Presentation of GFDI mbH ATLAS DENTAL study on 23 January 2019 in Bonn by Dr Bernd Rebmann (HSG), REBMANN RESEARCH
(study to be published on 12 March 2019)

Digitisation is becoming a reality on the European dental market, with the issue becoming both tangible and clearly perceptible throughout the entire value-added chain. Digital-based equipment and processes have already transformed the workflow to a degree barely comparable with other sectors. Disruptive innovation such as digital impression using intraoral scanners or 3D printing harbour enormous savings potential across the entire value chain while, simultaneously, providing advantages that benefit patients. The digital workflow ultimately requires increasingly fewer consultations in practice, as diagnostics will probably occur in the patient's home in future, and remote treatment is no longer regarded as purely utopian. Dental products realised through 3D printing or video consultations are probably only the beginning in this respect.

Cooperation between the dentist and dental lab will, in part, become more location-independent, and the digital workflow enables the involvement of production centres in the industry or major laboratories wherever this appears to be economically appropriate.

Manufacturers and dealers in dental products are facing up to competition from non-specialised digital giants active on a global level by positioning themselves as solution providers of a holistic product and service programme. Digital services require specialised know-how specific to this sector and provide companies “at home” in the sector with a competitive advantage. It is therefore essential that, in addition to dealing with their own data, decision-makers in the dental industry and trade also broaden their horizons and embrace changing market requirements and customer needs.

The 2019 ATLAS DENTAL study represents a continuation of the “Dental Schedule” from 2013 and, in addition to dental manufacturers and dealers, also addresses dentists in practices and technicians in dental laboratories. The goal of this study is

- to analyse structures and relevant market data in Europe and selected countries through comprehensive research of data and literature,
- to demonstrate the challenges, whether demographic, technological, market-related or regulatory, which market participants need to master
- and, ultimately, to generate development trends and scenarios from the knowledge and findings obtained.

Data research and management also play an increasingly significant role with regard to digitisation strategies. In particular, artificial intelligence systems already employed today in dental medicine (e.g. in diagnostics) thrive on good data. This is also reflected in ATLAS DENTAL through numerous vivid depictions of prepared data in profiles illustrating structures in specific countries. These are provided to aid speedy comprehension of potential opportunities and risks in a given country, including in comparison with other states. For example, Spain is distinguished by

- a low utilisation of dental services (demand indicator)
- a high level of trainee dentists (dentists/practices supply indicator)
- average figures in the dental laboratory area
- an extremely high dealer density
- a supply concentration in metropolitan areas, a slightly above-average level of digitisation, a moderately under-average level of innovativeness (infrastructure indicators)

Given the complexity of information predominating in Europe, “national info maps” in traffic light colours are an excellent aid to comprehension when it comes to maintaining transparency. For example, ATLAS DENTAL indicates a north-south disparity in Europe when it comes to availing of dental services.

The map of dental medicine graduates reveals an average to under-average tendency with regard to the percentage of new dentists in areas where demographics will probably have the strongest impact in future (namely Central Europe), while Spain and a few eastern countries stand out due to the predominance of green areas.

However, as the future dentist in Europe will be very digitally conscious and, additionally, more location-independent, we may hope that new dentists will be distributed more evenly across Europe.

The press and market participants may look forward to an interesting graphic depiction of a broad variety of data and extensive facts, information and revelations regarding current dental market trends. The study will be made available free of charge by GFDI mbH promptly on 12 March 2019 to mark the launch of the IDS fair.