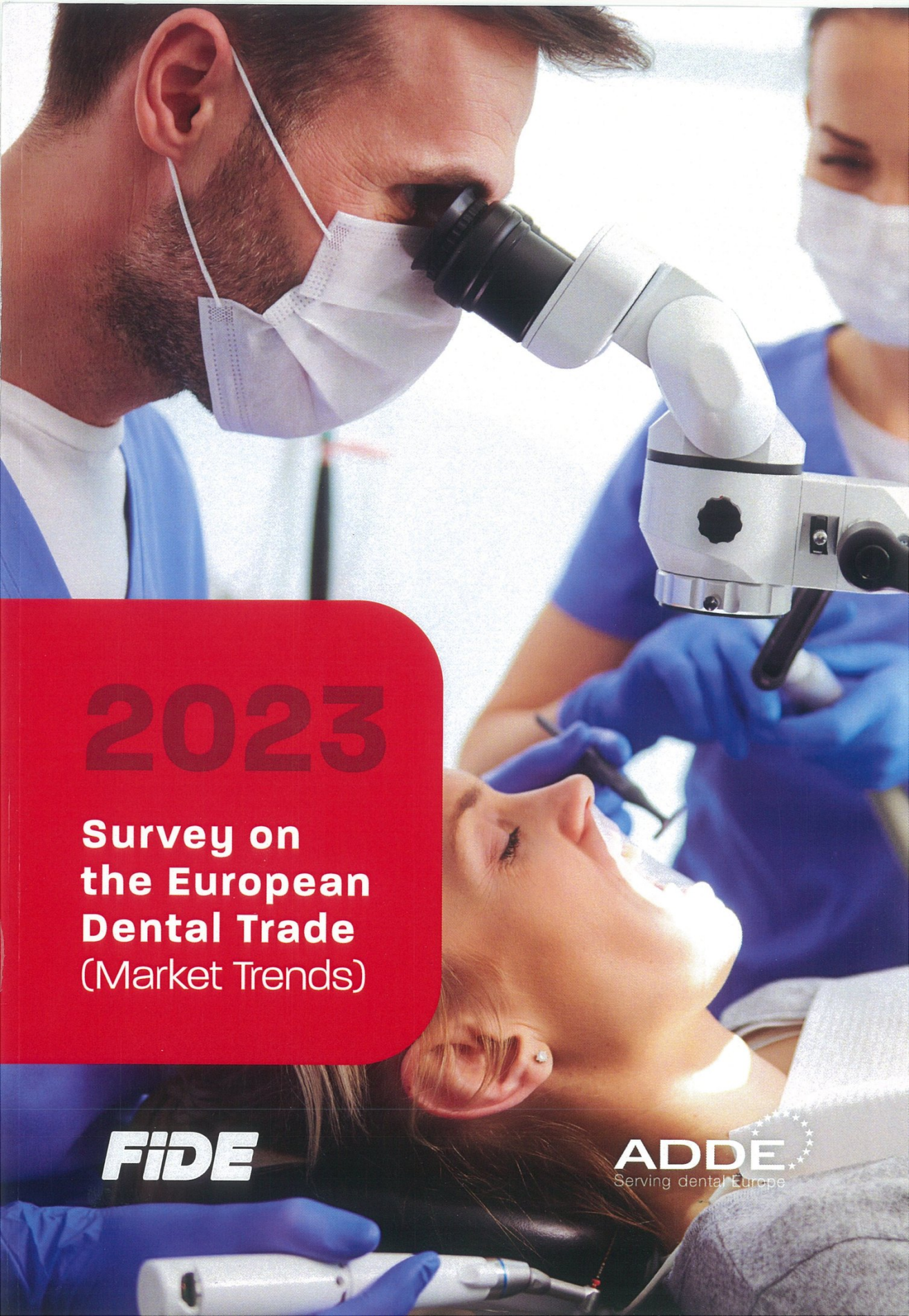


2023

Survey on the European Dental Trade (Market Trends)

FIDE

ADDE
Serving dental Europe

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Dear members of the dental world.

I am deligted having the opportunity to address you as the current President of ADDE. I am honoured to be for more than three decades part of such fabulous community working towards a common goal: improving the oral health.

Dental suppliers, dental depos, dental distributors, members of the national dental associations are important players in the dental industry. They help ensure that dental professionals have the tools they need to provide high-quality care to their patients. They work closely with dental manufacturers to bring new products to market and make sure that dental professionals have access to the latest technology and materials.

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6. **And last but not least: Preventive dental care**. Prevention is the key factor for the global oral health.

The dental trade, like any other industry, faces a number of challenges and potential concerns.

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To change our perception, to change our methods.

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Dr. Pavel Smažík
President ADDE



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Dr. Pavel Smažík
President ADDE



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ADDE CAN HELP YOU AS A MANUFACTURER

Manufacturers looking for distributors and importers around Europe choose ADDE – Association Dental Dealers Europe - to expand their EU distribution network.

EU Distributors and importers use our Survey or our Association ADDE to find new products and partners.

HADER SOLUTIONS

HADER SOLUTIONS & DISTRIBUTION LTD. is the "One-Stop Shop" that delivers on high quality, has CE markings conforming with the new MDR, and offers fair prices on implant components, attachments, and specialty prosthetic items in Europe.



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WHO IS ADDE?

European wide umbrella organisation with national federations from Germany, France, UK, Italy, The Netherlands, Belgium, Bulgaria, Spain, Austria, Ireland, Czech Republic, Malta and Switzerland. In total these national federations represent more than 1000 Dental depots with some 50'000 employees.

The Board

President
Dr. Pavel Smažík, Czech Republic

Board members
Ed Attenborough, United Kingdom
Jean Martin-Dondoz, France
Atilla Trägner, Austria
Martin Ravets, Belgium
Etienne Bachet, Malta
Gerard Lavery, Ireland

Secretary-General
Dominique Deschietere, Belgium

The main tasks of ADDE

ADDE was constituted in 1964 and they are an associate member of FDI World Dental Association, an active member of UAPME, European association of Croft, small and medium sized companies and they have a closely collaboration with FIDE, European association of dental manufacturers, based on the yearly meeting with both associations and this in a sense speaking about an European Dental Board Meeting – ONE DENTAL VOICE.

Countries

- Austria
- Belgium
- France
- Italy
- Czech Republic
- Germany
- Great Britain
- Ireland
- The Netherlands
- Switzerland
- Ukraine
- Spain
- Malta



The goals of ADDE

- Close contact to the European Dental Industry European network with industry (FIDE), dentists (FDI) and (CED), laboratories (FEPPD).
- To bring together the representative national dealer associations of all European countries. Defence of interests of member federations Information exchange (most relevant news relating to the Dental Trade).
- To develop amongst its members a spirit of fellowship, moral support, exchange of professional knowledge and practical experience on technical, trade and legal matter.
- To pool their knowledge with a view to improve general working conditions.
- To co-ordinate common interests of both the dental industry and the dental trade in Europe together with ADDE's sponsor members from the manufacturers' side and FIDE.
- European Dental Voice Gatekeeper in the EU-administration via Faros, our law office in Brussels. Cooperation in the technical and legal fields related to the Dental business.
- To provide our market with information through our annual Dental Survey, in close collaboration with FIDE: Better and evolved Economic Data. This through our yearly survey.

SPONSOR MEMBERS OF ADDE (BY MARCH 2023)

W&H Dentalwerk Buermoos GmbH
Ignaz-Glaser-Strasse 53, A-5111 Buermoos

Cefl a S.c.
Via Selice Provinciale n. 23/a, I-40026 Imola (Bo)

ADDE welcomes new members either national associations or direct associate membership by individual companies where there is either no national association or the national association is not a member of ADDE.

ADDE MEMBERSHIP

ADDE BOARD

President
Pavel Smažík
Czech Republic

Secretary General
Dominique Deschietere
Belgium

Faros
European Office

ACTIVE MEMBERS

Austria
Österreichischer Dentalverband

Belgium
Unifodent

Czech Republic
Asociace Czechdent

Germany
Bundesverband Dentalhandel e.V.

France
Comident

Great Britain
The British Dental Industry Association

Ireland
The Association of the Irish Dental Industry

Italy
ANCAD

The Netherlands
VGT

Switzerland
Association Suisse de Commerce Dentaire

Ukraine
UAIMDP

Spain
Fenin

ASSOCIATE MEMBERS

Malta
Bart Enterprises Ltd

ADDE WORKING GROUPS

The Medical Device Coordination Group ("MDCG") published an updated overview of the ongoing work performed by its subgroups.

The work performed is divided into the following categories:

i. Notified Bodies Oversight (NBO)

ii. Standards

iii. Clinical Investigations and Evaluation (CIE)

iv. Post-Market Surveillance and Vigilance (PMSV)

v. Market Surveillance (MS)

vi. Borderline & Classification (B&C)

vii. New Technologies

viii. Eudamed

ix. Unique Device Identification (UDI)

x. International Matters

xi. In vitro Diagnostic Medical Devices (IVD)

xii. Nomenclature

Following these subgroups inside the MDCG, ADDE organised following working groups.

1 **Medical Device Regulation**

The consequences for our EU dealers
President Ed Kolsteeg
Email: Ed@vgt.nl

2 **New and Emerging Technologies**

Impact and future rules about the new disruptive technologies as scanning, intra-and extra-oral, milling and laser fusing and 3D printing.
President: Atilla Traegner
Email: attila.traegner@kulzer-dental.com

3 **Tackling the problem of Counterfeit Dental Devices**

Unfair competition from businesses who do not comply with health and safety requirements imposed by EU law.
President Edmund Proffitt
Mail: edmundproffitt@bdia.org.uk

ADDE welcomes new members to the working groups, please contact the working group chair directly if you are interested to participate.

New Working Group

COMING UP : New regulations for distributors and E-commerce business as well as antitrust regulations

FIDE PRESENTATION

The Federation of the European Dental Industry - FIDE - was founded in May 1957, with its General Secretariat located in Cologne, Germany since that time. Today FIDE represents the interests of more than 550 dental manufacturers affiliated to FIDE through the membership of its national dental manufacturers' associations from 13 European countries.

Countries

- Austria
- Belgium
- France
- Italy
- Denmark
- Netherlands
- The United Kingdom
- Spain
- Switzerland
- Germany
- Ukraine

FIDE is a founding member of the IDM (International Dental Manufacturers Association), and an affiliate member of the FDI World Dental Federation.

In partnership with the whole dental sector, FIDE interfaces with the dental practice through the ERO and FEPPD, and the dental trade through the Association of Dental Dealers in Europe, ADDE. Together, the FIDE Executive Committee and the ADDE board of Officers comprise the European Dental Business Committee EDBC, providing a forum for regular exchange. The close cooperation between ADDE and FIDE has lead to the creation of the joint European Dental Market Survey, which is published annually.

FIDE's involvement on its members' behalf includes the following areas:

- Liaison and lobby efforts with medical legislation and standardization bodies (the European Commission, CEN TC 55, ISO TC 106).
- The representation of the European dental manufacturing industry to international bodies (IDM, FDI, ISO).
- Collating reliable statistics for the dental industry.
- Co-ordination of interests with regard to international dental exhibitions and congresses.
- Working groups on technical aspects of the dental industry.

The FIDE website, **www.fide-online.org,** presents published exhibition reports, regulatory affairs articles, a current list of international exhibitions, links and contact information for member associations, the Executive Committee and staff. Information on FIDE history, objectives and goals, along with information about the Survey on the European Dental Trade, can be found on the website as well.

FIDE - The Federation of European Dental Industry
Aachener Strasse 1053 - 1055
D-50858 Cologne

Phone: +49/221 50 0 687-23
Fax: +49/221 500 687-21
Email: info@fide-online.org
Website: www.fide-online.org



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FAROS

The newly founded law firm Faros, based in Brussels, is unique in its focus on competition law, data protection and compliance as a boutique firm building upon relevant expertise in high-profile cases. The Faros team previously worked with ADDE at the law firm contrast and remains the long term partner of ADDE. Members of the Faros team are ranked by leading independent legal directories, including Chambers and Partners.

The Faros team aims to provide clear and hands-on advice to its high-end international and national clients, turning the technicalities of competition law into clear guidance for the business. Faros frequently handles cases before the European Commission. Faros approaches competition law out of the box, which is best expressed by its extensive competition law compliance programme and its track record of leading publications.

Faros has extensive and relevant experience with distribution agreements. The team is regularly asked to speak at national and international conferences and events on the new European rules on vertical agreements that were amended in 2022. One of the Faros team members acted as expert advisor to DG Competition of the European Commission regarding the new EU regime on vertical agreements.

Faros provides ADDE on a monthly basis with relevant updates in the distribution sector as well as on developments relating to the Medical Device Regulation. Exciting times are ahead with the new Block Exemption Regulations on R&D and Specialisation and the new Horizontal Guidelines expected to be adopted by the middle of 2023. Hence, more relevant information for the ADDE members may be expected in the near future.

FAROS

Find more information on Faros and its team and publications on **www.faros.eu**.

Follow us on LinkedIn : **www.linkedin.com/company/faroslawfirm/**

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NewTom

what's next

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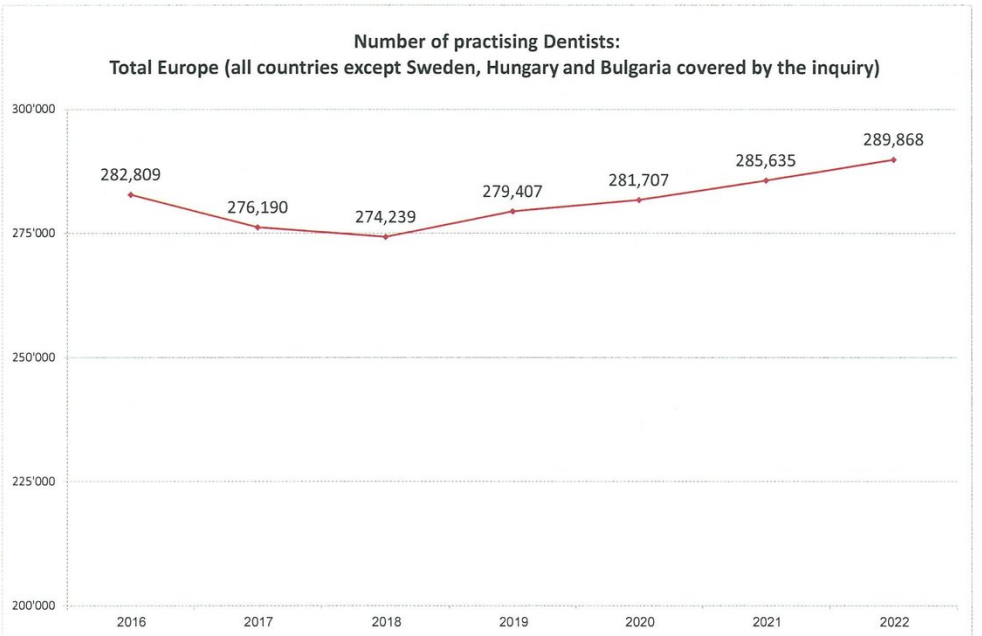


A real champion

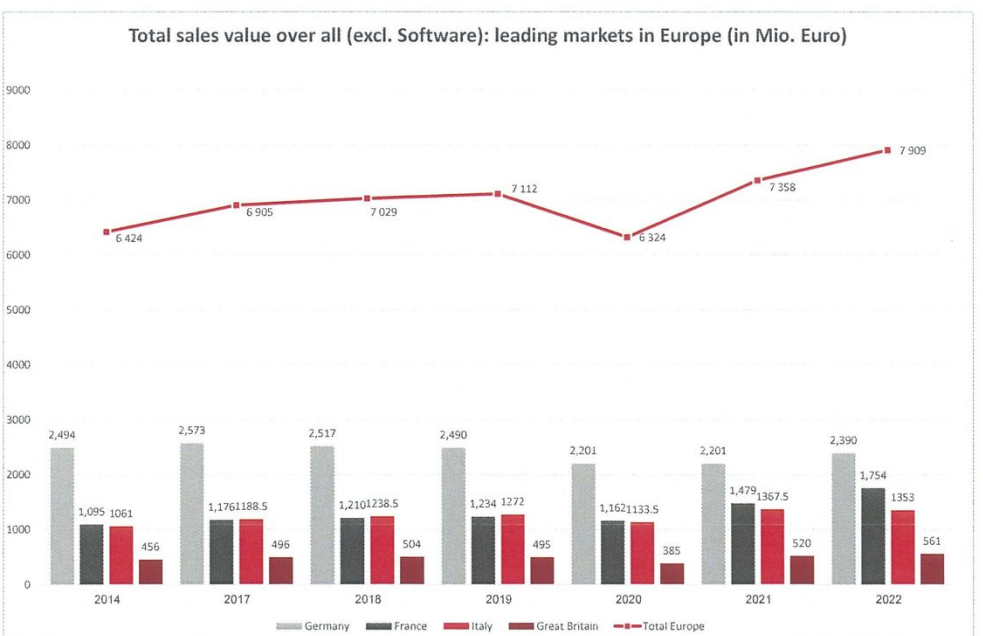
Synea Fusion is the best-selling contra-angle in the world from W&H. What makes it so successful? The model series combines the outstanding Synea qualities with unrivalled service life at an attractive purchase price.

synea FUSION

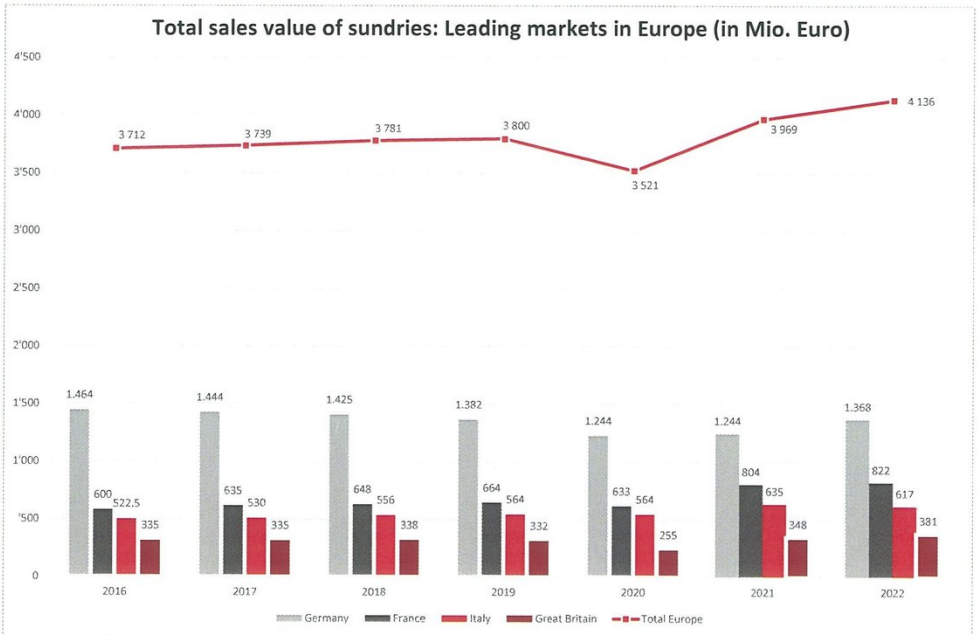
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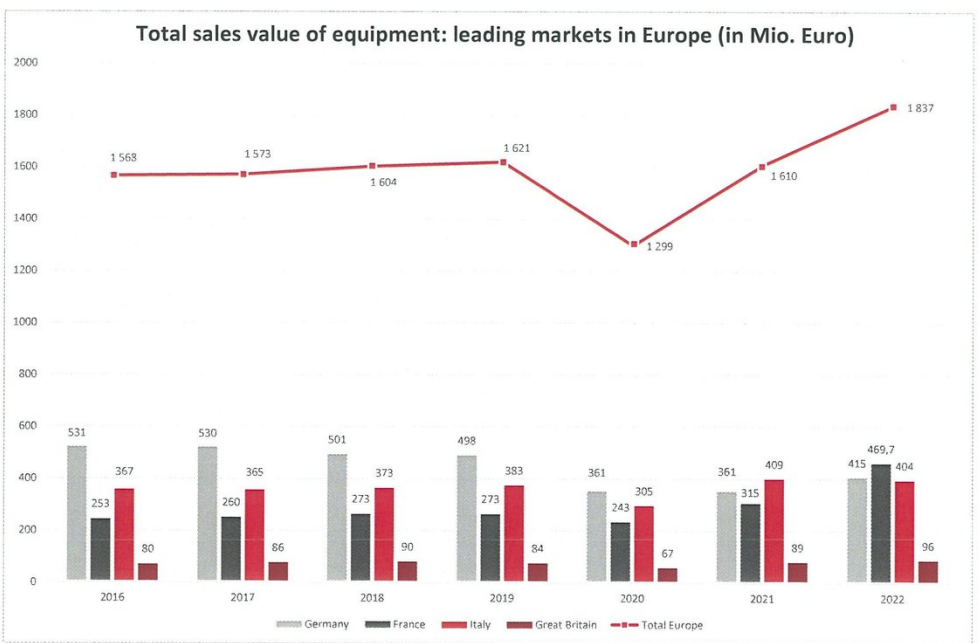
2. Total sales value over all (excl. Software)



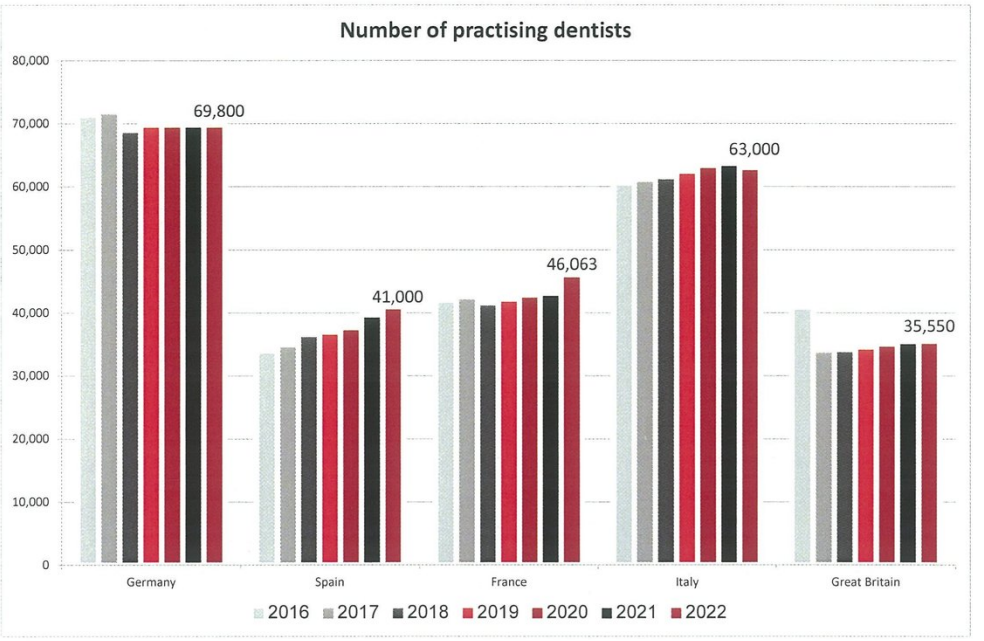
3. Total sales value of sundries



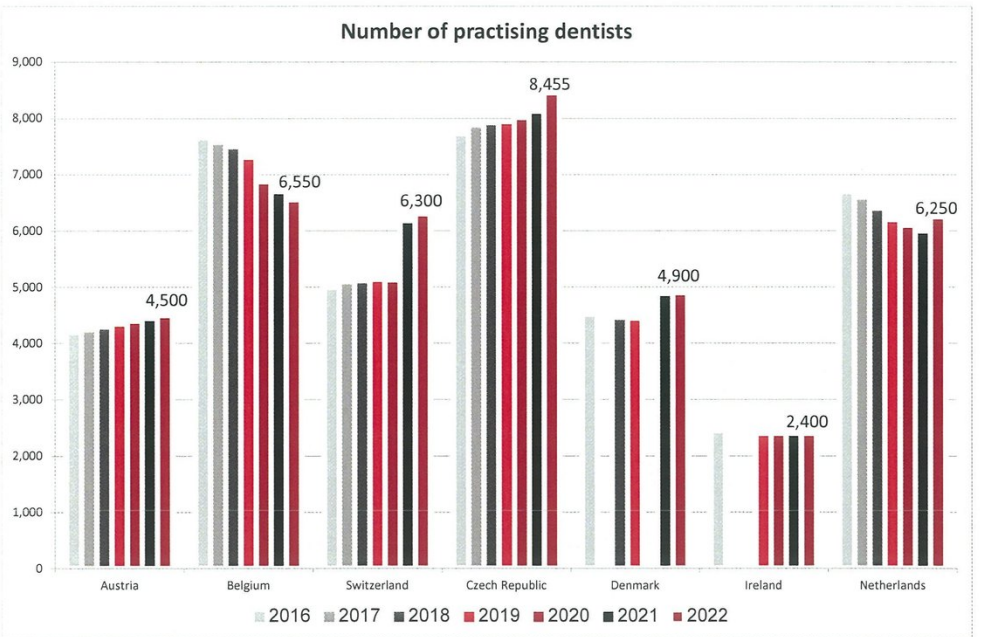
4. Total sales value of equipment



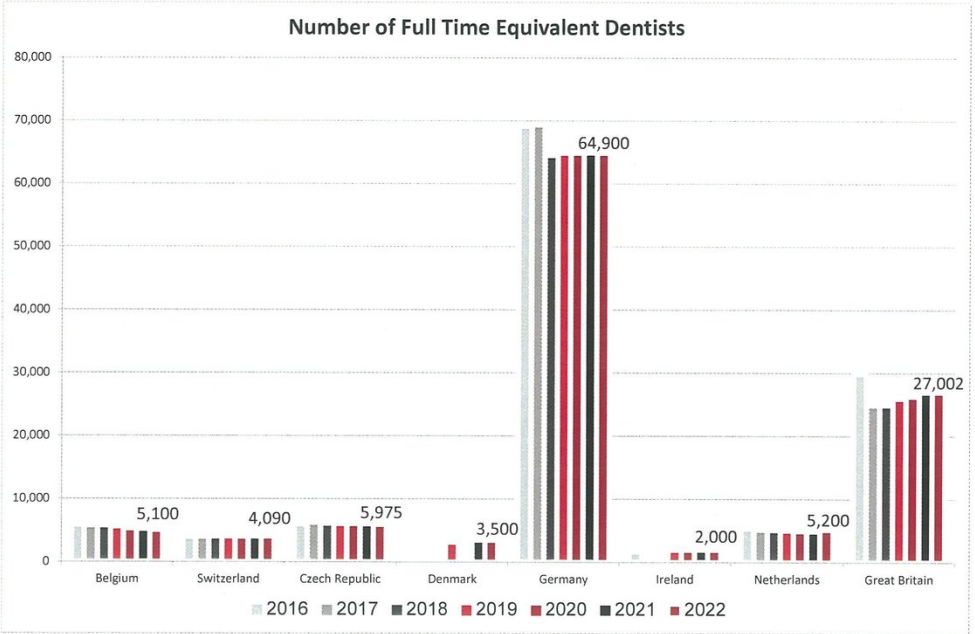
5. Number of practising dentists



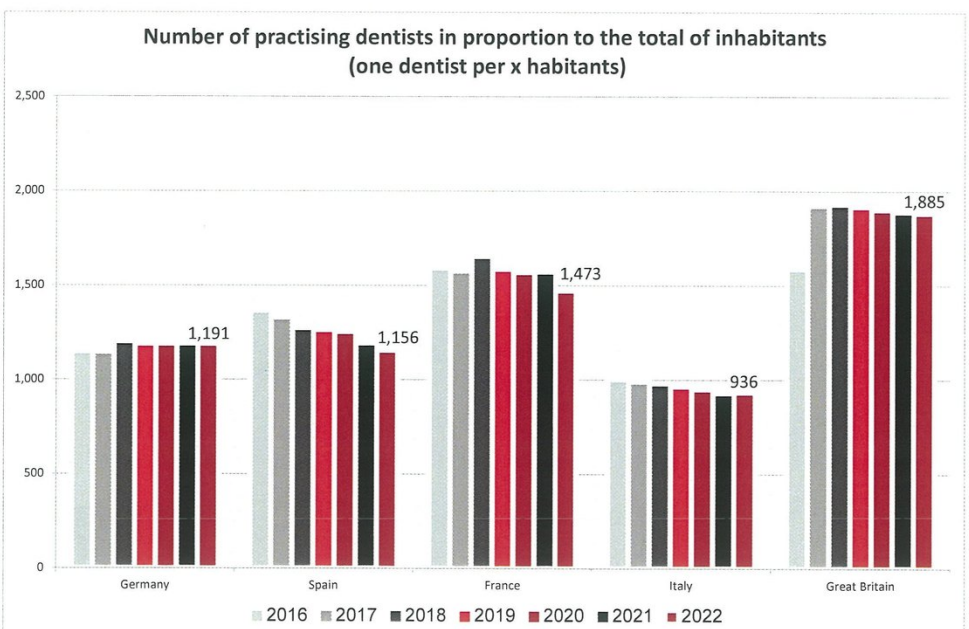
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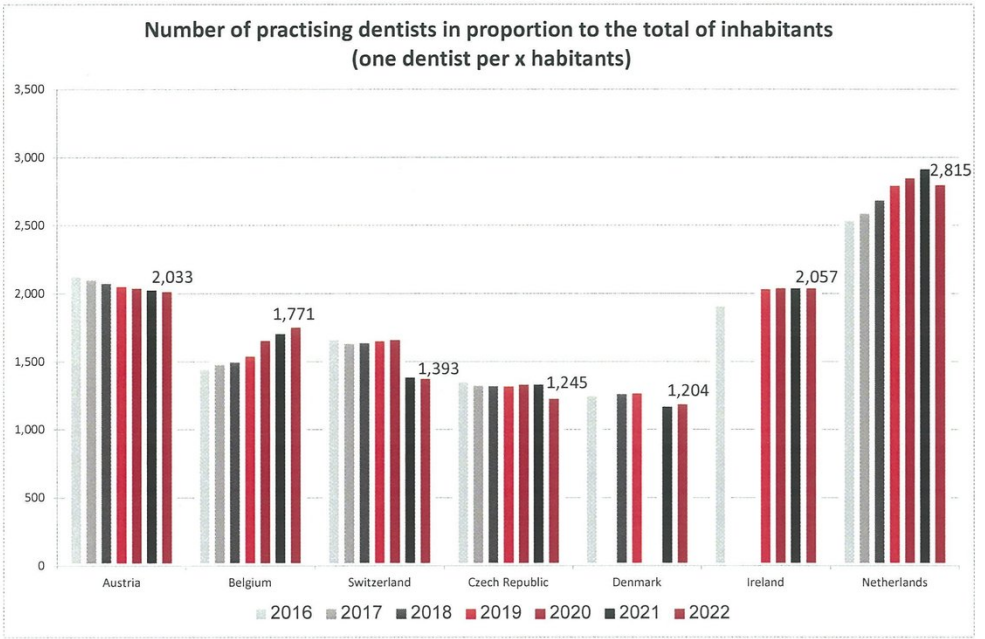
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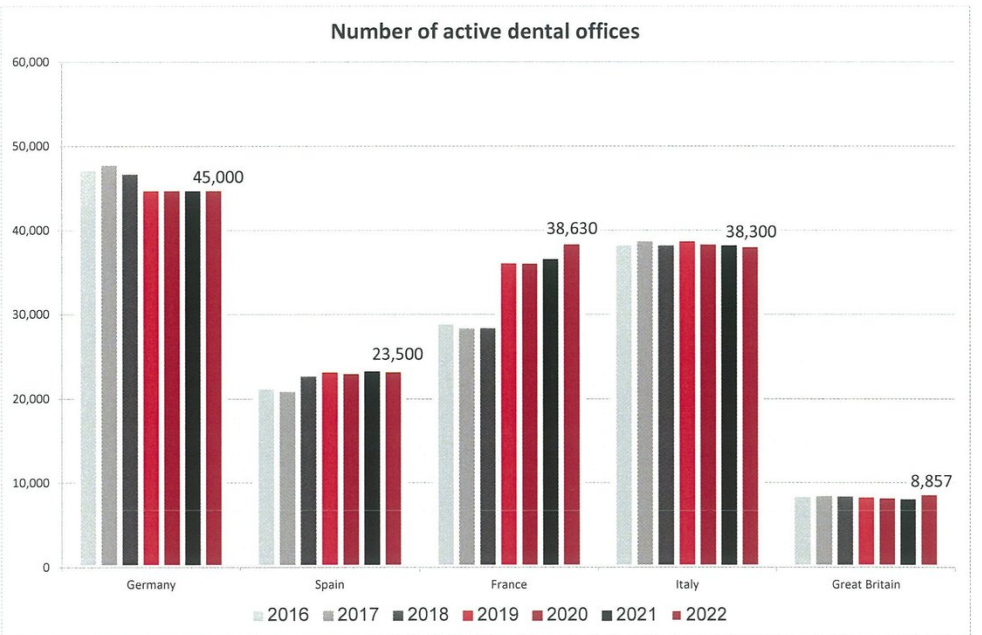
8. Number of practising dentists in proportion to the total of inhabitants



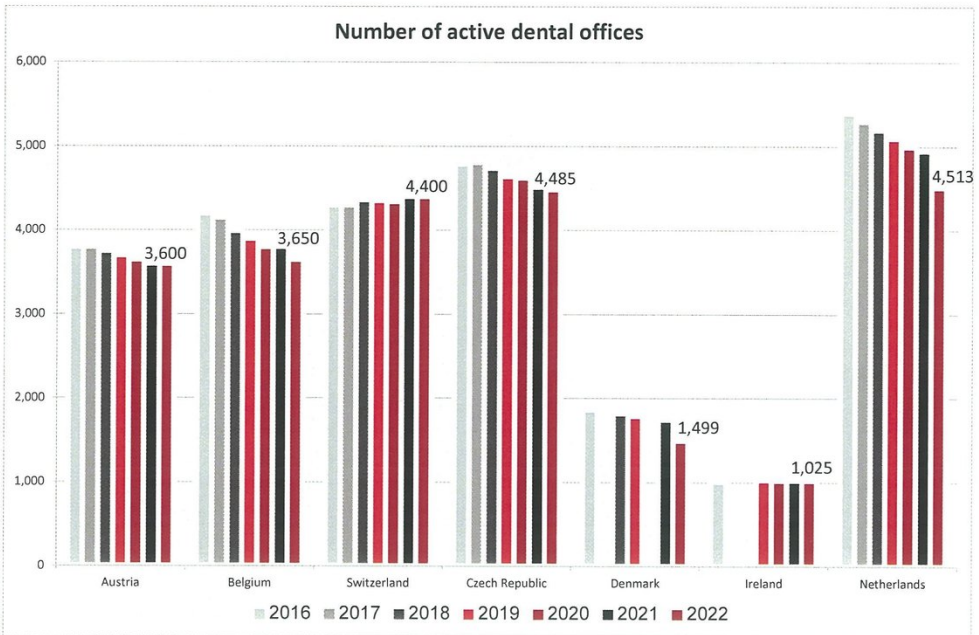
9. Number of practising dentists in proportion to the total of inhabitants



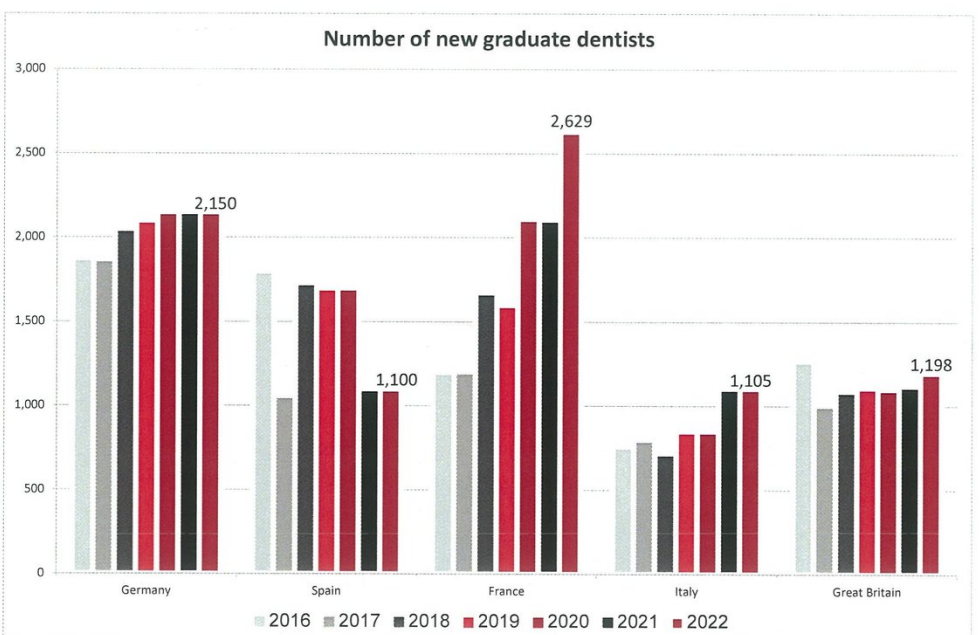
10. Number of active dental offices



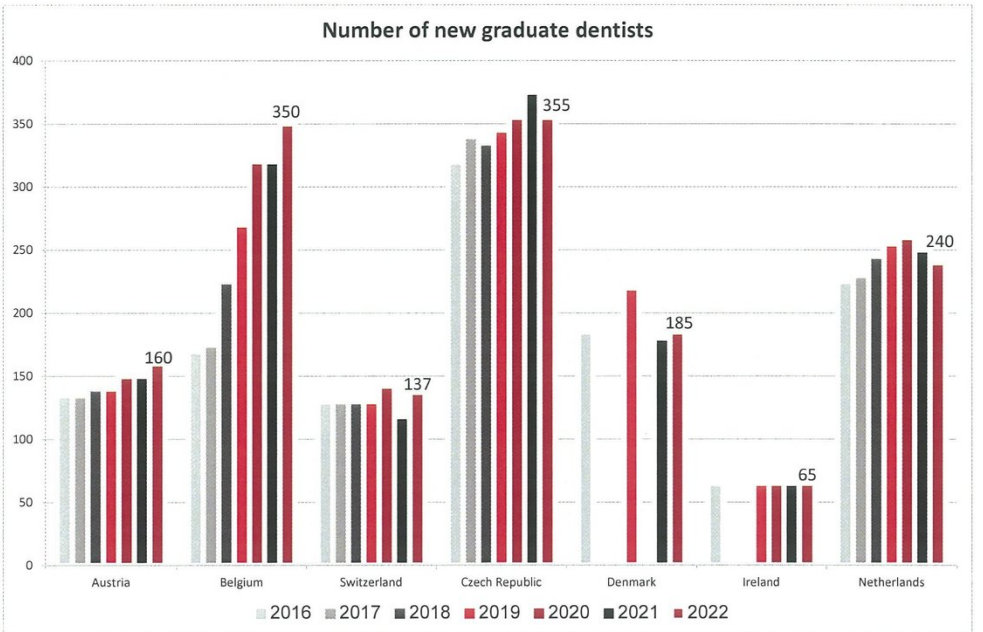
11. Number of active dental offices



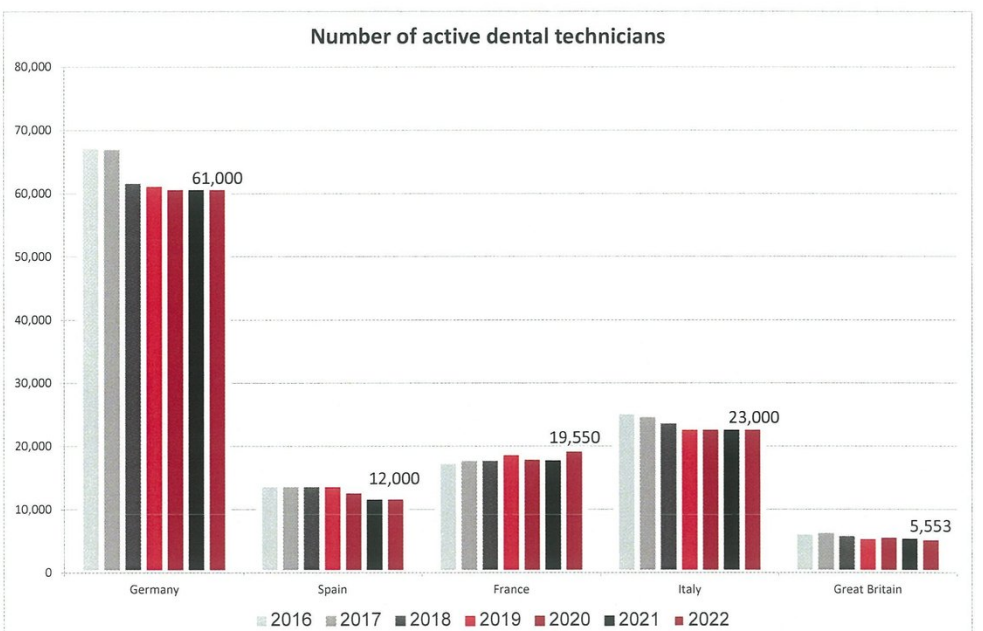
12. Number of new graduate dentists



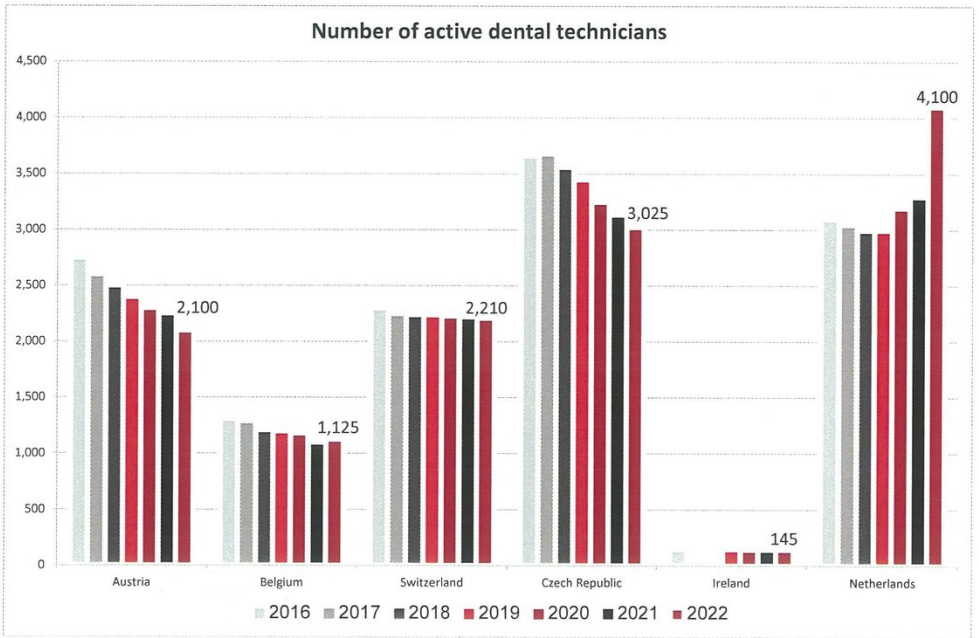
13. Number of new graduate dentists



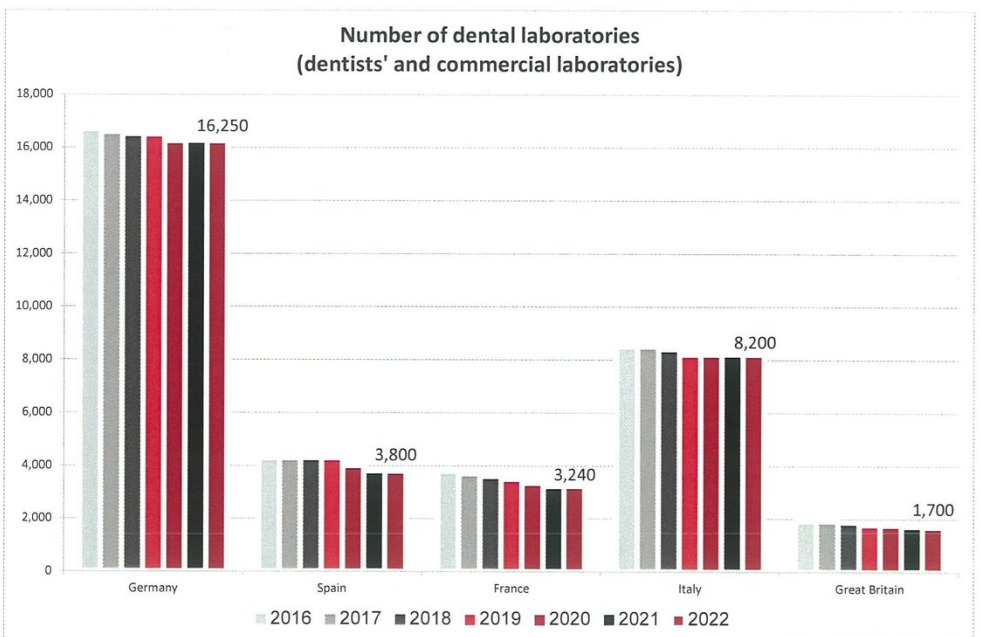
14. Number of active dental technicians



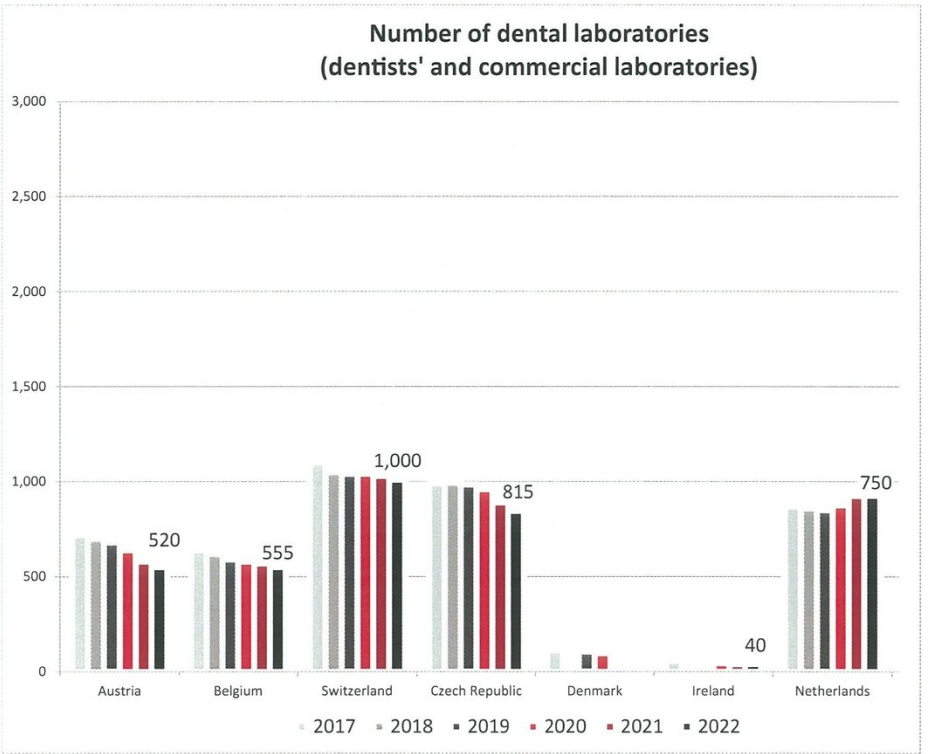
15. Number of active dental technicians



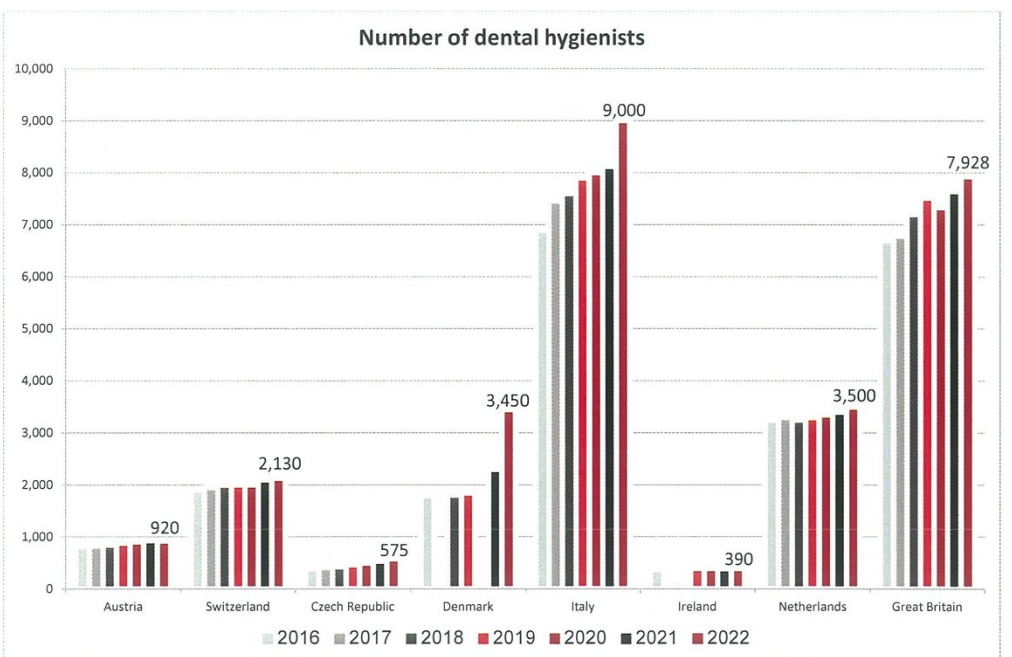
16. Number of dental laboratories



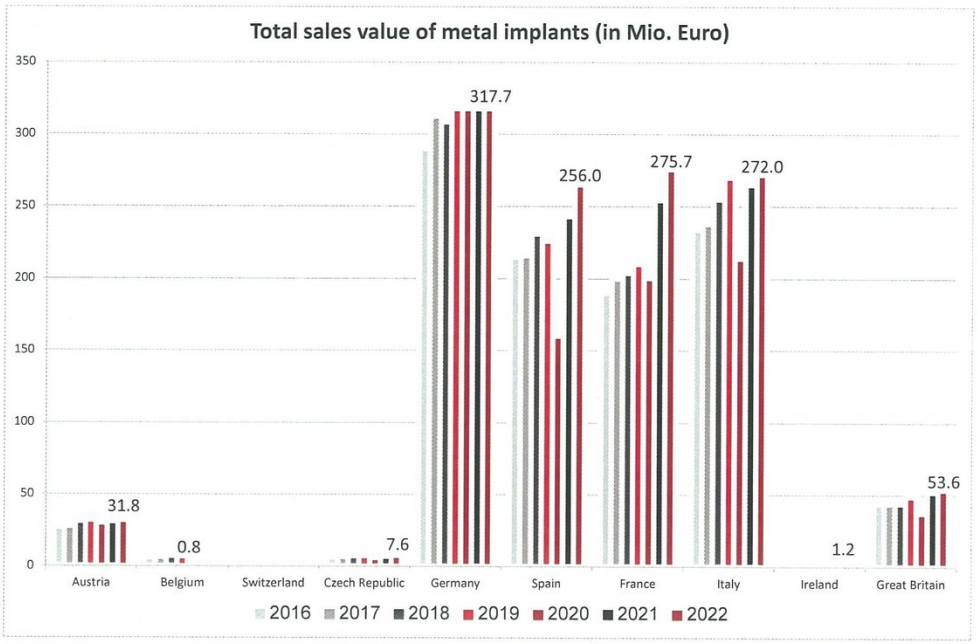
17. Number of dental laboratories



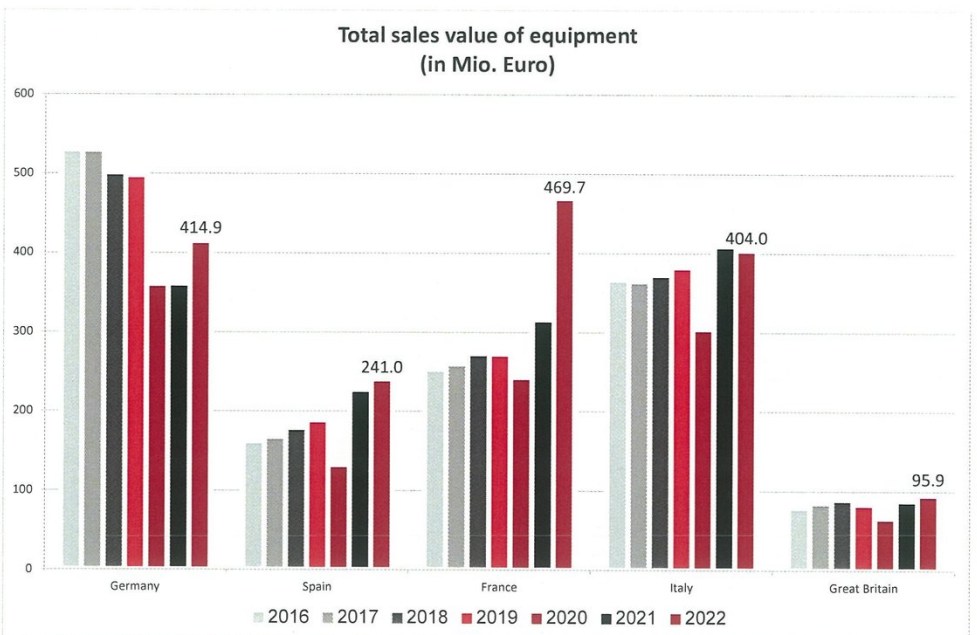
18. Number of dental hygienists



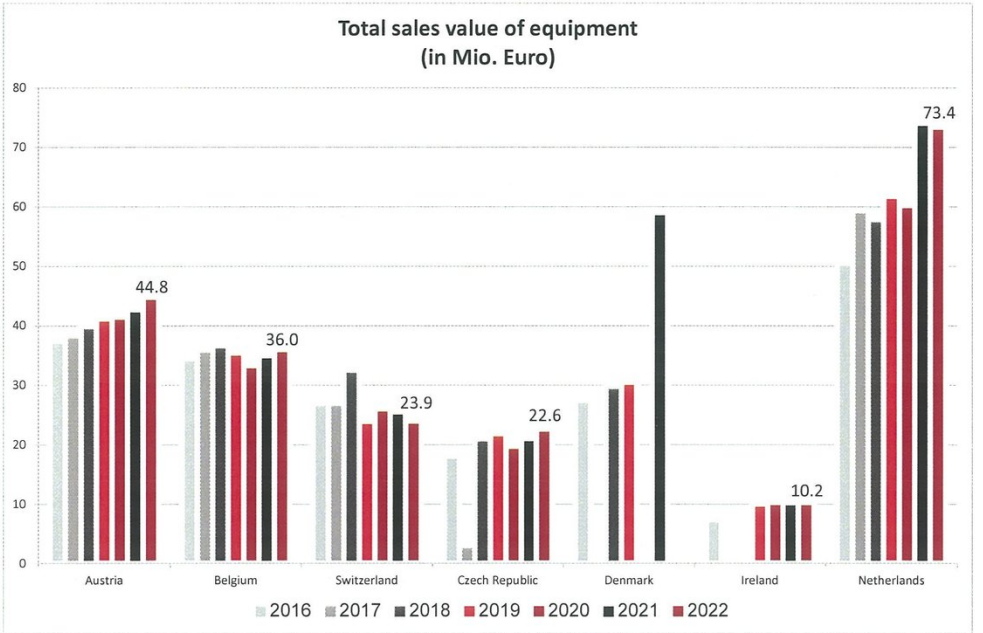
19. Total sales value of metal implants



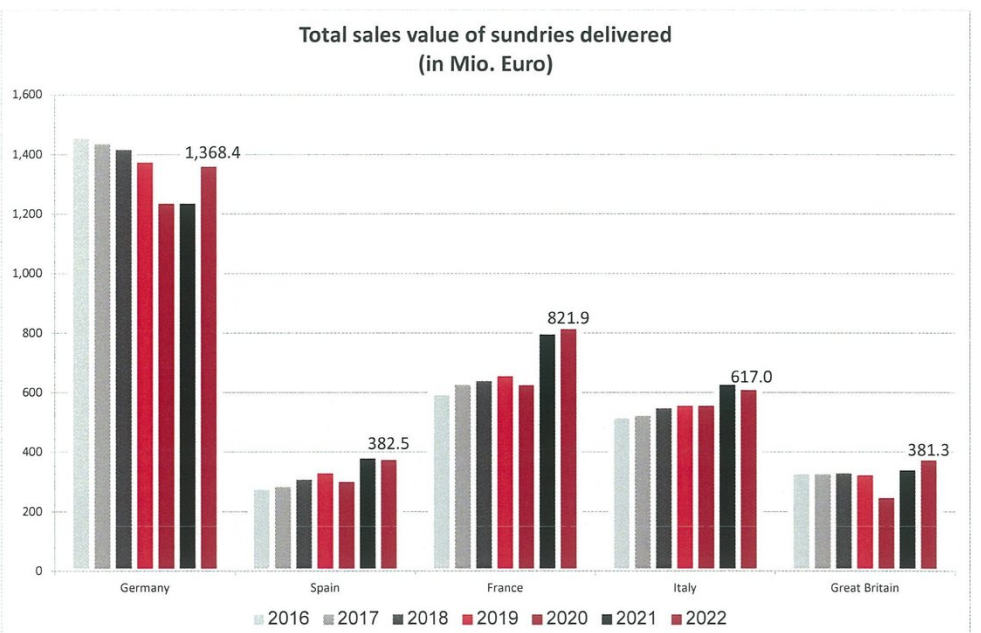
20. Total sales value of equipment



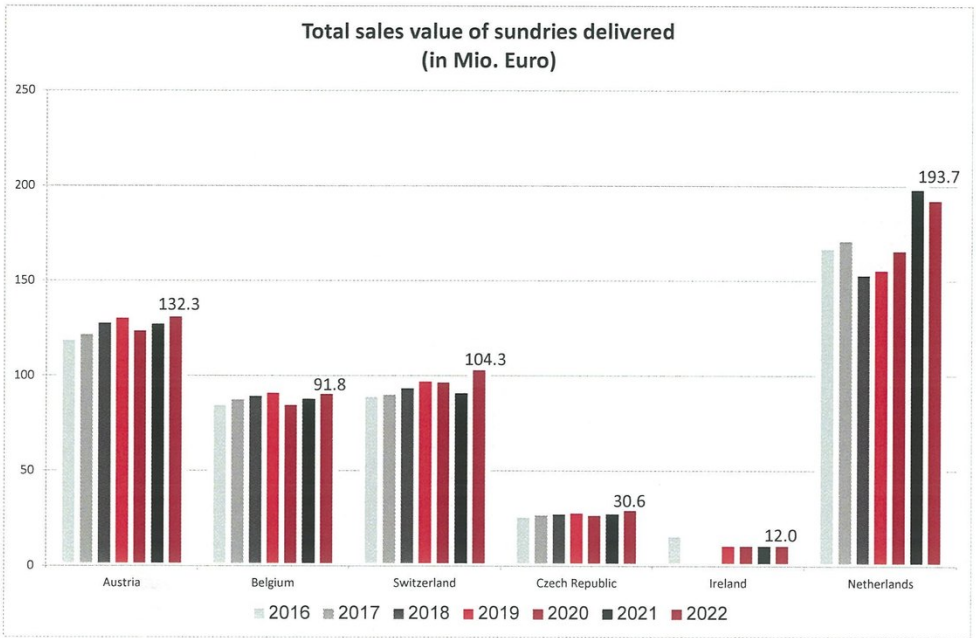
21. Total sales value of equipment



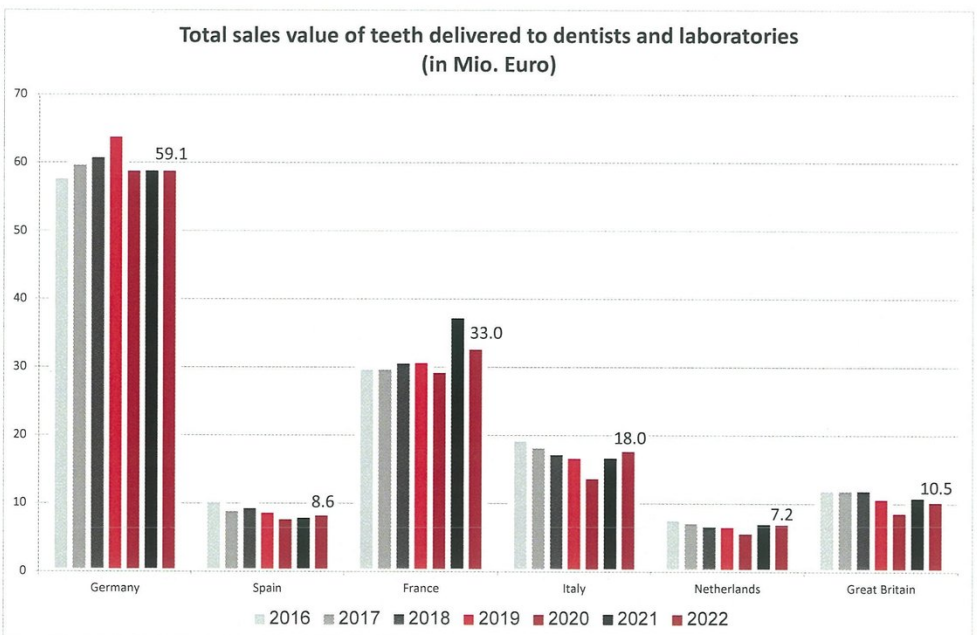
22. Total sales value of sundries delivered



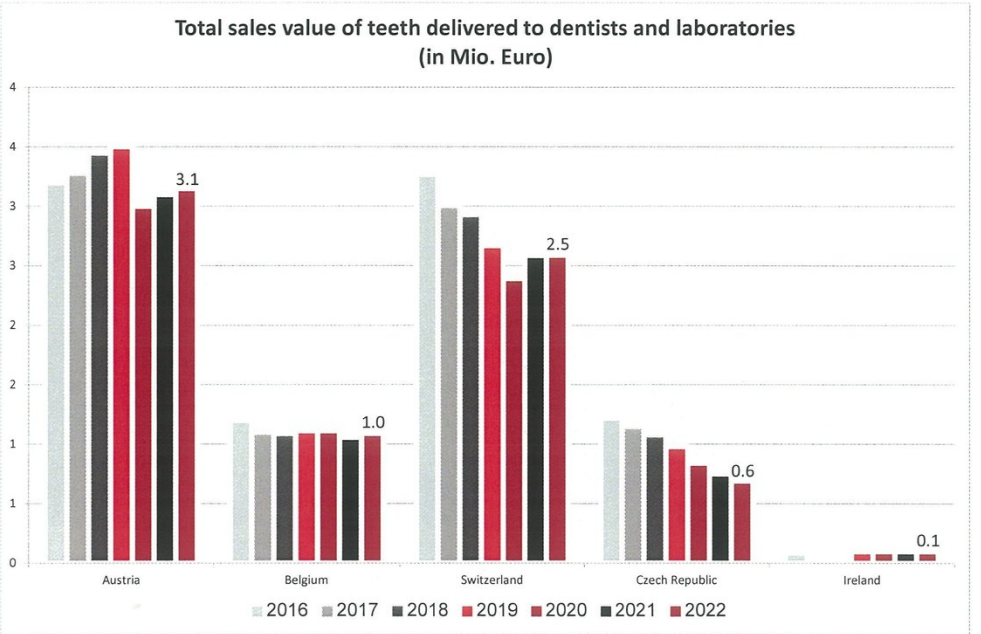
23. Total sales value of sundries delivered



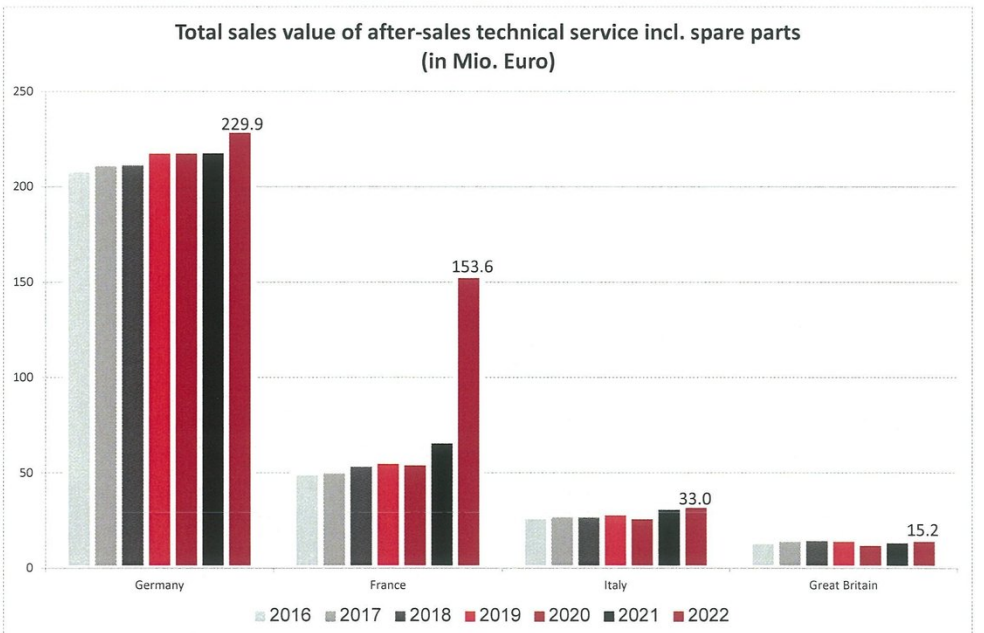
24. Total sales value of teeth delivered to dentists and laboratories



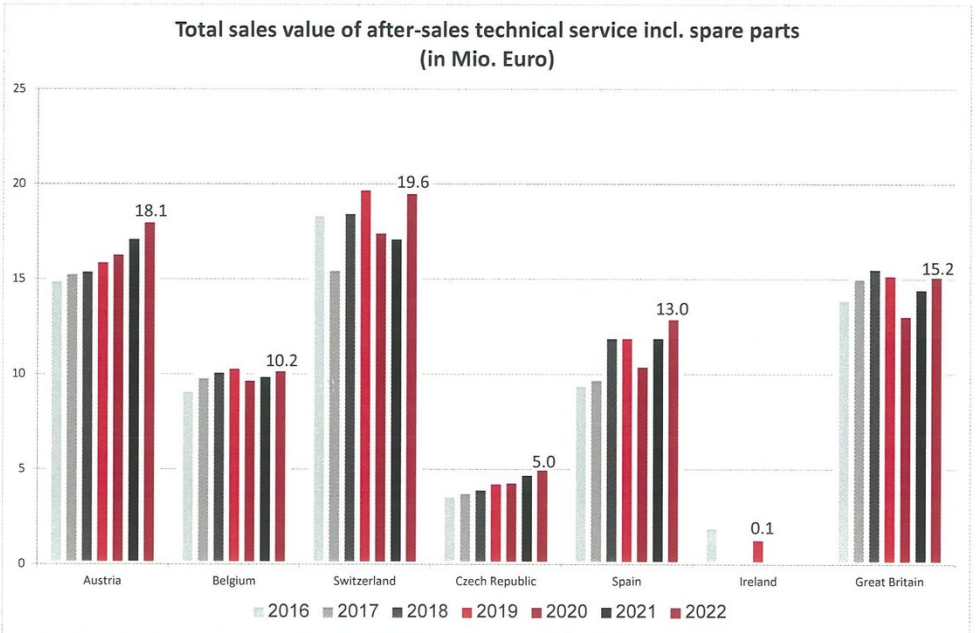
25. Total sales value of teeth delivered to dentists and laboratories



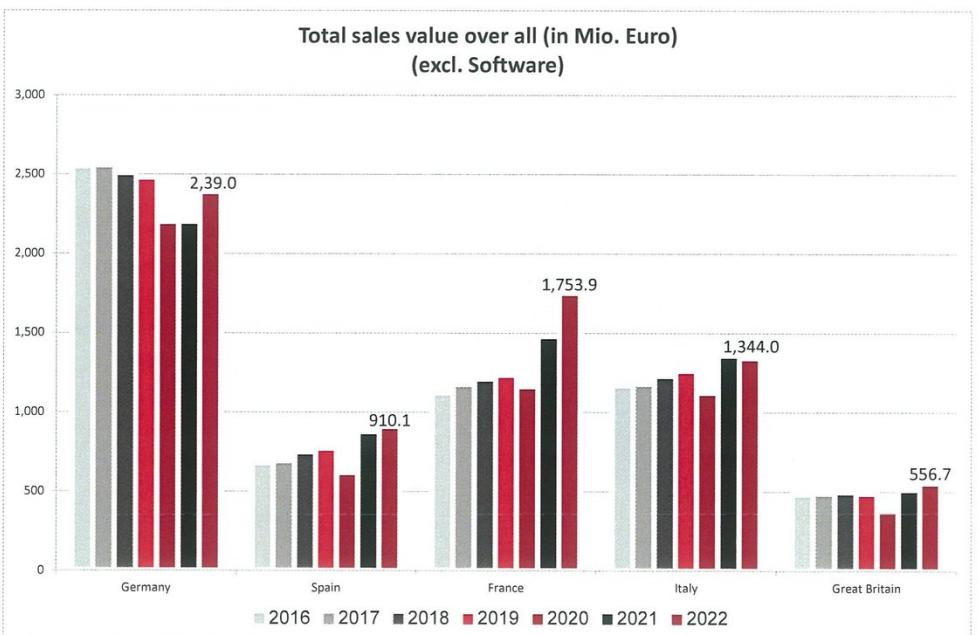
26. Total sales value of after-sales technical service incl. spare parts



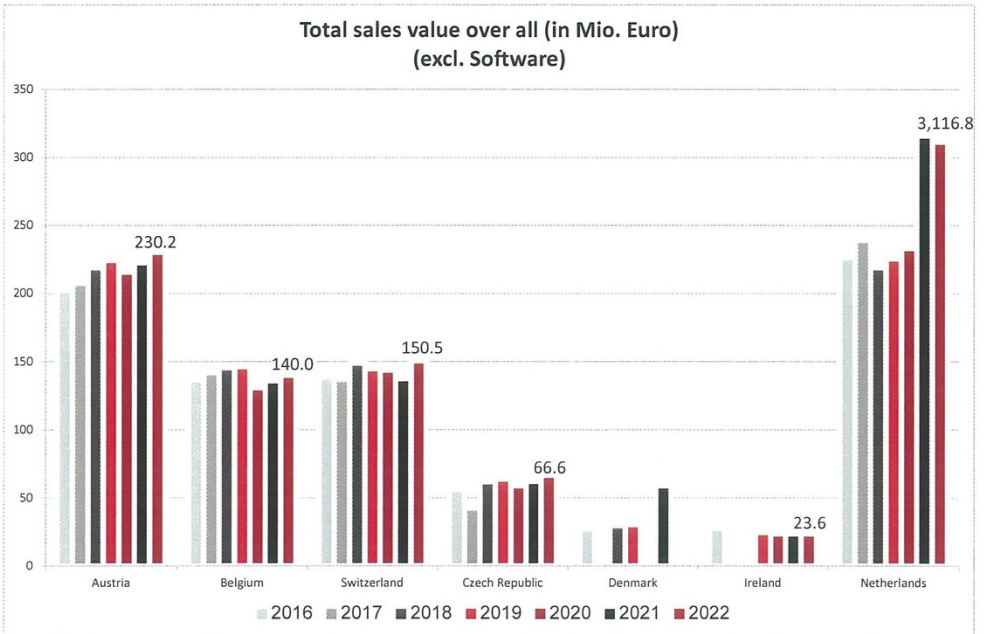
27. Total sales value of after-sales technical service incl. spare parts



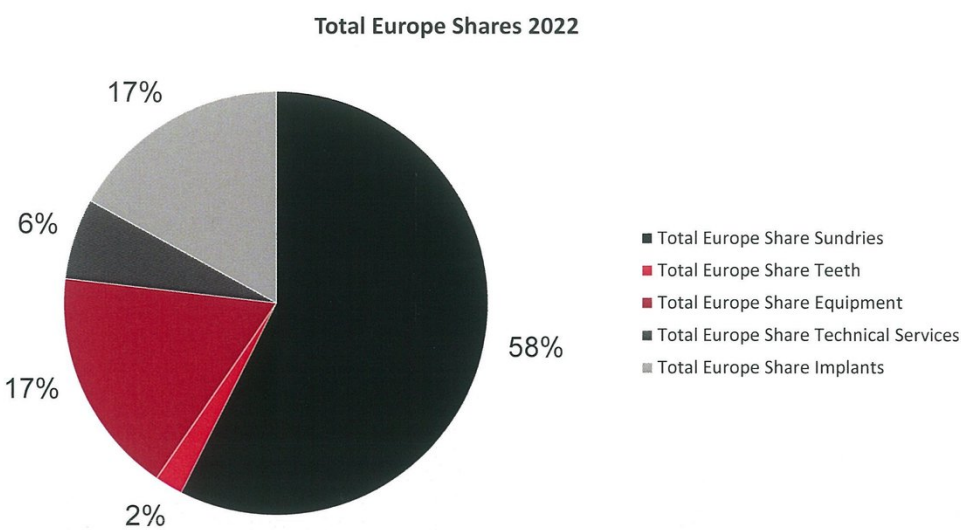
28. Total sales value over all (excl. Software)



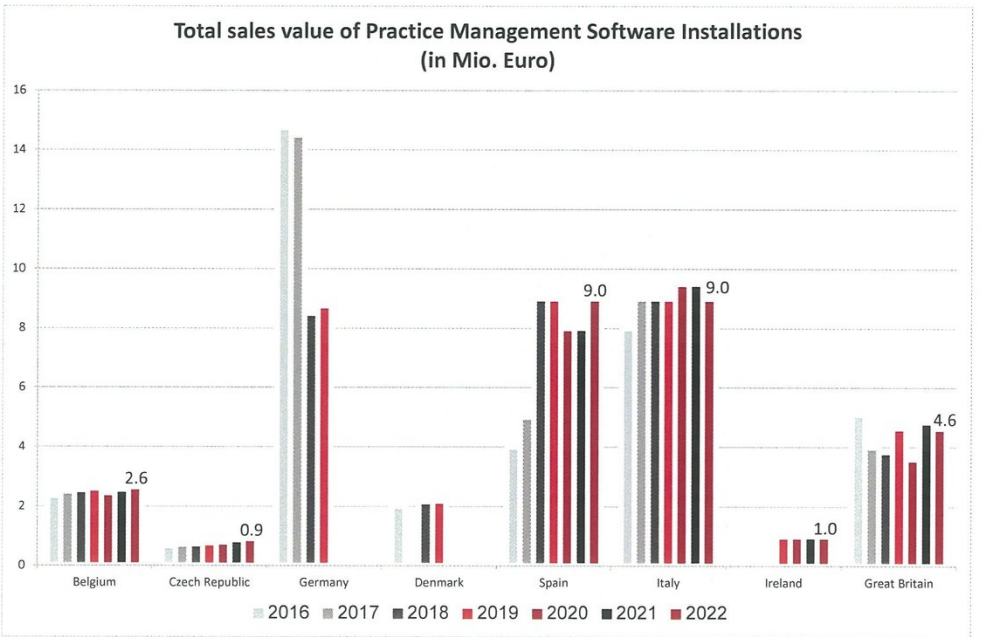
29. Total sales value over all (excl. Software)



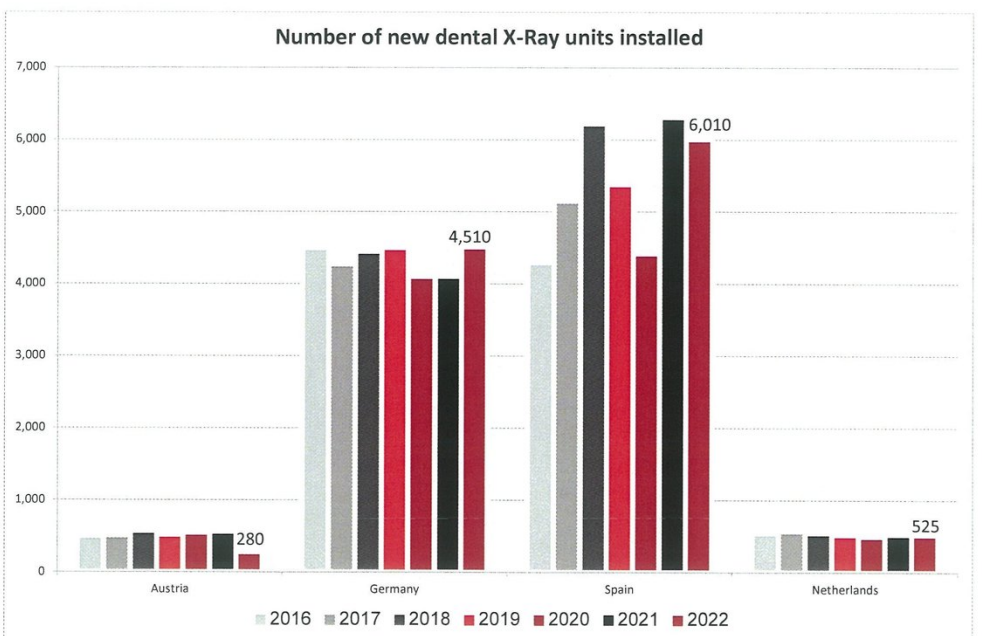
30. Total Europe Shares 2022



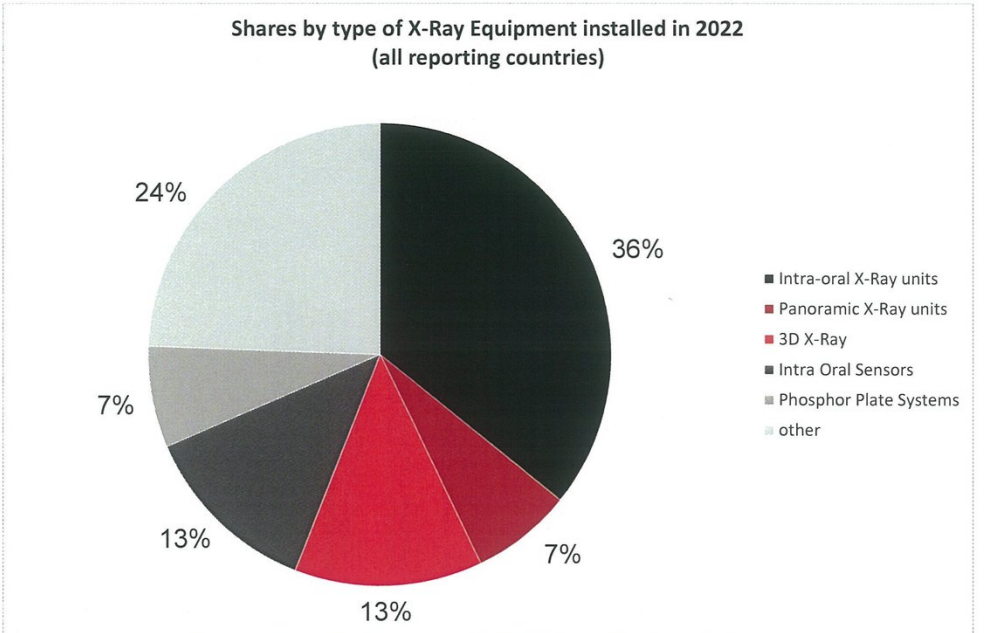
31. Total sales value of Practice Management Software Installations



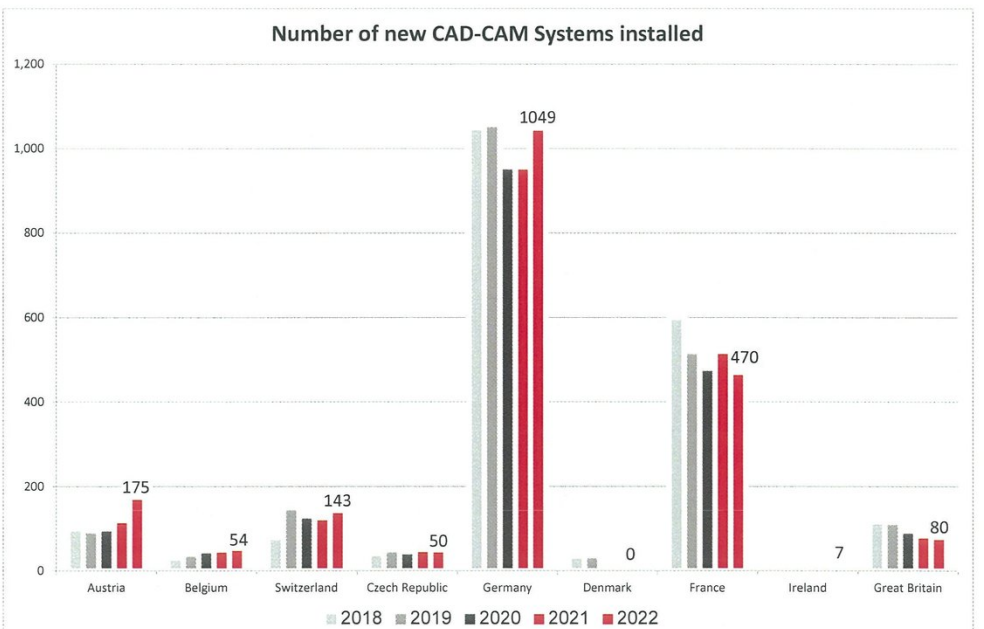
32. Number of all kind of X-Ray units installed



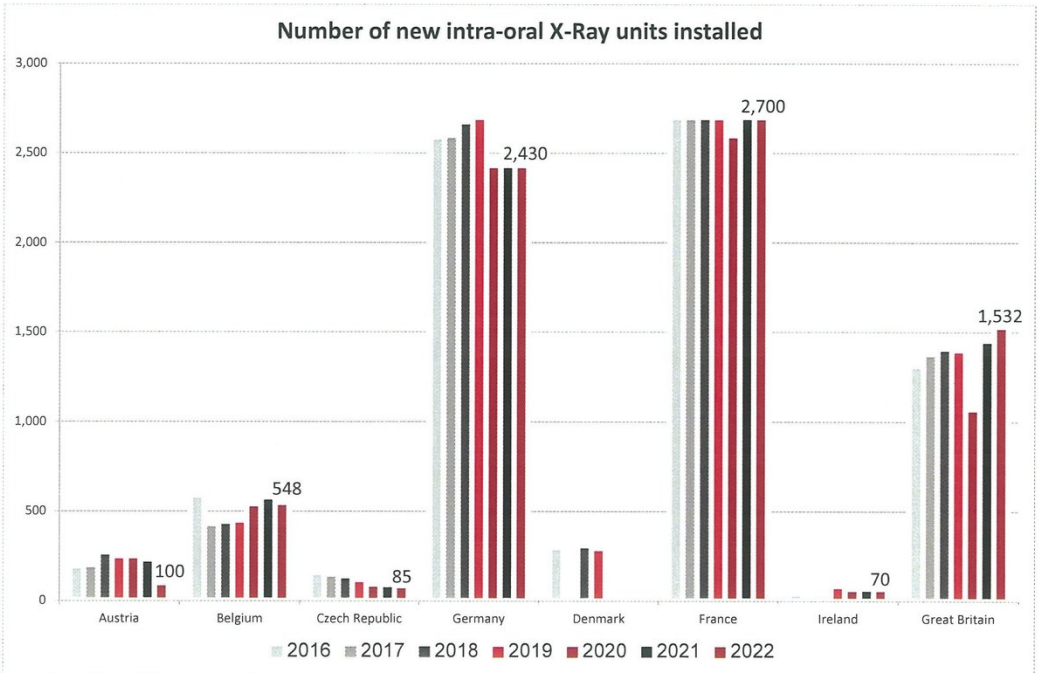
33. Shares by type of X-Ray Equipment installed in 2022



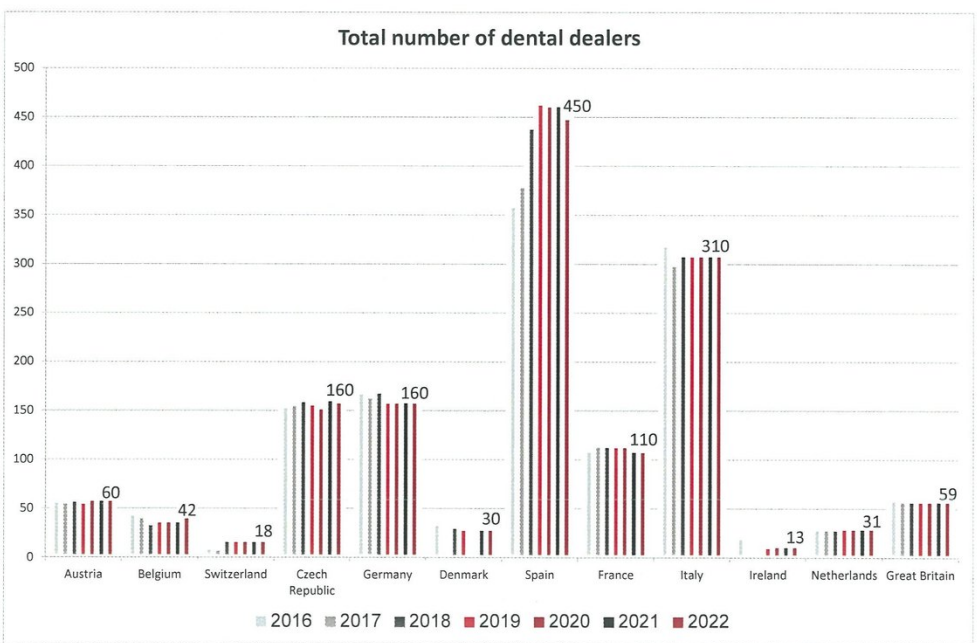
34. Number of new CAD-CAM Systems installed



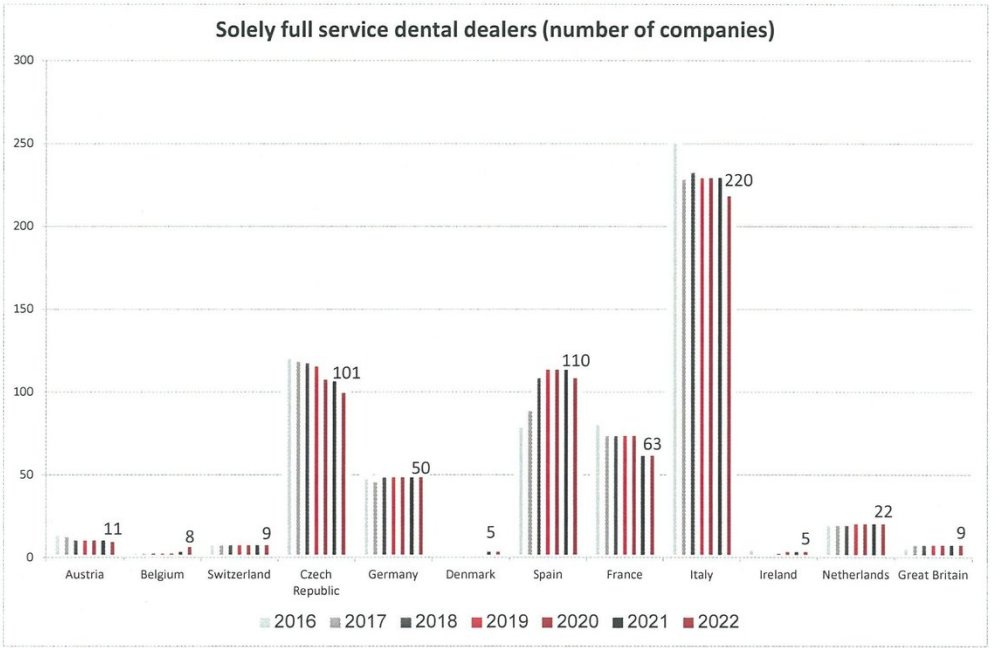
35. Number of new intra-oral X-Ray units installed



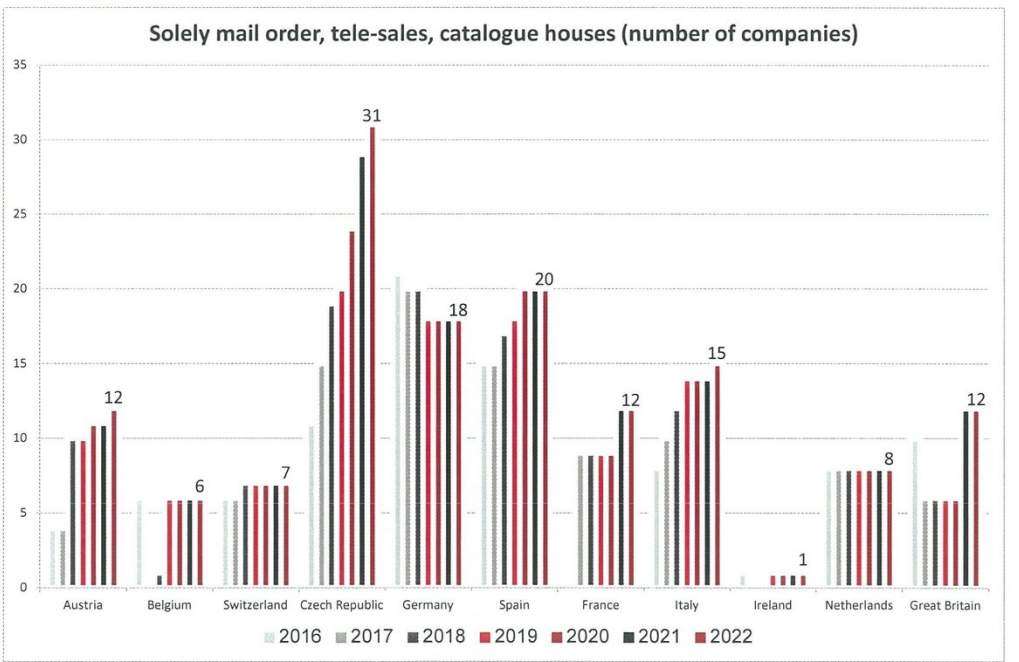
36. Total number of dental dealers



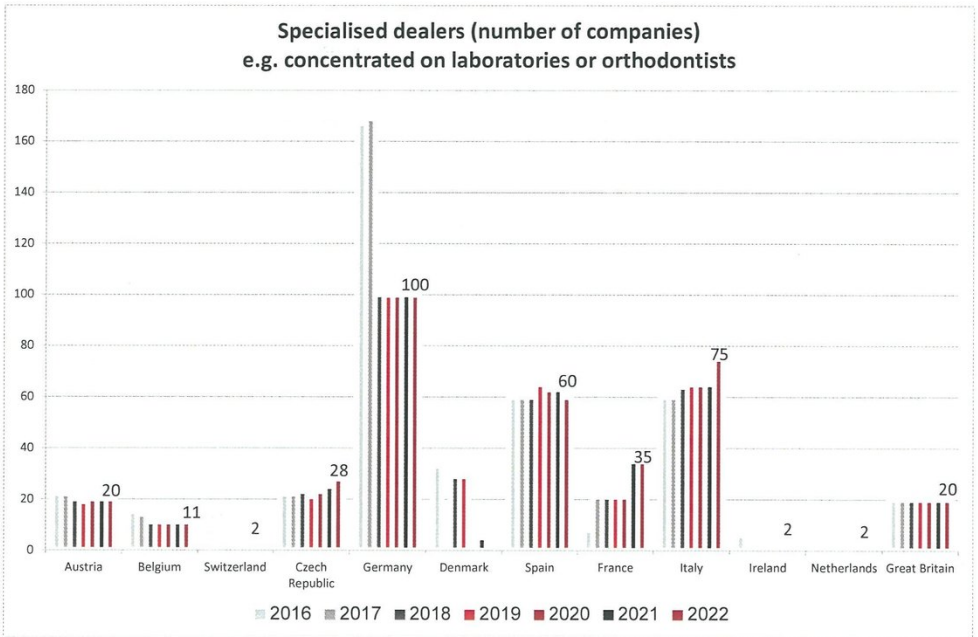
37. Solely full service dental dealers



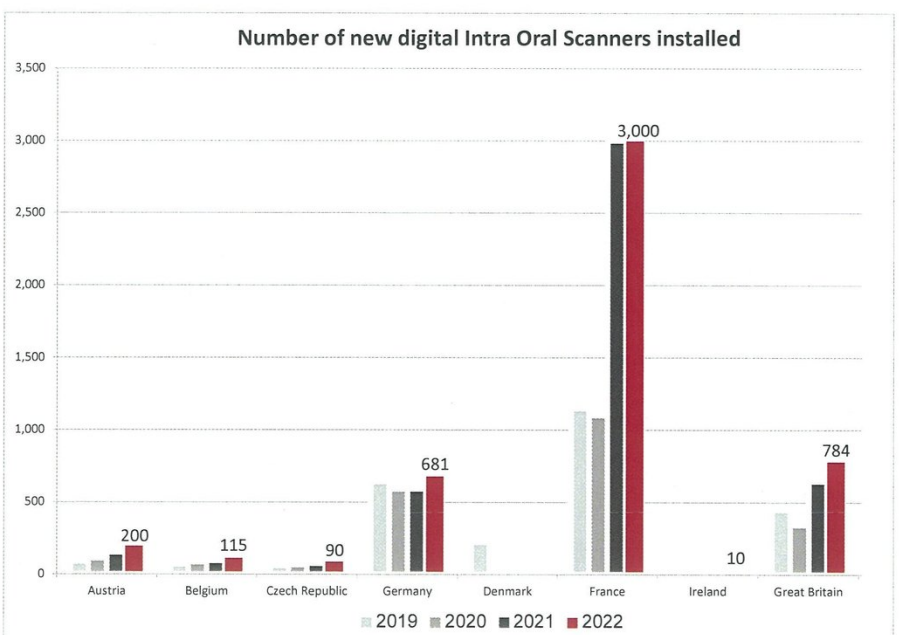
38. Solely mail order, tele-sales, catalogue houses



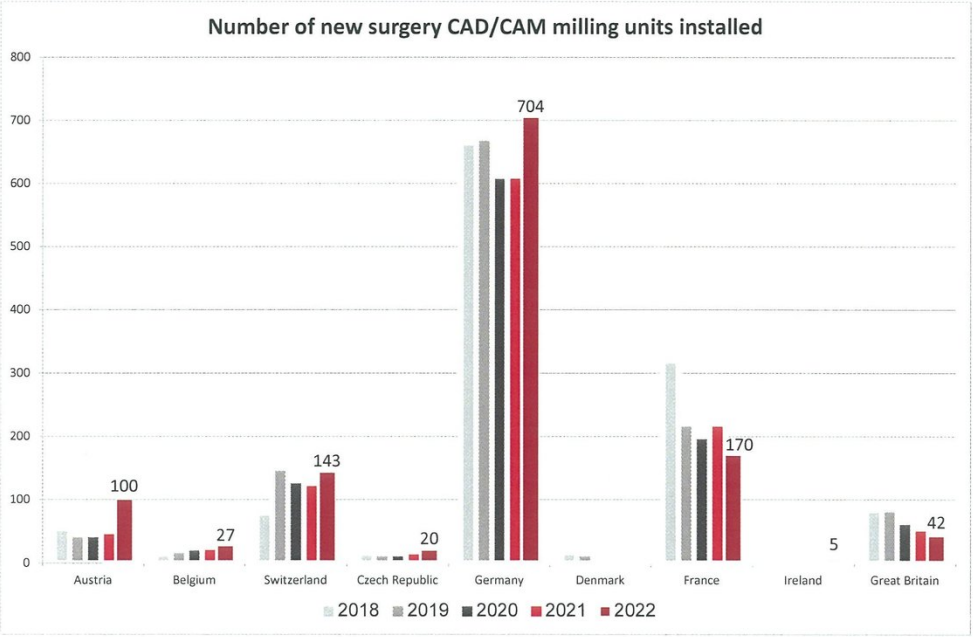
39. Specialised dealers e.g. concentrated on laboratories or orthodontists



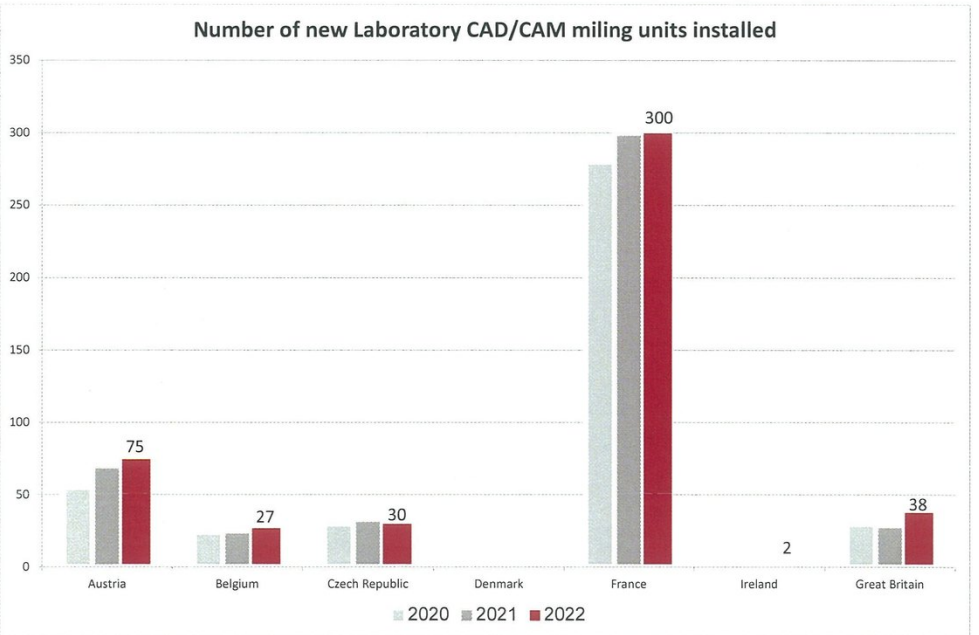
40. Number of new digital Intra Oral Scanners installed



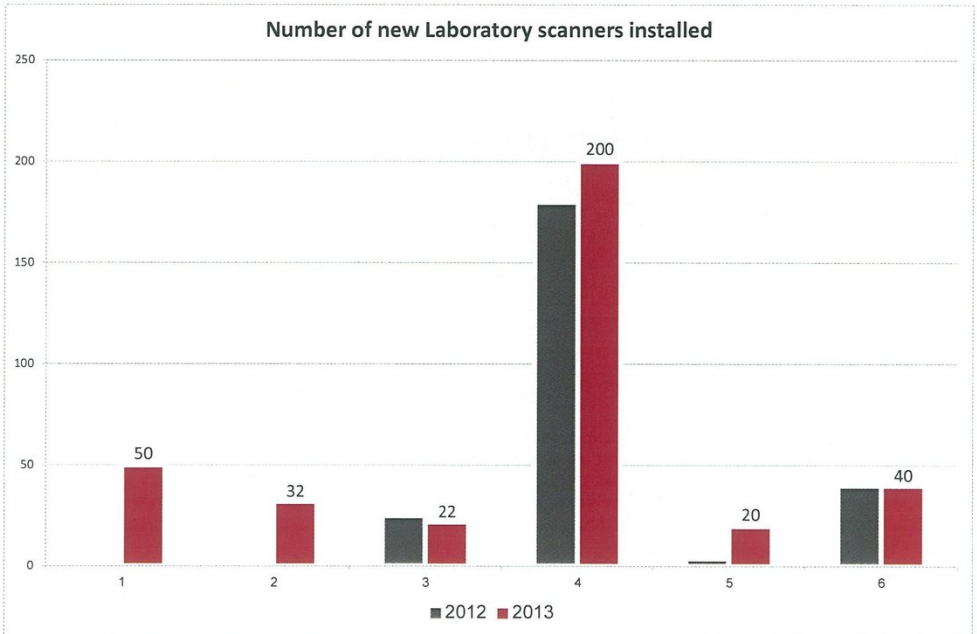
41. Number of new surgery CAD/CAM milling units installed



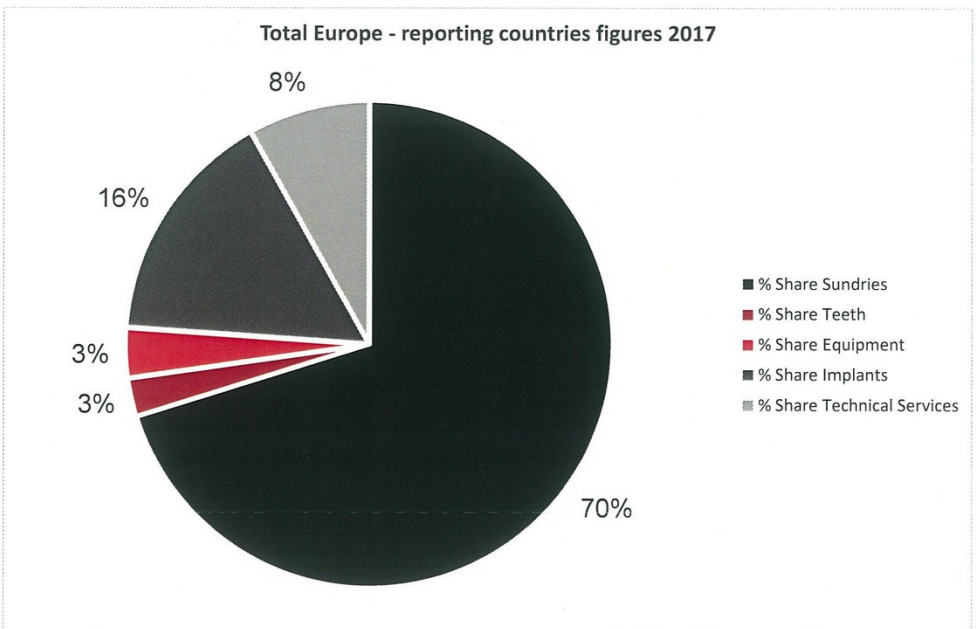
42. Number of new Laboratory CAD/CAM miling units installed



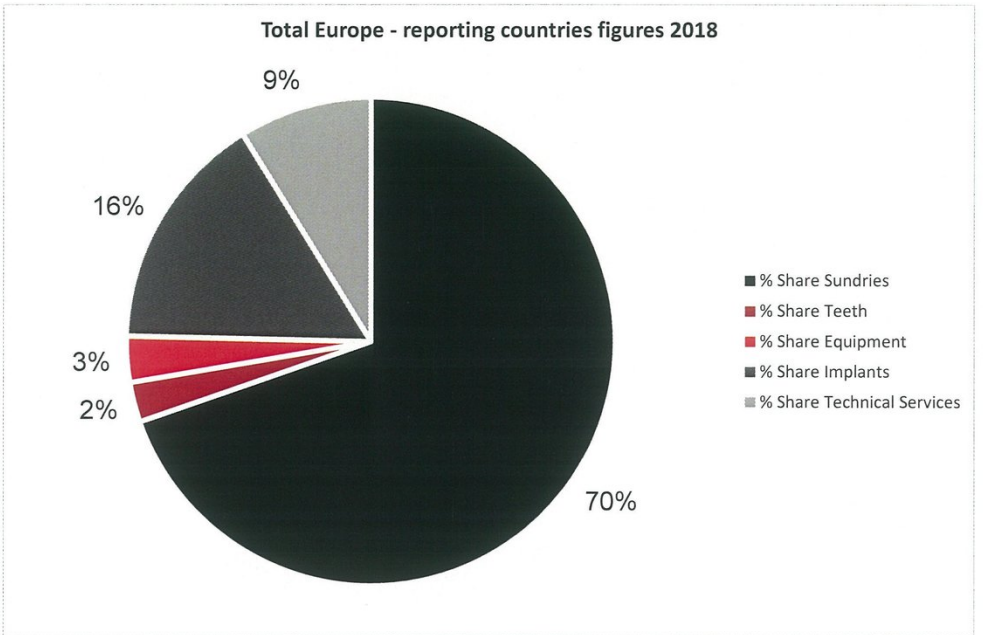
43. Number of new Laboratory scanners installed



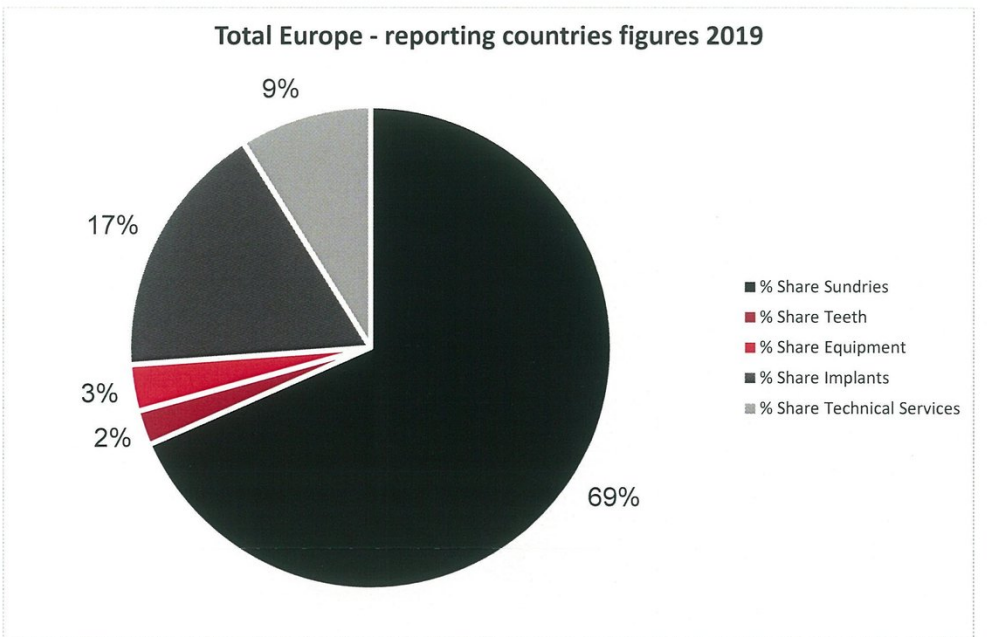
44. Total Europe - reporting countries figures 2017



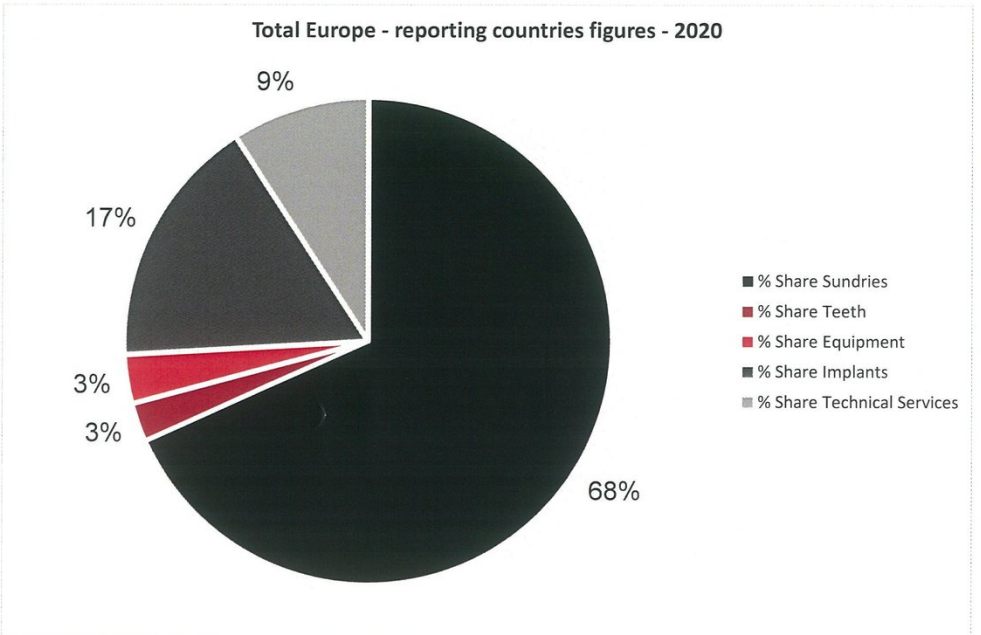
45. Total Europe - reporting countries figures 2018



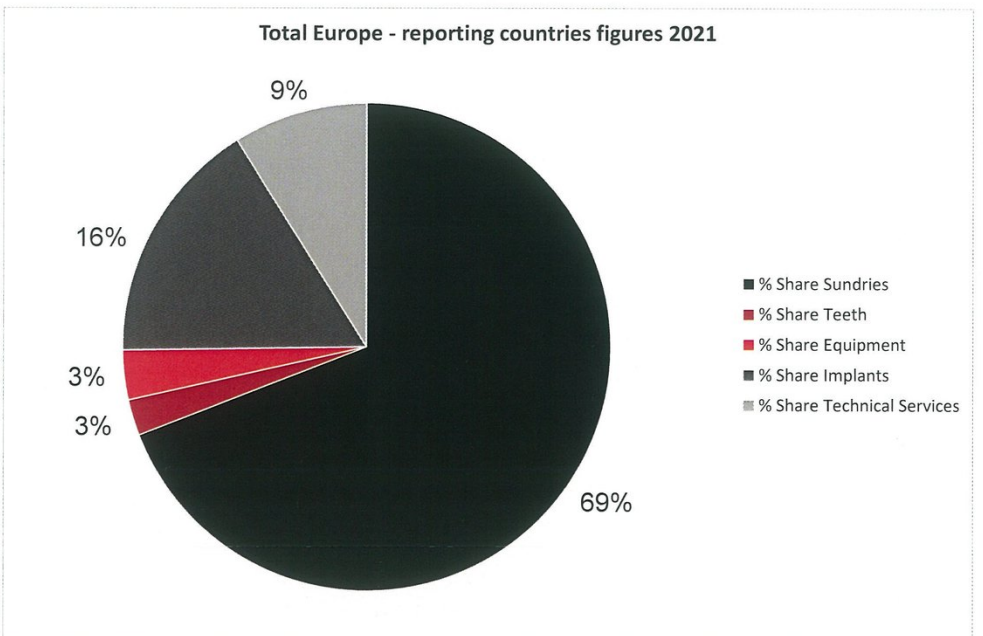
46. Total Europe - reporting countries figures - 2019



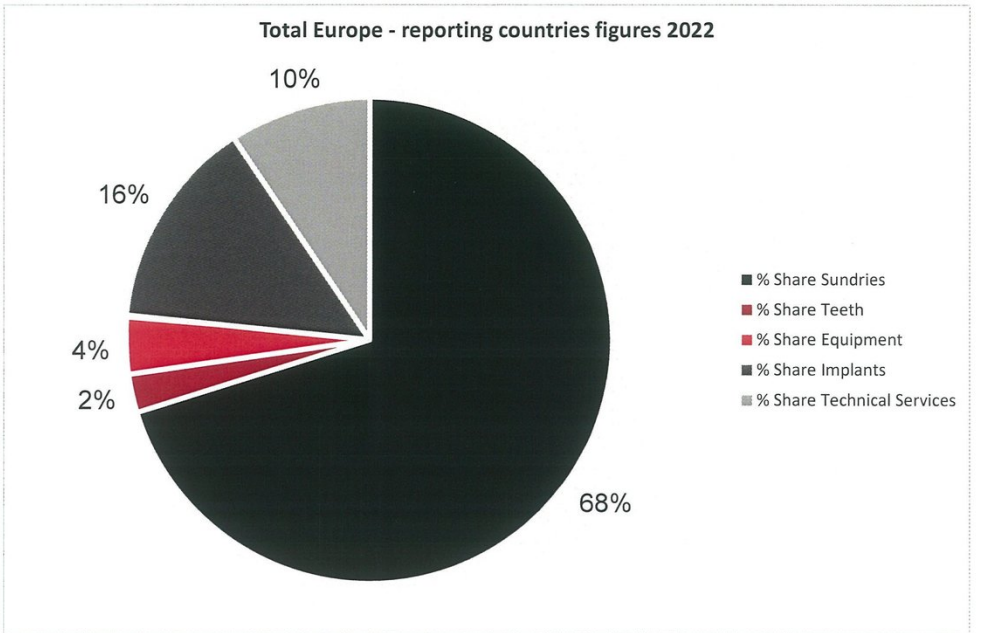
47. Total Europe - reporting countries figures 2020



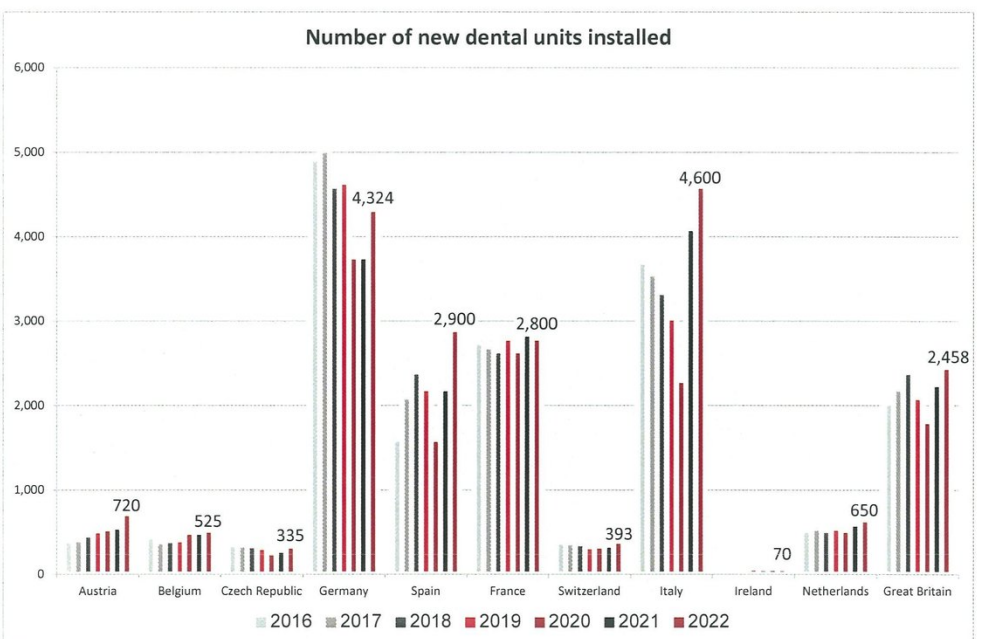
48. Total Europe - reporting countries figures 2021



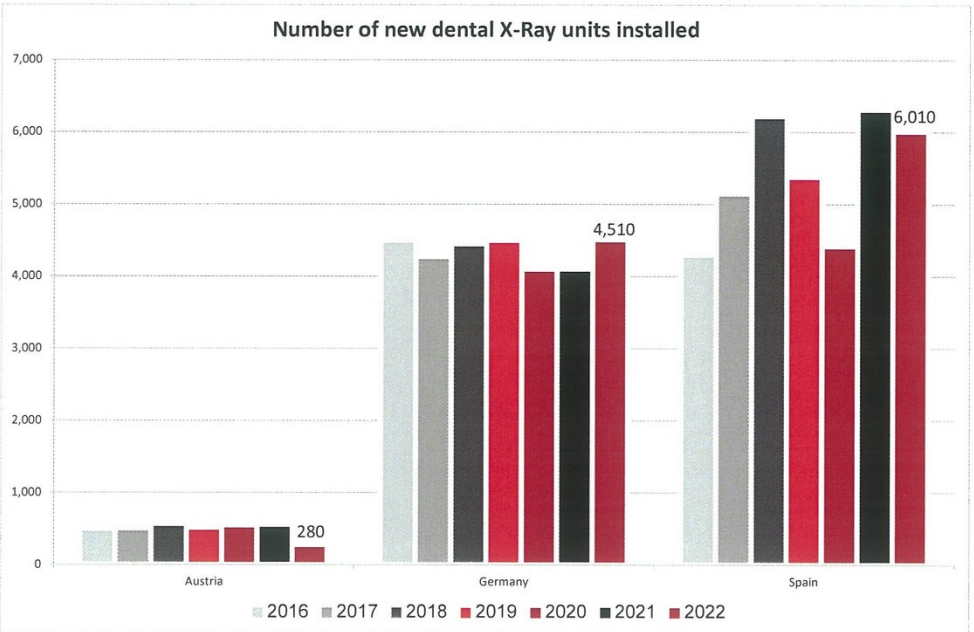
49. Total Europe - reporting countries figures 2022



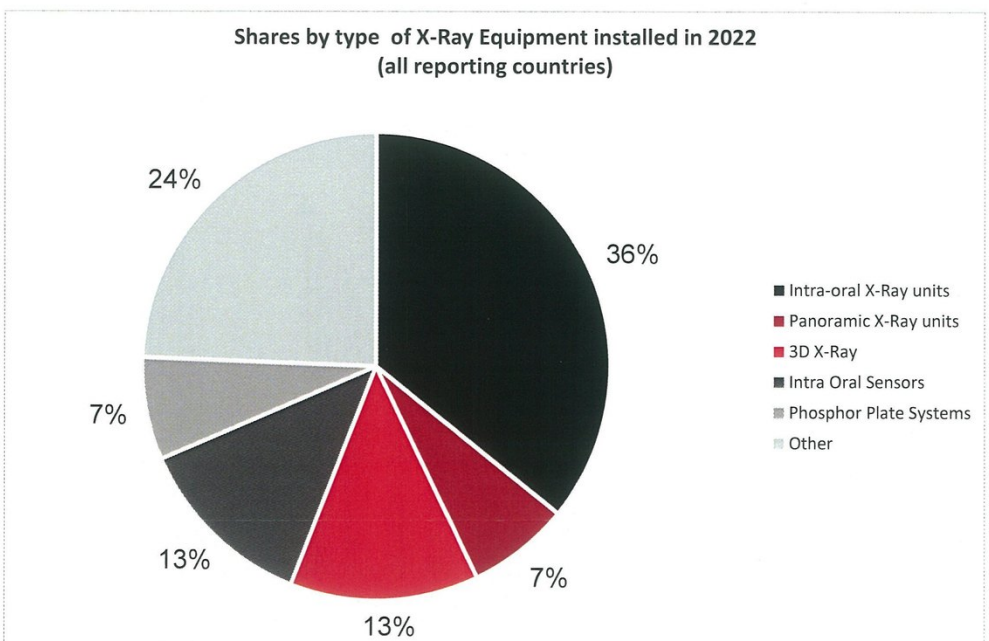
50. Number of new dental units installed



51. Number of new dental X-Ray units installed



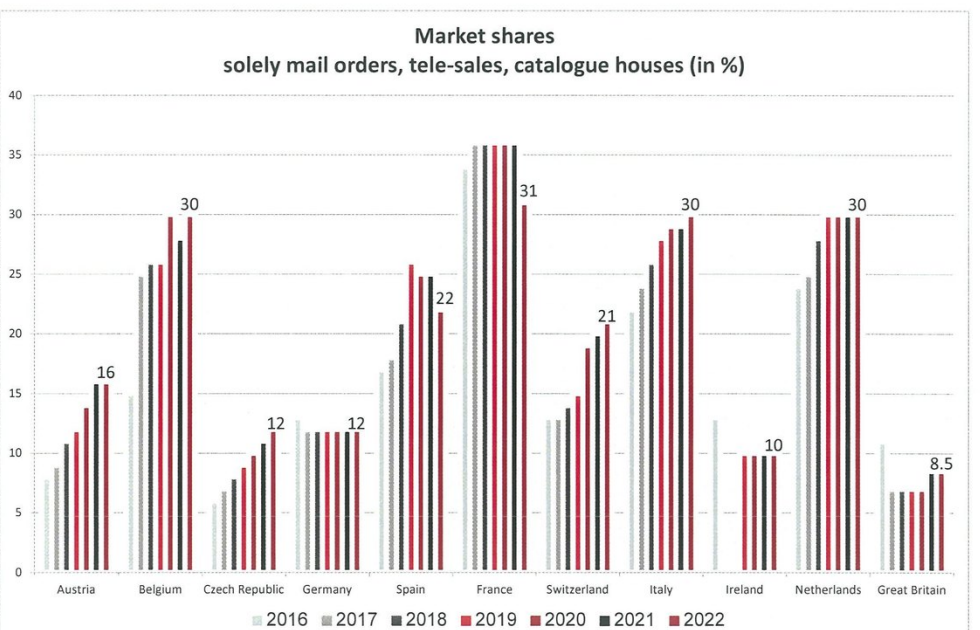
52. Shares by type of X-Ray Equipment installed in 2022, quantities



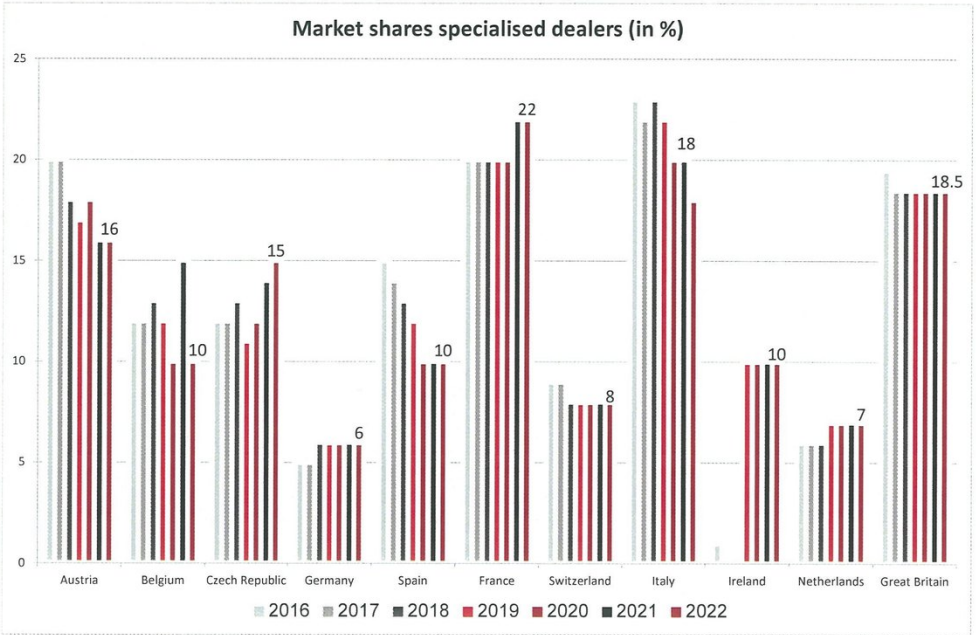
53. Market shares solely full service dental dealers (in %)



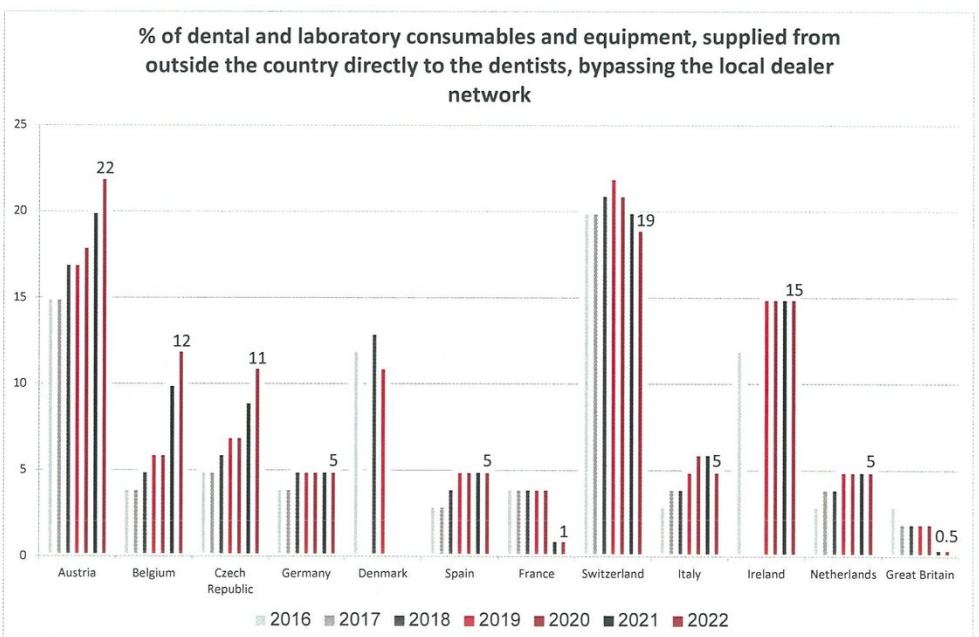
54. Market shares solely mail orders, tele-sales, catalogue houses (in %)



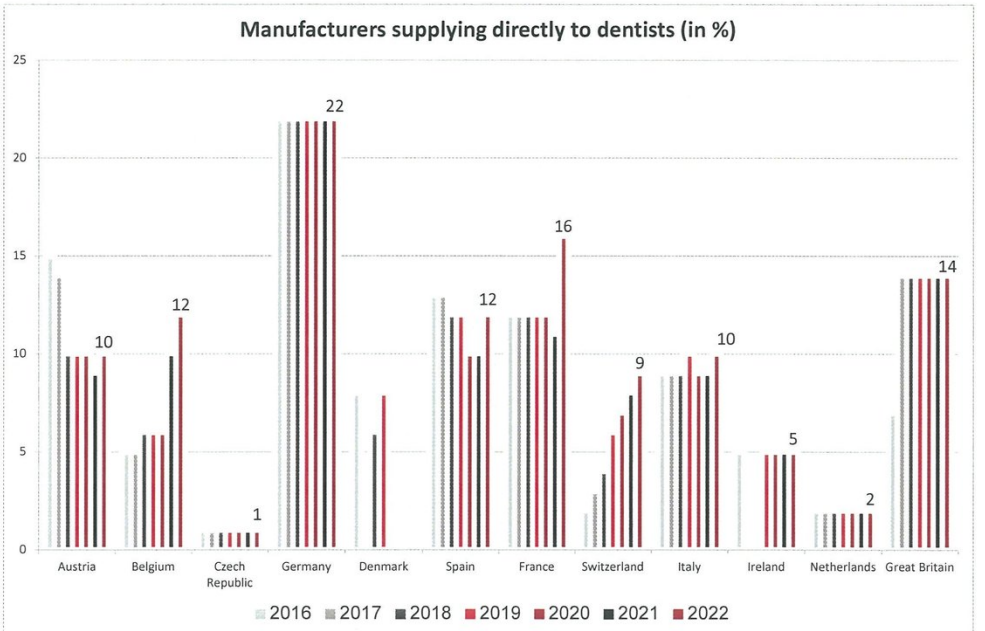
55. Market shares specialised dealers (in %)



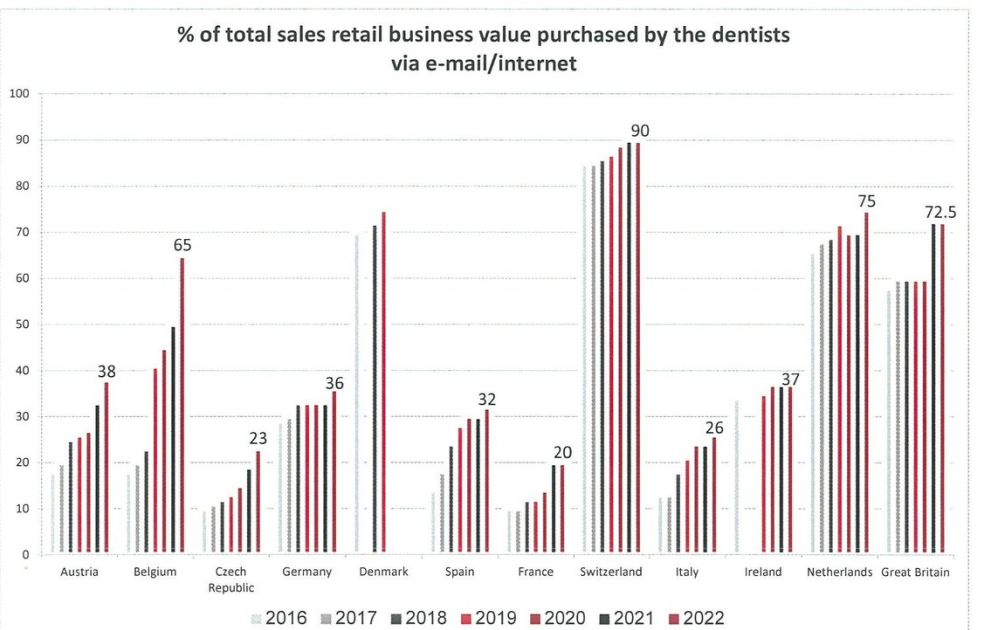
56. % of dental and laboratory consumables and equipment



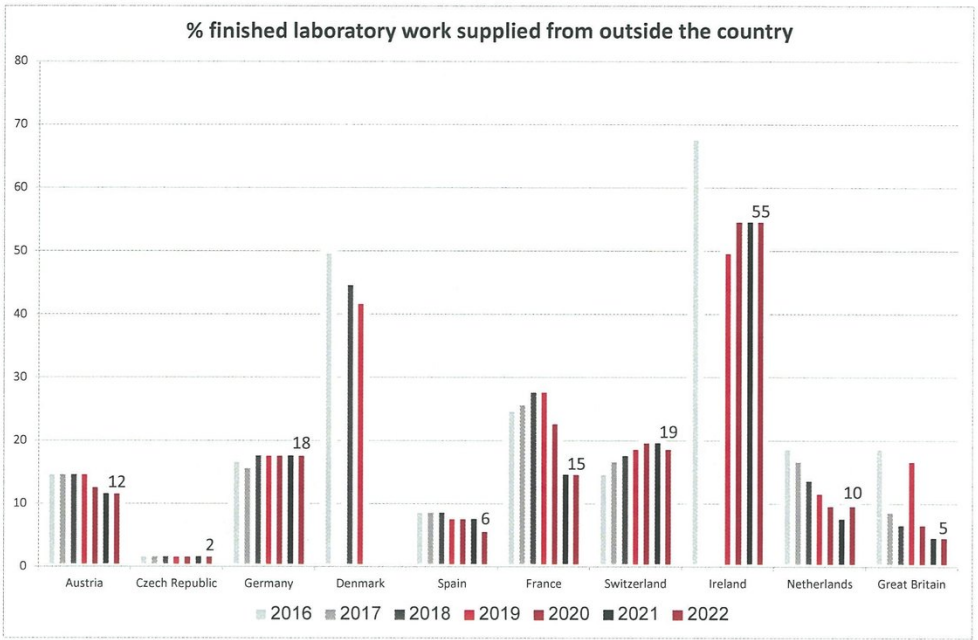
57. Manufacturers supplying directly to dentists (in %)



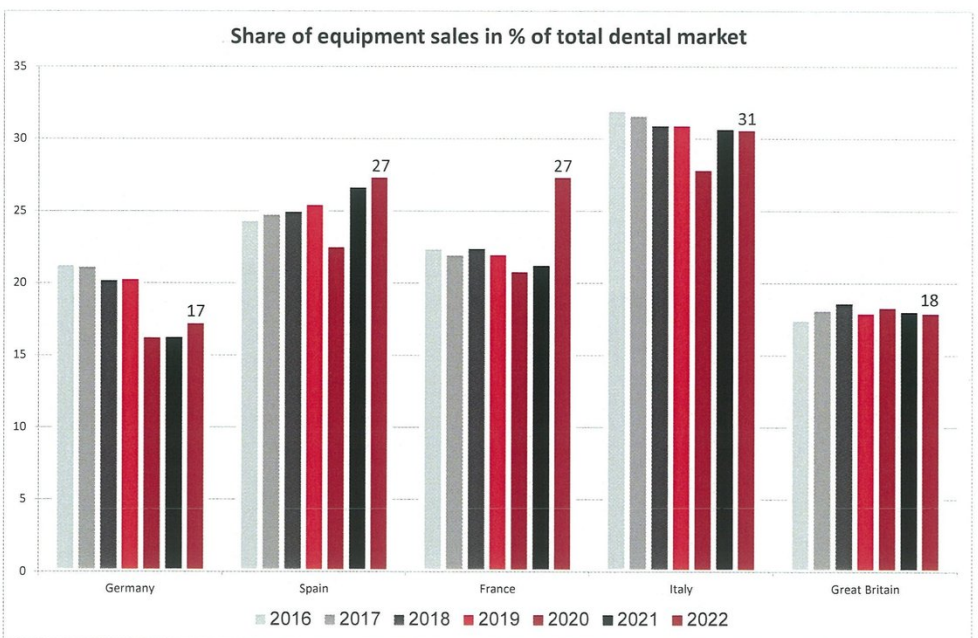
58. % of total sales retail business value purchased by the dentists via e-mail/internet



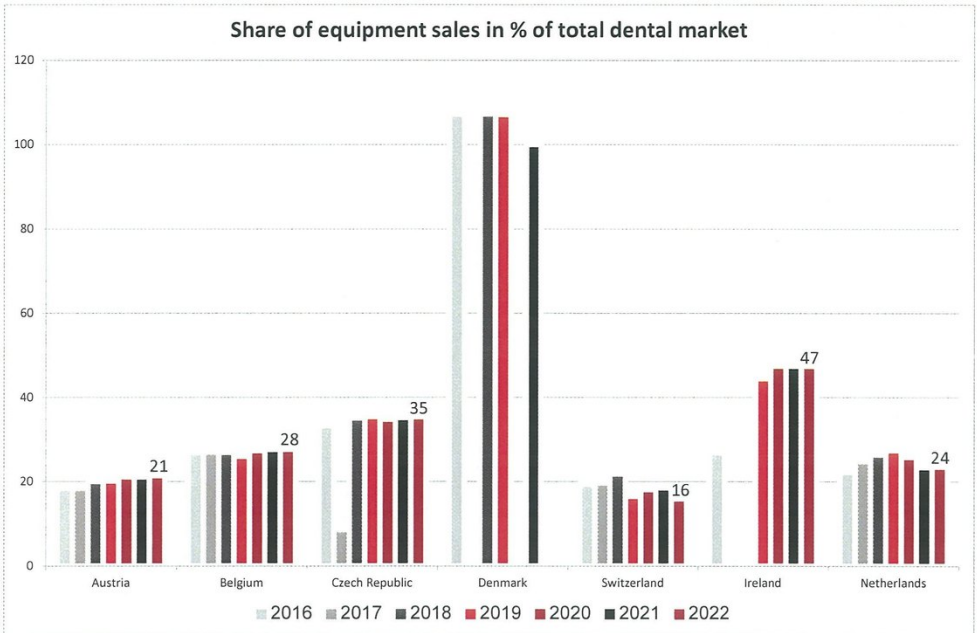
59. % finished laboratory work supplied from outside the country



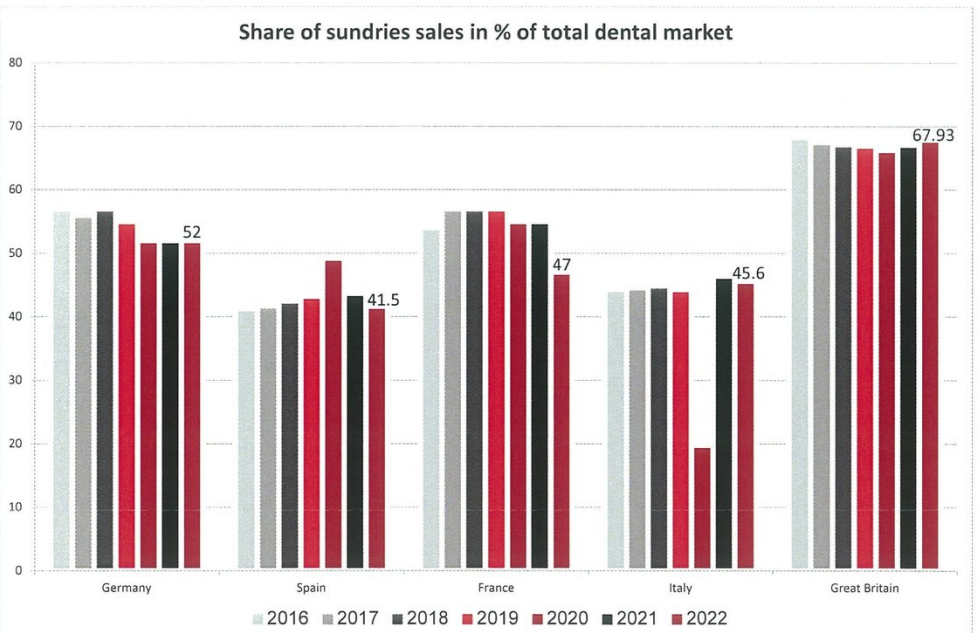
60. Share of equipment sales in % of total dental market



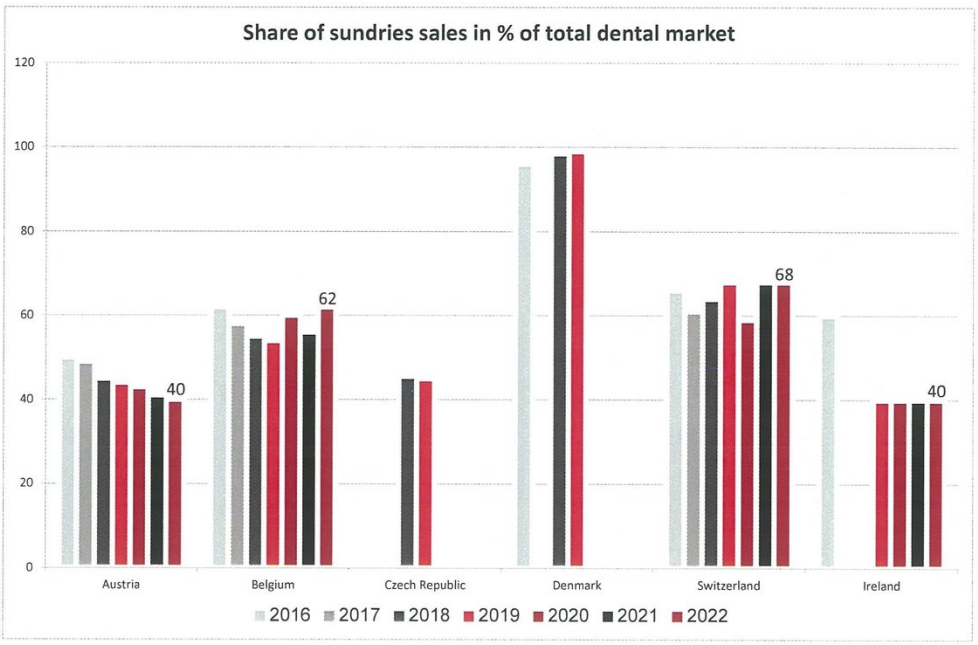
61. Share of equipment sales in % of total dental market



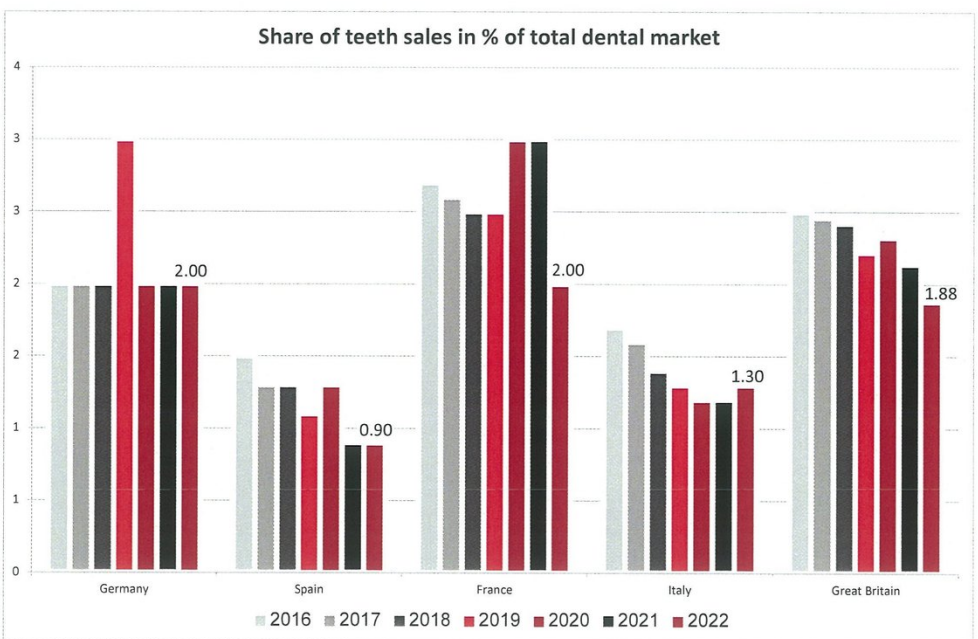
62. Share of sundries sales in % of total dental market



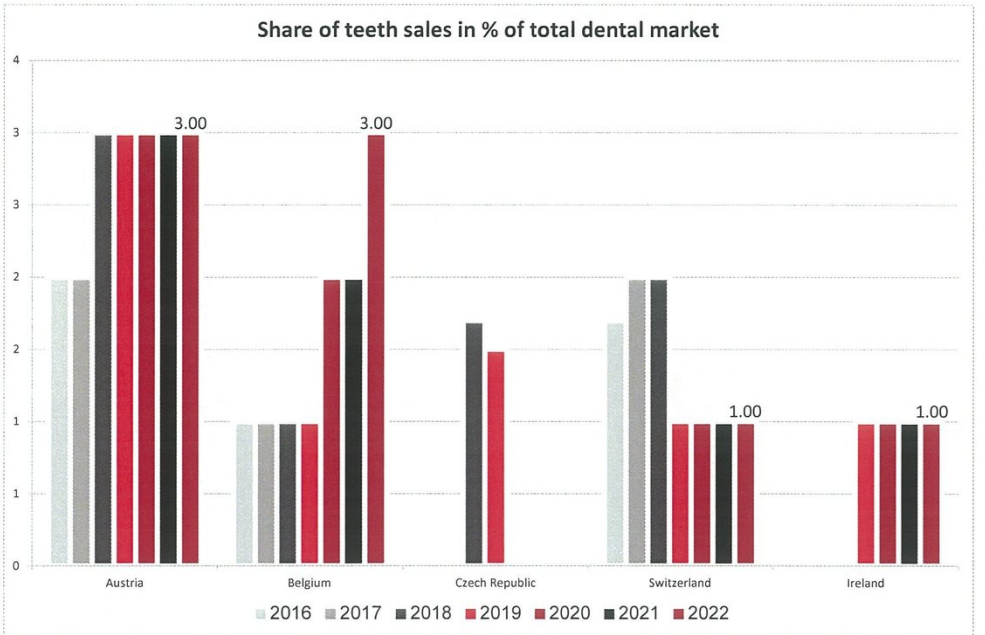
63. Share of sundries sales in % of total dental market



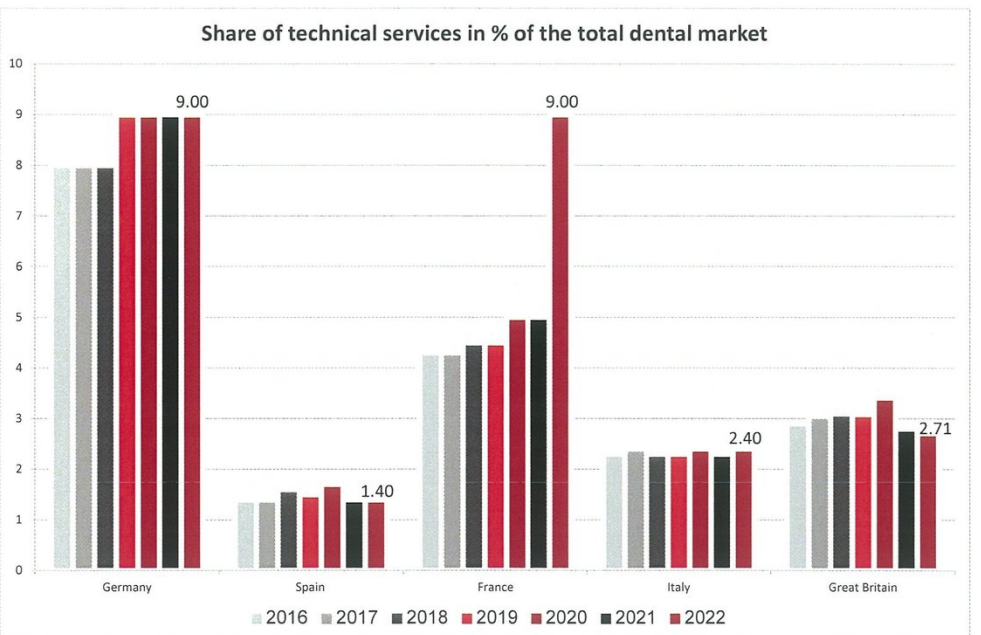
64. Share of teeth sales in % of total dental market



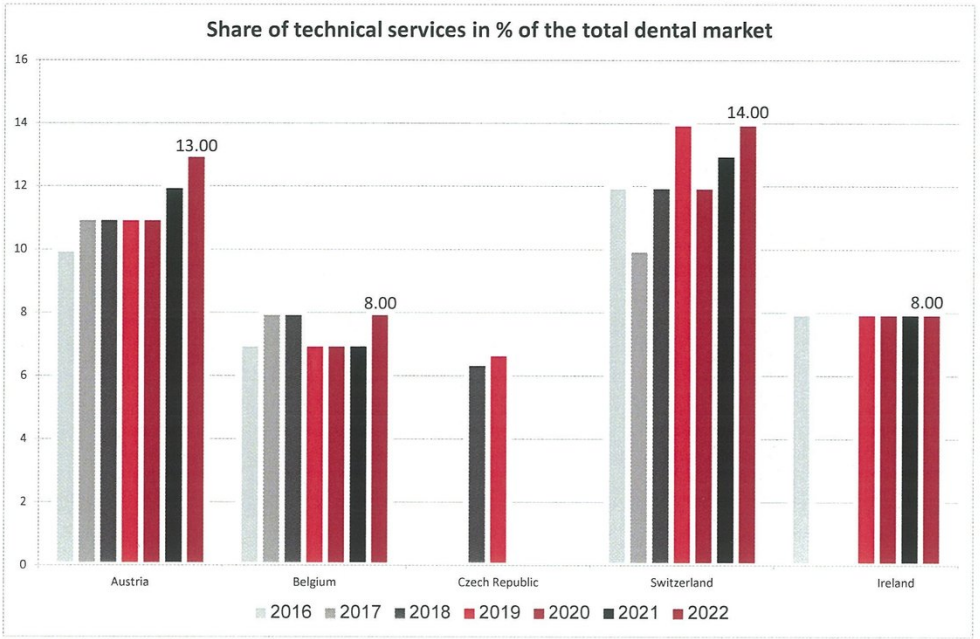
65. Share of teeth sales in % of total dental market



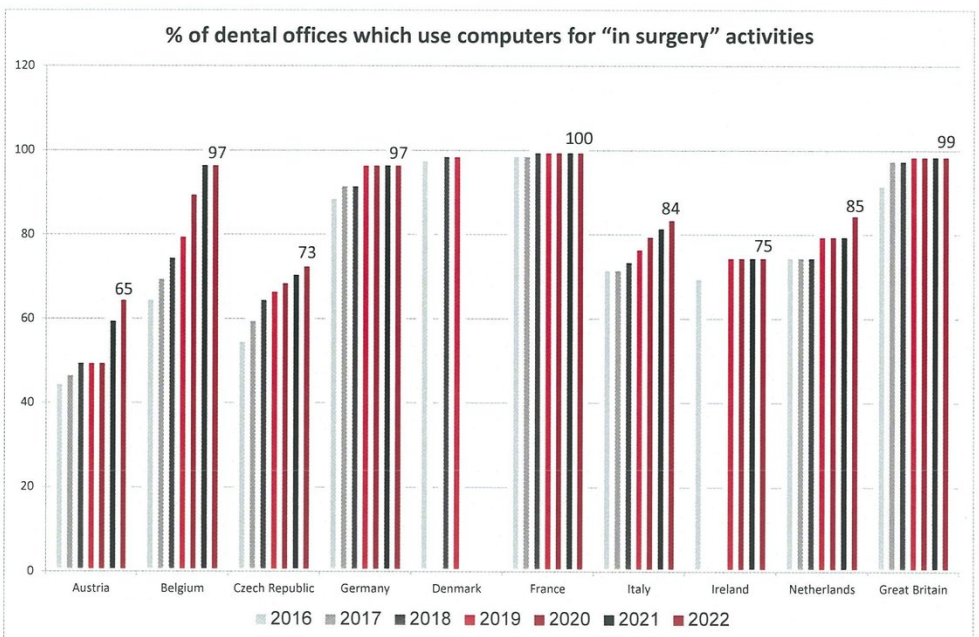
66. Share of technical services in % of the total dental market



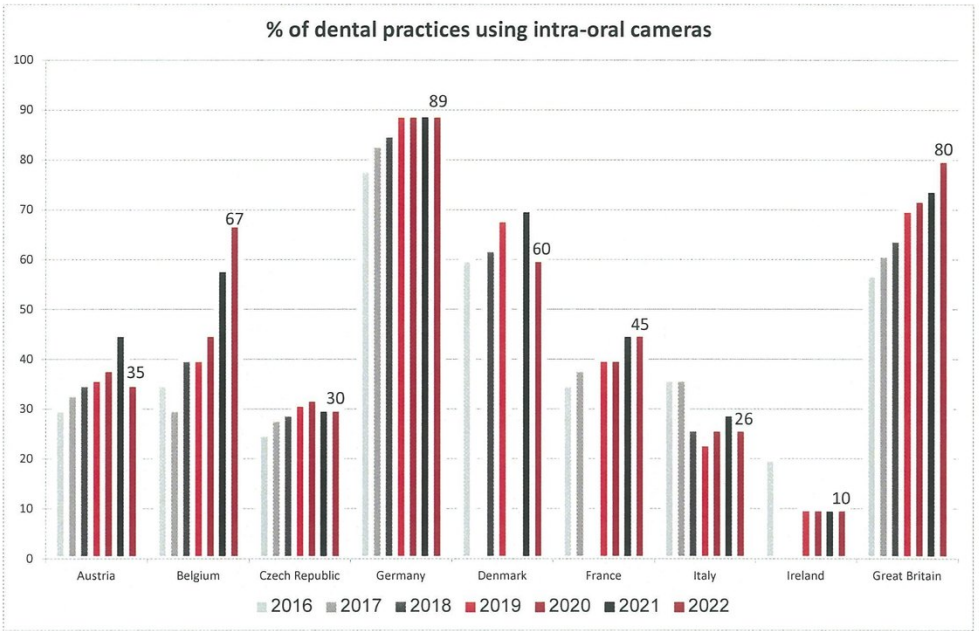
67. Share of technical services in % of the total dental market

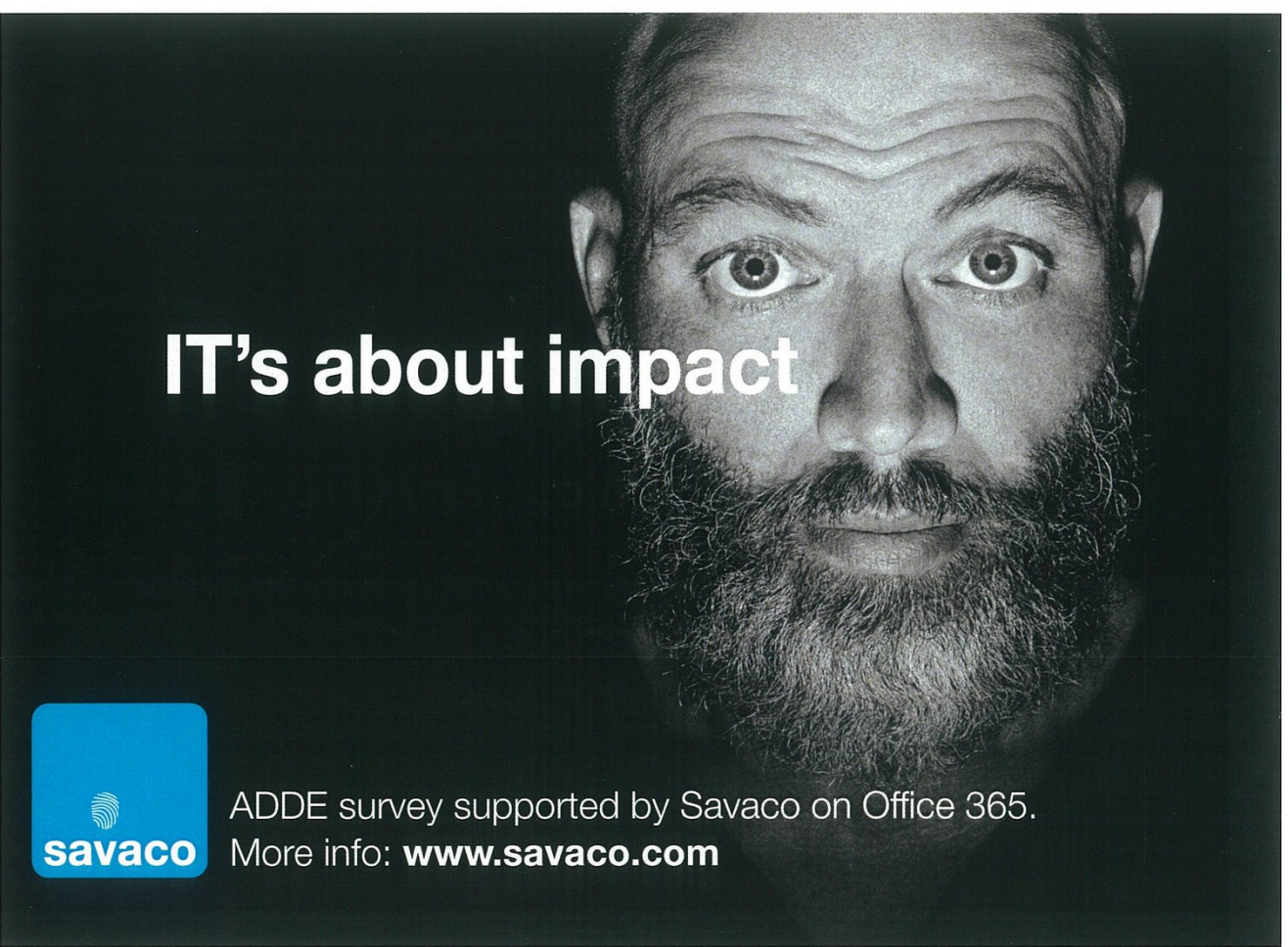


68. % of dental offices which use computers for "in surgery" activities



69. % of dental practices using intra-oral cameras







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QUESTIONNAIRE FOR THE ACTUAL SURVEY

1.

- **1.1.** Total inhabitants
- **1.2.** Total number of practising dentists (public and private)
- **1.3.** Total number of full time equivalent of practising dentists (public and private)
- **1.4.** Number of new graduate dentists (state examined) in 2022
- **1.5.** Number of dentist training institutions: dental faculties (public and private)
- **1.6.** Number of independent businesses
- **1.7.** Total number of dental hygienists
- **1.8.** Total number of dental hygienists
  - **a).** Percentage of dental hygienists that are operating their own business
- **1.9.** Total number of dental laboratories: (dentists' and commercial laboratories)
- **1.10.** Number of active dental technicians (laboratory owners & employees in dentists' and commercial laboratories)

2.

- **2.1.** Total sales value (retail) of all dental equipment that requires professional installation delivered to dentists/laboratories (excl. Practice Management Software) in Euro; VAT excluded
  - **a).** to Dentists
  - **b).** to laboratories
- **2.2.** Total sales value of Practice Management Software installations
  - **a).** to Dentists
  - **b).** to laboratories
- **2.3.** Total sum of sales of all other equipment (in Euro; VAT excl.) (excl. computers) delivered to dentists/laboratories
  - **a).** to Dentists
  - **b).** to laboratories
- **2.4.** Total sum of sales (retail) of sundries/consumables (excluding teeth / implants) delivered (in Euro; VAT excluded;)
  - **a).** to Dentists
  - **b).** to laboratories
- **2.5.** Total sum of sales (retail) of teeth delivered to dentists and laboratories (in Euro; VAT excluded)
  - **a).** to Dentists
  - **b).** to Laboratories
- **2.6.** Total sum of sales of implants (in Euro; VAT excluded)
  - **a).** to Dentists
  - **b).** to Laboratories
- **2.7.** Total sum of value of after-sales technical services incl. spare parts (in Euro; VAT excluded)
  - **a).** to Dentists
  - **b).** to Laboratories

3.

3.1. 3.1 How many dental packages (consisting of patient chair, spittoon and dental unit) have been installed in 2022

a) What is the average sales value of such a dental package (in EURO; VAT excluded)

3.2. 3.2 Shares by type of X-Ray Equipment installed in 2022

- **a).** Number of Intra Oral X-Ray units installed
- **b).** Number of 2D X-Ray units installed
- **c).** Number of 3D X-Ray units installed

3.3. Number of Phosphor Plate Systems installed

3.4. Number of Intra Oral Sensors installed

3.5. Number of new Digital Intra Oral Scanners installed (stand-alone or part of chair side system)

3.6. Number of new Surgery CAD/CAM milling units installed Number of new Laboratory CAD/CAM milling units installed

3.7. What % of dental offices use computers for "in surgery" activities (e.g. intra oral cameras / clinical charting etc.)

3.8. What percentage of dental practices uses intra-oral cameras

4.

4.1. Share of total sales value (retail) of all dental equipment that requires professional installation delivered to dentists/laboratories

(excl. Practice Management Software) in Euro; VAT excludedManagement Software) in Euro; VAT excluded

4.2. Share of total sales value of Practice Management Software

4.3. Share of total sales value of all other equipment (in Euro; VAT excl.) (excl. Computers for administitative purposes) delivered to dentists/laboratories

4.4. Share of total sales value (retail) of sundries/consumables (excluding teeth / implants) delivered (in Euro; VAT excluded;)

4.5. Share of total sales value (retail) of teeth delivered to dentists and laboratories (in Euro; VAT excluded)

4.6. Share of total sales value of implants (in Euro; VAT excluded)

4.7. Share of total value of after-sales technical services incl. Spare parts (in Euro; VAT excluded)

5.

5.1. What is the total number of dental dealers in your country?

5.2. How MANY of those dealers are:

- **a).** Full service dental dealers (equipment; sundries; teeth; tech. service)
- **b).** Full service dental dealers with less than 5 employees (FTE)
- **c).** Full service dental dealers with more than 5 employees (FTE)
- **d).** Mail order houses (= no reps, not visiting customers)
- **e).** Specialized dealers (concentrated on particular segments e.g. implants or orthodontic items)
- **f).** Any others

6.

6.1. What % of the total business in your country (dentist and laboratory) is delivered by:

- **a).** Full service dental dealers (equipment; sundries; teeth; tech. service)
- **b).** Full service dental dealers with less than 5 employees (FTE)
- **c).** Full service dental dealers with more than 5 employees (FTE)
- **d).** Mail order houses (no reps visiting customers)
- **e).** Specialized dealers (concentrated on particular segments e.g. implants or orthodontic items)
- **f).** any others
- **g).** Manufacturers direct
- **h).** What % of the total business is supplied from outside the country directly to the dentists bypassing the local dealer net

6.2. What % of the total retail business value is purchased by the dentists in your country via e-commerce / Internet?

7. What % of finished laboratory work for your country is being supplied from outside your country

8. Please specify your expectations for the growth rate of the dental market in your country for a) 2022 and b) the following year

- **a).** 2023
- **b).** 2024
- **c).** 2025
- **d).** 2026

9. Please indicate your major dental event taking place between April 2022 and March 2023 in your country:

10. Please indicate all VAT rates that apply in your dental market as per 01.01.2023.

- **a).** Normal rate
- **b).** Rate for Dental Services
- **c).** Rate for Equipment
- **d).** Exceptions, please specify

11. How many people in your country are working in

- **a).** Dental Manufacturer Company
- **b).** Dental Distribution Company

LIST OF VAT AS PER 2022

Country	Abbreviation	VAT Normal rate	VAT Dental Services	VAT Dental Equipment	VAT Dental Implants	VAT exceptions
Austria	A	20%	20%	20%	20%	10% anesthetics
Belgium	B	21%	21%	21%	6%	6% pharmaceuticals, medical devices that stay unchanged in the patient's mouth
Bulgaria	BG	20%	20%	20%	20%	no exceptions
Czech	CZ	21%	0%	21%		15% pharmaceuticals, medical devices that stay unchanged in the patient's mouth
Denmark	DK	25%	25%	25%		
France	FR	20%	20%	20%	20%	5,5/10% pharmaceuticals, medical devices that stay unchanged in the patient's mouth
Germany	D	19%	19%	19%	19%	
Great Britain	UK	20%	20%	20%		
Hungary	H	27%	27%	27%	27%	
Ireland						
Italy						4% for Implants and pharmaceuticals
The Netherlands	NL	21%	21%	21%	21%	6% pharmaceuticals and Cotton products
Spain	E	21%				4% pharmaceuticals, 21% Lab Product, 10% Dental devices surgeries
Switzerland	CH	8%	8%	8%	8%	2,5% pharmaceuticals