European dental implant market limited by financial uncertainty

Countries in Eastern Europe poised for highest growth

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The dental implant market, consisting of implants, abutments, and other devices, in Europe was valued at approximately €1.18 billion (US$1.6 billion) in 2012. Until the end of this year, the market will continue to contract slightly. It is expected to recover, however, and reach a value of just under €1.69 billion (US$2.3 billion) by 2021. Germany reigns as the largest market, worth over US$300 million in 2012—almost the equivalent of France and Spain combined. Overall, these two countries have the lowest growth rates, with both suffering from either low GDP growth or high unemployment rates along with overall concerns regarding unsustainable national debt levels. Demand for dental implant treatment continues to be fuelled by the ageing population. The US Census Bureau forecasts that the population aged 65 and older in Europe’s seven key markets will grow at an average compound annual growth rate of approximately 1.5% until 2021, whereas the total population will only grow at approximately 0.5% per year. As people age, their oral health tends to deteriorate, resulting in edentulism, for which implant restoration is increasingly becoming a recommended treatment option. For most European patients, dental implant procedures are considered elective and need to be paid out-of-pocket by patients. As a result, financial considerations are among the most important factors influencing patients’ decision to undergo these treatments. The unstable economy has resulted in increased patient hesitance to seek dental implant treatment and in higher preference for lower-risk and less-costly traditional procedures and products, such as traditional loading (instead of immediate functional loading) and screw-retained abutments (over cement-retained ones). Aside from the economy, countries such as Sweden and the Netherlands have experienced drastic shifts due to changes in government reimbursement. In the past year, both countries’ markets have suffered declines due to governments proposing changes to reimbursement. This uncertainty regarding dental implant treatment coverage has fuelled physician and patient reluctance to perform and undergo procedures. The current dental implant market is defined by a never-ending number of competitors in the marketplace. Competition will become increasingly fierce with the recent merger of DENTSPLY Friadent and Astra Tech Dental to form DENTSPLY Implants, placing the company in direct competition with market leader Straumann for the top spot. While physicians and other competitors still perceive the two as separate brands, DENTSPLY Implants’ wider product portfolio and greater focus on the implant business will likely change this. Furthermore, smaller competitors are currently penetrating the market with a
Researchers from the US have linked the growing number of adults under the age of 45 with oropharyngeal cancer to the human papillomavirus (HPV). From a review of cancer data spanning a 36-year period, the researchers observed a substantial increase in young adults with cancer of the tonsils and base of the tongue. In addition, they noted a wide deviation between Caucasians and African-Americans.

The researchers used data on more than 1,600 patients aged 36 to 44 who had been diagnosed with invasive oropharyngeal squamous cell carcinoma between 1973 and 2009. Overall, the study revealed a 60 per cent increase in cancers of the base of the tongue, tonsils, soft palate and pharynx in people younger than 45 during the period. While the rate of oral cancers decreased by 52 per cent among African-Americans, it increased by 113 per cent among Caucasians.

However, compared with Caucasians and other races, African-Americans had a lower five-year survival rate. The five-year survival for the whole study group was 54 per cent.

According to the researchers, 50 to 65 per cent of patients underwent surgical resection for their tumours. Patients who had both surgery and radiation therapy had the highest five-year survival rate, they said.

Although the growing incidence of oral cancer has been largely attributed to the sexual revolution of the 1960s and 1970s and changes in sexual practices, the current study of people born during this period suggested that other factors may contribute to this development.

“The predominance of oropharyngeal cancer in this age group suggests either non-sexual modes of HPV transfer at a younger age or a shortened latency period between infection and development of cancer,” explained Dr Farzan Siddiqui, lead author of the study.

According to the American Cancer Society, an estimated 56,000 people in the US will contract oral cavity and oropharyngeal cancers in 2015, with about 8,000 people dying of these cancers.