

today

SHOW
PREVIEW

A view on European dental markets



Markets in Europe have proven stable since the last IDS took place in 2011. An interview with ADDE president Dominique Deschietere.

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IDS 2013 trends in focus



CAD/CAM and growth factors have become key areas of dental innovation. Dr Nilesh R. Parmar provides an overview.

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A preview of the industry

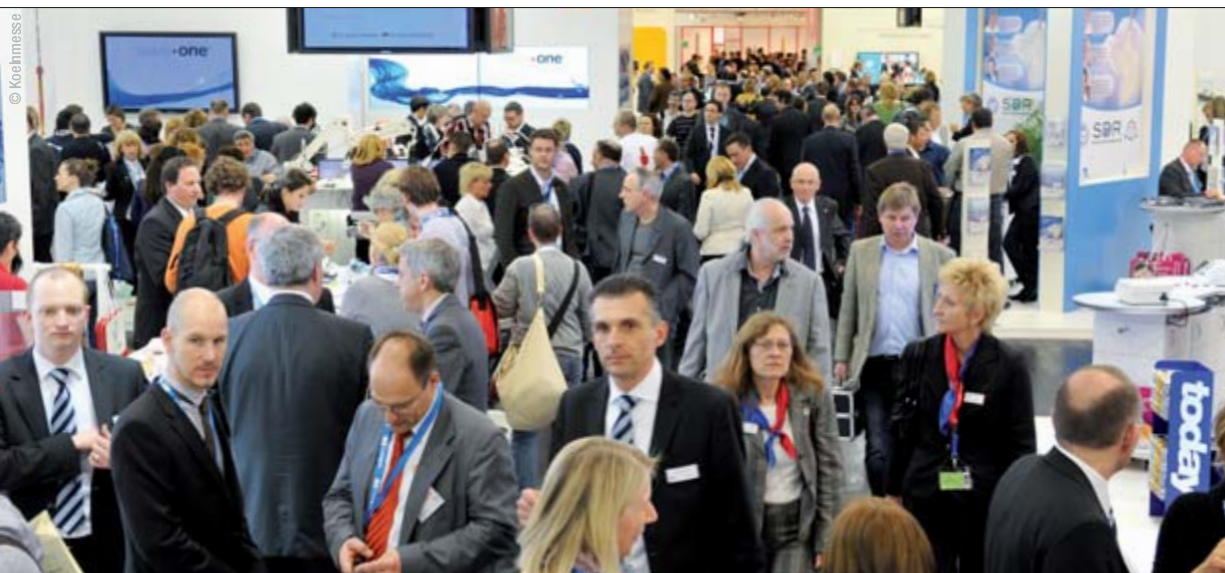


With more companies to be participating in IDS than ever before, there will be plenty of new products to see and discover.

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High foreign demand drives the world's largest dental showcase

Number of exhibiting companies increases by more than 10 per cent/According to the organiser Koelnmesse, dental CAD/CAM, implant treatment and lasers will be mega trends at upcoming International Dental Show in Cologne, Germany



• The last IDS, held in March 2011, drew 1,954 exhibitors and 118,000 professional visitors to Cologne, according to reports.

■ The development of CAD/CAM and implantology will continue to be the determining trends at the next International Dental Show, representatives of the organiser Koelnmesse and the Association of German Dental Manufacturers (VDDI) told reporters at a press conference in December. Besides these mega topics, the use of lasers in different fields of dentistry will be given particular attention.

Reportedly, more than 2,000 dental manufacturers and distributors have registered for this year's event, which has been expanded by 5,000 sqm and will fully occupy another hall at the Koelnmesse fairground in Cologne. According to Koelnmesse's chief operating officer, Katharina C. Hamma, the increase in exhibitors is due to the high demand from companies abroad, which has grown by 10 per cent compared with the last IDS. While the number of domestic businesses will remain the same, almost two-thirds (68 per cent) of all companies exhibiting in 2013 will come from outside Germany.

"IDS will prove its position as the global leading trade show in the den-

tal industry once again. Its success is an endorsement of our trade show concept," Hamma explained. "Therefore,



• Katharina C. Hamma, Chief Operating Officer of Koelnmesse.

we will be retaining the successful formula for the upcoming event."

Her company, which hosts other well-known international trade events like Art Cologne and gamescom,

stages the global dentistry showcase in partnership with the commercial enterprise of the VDDI and the Society for the Promotion of the Dental Industry (Gesellschaft zur Förderung der Dental-Industrie) every two years. The last edition, held in March 2011, drew 1,954 exhibitors and 118,000 professional visitors to Cologne, according to reports.

Hamma announced that in addition to professional activities presented by the German Dental Association and the Association of German Dental Technicians' Guilds (VDZI), the Federal Association of Dental Alumni (BdZA) in Germany will be hosting a Generations' Lounge for the first time at next year's IDS, which is intended to serve as a meeting point for dental students, practice newcomers and established practitioners. Furthermore, visitors will be able to learn more about the latest products and technologies at the customary Speakers' Corner (in Hall 3.1).

The IDS app has recently been updated. The application, available for several smartphones, such as Apple's iPhone, allows users to search for in-

formation on exhibitors and products ahead of the show.

The next edition is scheduled to open its doors soon with the usual Dealers' Day on Tuesday, 12 March 2013. More than 120,000 dental professionals from Germany and abroad are expected to attend the event to update their knowledge on the latest developments and trends in dental equipment and materials, according to Hamma. ◀

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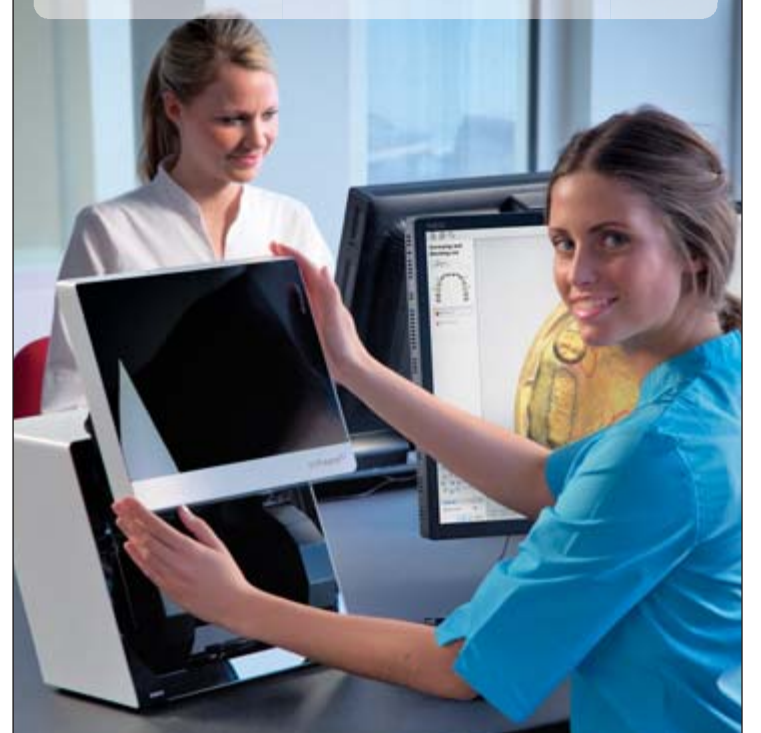
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Digital technology and CAD/CAM will determine dental market development

An interview with Dominique Deschietere, President of the Association of Dental Dealers in Europe



• Dominique Deschietere

■ Supported by growth in major markets like Germany, sales of dental equipment in Europe have proven relatively stable since the last IDS took place in 2011. *today international* had the opportunity to speak with Arseus Lab CEO and newly elected President of the Association of Dental Dealers in Europe (ADDE), Dominique Deschietere, Belgium, about the current state of the industry, and the challenges that lie ahead.

today international: Last year, the European Union announced the revision of its medical device regulations. How is this going to affect the dental industry?

Dominique Deschietere: The diversity and potential for innovation in our industry contribute to improved dental procedures and prosthetics, from which the patient can only bene-

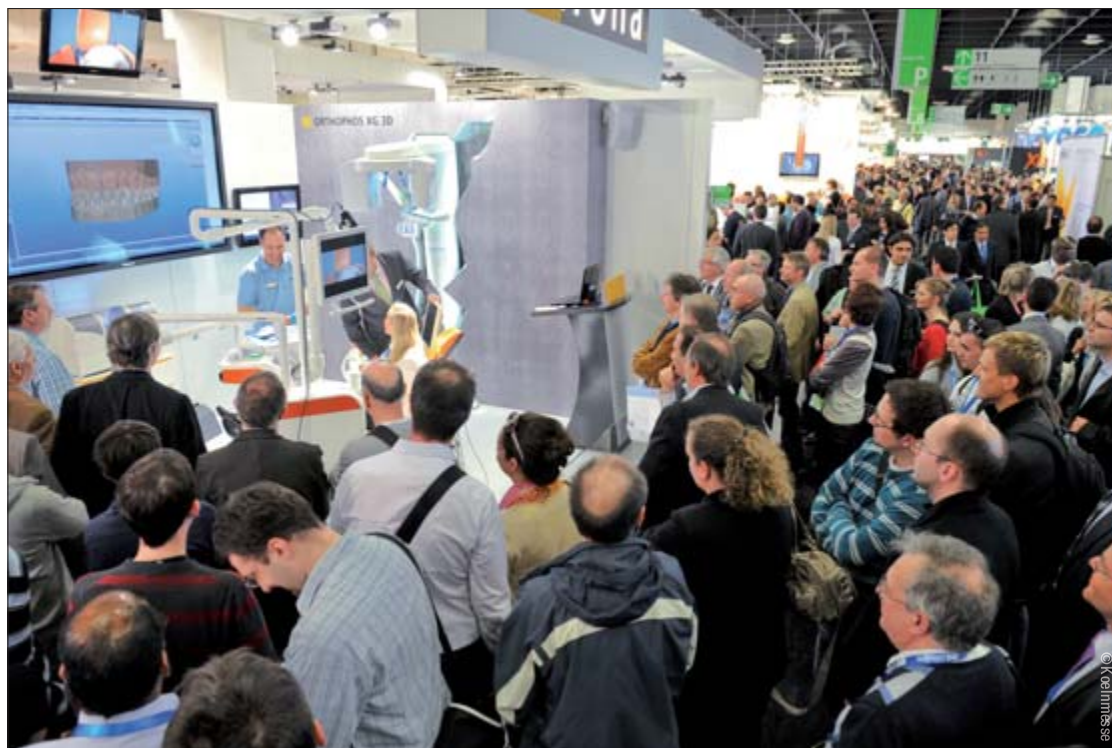
fit. As the dental industry and the health-care sector in general produce a wide range of products, from extremely sophisticated devices to consumables, we as distributors need to be vigilant regarding medical device regulations. The regulatory framework provided by the EU for market access, international business relations and legal agreements is in the patient's best interest. However, we also think that these matters should be adapted to the dental distributor market.

Why do the current regulations need to be changed at all?

The main reason for the revision is that current EU legislation dates from the late 1990s and is considered insufficient by many for our rapidly changing market. In addition, some member states of the EU have tended to interpret some of these rules broadly, which is not necessarily to the benefit of the patient. It also makes competition uneven for those distributors who adhere to the regulations. Therefore, it is essential to impose new regulations in order to increase traceability of dental products within and beyond the borders of the EU.

According to a 2011 survey by your organisation, sales of dental materials and equipment in Europe remained relatively stable. What is the current state of the industry on the continent?

Preliminary figures from our latest survey of the industry show that,



• Visitors watching a product presentation at IDS 2011. According to Deschietere, European dental practitioners and laboratories have become rather reluctant to make large investments.

except for a few countries, the market has achieved good sales. There might be a slight decrease in traditional product segments, as old technologies are replaced by new ones but it is still too early to provide a clear picture on the current market situation. Unfortunately, not all figures from our 2012 industry survey are available yet. However, we would like to invite everyone to our

presentation to be held on Wednesday, 13 March, at 16:00 in the Blue Room at the Koelnmesse fairground.

During a press conference in December in Cologne, the Chairman of the Association of German Dental Manufacturers, Dr Martin Rickert, said that the outlook for markets in Southern Europe is rather negative owing to the financial constraints the health-care sector is facing at the moment. What is the situation really like there?

It is no secret that some countries in Southern Europe that suffered most from the financial crisis are showing a negative trend with regard to dental investments. It is likely that this will be reflected in the sales figures from last year.

the continent have become rather reluctant to make large investments.

Where do you see the industry heading, and what segments are the most likely to grow in the next few years?

We will definitely see significant growth in digital dentistry as new technologies like intra-oral scanners, as well as digital imaging and planning instruments, find their way into dental practices. Dental laboratories too are increasingly making use of CAD/CAM technology. Both these developments will determine how the market and the dental business models will develop in the future.

Europe has traditionally been one of the largest markets for dental

“...it is essential to impose new regulations in order to increase traceability of dental products within and beyond the borders of the EU.”

While sales of sundries and technical services increased slightly in 2011, equipment sales decreased by over 2 per cent. Have dentists become more wary of investments?

Socio-demographic developments and changing patterns of reimbursements by public health services and insurers have had an impact on patients' health-care spending.

As a result of the financial crisis, people have had difficulty accessing capital through bank loans, renting, etc. which means they have less money available for medical and dental care. Consequently, dental practitioners and laboratories throughout

material and equipment, rivalled only by North America. How important have markets overseas become?

It goes without saying that in terms of economic growth, spending ability and other factors, the BRIC countries hold great potential. Dental distributors in Europe will be involved in this process as we gain access to other products and technologies from around the world. From this, competition will only increase within the EU. Our members will have to follow these changes carefully and learn to respond to them in a professional and transparent manner.

Thank you for the interview. ◀

AD

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IDS Speakers' Corner

TUESDAY, MARCH 12

- 14:00 – 14:30 **Dan McOwen**
CBCT/DVT 2013: Latest information, comparisons and purchasing guidelines
- 15:30 – 16:00 **Prof. Gianni Gaetta**
Velscope—saving lives, not only teeth

WEDNESDAY, MARCH 13

- 11:00 – 11:30 **Dr. Fay Goldstep**
Predictable proactive periodontal treatment
- 15:30 – 16:00 **Michael Bauer, M.Sc.**
The Use of Erbium lasers for Stimulation of Bone Growth Factors (PDGF)/Erbiumlasereinsatz zur Stimulierung der Knochenwachstumsfaktoren (PDGF)

THURSDAY, MARCH 14

- 11:00 – 12:00 **Dr. Gianluca Gambarini**
TF adaptive—a novel approach to canal instrumentation
- 12:00 – 12:30 **Dr. George Freedman**
Cement free implants and long term maintenance

FRIDAY, MARCH 15

- 11:00 – 11:30 **Dr. Henriette Lerner**
DVT 2013: Neuigkeiten, Vergleiche und Tipps zur Entscheidungsfindung
- 16:00 – 16:30 **Dr. Derry Rogers**
Introduction of new SDI products. Your Smile. Our Vision.

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Welcome to the International Dental Show 2013

By Dr Martin Rickert, Chairman of the Association of German Dental Manufacturers (VDDI)



• Dr Martin Rickert, Chairman of the Association of German Dental Manufacturers (VDDI).

The dental industry in Germany is very dynamic in every aspect, technologically and economically. Particularly in the last ten years, the field has seen the introduction of numerous preventative and treatment procedures, all of which were inconceivable a mere 15 years ago. New ceramic dental materials, synthetic filling materials, CAD/CAM in restorative dentistry, digital imaging and implant treatment planning—we have been working as a team in every area, keeping the German dental industry a world leader. Together, we are smart and full of ideas, as well as innovative and flexible in our thinking. Nowhere else can you feel this more than at the International Dental Show, which is to be held from 12 to 16 March in Cologne in Germany.

Well, what can you expect to see at the show? CAD/CAM is in-

creasingly finding its way into daily practice with an ever-expanding offering of intra-oral scanners of all varieties. Video signals, blue LEDs, the confocal principle, with or without scanning powder, you will have the opportunity to see and experience everything within a day to help you make your purchasing decision.

At the same time, once-closed systems can now be used with different software, production units and scanners. This flexibility offers numerous possibilities for you to optimise work procedures in your own practice and in collaboration with your dental partners.

Likewise, more and more options are becoming available to you owing to developments in the dental industry. The outsourcing of dental

work requiring large and expensive machinery has been en vogue for years. Recently, there has been the opposite trend, which has been a surprise to many, of insourcing previously outsourced manufacturing steps.

With the recent advancements in CAD/CAM technology, decisions regarding material selection can increasingly be tailored to every single patient. With state-of-the-art ceramic materials, dentists and dental technicians, for example, can work on multiple indications and with conventional metal ceramics using high gold-content alloys, which themselves are very up to date. Modern rapid-prototyping procedures could also become more important in the field of high-performance ceramics.

Is everything becoming digital then? The answer is yes, but everything is also becoming more biological and interdisciplinary—nowadays, dentists increasingly refer patients to other medical specialists. The fight against periodontitis and peri-implantitis has to be viewed in the context of systematic disease, a link clearly supported and illustrated by recent scientific results. Therefore, microbiological studies on genetics in particular have gained a more prominent role in dental science. In this field, the International Dental Show is also expected to showcase more precise and faster procedures.

In addition, innovations in the field of imaging have made their mark in the high-tech sector. Increasingly

combined into compact hybrid systems, intra-oral cameras, fluorescent cameras and even polymerisation lamps have become effective tools in the diagnosis of caries and in dental filling.

Owing to these developments, I am looking forward to the upcoming International Dental Show, and particularly to your visit and expert opinion on the innovations presented there. ◀◀

The industry highlight of the year

By Katharina C. Hamma, COO of Koelnmesse

The countdown to the International Dental Show (IDS) has started. In a few weeks, the global dental community will meet once again in Cologne.

The IDS is the undisputed leading global trade show for the dental industry. A visit to the trade fair halls in Cologne is a must for dentists and dental technicians, other dental staff, members of the specialist dental trade, scientists and researchers. There is no other event in which the entire dental industry—including all international market leaders—presents such a wide range of products and services. The exhibition will be showcasing items from many areas, including dentistry and dental technology segments; infection prevention and maintenance; dental services; and all of the relevant information, communication and organisational channels.

This year, the show will occupy 150,000 m² of exhibition space for the first time. More than 1,950 companies from over 55 countries will be presenting the latest trends, as well as many innovations and services. Once again, the percentage of visitors and exhibitors from outside Germany will increase, as we are expecting to welcome 10 per cent more exhibitors from abroad than we had two years ago. Overall, 68 per cent of the exhibitors will be coming to Cologne from outside Germany. From this, it is clear that the IDS is cementing its position as the leading global trade fair.

Visitors to the IDS will be travelling to Cologne from all over the world. Two years ago, some came from as far away as the Bahamas, Trinidad and Tobago, Zimbabwe, Togo, Madagascar, Qatar, Oman, Laos, Cambodia, Tajikistan, Polynesia and Micronesia. This year we are expecting to welcome more than 120,000 visitors from every part of the world, professionals who want to take a closer look at the latest innovations in the industry. Such an international exchange of experiences and business deals is only possible at the IDS in Cologne.

Visitors can be sure that there will be no lack of innovations at the fair. The industry's innovative capacity is well known, and the IDS is the largest show of innovations in the world of dentistry. However, new products and technologies are only



• Katharina C. Hamma, chief operating officer of Koelnmesse.

one side of the coin. As usual, the supporting programme will offer added value. At the Speakers' Corner in Hall 3.1, for example, IDS exhibitors will provide information daily about new products, services and technical processes. They will also report on the latest scientific and research findings. In addition, the German Dental Association (BZÄK) and the Association of German Dental Technicians' Guilds (VDZI) will round off the events at the IDS with their professional activities.


For an event of this scope, excellent preparation is essential. We offer visitors a number of tools to enable them to plan their visit optimally. These tools include the current update of the IDS app for smartphones, which now features an exhibitor search function and a navigation system to guide visitors through the halls and to stands of their interest. The update also provides information about catering options, local services and the IDS supporting programme. Thanks to the Business Matchmaking 365 function, exhibitors and visitors can communicate with each other even before IDS 2013 begins and after it ends. The online schedule planner makes it possible to arrange meetings with exhibitors in advance via e-mail. Anyone wanting an overview of the latest products can search for them in advance using our online innovation database. All these features will make it much easier to prepare for a visit to the IDS.

You will not want to miss the IDS. It is the ideal business, information and communication platform for the entire world of dentistry. And that makes it essential for everyone active in the dental industry.

I wish you a successful IDS 2013 and a enjoyable stay in Cologne! ◀◀

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EU faces serious recruitment problems in the health-care sector

■ The EU health-care sector is facing hard times. With an ageing work-force and insufficient new recruits to replace those who are retiring, the future does not look promising. Owing to demanding working conditions and relatively low pay in some health occupations, recruits are not attracted to the sector. A working document published by the European Commission (EC) last year demonstrates the gravity of the situation.

A while ago, the EU member states invited the EC to propose an action plan to assist them in tackling the key challenges facing the health work-force in the medium to longer term. This commission staff working document describes the current status of the sector, among other matters.

The health-care sector comprises workers who primarily deliver health-care services, including health professionals (doctors, nurses, midwives, pharmacists and dentists), allied health professionals, public-health professionals, health management, and administrative and support staff. Some people also work for the health-care sector indirectly, such as those employed in the health-care industries and support services, pharmaceuticals, medical device industries, health insurance, health research, e-health, occupational health, spa, etc.

Most health-care workers are female. More than 13.1 million women were employed in the sector in 2010, making up more than three quarters of the health work-force in the entire EU.

Health care is one of the largest sectors in the EU, with around 17.1 million jobs in 2010, which accounts for eight per cent of all jobs in the EU-27. The number of jobs in the sector increased by 21 per cent between 2000 and 2010, creating four million new jobs. According to the EC document, the health-care sector even continued to grow during the economic crisis, with the positive trend reflected in all age groups. Forecasts predict that it will remain a growing sector, even though employment growth will be more modest compared with 2000 to 2010.

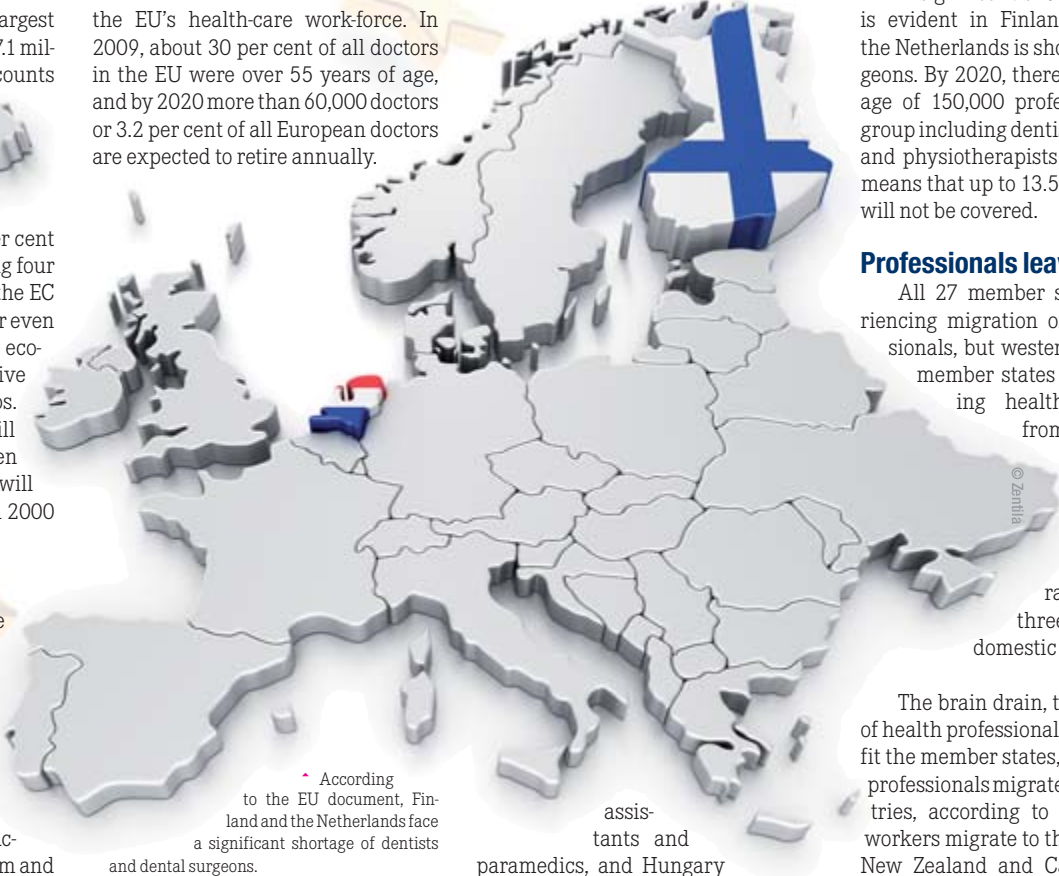
Lack of recruits

As the population ages, the demand for health care and thus for labour in this sector will increase dramatically. The number of elderly people aged 65 and over is projected to almost double over the next 50 years, from 87 million in 2010 to 152.7 million in 2060. According to the EC paper, long-term and formal care is likely to increase, with an expected reduction in the availability of informal careers, for example as a result of changing family structures.

Currently, most member states are facing critical work-force shortages in certain health professions and medical specialisations or geographical areas. Resulting from this, the retirement bulge is drastically shrinking

the EU's health-care work-force. In 2009, about 30 per cent of all doctors in the EU were over 55 years of age, and by 2020 more than 60,000 doctors or 3.2 per cent of all European doctors are expected to retire annually.

At the same time, not enough young recruits are coming through the system to replace those who leave. In Italy, 13,400 nurses were due to retire in 2010, but only 8,500 graduated in 2008/2009. Germany is facing serious difficulties in training a sufficient number of graduates, Slovakia has an insufficient number of nurses, midwives, physiotherapists, radiological



assistants and paramedics, and Hungary faces serious bottlenecks in supply caused by a reduced number of graduating nurses. Unfilled specialist training places have been reported in Austria, France, Hungary and Romania.

Jobs not appealing

The reasons for the lack of health-care workers are well known. Even though the level of education among health-care and social workers is higher than average, many jobs in the sector are poorly paid. Overall wage levels in the health-care and social services sectors tend to be lower than in other sectors of the economy. This tendency is related to the high rate of female employment in the sector and to the sex pay gap. On top of this, employees are often faced with long and demanding working hours, stress or difficult work-life balance. Those factors are reasons to quit for those already working in health care and make the sector unappealing to recruits.

European nurses in particular are significantly unhappy with their working conditions. According to the EC document, many report that they intend to leave their hospital positions, with numbers reaching from 19 per cent in the Netherlands to 49 per cent in Finland and Greece.

Dentists needed in Finland and the Netherlands

The commission estimates a potential shortfall of around one million health-care workers by 2020, increasing up to two million if long-term care and ancillary professions are taken into account. This means around 15 per cent of care will not be covered, compared with 2010.

The EU research project on health professional mobility and health systems (PROMeTHEUS) provides evidence from 17 European countries, for example Denmark, Finland, France, Germany and Romania, that there is an undersupply of health profession-

als in rural and sparsely populated areas, an oversupply of doctors in some urban areas, particularly in Germany, and an oversupply of nurses in Belgium. In addition, the number of medical specialists is increasing much more rapidly than the number of general practitioners.

A significant shortage of dentists is evident in Finland. Additionally, the Netherlands is short of dental surgeons. By 2020, there will be a shortage of 150,000 professionals in the group including dentists, pharmacists and physiotherapists in the EU. This means that up to 13.5 per cent of care will not be covered.

Professionals leaving the EU

All 27 member states are experiencing migration of health professionals, but western and northern member states are also receiving health professionals from other countries. However, based on the limited data available, outflows have rarely exceeded three per cent of the domestic work-force.

The brain drain, the high outflow of health professionals, does not benefit the member states, as many health professionals migrate to non-EU countries, according to the EC. Health workers migrate to the US, Australia, New Zealand and Canada, and the inflows of foreign doctors with long-term permits have also increased markedly in non-EU member Switzerland (70 per cent increase between 2001 and 2008), where mainly German professionals go.

In Austria, Belgium, Denmark, Germany, the Netherlands and Poland, nearly 30 per cent of all migrant doctors come from outside the EU. This figure rises to 60 per cent in France and Italy, and to 80 per cent in Ireland and the UK.

Action to be taken

In the document, the EC proposed three areas for action to help tackle the EU health-care work-force shortages: forecasting work-force needs and improving work-force planning methodologies, anticipating future skills needs in the health professions, and sharing best practice on effective recruitment and retention strategies for health professionals.

These areas for action reflect feedback from the commission's public consultation on the "Green Paper on the European Workforce for Health", which drew over 200 responses from several stakeholders.

The implementation of the actions requires enhanced collaboration—between the commission, the member states, stakeholders and social partners—and improved coordination across a range of policies (health, education, social, policy, employment, internal market, development and cohesion), the document says. Member states are urged to maximise the use of European funding instruments to support the actions to tackle health work-force shortages and to boost job creation in the health-care sector.

The complete document, including a detailed action plan to tackle the challenges for health-care systems, can be found in the document section at www.hospage.eu. ◀

Effects of tooth whitening under inspection by European Union



■ The Council of European Dentists (CED) is currently conducting a one-year survey on possible negative side-effects of tooth whitening and bleaching products. The committee has called upon dentists in the EU to report their own and their patients' observations.

The survey includes tooth whitening and bleaching products that are not freely available on the market to consumers, that is, those

that contain between 0.1 and 6 per cent hydrogen peroxide. It runs until 31 October 2013. The initial results will be reported to the European Commission by the end of this year.

Dentists can access the survey anonymously and voluntarily online through the website of their national dental association. According to the CED, only a summary of all responses will be published once the survey has been completed. The research is being

carried out in accordance with an agreement between the CED and the European Commission that was signed in March 2010 owing to the increasing availability of tooth whitening products on the EU market. The agreement was signed to ensure appropriate tooth whitening treatment through qualified dental professionals and to improve patient safety.

Over one year ago, the Council of the European Union passed an amended directive on tooth whitening products, which resolved that tooth whitening or bleaching products containing more than 0.1 per cent and up to 6 per cent hydrogen peroxide will only be sold to dentists. Products with concentrations of up to 0.1 per cent continue to be freely available on the market.

The CED is a non-profit organisation, which represents over 340,000 dentists across Europe. It is aimed at the promotion of high standards of oral health care and effective patient-safety-centred professional practice in Europe.



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