

The 38th International Dental Show in Cologne - 12-16.3.2019

In the 96th year of its existence, IDS remains the undisputed leading global trade fair of the dental industry. IDS is the most comprehensive marketplace for dental medical technology and covers all international dental market activities. Around 2,300 manufacturers of products, system solutions and services present all the innovations that researchers and developers have designed since the previous IDS in order to enable and facilitate the work of users. More than 155,000 trade visitors, dentists, dental technicians, their employees from the practices and laboratories, plus the next generation of dental care practitioners and dental technicians in training, and not least the international dental specialized trade make IDS a unique summit meeting, the "leading dental business summit".

What basic conditions influence the International Dental Show?

The world of the 21st century is in a process of fundamental change:

- **Politics:** we are observing a regrouping, a shift and displacement of the political importance of the major powers. We are seeing changes in the international political power structure.
- **The economy and commerce:** we are seeing a high degree of dynamic development in many economic regions, a great degree of competition prevails in all areas, including and especially in the segment of medical technology, and in our special field, that of dental medical technology. We are once again experiencing an intensive discussion revolving around trade barriers and protective tariffs. Things we believed long since overcome are now impairing free global trade.
- **Population growth:** we are seeing high growth in various regions of the world that poses major challenges for politics, the economy and the provision of medical care to people.
- **Technological development:** digitalisation is advancing rapidly, we are observing revolutionary changes in the production and distribution of goods and commodities that might surpass anything we can imagine. The innovation cycles are becoming shorter due to the ever-faster gains in knowledge made by medical technology research, the logistics chains are setting increasingly demanding tasks for manufacturers and distributors.

Many people and even entire societies perceive transition, changes and disruptions as threatening. They seem to pose a great risk to their existence and therefore often make them feel uneasy and worried.

However, transition, changes and disruptions are also periods that offer many opportunities for developing something new and turning previously inconceivable ideas into products and services. They are epochs in which we must question existing things and make use of the manifold new opportunities so that we can contribute specifically to progress.

The enduring transformation, the constant progress in knowledge is quite evident in a very special way in our international dental industry. Dentistry and the dental medical technology developed for it reflect the eras of turbulent development of past decades.

Our German dental industry has been the reliable partner of dentists and of dental technology for more than 100 years in the context of a constant process of progress. We are aware of our responsibility to manufacture products that benefit patients.

Open-mindedness and free trade are indispensable for keeping people healthy. The provision of dental medicine and dental technology to patients is primarily based on well-trained and highly dedicated dentists and dental technicians. Together they apply their specialist knowledge to patients in order to maintain or restore their oral health.

For these activities they require a wealth of products that are manufactured by our German dental industry in high quality. Our product developments make it possible for users around the world to offer their patients the entire therapeutic range of modern dentistry.

Our dental industry has stood for the quality, precision, and reliability of especially user-friendly products for more than a century.

Most recently we have observed strong tendencies toward protectionist measures in many global markets, also extending to market foreclosures, and particularly in the medical products segment.

- Ever new, additional regulatory requirements, as well as very cost-intensive validation processes are increasingly impairing market access for our products, or making them unnecessarily expensive.
- This results in considerable competitive disadvantages for us, which our industry is attempting to compensate for with great effort.

In contrast, we are emphatically in favour of free global trade and the unrestricted exchange of tested commodities and products that correspond to international standards and the legal requirements for medical products.

Our industry meets the challenges and shall make every effort to in future also be able to offer users and patients mature and thoroughly proven products.

We will only be able to do so successfully together over the long term when the basic conditions of national and international health and economic policy promote health science instead of hinder it!

IDS - a strong anchor of stability in turbulent times

The International Dental Show has always been and continues to be a secure anchor for stability in turbulent times.

The coming IDS will be the 38th since the premiere event in 1923.

The International Dental Show has itself been a motor and a benchmark of medical and dental technology development for 95 years.

The IDS has survived all times of crisis. It was and remains the comprehensive and fascinating display window of what is today possible, that which is coming tomorrow and what is already being developed conceptually for the day after tomorrow.

Dentistry and dental technology both demonstrate a high degree of affinity for technology, are themselves innovative, are not satisfied with that already achieved and strive for better.

Engineers and developers are partners in this process. They share the motives, the search for something even better, even more efficient, even more sophisticated methods of application. They are certain of being united in the wish to offer patients the best possible care for maintaining or restoring their health.

IDS is the best place to compare one's own company with the competition and position it on the global market. Dentists and dental technicians can gather information and ideas here that enable them to make future decisions for their practice or laboratory. This is particularly important in such turbulent times as these.

German dental industry: the heart and motor of IDS

The German dental industry has been the heart and motor of the IDS since 1923. Its 200 member companies form a strong community that is characterised by shared values: it is innovative, creative, flexible, service and customer-oriented, with a pronounced orientation to service, is open-minded and promotes the community. This is also what makes it so present and successful internationally.

The German dental industry is growing at home and abroad

We compile the sales figures for the business year 2018 in the spring of the present year, which is why they are not yet available to us.

In 2017, more than 20,700 people were employed with the around 200 member companies of the Association of the German Dental Industry in Germany and abroad. This means that the number of employees grew slightly by nearly three percent in comparison to 2016.

The VDDI member companies achieved a total turnover of around 5.3 billion Euro in 2017. This corresponds to a nearly 5 percent increase in comparison to 2016. Of these sales, around 3.4 billion Euro originate from foreign markets (+ five percent).

At 1.93 billion Euro, 2016 turnover was exceeded by 4.4 percent. Sixty percent of the association members participating in the survey in Germany registered higher sales in 2017 than in 2016.

Still positive are the expectations for the present year 2018. Here, 53 percent of the companies surveyed anticipate sales increases and another 45 percent sales at the level of the previous year.

Foreign business in nearly all regions on a strong growth course

The German dental industry registered an export share of nearly 64 percent in 2017. The significance of the global markets for our industry and its position in these markets was thus impressively emphasised.

Nearly half of the participants of the survey report increasing sales in foreign markets. Some 40 percent of them registered foreign sales at the 2016 level.

The following is an overview of the most important sales regions of our dental industry:

- The strongest market besides domestic sales remains Western Europe. Around 53 percent of survey participants reported increased sales here for 2017 and 36 percent still reported business at the 2016 level.
- Eastern Europe is developing clearly more positively than in 2016. 51 percent of companies surveyed by the VDDI reported increasing sales for 2017. Another 40 percent reported an unchanged annual turnover in comparison with the previous year.
- In the Far East, 55 percent of the companies registered increases and a third achieved turnover at the level of the previous year.
- 46 percent of the trust survey participants were able to expand their business activities in the North American sales market. Another 39 percent reported sales at the level of 2016.
- 45 percent of those surveyed achieved an increase in sales in the Near and Middle East in the reporting year. Sales in 2017 also stabilised at the 2016 level for 41 percent of the companies.
- The sales regions of Central and South America tended to develop slightly less well than the other export regions according to the survey. Only a third of those surveyed reported growth in sales there. That said, 58 percent of the companies from this region reported stable sales. Another nine percent were forced to accept an export decline there.

Summary: both domestic and foreign trade have made clear contributions to the growth of the German dental industry. Just as positive are the expectations for 2018 sales at home and abroad. Nearly two thirds of surveyed VDDI member companies anticipate a sales plus abroad. More than half of VDDI members are anticipating growth in domestic sales in 2018 according to our survey.

We are pleased at the sales figures of our industry in the domestic market of Germany, as well as in the international markets. However, sales increases are not the whole picture.

The sales of our industry have increased, but the margins are now noticeably narrower. Our dental industry can report an export rate of 64 percent. All companies that are present on the highly competitive global markets and also want to remain so over the long term must today make

considerably greater investments in production facilities, in logistics and in communication with our end customers

We are very pleased and even a little proud that our industry forms the core of IDS.

IDS, which takes place in Cologne every two years, is organised by the GFDI Gesellschaft zur Förderung der Dental-Industrie mbH, the commercial enterprise of the Association of the German Dental Industry. It is staged by the Koelnmesse GmbH, Cologne.

We are pleased and grateful that the dental industries of the world, as well as the international specialised dental trade contribute significantly towards the success of IDS. Manufacturers from all over the globe make IDS the global event of the dental industry every two years.

Outlook on IDS 2019

The IDS is a brand personality with unmistakable characteristics. At the brand heart of the IDS is a traditional openness to the world and the Olympian principle: "IDS is the world's leading trade fair for the dental community, which ensures sustainable success as a platform for innovations and market trends." This describes the brand positioning of IDS. Whether exhibitor or trade visitor, specialist trader or those seeking information, everyone should have the fair opportunity to achieve their goals at the IDS.

Which new products and trends can already be distinguished now for dental medicine and dental technology at IDS 2019?

Global dental trends:

- Improved digital work flows and additive manufacturing are at the fore of the international development.
- Analogue technologies still create the indispensable prerequisites for the lab and the practice– one example: parallel with intraoral scanners, classic impression materials are also continuing to develop impressively. Among others, A silicones can be used more universally and at the same time more comfortably (for example, for tooth-borne and at the same time for implant-borne prosthetics), while polyether can now accelerate the pace (faster setting).
- Digital procedures are now on the advance in the to date typically (nearly) purely analogue sub-disciplines of dentistry – for example, in orthodontics, total prosthetics or endodontics.

Interesting for the dentist and his team:

- Thanks to software support, endodontic treatments can be better planned in advance – extending to guide templates for preparation files (similar to drilling templates in implantology).
- On the prophylaxis front, alongside the classic, proven methods (scaling and root planing with hand curettes, ultrasound systems or powder jet devices), the diode laser is establishing itself as an additional options for killing germs and surface decontamination.
- When considering the future of parodontitis treatment, it is worth taking a look at the delicate approaches that rely on the strengths of subgingival tools, on low-abrasion powder for re-instrumentation and on current software offerings (e.g. documentation of complete parodontal status with sounding depths and attachment losses at up to six positions per tooth, and possibly the furcation involvement and chronological progressions).
- In prosthetics, the selection of materials from the field of high-strength glass ceramics (e.g. lithium disilicate, zirconium oxide-reinforced lithium silicate or hybrid ceramics, for example, ultrastructure feldspar ceramics infiltrated with polymer). The goal here is to combine the greater translucency and opalescence in comparison with structural ceramics with even greater strength, and in this way to expand the indication in the dental bridge segment. Depending upon the material and the patient case, chair-side processing with the CAD/CAM procedure can then present an option (workflow sketch: intraoral scan, design on the monitor, CAM production in the grinding machine).
- One field of innovation is still that of intraoral scanners: here too, the trend toward miniaturisation is continuing. They are becoming increasingly more handy and in some cases powder-free. Some of them can even be controlled with the help of gestures and voice.

Interesting for the dental technician and the lab team:

- The lab is developing even more intensively into a "problem solver". The dental technician works together closely with the dentist as a partner for implantological backward planning, suggests suitable structural materials, selects the aesthetically appropriate blanks and, if desired, the layering ceramics or a ceramic for the multi-layer technique as an alternative, and much more.
- The large offering of prosthetic materials is even more differentiated: new milling and press blanks, more colours, sometimes with internal colour progressions, as well as thermoplastic polymers (e.g. PEEK) and other printable plastics for short and long term temporary prostheses.
- In total prosthetics, digital-supported concepts assist the lab with additional manufacturing options in a to date nearly exclusively analogue area.
- The subtractive manufacture of restorations with the CAD/CAM procedure is being further developed, accompanied more and more by the additive: with the 3D printer. The number of available models is increasing

Interesting for the dental/dental technology team:

- Digital processes are increasingly simplifying orthodontics. For example, virtual set-ups can also be created using virtual models that extend beyond diagnostic questions, and even orthodontic appliances can be planned (i.e. fixed appliances).
- The teamwork between dentist and dental technicians is defined by many options on a scale between "completely analogue" and "fully digital", whereby differently tared, partially digital work flows simplify everyday routine, depending upon the clinical and economical requirements.
- 3D printing is considered to be a possible "game changer": new application methods, new forms of teamwork, new business models.

It is self-explanatory that by no means all interesting trends can be listed here. There are thus a great many more reasons to visit the International Dental Show from 12 to 16 March 2019 in Cologne, because it provides a comprehensive overview of processes, work flows and products in the entire field of dentistry.

IDS – The gateway to Europe – the gateway to the world

The IDS provides access to the European market and is the international marketplace with a high level of third country business. All international dealers are on location in Cologne; they purchase for their customers in their home countries, they know the users and the dental markets and supply them with products that they have seen, tested and negotiated for at the IDS in Cologne.

Welcome to the 38th International Dental Show in Cologne!