RESEARCH SUMMARY

Dental Devices and Materials Market in Japan:  
Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a survey on the domestic dental devices and materials market with the following conditions:

1. Research period: From March to June, 2014
2. Research targets: Manufacturers and sellers of dental devices, materials, dental drugs, preventive dentistry products, and dental implant materials
3. Research methodologies: Face-to-face interviews, surveys via email/telephone, and literature research

What is the dental devices and materials market?
The dental devices/materials market in this research targets the following five categories:

1) Dental devices (e.g. chair units, dental X-ray devices, dental CT scanners, microscopes, dental laser devices, dental CAD/CAM systems, electronic medical record and accounting systems, etc.)
2) Dental filling materials/metals (e.g. composite resin, bonding materials, gold-silver-palladium alloy, ceramic, hard gypsum, dental impression materials, etc.)
3) Dental drugs/pharmaceutical products (e.g. dental local anesthetic, whitening materials, etc.)
4) Preventive dentistry products (e.g. toothbrushes, interdental brushes, tooth pastes, mouth washes, etc.)
5) Dental implant materials (e.g. artificial dental roots, dental artificial bones, etc.)

Note that the market in this research does not include sterilizers to be equipped at dental clinics. Also, note that preventive dentistry products indicate those products mainly sold at dentists.

◆ Key Findings

Size of Dental Devices and Materials Market in FY2013 Rose by 1.4% from Previous Year to Attain 279.2 Billion Yen
Size of the domestic dental devices and materials market rose by 1.4% from the previous year to achieve 279.218 billion yen (based on the shipment value from the sellers). The biggest market growth factors is the last-minute surge in demands for chair units, dental CT scanners, microscopes, and other large equipments just before the consumption tax increase. This is likely to temporary influence the market size in FY2014 to decrease by 4.0%, marking 267.954 billion yen, based on the shipment value from the sellers.

Trends in Dental Materials: Dental Metal Demands to Decrease
Conventionally, gold-silver-palladium alloy had been extensively used for domestic dental treatment as an insurance-covered replacement of high-price metals. Now that people place importance on aesthetic point of view, materials like hard resin, hybrid ceramics have become popular. On the other hand, the dental CAD/CAM systems have contributed in favorable sales of all-ceramic and zirconium filling materials. Also, the market shows a
new products with added value gain popularity.

### Silver Lining of Market Recovery in Dental Implant Operations

The demands for the dental implant operations have at last hit the bottom in the latter half of 2013, and have gradually been recovering since the beginning of 2014. Although the total number of clinics capable of operating dental implant has been decreasing, the market of dental implant is expected to grow further, because handling of the demands can be shifted to the dental clinics that are able to perform appropriate treatments.

#### Contacts

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### Figure 1: Transition and Forecast of Size of Dental Devices and Materials Market

Notes:
1. The figures are based on the sales of the businesses.