

# Guest Editorial

## Global Market Trends in Dental Implants

The dental implant market today has a very different landscape than it did just a few years ago. This dramatic difference is due to a number of different factors that include the worldwide economic situation, the dramatic increase in the number of dental implant companies, and the effects of a changing patient profile.



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## Worldwide Economic Effect

The growth of the dental implant market had been on a steady rise for many years. It was averaging a predicted 16% growth per year in the United States (US) and the future looked just as bright, with many companies growing 40% or more, but all this changed in 2008. There was a gradual decrease in worldwide implant growth, with the premium brands suffering the most. By 2010, many of these companies were experiencing negative growth. The catastrophic economic collapse of some European Union countries in 2011 to 2012 and the political fallout from it greatly impacted the growth of implant sales in Europe and the Mediterranean region. A few of the European based implant companies were also directly affected by the resultant decrease in the value of the Euro. As the Euro lost ground to the Dollar, the sales to the largest implant market in the world, the US, became less profitable to these companies. One particular victim of note was Straumann AG. On April 29, 2013, they announced a decrease in their sales force by 200 jobs to bolster profitability for their shareholders.

## Dental Implant Players

In the last 5 years, the implant marketplace has seen a shift away from many of the well-known major players. The rising number of implant companies and the continued shift toward lower cost implants has decreased the market share of the major implant players. Between 2003 and 2013, the number of implant brands has nearly tripled; this increased competition is creating a price war driven by what the patient will pay.

Table 1: 2008 to 2012 industry changes

Company	2008 (market share)	2012 (market share)
Nobel Biocare	27%	20%
Zimmer	8%	8%
Straumann	22%	19%
Biomet 3i	10%	9%
Dentsply	9%	20%
Other	24%	24%

Source: Company data, Morgan Stanley research

Dentsply's growth was likely due to acquisition and absorption of its dental implant competitors. With the 'other' group, it appears at first glance that the growth has been stagnant but this is deceptive. From 2008 to 2012, the total number of implants sold has grown dramatically and what appears to be no growth for them is in reality a dramatic increase in actual units sold (Table 1). Many of the larger premium implant companies have offset their decreased implant sales by the sales of lab-related products, including computer-aided design/computer-assisted manufacturing (CAD/CAM) ceramic and titanium products.

## The New Patient

Patients are directly changing the face of the implant industry and this increased awareness is driving the global dental implant market. By demanding a dental implant as the preferred treatment option for an edentulous space, patients are driving a change in dental practice and the treatments their practitioners must offer. As a result, the general practitioner is the fastest growing implant segment, which has created a very competitive market for the private practitioner. This has resulted in a downward shift in implant treatment cost.

## **Quality Technology, Premium Treatment, Affordable Price: A Key to Success**

Historically, implant treatment and affordability were diametrically opposed, as high treatment fees were required to offset steep implant prices. In 2006, implant firec ignited a fundamental change in the dental implant industry when it launched the ‘value segment’; its products were strategically positioned between discounting and the premium implant segment. Implant fees continued to stay high, since initially practitioners used the lower cost implants but did not adjust their fees. The market at the time allowed for premium prices for what was considered premium treatment. The ability to keep prices inflated is no longer sustainable in today’s highly competitive market, with the new savvier patients.

OCO Biomedical, located in Albuquerque, New Mexico, USA, addressed these issues head-on and then took it to the next level. OCO Biomedical has been manufacturing and selling implant related products since 1977, when Dr Dave Dalise created and patented the O-Ball overdenture connection. OCO Biomedical has been pushing the boundaries of implantology ever since. With seven implant lines that cover the spectrum with small diameter implants, one piece implants, two piece tissue level implants, bone level implants, and wide body implants, the system allows the practitioner to address nearly every clinical situation with one system and one surgical kit. The OCO Biomedical implant line is based on its patented implant body. This is the only US made implant to hold a US patent for immediate load. Its dual stabilization macrostructure, including the patented Bull Nose Auger tip, allows placement with unparalleled initial stability and allows for unsurpassed immediate load capability. This is achieved by placing bone in tension rather than compression; this changes the physiologic environment within bone, and not only enhances but also accelerates osseointegration.

Patient desires to get a tooth or teeth the same day as a loss, rather than waiting 4 to 6 months for grafting, implant placement and integration, has driven the industry to develop the techniques and ability to provide an immediate load option. OCO has been doing this since 2003 when OCO Biomedical introduced with one-piece immediate load implant, the ISI. This groundbreaking implant had the then, patent pending technology that has been incorporated into OCO’s complete implant line-up. Combining this incredible stability with a straightforward two-drill surgical protocol and surprising affordability, OCO Biomedical provides a complete system at a price point that is well below the true value of the implant. The continued and focused research in the dental implant field is bringing us new technology and better treatment options for our patients. OCO Biomedical is committed to constantly evolving, developing and manufacturing state-of-the-art dental implants, instruments and surgical protocols that will keep us on the cutting edge of the field.

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