subjected to high risk for COVID-19 infection. As

demonstrated by the recent corona-virus outbreak, dental practice has been stopped hence the demand for these endodontic devices has been slightly decreased and will remain in the global market to be sustained in the near future.

Key Vendor Takeaway

The leading players of the global Endodontic Devices market include Dentsply Sirona, Danaher Corporation, FKG Dentaire S.A., Ivoclar Vivadent AG, Ultradent Products, Inc., Septodont, Micro-Mega SA, Coltene Holding, DiaDent Group International, and Brasseler Holdings, LLC.

Companies are actively involved in strategic mergers and acquisitions to capture a large customer base. In February 2020, Danaher has been acquired the Biopharma Business of General Electric Life Sciences and named Cytiva. This acquisition helped the company to obtain a standalone operating company within Danaher's Life Sciences segment in the global industry.

The market size and forecast for each segment and sub-segments has been considered as below:

Historical Year - 2015 to 2018

Base Year - 2019

Estimated Year - 2020

Projected Year - 2026

TARGET AUDIENCE

Traders, Distributors, and Suppliers

Manufacturers

Government and Regional Agencies

Research Organizations

Consultants

Distributors

SCOPE OF THE REPORT

The scope of this report covers the market by its major segments, which include as follows:

ENDODONTIC DEVICES MARKET KEY PLAYERS

Dentsply Sirona

Danaher Corporation

FKG Dentaire S.A.

Ivoclar Vivadent AG

Ultradent Products, Inc.

Septodont

Micro-Mega SA

Coltene Holding

DiaDent Group International

Brasseler Holdings, LLC

ENDODONTIC DEVICES MARKET, BY PRODUCT TYPES

Endodontic Instruments

Handpieces

Apex Locators

Endodontic Motors

Endodontic Scalers

Endodontic Lasers

Machine Assisted Obturation Systems

Others

Endodontic Consumables

Access Preparation

Burs

Drills

Shaping and Cleaning

Irrigation Solutions & Lubricants

Files & Shapers

ObturationMaterials

Cements & Pastes

Mineral Trioxide Aggregate (MTA)

Calcium Phosphates

Others

Metals

Plastic

ENDODONTIC DEVICES MARKET, BY END USERS

Dental Hospitals

Dental Academic & Research Institutes

Dental Clinics

ENDODONTIC DEVICES MARKET, BY REGION

North America

The U.S.

Canada

Europe

Germany

France

Italy

Spain

United Kingdom

Rest of Europe

Asia Pacific

India

China

South Korea

Japan

Singapore

Rest of APAC

Latin America

Brazil

Mexico

Argentina

Rest of LATAM

The Middle East and Africa

Saudi Arabia

United Arab Emirates

Rest of MEA

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These experts are dedicated to creating concrete market data analysis in various industries such as Healthcare, Bulk Chemicals, Semiconductors and Electronics, Foods and Beverages. We strive to develop meaningful and evidence-based research data that helps our clients, empowering organizations and brands of all sizes with strategic analysis, accurate data, and consumer trends.

We aim to be the number one choice for various clients who require credible data to make vital business decisions. We wish to be a trusted and reliable analytics partner to major business organizations.

We understand that critical business decisions can be taken only when verified, authentic information is available. Therefore, our experts work meticulously to provide our clients with the accurate data, so that they need not spend time in verifying it.

It is also our goal to help our clients ignore traditional research methods that require a large amount of capital, manpower, and most important of it all – the time. We know that these factors are precious to a company and always follow the latest research techniques that produce the required result in a short span of time.

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FIGURE Singapore Endodontic Devices market size, forecast and trend analysis, 2015 to 2026 (USD Million)

FIGURE Rest of APAC Endodontic Devices market size, forecast and trend analysis, 2015 to 2026 (USD Million)

FIGURE Latin America Endodontic Devices market size, forecast and trend analysis, 2015 to 2026 (USD Million)

FIGURE Latin America Endodontic Devices market share analysis by country, 2018

FIGURE Brazil Endodontic Devices market size, forecast and trend analysis, 2015 to 2026 (USD Million)

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FIGURE Saudi Arabia Endodontic Devices market size, forecast and trend analysis, 2015 to 2026 (USD Million)

FIGURE United Arab Emirates Endodontic Devices market size, forecast and trend analysis, 2015 to 2026 (USD Million)

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