

DENTISTRY 2014 UK MARKET REPORT

FOURTH EDITION



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COVERING:

*KEY MARKET SPENDING STATISTICS
DEMAND FOR DENTISTRY
NHS DENTISTRY TRENDS
PRIVATE DENTISTRY TRENDS
IMPACT OF GOVERNMENT POLICY
DENTIST SUPPLY TRENDS
CORPORATE PENETRATION &
CONSOLIDATION*

The healthcare experts

DENTISTRY UK MARKET REPORT 2014



The fourth edition of this LaingBuisson report provides the definitive review of the UK primary care dentistry market, currently worth £5.9bn per annum. This dynamic market remains in a state of flux as government spending on NHS dentistry under a new commissioning structure and continued austerity, is yet to show its hand, and the private dentistry market looks to bounce back following its contraction during the economic depression.

DENTISTRY UK MARKET REPORT 2014 analyses NHS and private primary care dentistry demand and supply as it stands, and provides unique market statistics on dentistry spending by government and by individuals in the UK, the latest for 2013/2014, and offers expert insight about future trends which are to shape the primary care dentistry market and key data projections.

The report publishes original key spending and activity statistics for the UK primary care dentistry sector derived from LaingBuisson's fourth Survey of Primary Care Dental Practitioners carried out in late 2013 (endorsed by The Dental Fusion Organisation). Combined with its three previous survey (in 2009, 2003 & 1999), LaingBuisson offers informative comparatives on the changing face of dentistry trends, which provide the backbone for dentistry projections going forward.

A key section of this new Dentistry report analyses corporate dentistry (provision by dentistry groups) as a distinct market sector, providing current 2013/2014 market values, corporate dentistry market shares and comparatives, recent growth of corporate dentistry and the annual rate of corporatisation, profitability of dentistry groups, market share estimates for the Top 40 UK groups, and detailed profiles of all leading dentistry groups (over 30 included) with comprehensive financial information.

The market for dental plans is another highlight of this new report, offering the latest market values and trends for dental capitation and dental insurance, based on LaingBuisson's unique annual Survey of UK Dental Plan Providers, future trends analysis, and a profile of all the dental plan providers operating with a significant share in the UK.

This expert report is essential reading for dentistry providers, investors, commissioners and policy makers, dental plan providers, dental companies and corporates, researchers, regulators, and dental associations and representatives.

Exclusive Tables & Figures include...

- Value of primary care dentistry in the UK by sector, 1981/82 – 2013/2014 (including 3 year 2016/2017 projection)
- Value of primary care dentistry in the UK by spending sector, 1989/90 – 2013/14 at constant 2013/14 prices
- Real growth of UK primary care dentistry (NHS & private), 1989/90 – 2013/14
- Spending per capita on primary care dentistry in the UK, 1988/89 – 2013/2014, at constant 2013/2014 prices
- Real spending growth on NHS primary care dentistry by NHS & patients in England, 1990/91 – 2012/13
- NHS patients seen in the previous 24 months at 31 March 2010 and at 31 March 2013 as a proportion of the population, by Strategic Health Authority in England
- Total spending on NHS primary care dentistry in Scotland, patients registered for NHS treatment, and patients participating, 2003/04 – 2012/13
- Total spending on NHS primary care dentistry in Wales, patients seen & courses of treatment, 2006/2007 – 2012/2013
- Gross spending on Health Service primary care dentistry in Northern Ireland, patients registered for Health Service treatment, & Health Service treatments 2006/2007 – 2012/2013
- Percentage of total patients in the UK treated on the NHS and treated privately, 1978 – 2013
- Private primary care dentistry spending in the UK by funding source, 2013/14
- Number of dental plan subscribers, people covered, subscriptions earned and claims paid, UK 2003-2012 (including 3 year 2015 projection)
- Company paid and individually paid dental plan subscribers and subscriptions earned, UK 2003-2012 (including 3 year 2015 projection)
- Availability of private dental capitation plans in dental practices, and reason for not offering a plan, November 2013
- Dentists contracted to provide NHS primary care dentistry by country, 1985 – 2013
- Estimated revenues and revenue market shares of corporate dentistry groups, including NHS and private market shares, for 2013/2014
- 'Then and Now' – Top 40 UK corporate dentistry capacity (practices & dentists) by group & area of coverage including dentist market shares, at October 2010 & February 2014
- Corporate consolidation acquisitions in the 2000s & 2010s
- Sale of the Top 4 corporate dentistry groups in the 2000s & 2010s
- Revenue and pre-tax profit/ (loss) of leading corporate dentistry groups in the UK, 2012/2013



Executive Summary & Highlights

- + Market trends and dynamics
- + NHS & private dentistry demands
- + Key market components
- + Supply trends
- + Future prospects

Demand for Dentistry

- + Patient benefits
- + Penetration of dentistry demand
- + Spending on services (per capita estimates)
- + Future demands

NHS Primary Care Dentistry

- + Spending comparisons by country
- + NHS primary care dentistry in England, Scotland, Wales & Health Service dentistry in Northern Ireland
- + Activity - registrations, patients seen, treatments
- + Spending - NHS and private
- + Regional analysis

Government Policy

- + Review of Coalition reforms for dentistry, and future prospects
- + New CQC regulation
- + Historical review of government policy - Conservatives & Labour
- + Government policies in Scotland, Wales & NI

Private Primary Care Dentistry

- + Private dentistry demand trends
- + Factors which influence private demand
- + Private supply trends
- + Future trends & prospects

Dental Plans

- + Key statistics on volumes, spending & price inflation
- + Market players & profiles

LaingBuisson's Survey of Primary Care Dental Practitioners

- + Key survey results - average patient activity & gross fees across dentists
- + Growth in NHS and private activity
- + Average dental practice (chairs & occupancy)
- + Availability of private dental capitation plans

Supply of Dentists

- + Key supply statistics - dentists practising in the UK
- + NHS primary care dentists - growth trends, regional supply, dentist penetration by region
- + Dental education - undergraduate application trends, student trends
- + Dental workforce projections
- + Dental care professionals & dental specialists
- + Income & profitability of primary care dentists - official figures & LaingBuisson estimates

Corporate Dentistry

- + History pre- and post-2006
- + Size of corporate dentistry market
- + Growth between 2010 & 2014
- + Past & future consolidation trends
- + New corporate entrants
- + Financing & profitability of corporate dentistry
- + Detailed profile of more than 30 leading dentistry groups

Office of Fair Trading

- + Review of the recent investigation of Dentistry by the Office of Fair Trading

Financial Appendix

- + Detailed analysis of the statutory accounts of major providers

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