Dental Laser Market Size, By Product (Soft Tissue Dental Laser [CO_2 Laser Systems, Diode Laser Systems, Nd:YAG Laser Systems]), All Tissue Dental Laser [Er:YAG Laser Systems, Er,Cr:YSGG Laser System]), By Application (Oral Surgery, Peri-Implants, Periodontics, Endodontic Treatment, Tooth Whitening, Conservative Dentistry), By End-use (Dental Clinics, Hospitals), Industry Analysis Report, Regional Outlook (U.S., Canada, Germany, UK, France, Italy, Spain, Russia, The Netherlands, Japan, China, India, Australia, South Korea, Brazil, Mexico, Saudi Arabia, South Africa, UAE), Application Potential, Growth Potential, Price Trend, Competitive Market Share & Forecast, 2019 – 2025

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Report Content

Data Tables

Charts & Figures

Chapter 1 Methodology

1.1 Methodology

The methodology adopted for the research is the amalgamation of multiple approaches to provide realistic scenario of market. Extensive secondary research was conducted for collection of data required for estimations as well as forecasting. All analyst inputs, data obtained by authorized secondary sources and conclusive results were validated and verified through detailed primary interviews with key opinion leaders. (Industry experts with relevant experience, company executives, end-uses for the industry etc.)

Dental laser market was estimated using pyramid approach also referred as bottom-up methodology, where each region is estimated separately as an individual entity. Global market is derived by integrating regional information.

- An example of country level forecast is given below for reference:

Key parameters considered while estimating U.S. dental laser market

- Growing adoption of dental laser systems
- Rising oral disease burden
- Growing geriatric population
- Technological advancements
- Healthcare expenditure
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- xxxxxxxxxxxxxxxxxxxxxxxxxx

Product segment share for U.S. dental laser market:

Product Segment	U.S. Market Share (2018)
Soft Tissue Dental Laser	64.7%
All Tissue Dental Laser	xx%
Others	xx%

Product shares are based on analyst’s input, authorized data sources and were validated through primary interviews with industry experts and key opinion leaders.

Impact analysis of dental laser market drivers and restraints

Drivers	Short term	Medium term	Long term
Increasing patient preference towards dental tourism	0.6%	0.8%	1.0%
Growing preference for non-invasive procedures	0.8%	0.9%	1.2%
Increasing prevalence of oral diseases globally	0.9%	0.9%	1.2%
Technological advancements	0.6%	0.7%	1.0%
Growing geriatric population in developing economies	0.7%	0.8%	1.0%
Industry pitfalls and challenges	**Short term**	**Medium term**	**Long term**
High cost associated with dental laser	-1.0%	-0.8%	-0.6%
Lack of knowledge in underdeveloped economies	-0.9%	-0.7%	-0.4%

Data sources:

Both, primary as well as secondary research approaches were adopted to gather relevant market information. Participants in the industry value chain such as manufacturers, distributors and consumers were contacted to obtain most pragmatic market information. Below is the list of some prominent companies that were contacted for the study:

Major industry players approached during research process

- BIOLASE, Inc.
- Convergent Dental Inc.
- Dentsply Sirona
- LightScalpel
- Zolar Technology
- xxxxxxxxxxxxxxxxxxxx
- xxxxxxxxxxxxxxxxxxxx

List of secondary sources

Region	Secondary sources
North America	Alaska Dental Society Kansas Dental Association Hawaii Dental Association Montana Dental Association American Dental Association New Hampshire Dental Society New Mexico Dental Association Delaware State Dental Society Idaho State Dental Association Arkansas State Dental Association xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Europe	European Medical Laser Association (EMLA) World Federation Laser Dentistry - European Division xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Asia Pacific	Asia Pacific Dental Congress xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Latin America	Academy of Laser Dentistry (ALD) xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Middle East & Africa	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

1.1 Market definitions

- North America includes the U.S. and Canada
- Europe includes Germany, UK, France, Spain, Italy, Poland, Sweden, etc.
- Asia Pacific includes China, Japan, India, Australia, South Korea, Taiwan, Philippines, etc.
- Latin America includes Brazil, Mexico, Argentina, Chile, Peru, etc.

- MEA includes South Africa, Saudi Arabia, UAE, Qatar, Kuwait, Bahrain, Egypt, etc.
- Totals have been rounded off
- The scope of study covers dental laser market based on product, application and end-use
- Product segment is further divided into soft tissue dental laser, all tissue dental laser, and others
- Applications of dental laser in oral surgery, peri-implants, periodontics, endodontic treatment, tooth whitening, conservative dentistry, and others have also been studied
- End-use covers dental clinics, hospitals, and others
- The market estimates are an output of triangular research and analysis methodology that include secondary research, primary research. Adoption of dental laser systems, technological advancements are major factors attributable to market value estimates of base years. The factors have been quantified for regional level analysis of market and aggregated to arrive at the total market estimates.
- Soft tissue dental laser is abbreviated as STDL
- All tissue dental laser is abbreviated as ATDL
- CO_2 laser systems is abbreviated as CO_2 LS
- Diode laser systems is abbreviated as DLS
- Nd:YAG laser systems is abbreviated as Nd:YAG
- Er:YAG laser systems is abbreviated as Er:YAG
- Er,Cr:YSGG laser systems is abbreviated as Er,Cr:YSGG
- Endodontic treatment is abbreviated as ET
- Conservative dentistry is abbreviated as CD

1.2 Forecast parameters

- Market forecast is based on analysis of prominent factors that will impact market growth during the projection years
- Market growth impacting forces such as trends in dental laser industry, their adoption statistics have been studied and their impact on market growth has been applied to forecast market value
- Further, following parameters have been analyzed and their weighted impact are applied to the base line market growth trend to determine forecast trend
    - Adoption of dental laser systems
    - Oral disease burden
    - Healthcare expenditure
    - Geriatric population

  - Technological advancements
- Short term refers to duration less than 2 years, medium term refers to duration between 2 to 5 years and long term refers to duration over 5 years
- Compound annual growth rate (CAGR) is calculated from 2019 to 2025
- GDP and inflation have not been accounted while estimating the market
- 2018 is the base year for our forecast, thus, up to 2018, data for all the years is based on the actuals obtained via research

1.3 Data sources

1.3.1 Secondary

1.3.1.1 Paid sources

- Hoover's
- Bloomberg

1.3.1.2 Unpaid sources

- WHO
- OECD
- UNICEF
- U.S. FDA
- The World Bank
- Investor presentations
- Company annual reports
- Alaska Dental Society
- Kansas Dental Association
- Hawaii Dental Association
- Asia Pacific Dental Congress
- Montana Dental Association
- American Dental Association
- New Hampshire Dental Society
- New Mexico Dental Association
- Delaware State Dental Society
- Idaho State Dental Association
- Arkansas State Dental Association

- European Medical Laser Association (EMLA)
- World Federation Laser Dentistry - European Division
- xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
- xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

1.3.2 Primary

- BIOLASE, Inc.
- Convergent Dental Inc.
- Dentsply Sirona
- LightScalpel
- Zolar Technology
- xxxxxxxxxxxxxxxxxxx
- xxxxxxxxxxxxxxxxxxx

Chapter 2 Executive Summary

2.1 Dental laser industry 360^0 synopsis, 2014 – 2025

TABLE 1 Dental laser industry 360^0 synopsis, 2014 – 2025

Industry Factor	Description
Market size & forecast (Revenue)	Revenue: USD 128.5 Mn (2018) → USD xx Mn (2025)
Product trend (2018)	Soft Tissue Dental Laser – 64.7% All Tissue Dental Laser – xx% Others – xx%
Application trend (2018)	Oral Surgery – 36.0% Peri-implants – xx% Periodontics – xx% Endodontic Treatment – xx% Tooth Whitening – xx% Conservative Dentistry – xx% Others – xx%
End-use trend (2018)	Dental Clinics – 57.0% Hospitals – xx% Others – xx%
Regional trend (2018)	North America – 30.6% Europe – xx% Asia-Pacific – xx% Latin America – xx% Middle East and Africa – xx%
Industry background	In 1917, Albert Einstein laid foundation for the discovery of laser and its prototypes by theorizing photoelectric amplification that could release stimulated emission or a single frequency. The term laser is an acronym for light amplification by stimulated emission of radiation and was introduced to the public in 1959, in an article in Columbia University. In 1961, a laser was developed from crystals of yttrium-aluminum-garnet treated with 1-3% neodymium. Later, the argon laser was discovered in 1962 while, the ruby laser introduced in 1963, was used as the first medical laser to congeal retinal lesions. Continuous innovations in the field of dentistry for efficient patient care proved beneficial for overall industry. FDA approvals for dental laser and several product launches over the recent years have enhanced the demand for such equipment. Business players operating in the dental laser market are focusing on R&D activities for developing technologically advanced products. Rising awareness regarding oral hygiene worldwide along with adoption of such products in various non-invasive procedures will surge the demand for dental laser during the forthcoming years.

2.1.1 Business trends

TABLE 2 Dental laser market, 2014 – 2025, (USD Million)

2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
106.9	111.8	117.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%

Increasing prevalence of oral cancers and other dentistry diseases coupled with technological adavcement in dental laser industry will drive the global dental laser market size. Rising awareness pertaining to the benefits of dental laser products will serve to be a high impact rendering factor.

2.1.2 Product trends

TABLE 3 Dental laser market, by product, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
STDL	68.7	72.0	75.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%
ATDL	34.3	35.8	37.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%
Others	3.8	4.0	4.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%
Total	106.9	111.8	117.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%

Soft Tissue Dental Laser is abbreviated as STDL, All Tissue Dental Laser is abbreviated as ATDL

Development of technologically advanced soft tissue laser for gingival contouring provides secured treatment thereby favors industry growth. Usage of diode laser allows quick and precise removal of excess tissue with minimal incision fosters segmental growth.

2.1.2.1 Soft tissue dental laser trends

TABLE 4 Dental laser market, by soft tissue dental laser, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
CO_2 LS	19.8	20.8	21.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%
DLS	38.7	40.4	42.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%
Nd:YAG	10.3	10.8	11.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%
Total	68.7	72.0	75.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%

CO2 Laser Systems is abbreviated as CO2 LS, Diode Laser Systems is abbreviated as DLS, Nd:YAG Laser System is abbreviated as Nd:YAG

2.1.2.2 All tissue dental laser trends

TABLE 5 Dental laser market, by all tissue dental laser, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Er:YAG	14.7	15.3	16.0	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Er,Cr: YSGG	19.7	20.5	21.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**34.3**	**35.8**	**37.5**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Er:YAG Laser Systems is abbreviated as Er:YAG, Er,Cr:YSGG Laser Systems is abbreviated as Er,Cr:YSGG

2.1.3 Application trends

TABLE 6 Dental laser market, by application, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Oral Surgery	38.8	40.5	42.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Peri-implants	8.1	8.5	8.9	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Peri-odontics	16.9	17.7	18.7	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
ET	12.1	12.7	13.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Tooth Whitening	5.4	5.7	6.0	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
CD	14.2	14.8	15.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	11.4	11.8	12.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**106.9**	**111.8**	**117.1**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Endodontic Treatment is abbreviated as ET, Conservative Dentistry is abbreviated as CD

Endodontic treatment segment will grow significantly. Increasing demand for effective tooth repair with reduced pain will foster the segmental growth. Several benefits delivered by endodontic treatment including preserving natural tooth structure, efficient as well as cost-effective and visually appealing result fosters the segmental growth.

2.1.4 End-use trends

TABLE 7 Dental laser market, by end-use, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Dental Clinics	60.7	63.5	66.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Hospitals	28.2	29.5	30.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	18.0	18.8	19.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**106.9**	**111.8**	**117.1**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Increasing number of cost-effective dental implants treatments due to dental tourism surges the patient preferences for dental clinics. Also, convenient diagnosis and screening services provided by dental clinics will augment industry growth.

2.1.5 Regional trends

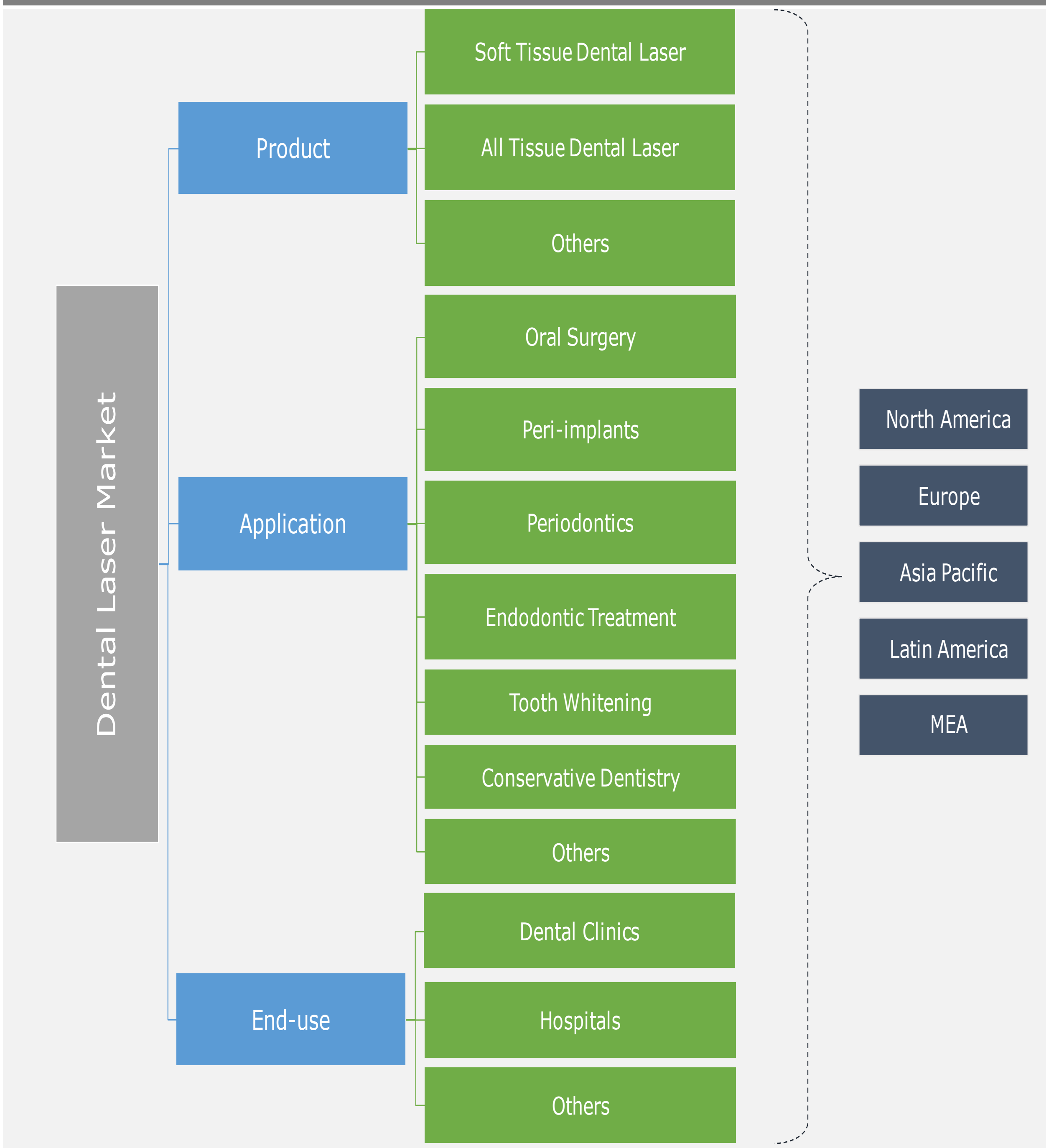
TABLE 8 Dental laser market, by region, 2014 – 2025 (USD Million)

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
North America	33.7	35.0	36.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Europe	31.9	33.2	34.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Asia Pacific	22.4	23.8	25.2	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Latin America	12.0	12.7	13.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
MEA	6.8	7.2	7.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**106.9**	**111.8**	**117.1**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Chapter 3 Dental Laser Industry Insights

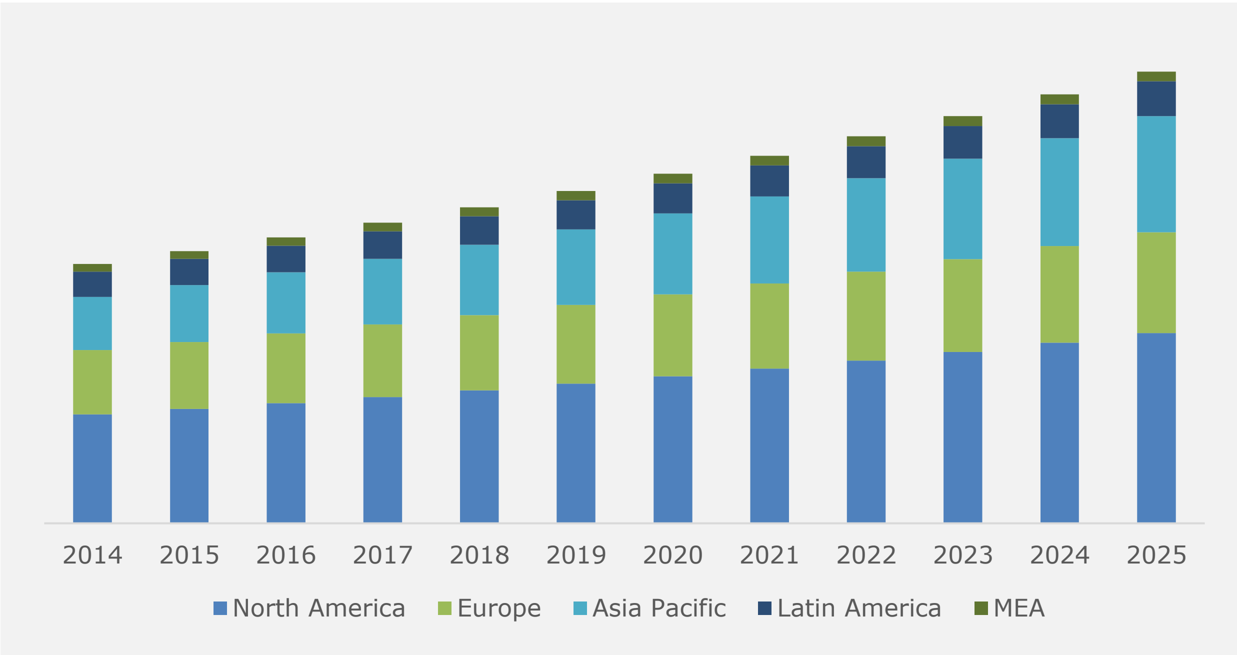
3.1 Industry segmentation

FIG. 1 Industry segmentation



3.2 Industry landscape, 2014 – 2025

FIG. 2 Global dental laser market size, 2014 – 2025 (USD Million)



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3.3 Industry impact forces

TABLE 9 Industry impact forces

Growth drivers	Short term	Medium term	Long term
Increasing patient preference towards dental tourism			
Growing preference for non-invasive procedures			
Increasing prevalence of oral diseases globally			
Technological advancements			
Industry pitfalls & challenges			
High cost associated with dental lasers			
Lack of knowledge in underdeveloped economies			

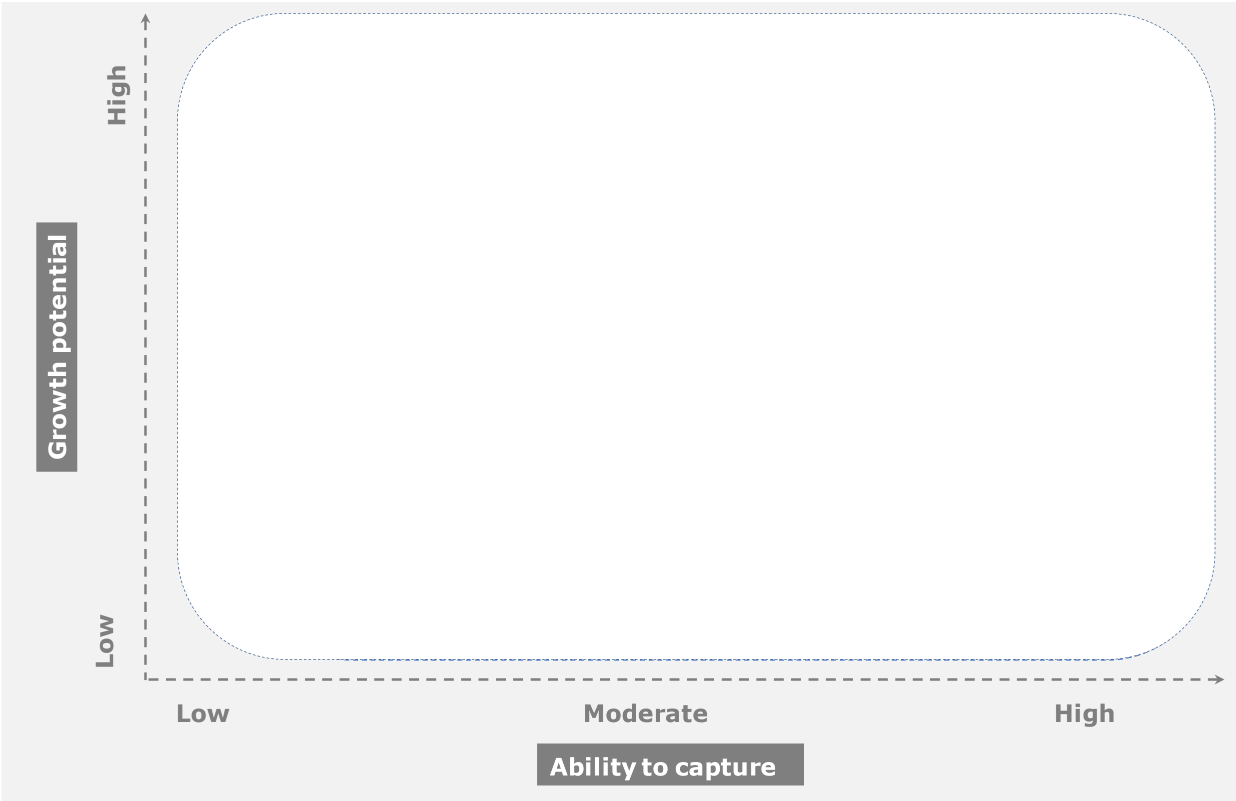
3.3.1 Growth drivers

3.3.1.1 Growing preference for non-invasive procedures

Increasing number of non-invasive procedures and consequent rise in number of oral cancers will drive the demand of dental laser market over the forecast timeframe. Rising oral problems across the globe will further support the thriving number of non-invasive surgeries. xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

3.4 Growth potential analysis

FIG. 3 Growth potential analysis, by product



<u>Growth potential denotes the revenue opportunity offered by the segment while ability to capture denotes the potential of a new entrant to capture market share, taking into consideration the intensity of competition. Bubble size represents present revenue</u>.

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3.5 Porter's analysis

FIG. 4 Porter's analysis

Threat of new entrants (XX → XX)

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Supplier power (XX → XX)

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Industry rivalry (Moderate → High)

Industry rivalry is anticipated to be moderate to high during the forecast period. The market players resort to various strategic initiatives such as acquisitions, mergers, technological advancements and new product development to strengthen their foothold in the market and broaden existing product portfolio. Entry of new market players with innovative dental lasers will further intensify industry rivalry.

Buyer power (XX → XX)

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Threat of substitutes (XX → XX)

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3.6 PESTEL analysis

FIG. 5 PESTEL analysis

Political

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Legal

Dental laser market is highly regulated with presence of regulatory bodies to ensure the quality of dental laser devices. Many guidelines set by these authorities will have positive impact on device quality leading to surge in demand. Different dental laser devices are classified under regulations depending on the product and its applications.

Environmental

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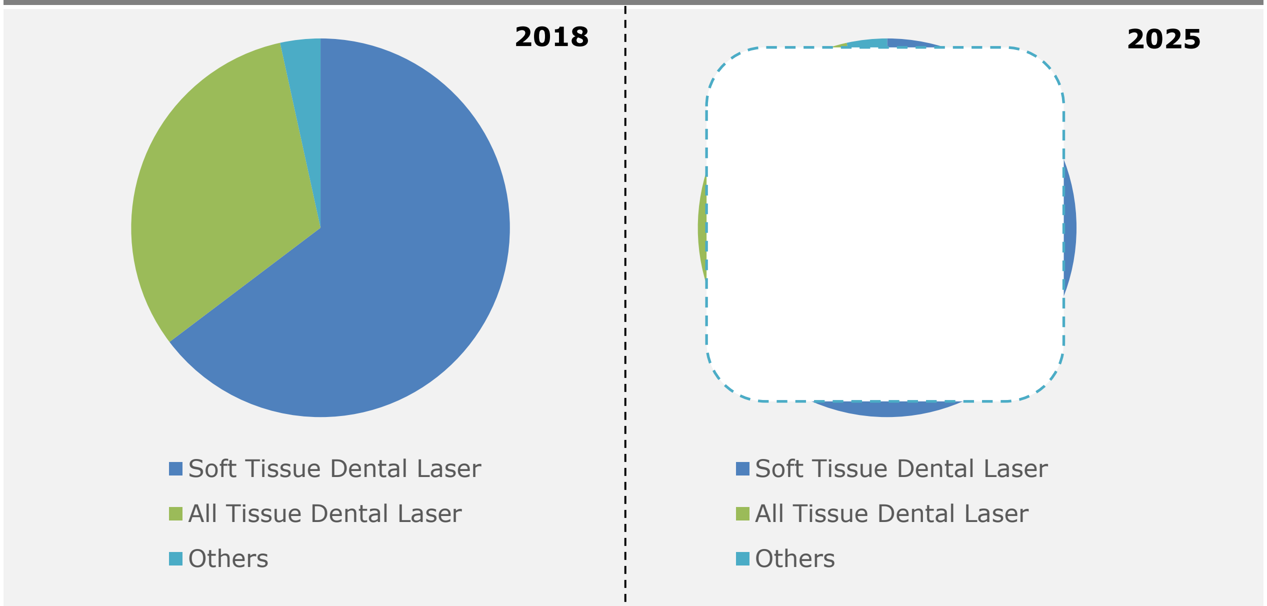
Chapter 4 Dental Laser Market, By Product

4.1 Dental laser market share, by product, 2018 & 2025

FIG. 6 Dental laser market share, by product, 2018 & 2025



4.2 Soft tissue dental laser

4.2.1 Market size, by region, 2014 – 2025

TABLE 10 Soft tissue dental laser market size, by region, 2014 – 2025 (USD Million)

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
North America	21.6	22.5	23.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Europe	20.5	21.4	22.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Asia Pacific	14.4	15.3	16.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Latin America	7.7	8.2	8.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
MEA	4.4	4.6	4.9	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**68.7**	**72.0**	**75.5**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

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4.2.2 CO_2 laser

4.2.2.1 Market size, by region, 2014 – 2025

TABLE 11 CO_2 laser systems market size, by region, 2014 – 2025 (USD Million)

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
North America	6.2	6.5	6.7	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Europe	5.9	6.2	6.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Asia Pacific	4.2	4.4	4.7	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Latin America	2.2	2.4	2.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
MEA	1.3	1.3	1.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**19.8**	**20.8**	**21.8**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

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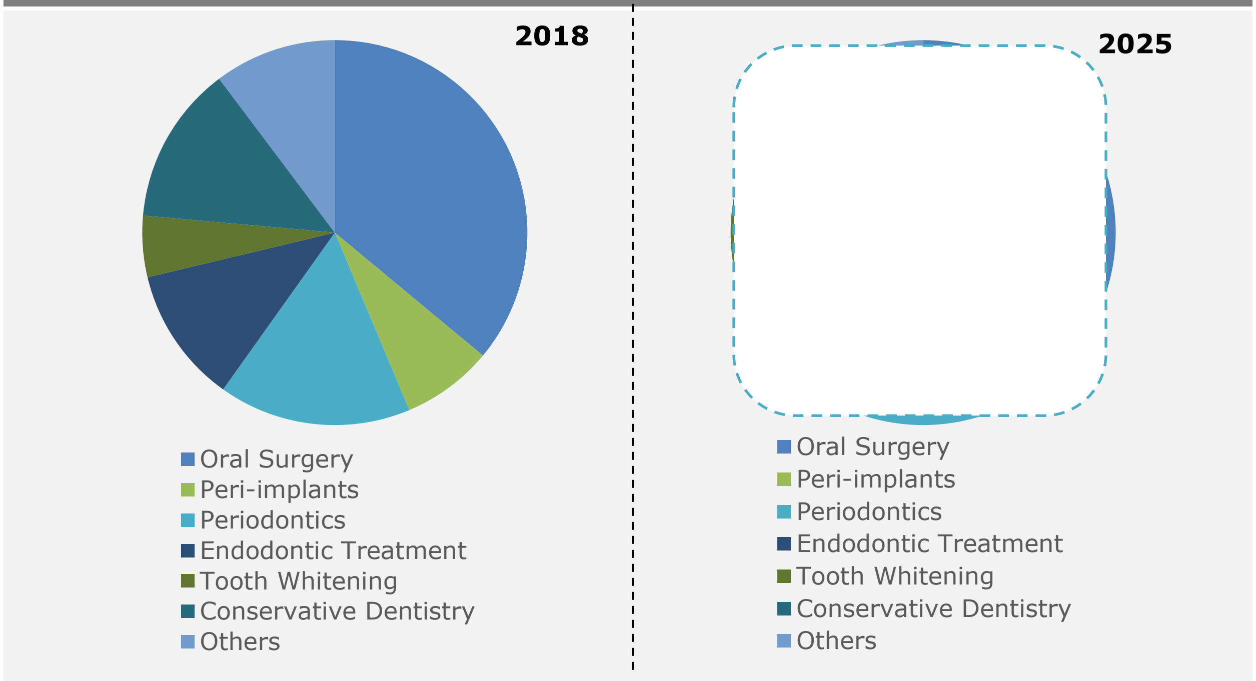
Chapter 5 Dental Laser Market, By Application

5.1 Dental laser market share, by application, 2018 & 2025

FIG. 7 Dental laser market share, by application, 2018 & 2025



5.2 Oral surgery

5.2.1 Market size, by region, 2014 – 2025

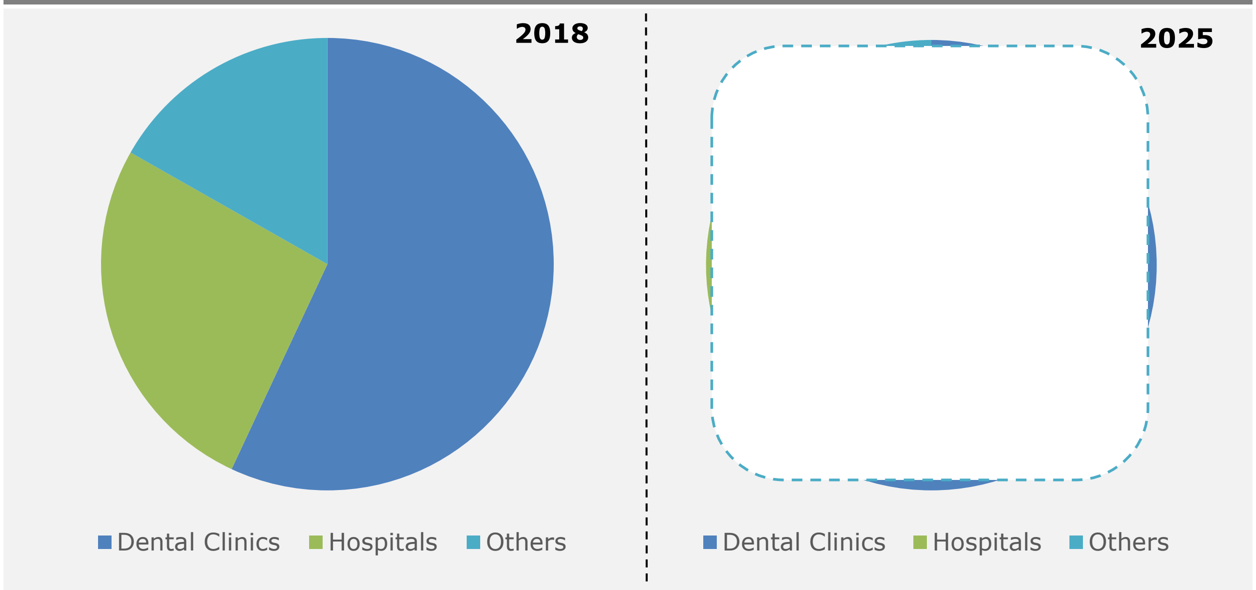
TABLE 12 Oral surgery market size, by region, 2014 – 2025 (USD Million)

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
North America	12.2	12.6	13.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Europe	11.6	12.0	12.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Asia Pacific	8.2	8.6	9.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Latin America	4.4	4.6	4.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
MEA	2.5	2.6	2.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**38.8**	**40.5**	**42.4**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Chapter 6 Dental Laser Market, By End-use

6.1 Dental laser market share, by end-use, 2018 & 2025

FIG. 8 Dental laser market share, by end-use, 2018 & 2025



6.2 Hospitals

6.2.1 Market size, by region, 2014 – 2025

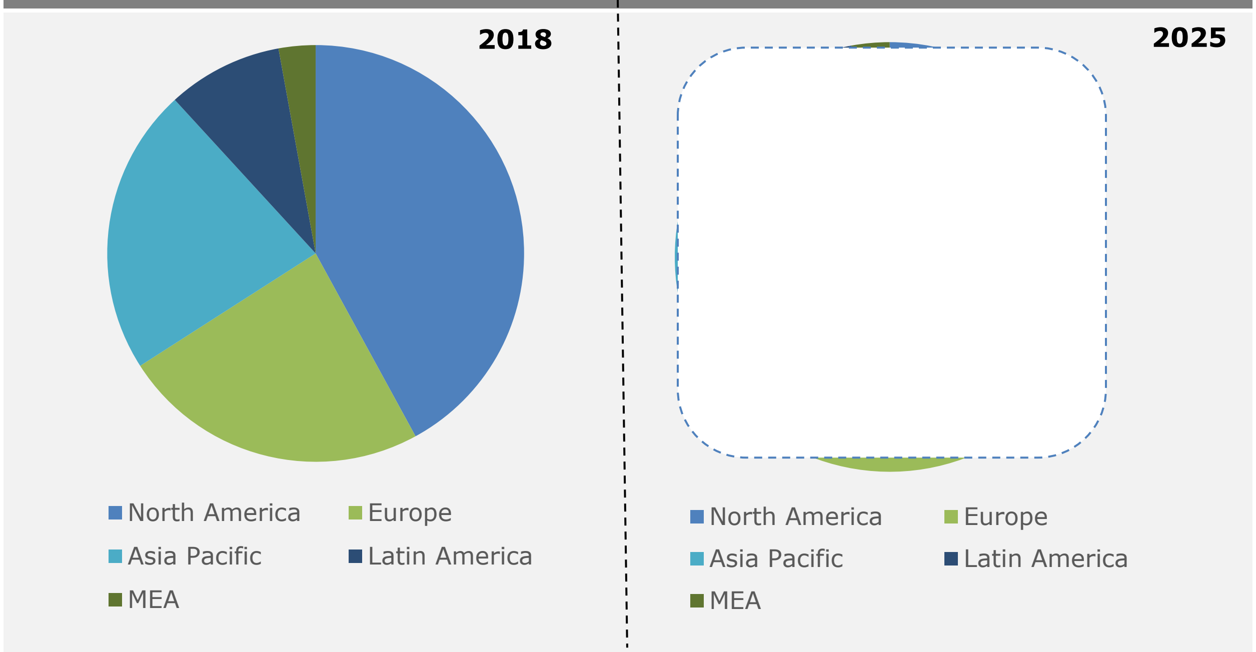
TABLE 13 Hospitals market size, by region, 2014 – 2025 (USD Million)

Region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
North America	8.9	9.2	9.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Europe	8.4	8.8	9.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Asia Pacific	5.9	6.3	6.7	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Latin America	3.2	3.3	3.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
MEA	1.8	1.9	2.0	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**28.2**	**29.5**	**30.8**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Chapter 7 Dental Laser Market, By Region

7.1 Dental laser market share, by region, 2018 & 2025

FIG. 9 Dental laser market share, by region, 2018 & 2025



7.2 North America

7.2.1 Market size, by country, 2014 – 2025

TABLE 14 North America dental laser market size, by country, 2014 – 2025 (USD Million)

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
U.S.	31.50	32.72	34.04	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Canada	2.18	2.24	2.29	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**33.68**	**34.96**	**36.33**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

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7.2.2 Market size, by product, 2014 – 2025

TABLE 15 North America dental laser market size, by product, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
STDL	21.6	22.5	23.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
ATDL	10.8	11.2	11.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	1.2	1.3	1.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**33.7**	**35.0**	**36.3**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Soft Tissue Dental Laser is abbreviated as STDL, All Tissue Dental Laser is abbreviated as ATDL

7.2.2.1 Market size, by soft tissue dental laser, 2014 – 2025

TABLE 16 North America dental laser market size, by soft tissue dental laser, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
CO_2 LS	6.2	6.5	6.7	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
DLS	12.1	12.6	13.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Nd:YAG	3.3	3.4	3.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**21.6**	**22.5**	**23.4**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

CO2 Laser Systems is abbreviated as CO2 LS, Diode Laser Systems is abbreviated as DLS, Nd:YAG Laser System is abbreviated as Nd:YAG

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7.2.2.2 Market size, by all tissue dental laser, 2014 – 2025

TABLE 17 North America dental laser market size, by all tissue dental laser, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Er:YAG	4.6	4.8	5.0	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Er,Cr: YSGG	6.2	6.4	6.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**10.8**	**11.2**	**11.6**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Er:YAG Laser Systems is abbreviated as Er:YAG, Er,Cr:YSGG Laser Systems is abbreviated as Er,Cr:YSGG

7.2.3 Market size, by application, 2014 – 2025

TABLE 18 North America dental laser market size, by application, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Oral Surgery	12.2	12.6	13.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Peri-implants	2.6	2.7	2.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Peri-odontics	5.3	5.6	5.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
ET	3.8	3.9	4.1	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Tooth Whitening	1.7	1.8	1.9	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
CD	4.5	4.6	4.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	3.6	3.7	3.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**33.7**	**35.0**	**36.3**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Endodontic Treatment is abbreviated as ET, Conservative Dentistry is abbreviated as CD

7.2.4 Market size, by end-use, 2014 – 2025

TABLE 19 North America dental laser market size, by end-use, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Dental Clinics	19.1	19.8	20.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Hospitals	8.9	9.2	9.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	5.7	5.9	6.2	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**33.7**	**35.0**	**36.3**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

7.2.5 U.S.

7.2.5.1 Market size, by product, 2014 – 2025

TABLE 20 U.S. dental laser market size, by product, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
STDL	20.23	21.05	21.93	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
ATDL	10.12	10.49	10.89	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	1.16	1.19	1.22	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**31.50**	**32.72**	**34.04**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

7.2.5.1.1 Market size, by soft tissue dental laser, 2014 – 2025

TABLE 21 U.S. dental laser market size, by soft tissue dental laser, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
CO_2 LS	5.8	6.1	6.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
DLS	11.4	11.8	12.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Nd:YAG	3.1	3.2	3.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**20.2**	**21.0**	**21.9**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

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7.2.5.1.2 Market size, by all tissue dental laser, 2014 – 2025

TABLE 22 North America dental laser market size, by all tissue dental laser, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Er:YAG	4.3	4.5	4.7	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Er,Cr: YSGG	5.8	6.0	6.2	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**10.1**	**10.5**	**10.9**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

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7.2.5.2 Market size, by application, 2014 – 2025

TABLE 23 U.S. dental laser market size, by application, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Oral Surgery	11.4	11.8	12.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Peri-implants	2.4	2.5	2.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Peri-odontics	5.0	5.2	5.4	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
ET	3.5	3.6	3.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Tooth	1.6	1.7	1.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
CD	4.2	4.3	4.5	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	3.4	3.5	3.6	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**31.5**	**32.7**	**34.0**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

7.2.5.3 Market size, by end-use, 2014 – 2025

TABLE 24 U.S. dental laser market size, by end-use, 2014 – 2025 (USD Million)

Segment	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR
Dental Clinics	17.9	18.6	19.3	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Hospitals	8.3	8.6	8.9	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Others	5.3	5.5	5.8	xx	xx	xx	xx	xx	xx	xx	xx	xx	**xx%**
Total	**31.5**	**32.7**	**34.0**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx**	**xx%**

Chapter 8 Company Profiles

8.1 Dentsply Sirona Inc.

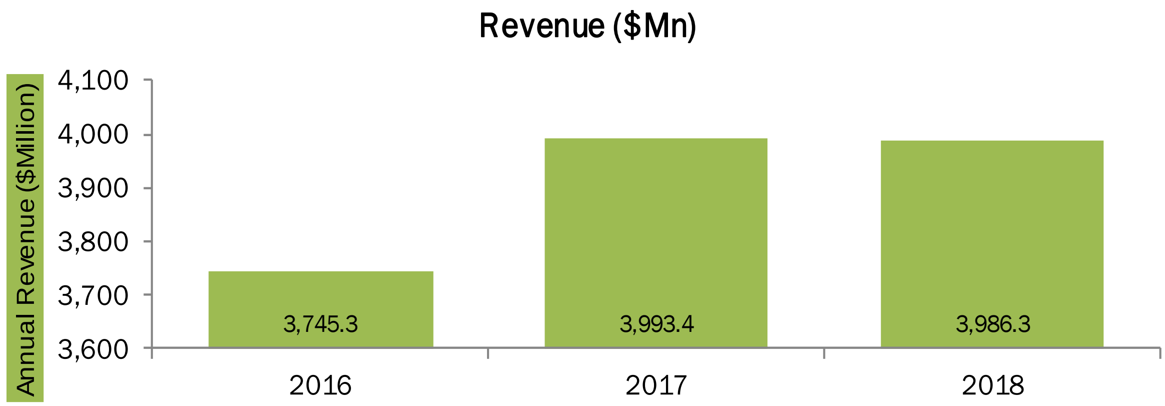
8.1.1 Business overview

Snapshot	
Headquarters	U.S.
Year of establishment	1899
Employees	16,400 (as of December 2018)
Regional presence	Global
D-U-N-S Number	10-222-1942
Traded	XRAY (NASDAQ)

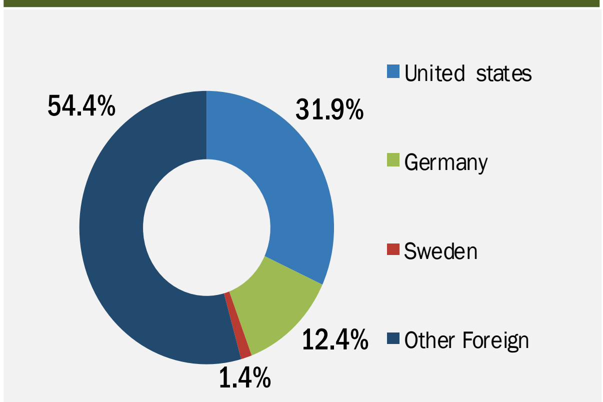
Dentsply Sirona makes a variety of dental goods, from pastes, anesthetics, and tooth whiteners for artificial teeth, bridge and crown materials, and implants. It also brands dental equipment, counting ultrasonic polishers, root canal instruments, orthodontic appliances and X-ray viewers. The company manufactures numerous products under approximately 100 brand names. More than half of the company products are sold through international and domestic distributors, the firm also sells products directly to dental labs, dentists, and dental schools in more than 120 countries.

8.1.2 Financial data

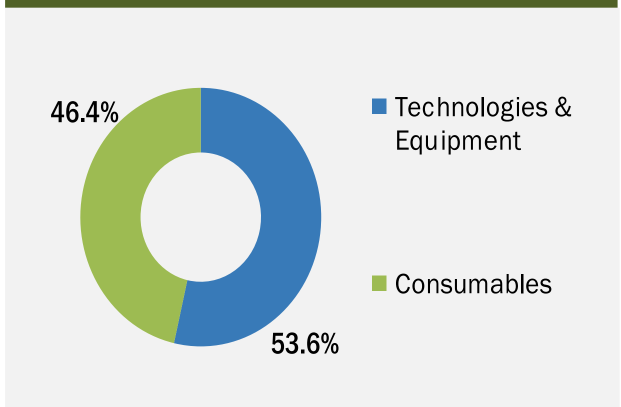
COMPANY FINANCIALS



GEOGRAPHIC REVENUE MIX



BUSINESS REVENUE MIX



Note: Net Sales

8.1.3 Product landscape

Products	Features/Application
SiroLaser Blue	• Improved bacterial reduction • Less post-operative pain • Mostly scar-free wound healing
xxxxxxxxxxxx	• xxxxxxxxxxxxxxxxxxx • xxxxxxxxxxxxxxxxxxx

Note: Above listed are major products/ categories

8.1.4 Strategic outlook

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8.1.5 SWOT analysis

SWOT analysis, Dentsply Sirona Inc.

S	• Improved performance of the consumable segment enhances firm's revenue share • Innovative product portfolio gives company a competitive advantage
W	• Dependence on few customers for revenue generation is a weakness
O	• Strategic acquisitions and collaborations will provide growth opportunities for the firm • Growing dental devices market will create huge growth opportunities
T	• Rapid technological changes may pose a threat to the company • Strict government regulations and increasing market competition will hinder the business growth

Note: The final report will contain profiles of the following companies based on the above-mentioned attributes (company overview, revenue, products and strategic developments):

8.2 AMD Lasers

8.3 BIOLASE, Inc.

8.4 BISON MEDICAL

8.5 CAO Group

8.6 Convergent Dental Inc.

8.7 Fotona

8.8 LightScalpel

8.9 J. MORITA CORP.

8.10 THE YOSHIDA DENTAL MFG. CO., LTD.

8.11 Zolar Technology