

# The Italian dental market: current prospect and evolutionary trends



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To analyse the dental industry, we should consider simultaneously two different sectors, connected but not necessarily dependent one to the other: the "national market" and the "Italian production".

The first one concerns consumptions and investments in our Country of both dental practises and dental laboratories, while the second takes into account the production of devices by Italian manufacturers, intended to satisfy the domestic demand and partially aimed to the export.

### The Italian dental market

Nowadays, the total market value almost reaches 1.2 billion euros, getting closer for the first time to the all-time record set in 2011. This value is determined by "retail" prices, that is the purchase of devices by dentists and dental technicians.

Just like the Country in general, also this industry is living a positive period confirmed by the economic trend of the first trimester 2016, showing a slow recovery in consumption and a substantial increase of investments towards dental equipment.

As shown in the graphic, the trends in consumption (red line) are rather uniform and structural, while the equipment sector (blue line) is characterized by sudden turns due to the higher cyclical nature of the professionals' investments.

Regarding the equipment sector, after a stagnant and negative development in the 2014-2015 two-year period, we can notice, since the second half of last year and the first months of 2016, a surge in sales closing at +10% until the end of March.

As said before, way more homogeneous are the consumption trends closing at +3.2%: these are directly linked to the workload (number of patients and treatments) unlike the investments in technologies, strictly subordinated to the operators' trust and sense of confidence in the future.

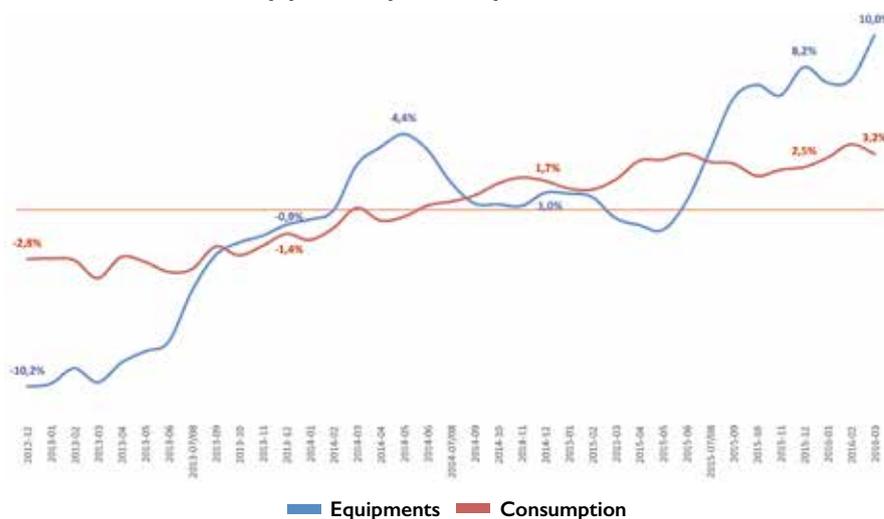
Following the positive trend of this first trimester, 2016 could become the awakening year for this sector, hoping that the sales recovery comes together with an increase in the number of provided care and patients.

The positive signals derived from the equipment sales for dental practices and dental technicians come without any doubts from the digital development and from some other influencing factors: such as a renewed positive "sentiment", the tax benefits and the new dentistry models.

After the structural crisis that hit the industry in 2012, the operators' trust in the future is perceived as comforting. Now the operators start to make major purchases again, innovating their business. Especially involved in this renewal are dental laboratories, considering the ongoing digital revolution of the production methods necessary to survive the competition. Key-Stone research shows that 60% of Italian dental laboratories offer dentists the possibility to realize devices digitally.

The tax benefits established by the 2016 stability law, allow to put into effect this

Monthly year-on-year analysis of economic trends



renovation cycle: for instance, the tax bonus is an excellent help for the purchase of capital goods and an opportunity for professionals to equip themselves as well under the digital aspect. All of this, dumping the costs in the following years.

The third driver is the booming in recent years of group dental practises belonging to "franchising": since 2012 the number doubled, counting today more than 600 group dental practices. In the biennial period 2012/2013 we saw a much faster development of these realities, recovered again in 2015 despite numerous closures. The year 2016, even though is experiencing a growth slowdown, should be monitored due to the declared upcoming opening of such dental practices.

**The Italian production**

The Italian dental production has always been known as the crown-jewel of our manufacturing industry. With a strong presence in almost every country in the World, its trend is constantly overseen by the studies that Key-Stone, on behalf of UNIDI, has been carrying out for the past 10 years.

Taking a closer look to the manufacturing sector, we should remember that Italy represents one of the most important hubs for the production of medical and dental devices, presenting almost always a virtuous trend: without counting the 2009 sudden crisis (-3,5%) and after an incredibly positive two-year period in 2010/2011 followed by a growth slowdown, the year 2015 proved to be the year of the dental awakening with a reassuring 4.1% growth, consolidating the Italian dental sector to 802 million euros.

These Italian dental industry positive data owe its performance mostly to the export market which in 2015 reached approximately 490 million, with a 40% increase from 2009 until now (average trend on the period 5.8%). This shows the worldwide confirmation of appreciation and importance for the Made in Italy in the dental sector.

*Source: Il mercato dentale italiano: attuali prospettive e trend evolutivi. R. Rosso - Doctor Os - 2016; XXVII (6): 473-474*

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