**Global Dental Burs Market**

**1. Introduction and Strategic Context**

The **Global Dental Burs Market** will witness a robust CAGR of **6.9%**, valued at **USD 945.7 million in 2024**, expected to appreciate and reach **USD 1.42 billion by 2030**, confirms Strategic Market Research.

Dental burs are rotary instruments used in dental procedures to cut, grind, and polish hard tissues, such as tooth enamel and bone. With a critical role in cavity preparation, restorative work, and surgical procedures, dental burs are essential tools for general dentistry and specialized practices alike. From tungsten carbide to diamond-coated varieties, advancements in precision tooling and material science are redefining performance expectations.

The market’s strategic relevance in the **2024–2030** window is driven by the rapid growth of dental tourism, an aging population with increasing dental needs, and technological enhancements in minimally invasive dentistry. As aesthetic procedures gain traction and digital dentistry becomes mainstream, the demand for high-precision, customizable, and disposable burs is surging globally.

**Key macro-level forces influencing this market include:**

* **Technological innovation:** Integration of CAD/CAM, 3D printing, and laser-compatible burs
* **Regulatory shifts:** Stricter sterilization and reprocessing guidelines prompting the move to single-use burs
* **Disease burden:** Rising prevalence of periodontal disease, dental caries, and edentulism, particularly in emerging economies
* **Economic trends:** Growing middle-class expenditure on cosmetic dentistry in Asia-Pacific and Latin America

Stakeholders span across the dental healthcare ecosystem, including **OEMs**, **dental equipment distributors**, **hospital procurement managers**, **private dental clinics**, **DSOs (Dental Support Organizations)**, **insurance providers**, **academic institutions**, and **regulatory bodies**.

*Industry experts emphasize that the shift towards single-patient-use burs—driven by infection control priorities—will be a critical inflection point, pushing manufacturers toward cost-effective, eco-friendly innovations.*

**2. Market Segmentation and Forecast Scope**

The **dental burs market** is segmented to capture the full diversity of product types, applications, and end-user dynamics. This structured segmentation enables stakeholders to pinpoint high-growth niches, optimize product portfolios, and craft region-specific go-to-market strategies.

**By Product Type:**

* **Diamond Burs**
* **Tungsten Carbide Burs**
* **Steel Burs**
* **Ceramic Burs**
* **Others (Zirconia, Carbon-coated, etc.)**

**Diamond burs** held the largest share in **2024**, accounting for **38.2%** of the global market. Their dominance is attributed to superior cutting efficiency and compatibility with high-speed handpieces, particularly in crown and bridge preparation. However, **tungsten carbide burs** are expected to exhibit the fastest CAGR during the forecast period, owing to their precision in enamel cutting and durability in endodontic and surgical procedures.

**By Application:**

* **Restorative Dentistry**
* **Oral Surgery**
* **Orthodontics**
* **Implantology**
* **Others (Prophylaxis, Cosmetic Dentistry)**

*Restorative dentistry continues to lead the application segment due to high procedure volume in fillings, cavity preps, and crowns*. Meanwhile, **implantology** is emerging as the fastest-growing application, backed by technological convergence in guided surgery and bone grafting burs.

**By End User:**

* **Hospitals**
* **Dental Clinics**
* **Academic & Research Institutes**
* **Dental Laboratories**

**Dental clinics** are the dominant end-user segment, supported by the proliferation of independent practices and DSOs across North America, Europe, and parts of Asia. These facilities prefer high-rotation, cost-efficient burs, particularly single-use options to maintain infection control standards.

**By Region:**

* **North America**
* **Europe**
* **Asia Pacific**
* **Latin America**
* **Middle East & Africa**

*North America led the global market in 2024, thanks to high procedural volumes and an advanced reimbursement ecosystem for dental care.* However, **Asia Pacific** is projected to register the highest CAGR through 2030, fueled by dental tourism, rising disposable income, and significant government investments in oral health awareness.

This segmentation framework serves as a foundational lens to track shifts in demand patterns, pricing sensitivity, and innovation priorities across global and regional sub-markets.

**3. Market Trends and Innovation Landscape**

The **dental burs market** is undergoing a significant transformation shaped by material science innovations, rising digitization in dentistry, and shifting customer expectations for sterility, precision, and procedure-specific customization. Manufacturers and dental professionals alike are increasingly turning toward technologies that offer both performance enhancement and workflow optimization.

**Key Innovation Trends**

**1. Advanced Material Integration:**  
Recent innovations have focused on hybrid materials that combine the cutting strength of tungsten carbide with the flexibility of polymeric binders. **Multi-layer diamond burs**, designed to reduce chatter and improve cutting surface lifespan, are also gaining prominence. *Industry insiders suggest that future burs will embed nanodiamond coatings to further improve thermal conductivity and abrasive efficiency.*

**2. CAD/CAM and Digital Dentistry Compatibility:**  
The rise of computer-aided design and manufacturing (CAD/CAM) systems has increased the demand for burs with precise geometries and controlled cutting angles. These burs are optimized for scanning workflows and restoration shaping, especially in chairside milling environments. *Burs designed specifically for intraoral scanning units and milling machines are carving a niche for digitally integrated practices.*

**3. Eco-Friendly, Single-Use Models:**  
Sterilization standards, particularly in OECD countries, are pushing clinics toward **disposable dental burs** that reduce infection risks without compromising performance. Innovations in biodegradable composites are underway to make disposable burs environmentally sustainable—addressing growing concerns around medical waste.

**4. Custom Bur Kits for Specialties:**  
Specialty-specific bur kits tailored to prosthodontics, pediatric care, or endodontic surgery are reshaping procurement patterns. These pre-configured kits improve procedural speed, inventory management, and clinical standardization.

**M&A, Partnerships, and Emerging Players**

* Several mid-size players have merged to create regional distribution powerhouses, aiming to challenge the dominance of legacy brands.
* New entrants are targeting niche opportunities, such as **orthodontic debonding burs** and **zirconia polishers**, aiming to capture value in underserved product subcategories.
* Partnerships between bur manufacturers and **dental software developers** are becoming more common, integrating bur selection into digital treatment planning modules.

*One R&D director from a European bur manufacturer noted, “The next wave of differentiation won’t come from raw material strength, but from procedural intelligence—how well the bur fits into the digital and ergonomic workflow of the practitioner.”*

These trends suggest a future where innovation in dental burs isn’t just about sharper tools—it’s about smarter systems.

**4. Competitive Intelligence and Benchmarking**

The **dental burs market** is moderately fragmented, featuring a blend of long-established multinational corporations and fast-growing regional players. Competition is defined by product innovation, global distribution reach, pricing strategies, and alignment with evolving clinical workflows.

**Key Players and Strategic Highlights**

**1. Dentsply Sirona**  
A global leader in dental consumables and equipment, **Dentsply Sirona** maintains a broad bur portfolio tailored to both general and specialist practitioners. The company emphasizes **premium carbide and diamond burs** optimized for CAD/CAM systems. Its strategy involves bundling burs with its own proprietary handpieces and treatment centers—driving brand lock-in across clinics.

**2. Kerr Dental (Envista Holdings)**  
Known for its durable and ergonomically designed dental burs, **Kerr Dental** offers both single-use and reusable models. The brand has recently shifted focus toward eco-friendly, single-patient-use kits. *Kerr’s strategic alignment with Envista’s digital ecosystem, including implantology and imaging platforms, enhances its cross-functional appeal.*

**3. Brasseler USA**  
As a specialist in rotary instruments, **Brasseler USA** differentiates through **custom bur kits and specialty-specific solutions**. Their stronghold in the U.S. market is bolstered by direct-to-dentist distribution and continuing education programs, which solidify loyalty among high-volume private practices.

**4. COLTENE Holding AG**  
This Switzerland-based player leverages strong R&D to deliver **precision-engineered carbide burs** with enhanced surface treatment for longer durability. The company has made strategic inroads in emerging markets via low-cost, high-reliability offerings tailored to dental schools and training institutions.

**5. Mani, Inc.**  
A dominant name in Asia, **Mani** focuses on affordable, high-precision burs for both surgical and restorative applications. Its cost-effective models are popular among bulk purchasers in Japan, India, and Southeast Asia. *Mani is increasingly investing in automation and robotics to streamline bur production without sacrificing quality.*

**6. Microcopy Dental**  
An innovation-first manufacturer, **Microcopy** is credited with pioneering **single-use, pre-sterilized burs**. Its high-volume SKUs are favored in practices concerned with cross-contamination risks. Their “Ready-to-Use” product line has seen strong uptake in both North American and European infection-conscious markets.

**7. SHOFU Dental**  
Known for its **ceramic and diamond bur technologies**, **SHOFU Dental** is growing its footprint in cosmetic and minimally invasive procedures. The company’s burs are often packaged with polishing systems, reinforcing procedural continuity.

**Strategic Benchmarks**

* **Product Breadth:** Dentsply Sirona and Brasseler lead in portfolio size, while Microcopy dominates the single-use niche.
* **Global Reach:** Kerr and COLTENE have wider global footprints, supported by robust distributor networks.
* **Innovation:** SHOFU and Microcopy score high in product uniqueness, while Mani wins on manufacturing efficiency.
* **Pricing Strategy:** Mani and COLTENE offer value-based pricing for cost-sensitive regions, whereas Dentsply Sirona targets premium practices.

*Analysts anticipate that the next competitive edge will lie in AI-augmented inventory systems that recommend optimal burs per patient case, improving both chairside speed and patient outcomes.*

**5. Regional Landscape and Adoption Outlook**

The **dental burs market** exhibits strong geographic diversity in both adoption rates and growth potential. While developed markets continue to dominate in terms of value, emerging regions are showing exceptional volume-based momentum, fueled by rising dental awareness, expanding healthcare infrastructure, and the growing appeal of dental tourism.

**North America**

North America, led by the **United States**, commanded the largest market share in 2024, supported by a mature dental care ecosystem, high dentist-to-population ratio, and advanced insurance models. The U.S. dental sector benefits from early adoption of **digital workflows and infection control standards**, accelerating the use of **single-use, pre-sterilized burs** in group practices and large-scale dental support organizations (DSOs).

*Canada mirrors similar trends, particularly in university hospitals and public dental services, which are increasingly mandating compliance with CDC sterilization protocols.*

**Europe**

Europe presents a balanced market with strong procedural volumes and a high concentration of **dental schools and academic institutions**. Countries such as **Germany, the UK, France, and Italy** are key contributors, owing to both public and private reimbursement schemes for restorative and prosthetic procedures.

*Germany, in particular, shows high uptake of CAD/CAM-compatible burs and specialty kits, driven by its robust network of prosthodontic laboratories and advanced clinical settings.*

Eastern Europe, while slower to adopt premium burs, is emerging as a **value-based procurement zone**, attracting mid-tier manufacturers offering affordable yet durable carbide and diamond burs.

**Asia Pacific**

Asia Pacific is the fastest-growing regional market, led by **China, India, Japan, and South Korea**. The region benefits from:

* **Expanding middle-class access to dental care**
* **Government-led oral health campaigns**
* **High-volume dental tourism markets**, especially in Thailand and India

*Japan and South Korea demonstrate high penetration of premium dental burs tailored for implantology and cosmetic procedures.* Meanwhile, **India** represents a cost-sensitive but rapidly modernizing market, where **local production of burs** is increasing in tandem with foreign collaborations.

**Latin America**

Countries such as **Brazil, Mexico, and Colombia** are becoming dental procedure hubs, partly due to affordable care costs and a growing domestic emphasis on cosmetic dentistry. While procurement here still leans toward **multi-use steel burs** and generic models, trends are gradually shifting toward tungsten carbide and eco-conscious products.

*Brazil, in particular, has demonstrated significant growth in implantology-driven burs, thanks to its thriving cosmetic dentistry sector.*

**Middle East & Africa (MEA)**

Although currently the smallest market, MEA is showing early signs of acceleration. The **Gulf Cooperation Council (GCC)** countries, including **UAE and Saudi Arabia**, are investing in premium dental clinics to cater to medical tourism and elite urban populations.

*South Africa is driving growth within Sub-Saharan Africa, especially through university-linked public dental health programs that now mandate higher instrument sterilization standards.*

**White Space and Underserved Regions**

Significant white space exists in rural Asia, sub-Saharan Africa, and parts of Latin America where access to high-quality burs remains limited. These zones represent a major opportunity for:

* **Low-cost, reusable burs**
* **Mobile dental units equipped with all-in-one kits**
* **Training partnerships to familiarize professionals with specialty burs**

*Analysts expect strategic investments in regional manufacturing and distribution to close these supply gaps and unlock untapped procedural volumes.*

**6. End-User Dynamics and Use Case**

The demand landscape in the **dental burs market** is largely shaped by the operating models, procurement priorities, and procedural preferences of key end users. Each category—ranging from large-scale hospitals to independent dental clinics—interacts with burs differently in terms of volume, type, and innovation readiness.

**Hospitals**

Large hospitals, particularly those with dental departments, prioritize **multi-disciplinary bur kits** that support a variety of procedures—oral surgery, implantology, and conservative treatment. These institutions typically procure **bulk, multi-use burs** and invest in **autoclaving systems** for reuse. However, infection control trends are nudging hospitals toward hybrid models that include **single-use burs for high-risk procedures**.

*Teaching hospitals also act as early adopters of procedural innovations, often testing new bur geometries and materials as part of clinical research programs.*

**Dental Clinics**

**Private dental clinics**—ranging from solo practices to multi-chair setups—constitute the largest consumer base for dental burs. Their preferences are shaped by:

* **Turnover speed**: High patient volumes demand quick bur replacement
* **Sterility**: Many clinics are shifting to **pre-sterilized, single-use burs**
* **Procedure diversity**: Clinics need versatile kits suitable for both restorative and cosmetic cases

*Large DSOs (Dental Support Organizations) often partner with manufacturers to create custom bur assortments aligned with standardized treatment protocols.*

**Academic & Research Institutes**

Dental schools and academic hospitals use burs primarily for **training and evaluation purposes**. They seek cost-effective options, often in large quantities, and favor reusables to stretch budget allocations. However, curriculum shifts toward infection control and digital dentistry are prompting these institutions to integrate more advanced and specialty burs into student kits.

*Academic settings are also hotbeds for prototype testing and material validation for emerging bur technologies.*

**Dental Laboratories**

Though not primary users of traditional dental burs, **dental laboratories** employ burs in **milling machines and prosthetic finishing** tasks. They favor **CAD/CAM-compatible burs** with tight tolerances and long operational lifespans.

**Realistic Use Case**

*Case Study: Modern Implantology in a South Korean Hospital*

At a tertiary care hospital in **Busan, South Korea**, the dental surgery department implemented a **bur customization program** for implantology procedures. Partnering with a local bur manufacturer, the hospital deployed **multi-layered diamond burs** tailored for cortical bone drilling and ridge modification. Over a 6-month pilot, the surgical team reported a **22% reduction in chairside procedural time** and **17% fewer bur replacements**, improving both clinical throughput and cost efficiency.

*The program’s success has since prompted the hospital to expand customized bur protocols to periodontal and sinus lift surgeries.*

This section illustrates how different institutions engage with burs in ways that align with their workflows, budgets, and risk protocols—highlighting the need for adaptive marketing and product development strategies.

**7. Recent Developments + Opportunities & Restraints**

**🔄 Recent Developments (Last 2 Years)**

1. **Microcopy Dental** launched its **NeoDiamond X-Series** of single-use burs, integrating nano-crystalline diamond particles for smoother enamel cuts and longer lifespan.  
   <https://www.microcopydental.com/neo>
2. **COLTENE Group** announced a strategic distribution agreement with a leading dental group purchasing organization in Europe, enabling access to over 4,000 clinics.  
   <https://www.coltene.com/news>
3. **Brasseler USA** introduced an AI-supported inventory management tool, “**SmartTray**,” helping clinics reorder burs based on procedure frequency and rotation rate.   
   <https://www.brasselerusa.com/news/smarttray>
4. **Mani, Inc.** inaugurated a fully automated production facility in Tochigi, Japan, aimed at increasing output of rotary burs by 35% to meet growing APAC demand.  
   <https://www.mani.co.jp/newsroom>
5. **Kerr Dental** unveiled its **environmentally sustainable packaging system** for its rotary products, reducing plastic usage by 45%.  
   <https://www.kerrdental.com/news>

**🔁 Opportunities**

**1. Expansion of Dental Tourism in Emerging Markets:**  
Countries such as **India, Thailand, and Mexico** are drawing international dental tourists, creating strong demand for **affordable, disposable burs** tailored to high patient turnover environments.

**2. Integration of AI and Predictive Analytics in Inventory Management:**  
Advanced tracking tools can help clinics monitor bur usage patterns and automate procurement, improving efficiency while reducing operational costs.

**3. Eco-Friendly Innovations:**  
There’s increasing room for **biodegradable and recyclable single-use burs**, catering to both infection control mandates and sustainability goals in Europe and North America.

**🚧 Restraints**

**1. High Capital Costs for Premium Burs and Digital Equipment Compatibility:**  
Clinics in developing regions often hesitate to adopt **CAD/CAM-specific or nano-coated burs** due to high costs and limited digital infrastructure.

**2. Regulatory Delays and Sterilization Compliance Complexity:**  
New product approvals, particularly in **Europe under MDR** (Medical Device Regulation), are facing extended timelines. This affects smaller manufacturers entering the premium or single-use segment.

This section underscores the balance of opportunity and challenge that shapes strategic decision-making in the dental burs space.

**8. Report Summary, FAQs, and SEO Schema**

**📘 A. Report Title**

**Dental Burs Market By Product Type (Diamond Burs, Tungsten Carbide Burs, Steel Burs, Ceramic Burs, Others); By Application (Restorative Dentistry, Oral Surgery, Orthodontics, Implantology, Others); By End User (Hospitals, Dental Clinics, Academic & Research Institutes, Dental Laboratories); By Geography, Segment Revenue Estimation, Forecast, 2024–2030.**

**🌍 A.2. Market Name (lowercase)**

**dental burs market**

**📈 A.3. Market Size Headline**

**Dental Burs Market Size ($1.42 Billion) 2030**

**📊 B. Report Coverage Table**

| **Report Attribute** | **Details** |
| --- | --- |
| Forecast Period | 2024 – 2030 |
| Market Size Value in 2024 | **USD 945.7 Million** |
| Revenue Forecast in 2030 | **USD 1.42 Billion** |
| Overall Growth Rate | **CAGR of 6.9% (2024 – 2030)** |
| Base Year for Estimation | 2023 |
| Historical Data | 2017 – 2021 |
| Unit | USD Million, CAGR (2024 – 2030) |
| Segmentation | By Product Type, By Application, By End User, By Geography |
| By Product Type | Diamond Burs, Tungsten Carbide Burs, Steel Burs, Ceramic Burs, Others |
| By Application | Restorative Dentistry, Oral Surgery, Orthodontics, Implantology, Others |
| By End User | Hospitals, Dental Clinics, Academic & Research Institutes, Dental Laboratories |
| By Region | North America, Europe, Asia-Pacific, Latin America, Middle East & Africa |
| Country Scope | U.S., UK, Germany, China, India, Japan, Brazil, etc. |
| Market Drivers | - Rise in minimally invasive dental procedures - Expansion of dental tourism - Shift toward single-use instruments |
| Customization Option | Available upon request |

**❓ C. Top 5 FAQs**

| **Question** | **Answer** |
| --- | --- |
| **How big is the dental burs market?** | The global dental burs market was valued at **USD 945.7 million** in 2024. |
| **What is the CAGR for dental burs during the forecast period?** | The dental burs market is expected to grow at a CAGR of **6.9%** from 2024 to 2030. |
| **Who are the major players in the dental burs market?** | Leading players include **Dentsply Sirona**, **Brasseler USA**, and **Kerr Dental**. |
| **Which region dominates the dental burs market?** | **North America** leads due to high procedural volume and advanced infection control practices. |
| **What factors are driving the dental burs market?** | Growth is fueled by **technological innovation**, **dental tourism**, and **sterility-focused clinical protocols**. |

**🔗 D. JSON-LD Schema Markup**

**1. Breadcrumb Schema**

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**2. FAQ Schema**

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**9. Table of Contents for Dental Burs Market Report (2024–2030)**

**Executive Summary**

* Market Overview
* Market Attractiveness by Product Type, Application, End User, and Region
* Strategic Insights from Key Executives (CXO Perspective)
* Historical Market Size and Future Projections (2022–2030)
* Summary of Market Segmentation by Product Type, Application, End User, and Region

**Market Share Analysis**

* Leading Players by Revenue and Market Share
* Market Share Analysis by Product Type, Application, and End User

**Investment Opportunities in the Dental Burs Market**

* Key Developments and Innovations
* Mergers, Acquisitions, and Strategic Partnerships
* High-Growth Segments for Investment

**Market Introduction**

* Definition and Scope of the Study
* Market Structure and Key Findings
* Overview of Top Investment Pockets

**Research Methodology**

* Research Process Overview
* Primary and Secondary Research Approaches
* Market Size Estimation and Forecasting Techniques

**Market Dynamics**

* Key Market Drivers
* Challenges and Restraints Impacting Growth
* Emerging Opportunities for Stakeholders
* Impact of Regulatory, Behavioral, and Technological Factors

**Global Dental Burs Market Analysis**

* Historical Market Size and Volume (2022–2023)
* Market Size and Volume Forecasts (2024–2030)

**Market Analysis by Product Type**

* Diamond Burs
* Tungsten Carbide Burs
* Steel Burs
* Ceramic Burs
* Others

**Market Analysis by Application**

* Restorative Dentistry
* Oral Surgery
* Orthodontics
* Implantology
* Others

**Market Analysis by End User**

* Hospitals
* Dental Clinics
* Academic & Research Institutes
* Dental Laboratories

**Market Analysis by Region**

* North America
* Europe
* Asia-Pacific
* Latin America
* Middle East & Africa

**Regional Market Analysis**

**North America**

* U.S.
* Canada
* Mexico

**Europe**

* Germany
* United Kingdom
* France
* Italy
* Spain
* Rest of Europe

**Asia-Pacific**

* China
* India
* Japan
* South Korea
* Rest of Asia-Pacific

**Latin America**

* Brazil
* Argentina
* Rest of Latin America

**Middle East & Africa**

* GCC Countries
* South Africa
* Rest of Middle East & Africa

**Key Players and Competitive Analysis**

* Dentsply Sirona
* Kerr Dental (Envista Holdings)
* Brasseler USA
* COLTENE Holding AG
* Mani, Inc.
* Microcopy Dental
* SHOFU Dental
* Comparative Benchmarking Matrix

**Appendix**

* Abbreviations and Terminologies Used in the Report
* References and Sources

**List of Tables**

* Market Size by Product Type, Application, End User, and Region (2024–2030)
* Regional Market Breakdown by Product Type and End User (2024–2030)

**List of Figures**

* Market Dynamics: Drivers, Restraints, Opportunities, and Challenges
* Regional Market Snapshot for Key Regions
* Competitive Landscape and Market Share Analysis
* Growth Strategies Adopted by Key Players
* Market Share by Product Type, Application, and End User (2024 vs. 2030)