

IDS 2019 – the 38th show since 1923 - international PK - speech USA/Honolulu

Ladies and gentlemen, welcome to today's press conference where we will be presenting the 38th International Dental Show, Cologne.

On behalf of the VDDI Board of Directors and the Advisory Board I would like to convey their kind regards and bid you a warm welcome.

Today we warmly invite you to the 38th International Dental Show from March 12 to March 16 2019 being held in Cologne.

Celebrating its 95th anniversary, the IDS is now the world's undisputed leading trade fair for the dental industry. The IDS is the most comprehensive marketplace for dental medical technology and covers the entire international dental market. More than 2,300 manufacturers of products, system solutions, and services will present the innovations devised by researchers and developers since the last IDS, all of which will enable users to carry out their work simply and efficiently. More than 155,000 trade visitors, dentists, dental technicians, dental office and laboratory employees, the younger generation of dental professionals, as well as trainees from the field of dental technology, along with international dental dealers make the IDS a unique summit conference and the leading dental business summit in the world.

Before I introduce the IDS trends for 2019, I would like to take a quick look at the underlying conditions of the international dental show. What do we experience, which environment surrounds us?

I will provide just a few highlights here:

The 21st century world finds itself in profound change:

- Politics: we can observe a new grouping, shift, and transfer of political power among the superpowers, we are seeing changes in the international political power structure.
- Economy and trade: we see rapid, dynamic development in many regions, there is great competition in all areas, particularly in medical technology and our speciality, dental medical technology. We see a rekindled discussion about trade barriers and tariffs, things we believed to be a thing of the past once again interfere with free world trade.
- Population growth: We see the high level of population growth in various regions of the world which poses great challenges for politics, business, and medical care.
- Technological development: digitisation is making rapid progress, we can observe revolutionary upheavals in the production and distribution of goods that surpass anything imaginable. Innovation cycles become ever shorter thanks to the

increasingly rapid gain of scientific knowledge in medical-technological research, improved supply chains place high demands on manufacturers and sales.

Change, upheaval, disruption are threatening for many people or even whole societies, they pose a great threat to their existence and often cause unease and discomfort.

Change, upheaval and disruption are epochs which provide many opportunities for developments or to convert previously inconceivable ideas into products and services. These are periods in which we **must question the norm** and take advantage of the many new opportunities and our specific contribution to progress.

»**Life belongs to the living, and he who lives must be prepared for change**« once said the German poet Johann Wolfgang von Goethe so fittingly.

The continuing change, the steady progress in knowledge becomes clear in a special way in our international dental industry. Dentistry and the dental medical technology developed for this purpose reflects the turbulent times of development through the past decades.

Our German dental industry has been a reliable partner to the dental profession and dental technology and their search for continuous progression for more than 100 years. We know our responsibility to produce products that benefit patients.

Being open to the world and to free trade is essential to people's health. The dental treatment of patients depends first and foremost on well trained and highly motivated dentists and dental technicians. Together, they apply their expertise towards preserving or restoring their patients' oral health.

To complete this task, they need a wide range of products like those our manufacturers from the German dental industry produce in high quality. Our product developments enable users all over the world to provide their patients the entire spectrum of modern dentistry.

For more than 100 years, our dental industry has stood for quality, precision, and reliability in particularly user-friendly products.

In recent times, however, we have observed strong tendencies towards protectionist measures or even the rekindling of trade barriers in many world markets, above all in the field of medical products.

New and additional regulatory requirements as well as costly approval procedures increasingly hinder market access for our products or make them unnecessarily expensive.

From this we incur considerable competitive disadvantages and our industry goes to great lengths to compensate this.

However, we are strong advocates of free world trade and the unimpeded exchange of certified goods and products that adhere to international standards and medical product regulatory requirements.

Our industry meets the challenges and will make every effort to provide users and patients with sophisticated and proven products in future.

We can only achieve this successfully in the long term when national and international health policies and economic frameworks promote the health economy rather than impede it!

The IDS - an anchor of stability in turbulent times

The International Dental Show always has been and still is an anchor of stability in turbulent times.

The next IDS will be the 38th since the inaugural event in 1923.

For 95 years, the international dental show has itself been a motor and gauge of medical and dental technical development.

The IDS has survived many times of crisis, it is and always has been the most comprehensive and fascinating showcase of what is possible today, of what tomorrow will bring, and of that which is already in mental development for the future.

Dentistry and dental technology both are highly affinitive with technology, are themselves innovative, never rest on their laurels, and always strive to achieve greater things.

Engineers and developers are partners in this process, they share the motives, the search for better, more efficient, more sophisticated treatment methods, they are united in providing patients with the best possible health care for the maintenance and restoration of their oral health.

The IDS is the best place to compare and position one's own company with competitors from across the world market. Dentists and dental technicians can gather information and suggestions that enable them to make future decisions for their practise or their laboratory. This is especially important in such turbulent times as today.

German Dental Industry: heart and engine of the IDS

Since 1923, the German dental industry has been the heart and engine of the IDS. Its 200 member companies form a strong community characterised by shared values: pronounced service, innovative, creative, flexible, service-orientated, customer-orientated, open-minded and promotes the community. That makes them so present and successful internationally.

The German Dental Industry is growing at home and abroad

In 2017, the 200 member companies of the Association of German Dental Manufacturers employed more than 20,700 people. Thus, the number of employees increased slightly by almost three per cent compared to 2016.

In 2017, the member companies of the VDDI generated total sales of just under € 5.3 billion. This is an increase of almost five per cent over the 2016 result. Of these sales, around 3.4 billion euros were generated in foreign markets (+ five per cent).

At 1.93 billion euros, the 2016 turnover was exceeded by 4.4 per cent. Sixty per cent of Association members taking part in the survey in Germany reported in 2017 higher sales than in the year 2016.

Expectations for the current financial year remain positive. Here, 53 per cent of companies surveyed expect revenue increases and an additional 45 per cent assume sales on last year's level.

Foreign business in almost all regions of strong growth

In 2017, the German dental industry reported an export ratio of 64 per cent. This impressively underlined the importance of world markets for our industry and its position in these markets.

Almost half of the survey respondents report rising sales in foreign markets. Over 40 per cent had sales levels abroad similar to those of 2016.

Here is a review of the most important regions:

- Western Europe remains the strongest market next to domestic sales. Around 53 per cent of the survey participants reported an increase in sales for 2017 and a further 36 per cent a business trend at 2016 level.

- Nearly half of the trustee survey participants in the North American sales market expanded their business activities by 46 per cent. Additional 39 per cent reported sales at the level of 2016 sales.
- Eastern Europe developed significantly better than in 2016. Fifty-one per cent of companies surveyed by the VDDI reported increasing sales in 2017. Another 40 per cent revealed an unchanged annual revenue over the previous year.
- In the far East 55 per cent of companies showed an increase and a third scored sales on last year's level.
- In the year under review 45 per cent of respondents reported a rise in sales in the Middle East. Further, 41 per cent of the member companies' sales in 2017 remained on par with 2016 levels.
- Sales regions of Central and South America developed weaker than the other export regions. Only a third of those surveyed reported an increase in their sales. But 58 per cent of companies in this region reported stable sales. Another nine per cent suffered a decline of exports there.

Conclusion: Both domestic and foreign business has made a significant contribution to the growth of the German dental industry. Expectations for domestic and foreign sales in 2018 are also positive. Nearly two-thirds of VDDI member companies expect an increase in unit sales from abroad. According to our survey, more than half of the VDDI members expect domestic sales to increase in 2018.

We are pleased about the sales figures from our industry in its home market of Germany, as well as international markets. Revenue increases from year to year do not reflect the whole picture.

The turnover in our industry has increased, but margins have decreased noticeably. Our dental industry has an export rate of 64 per cent. All companies who operate within this highly competitive world market and who want to remain active in the long-term must make substantially higher investments in production plants, logistics, and communications with and to our customers.

We are happy and even slightly proud that our dental industry is at the core of the IDS.

The IDS (International Dental Show) takes place in Cologne every two years and is organised by the GFDI (the Society for the Promotion of Dental Industry), the commercial enterprise of the Association of German Dental Manufacturers (VDDI). It is staged by Koelnmesse GmbH, Cologne.

We are happy and grateful the world's dental industries and international dental traders make a significant contribution to the success of the IDS, because the manufacturers from all over the world make the biannual IDS the world's leading dental event.

A look ahead to the IDS 2019

The IDS is a trademark personality with distinct characteristics. The brand core of the IDS is marked by the traditional world cosmopolitan attitude and the Olympic principle: „the IDS is the leading world summit for the dental community which secures lasting success as a platform for innovations and market trends.“ This describes the brand positioning of the IDS and be it exhibitors or specialised visitors, specialist dealer or information seekers, everyone should have a fair opportunity to reach its goal at the IDS.

Which innovations and trends stand out for the IDS in 2019?

The International Dental Show 2019 will cause a stir in dentistry and dental technology. The industry's seismographs are already reporting some of the main trends.

Global dental trends:

- At the top of international development are improved digital workflows and additive manufacturing.
- Analogue technologies remain indispensable requirements for laboratory and dental office - an example: Parallel to the intraoral scanners, classic impression materials are experiencing an impressive evolution. Among other things, A-type silicones are becoming more comfortable to use (for example for tooth-borne and, at the same time, for the implant-borne prosthetics) and universally applicable, while polyethers are now even faster setting.
- And digital technologies are now making their way into the traditionally analogue-dominated areas of dentistry such as orthodontics, full prosthetics, or endodontics.

Interesting for the dentist and his team:

- Endodontic treatments can be planned in advance much better thanks to software support - even guide templates for the endodontic files (similar to the drilling templates in implantology).
- The diode laser is proving itself as a supplementary alternative to proven prophylaxis treatment methods (scaling and root planning with hand curettes or ultrasonic systems and powder jet equipment) for killing germs and for surface decontamination.
- For the future treatment of periodontitis it is worth looking at minimal approaches that play out their strengths in the subgingival instrumentation, at minimally abrasive powders for the reinstrumentation - and at current software offers (such as documenting complete periodontal statuses with probe depths and loss of attachment on up to six digits per tooth, if necessary furcation involvement and temporal gradients).
- In prosthetics, the range of materials is broadened to include other materials from the field of high-strength glass-ceramics (such as lithium disilicate, zirconium oxide-reinforced lithium silicate or hybrid ceramics such as polymer infiltrated fine-structure feldspar ceramics). The aim is to extend the indication for bridges by combining the higher translucency and opalescence, when compared to structural ceramic, with even greater strength. Depending on the material and patient case, the chairside CAD/CAM method could also be an option (workflow example: Intraoral scan, design on screen, CAM manufacturing in the milling unit).
- Intraoral scanners are a continuous source of innovation: Here, too, the trend towards miniaturisation continues as they become even more convenient to use and sometimes powder-free. And some can be controlled by gestures and speech.

Interesting for the dental technician and the laboratory team:

- The laboratory is increasingly stepping up to become the "problem solver". The dental technician works closely with the dentist during implant backward-planning, suggests suitable materials, chooses the aesthetically best fitting blanks and porcelain or multilayer ceramic, if required.
- The wide range of prosthetic materials is becoming even more diverse: new milling and pressable blanks, more shades with internal gradients as well as thermoplastic polymers (PEEK), and other pressable plastics for short and long-term temporary restorations.
- In complete prosthetics, digital-based concepts provide additional manufacturing alternatives in the lab in an area almost exclusively dominated by analogue technology.

- Subtractive manufacturing of restorations in the CAD/CAM process will be further developed, in addition the additive occurs more: with the 3D printer. The number of available models is increasing

Interesting for the dentist-dental technician team:

- Digital procedures are increasingly facilitating orthodontics. For example, virtual models can be used not only for diagnostics, but for creating virtual setups and even for planning orthodontic appliances (fixed appliances).
- The teamwork between dentist and dental technician is determined by numerous options on the scale between "completely analogue" and "fully digital", where different and, depending on the clinical and economic requirements, balanced part-digital workflows facilitate everyday life.
- 3D printing is regarded as a potential "game changer": new applications, new business models and new forms of teamwork.

It goes without saying that not all interesting trends can be listed here now. So there is still a long list of other reasons to visit the international dental show from March 12 to 16 2019 in Cologne, because it offers a comprehensive outline of processes, workflows, and products for all dentistry.

IDS - The gateway to Europe - the gateway to the world

The IDS opens access to the European market and is also the international marketplace with a high level of third-party business. All international dealers are in Cologne; They shop for their customers in their home countries, they know the users and the dental markets and provide them with products that they have seen, tested and negotiated at the IDS in Cologne.

At the 37th IDS 2017 we had the pleasure to welcome 209 exhibitors (2015: 194) and 1,997 visitors (2015: 1,840) from the USA in Cologne. Compared to the previous event in 2015, the presence of the dental industry in the US grew again. This underlines the high drawing power of the IDS as a world marketplace for the dental industry, as well as the great importance of US dental technology for the world. We again expect a further increase in visitors from the USA in 2019.

We hope we have awakened your curiosity with our IDS preview and that we have motivated you and your readers to make your way to the IDS 2019 in Cologne.

We look forward to working with you!