market overview

The European Dental Market in figures

Data Sources: FIDE, Rebmann Research, Idata Research, Condesic Research
Year: 2011
Market volume/size

Average percentage for dental treatments in oral health expenditure: 5.9%
Total sales of dental market, without software: €6.19 bn
Market for instruments, hygiene and oral care equipment and disposables: €520 mn
Market for teeth whitening products: €40 mn
Sales of consumables: €3.14 bn
Total number of metal implants: €1.02 bn
Number of installed dental x-ray equipment per 1,000 inhabitants: 0.07

Workforce

Number of practicing dentists: 268,282
Number of dental offices: 163,546
Number of dental technicians: 147,121
Number of dental hygienists: 24,477
Number of dental laboratories: 46,372

Oral health resources

Share of dental expenditure on total health expenditure by country:
- Belgium: 2.2%
- Netherlands: 4.1%
- Denmark: 4.3%
- France: 4.5%
- Austria: 5%
- Spain: 5%
- UK: 6%
- Switzerland: 6.2%
- Italy: 6.5%
- Germany: 7.6%

Dental care utilization

Number of dental visits per dentist, by country:
- Denmark: 1,142
- Italy: 1,495
- UK: 1,662
- Germany: 1,825
- Austria: 2,222
- Switzerland: 2,305
- France: 2,533
- Belgium: 2,581
- Spain: 2,837
- Netherlands: 3,837
Quick facts about relevant European markets

(source: Gap in the market, Candesic analysis on Healthinvestor June 2012)

Shortage of dentists likely to attract new practitioners

**Switzerland**
- High margins from prices and large number of implants

**Spain**
- Flat growth and excess of dentists
- Unstable economic environment

**France**
- Market valued €10 billion market

**Sweden**
- 9% growth between 2008 and 2011
- Increasing number of patients turning to private practices
- 29.5% foreign dentists

**Norway**
- Among European highest incomes, supporting demand for sophisticated procedures
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**UK**
- Trend towards merging and concentrating in groups
- Private dentistry competes with NHS providing free dental care

**Finland**
- Limited size, valued €1 bn
- Strong public role

**Netherlands**
- Market valued €2.6 bn
- Limited population and moderate prices

**Germany**
- Biggest market in Europe valued €11.6 bn
- Annual growth around 3%

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**Italy**
- Dual market (north and south, north has the greatest share)
- Flat growth, market valued €9 bn

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