

Investment and market consolidation suggest an optimistic future for UK dentistry

The UK market for dentistry is estimated to be worth £7.1 billion as of 2017/18, representing real terms growth of 0.2% during the year (after taking account of CPI). £3.6 billion is attributable to the private sector, and £3.5 billion to NHS spend.

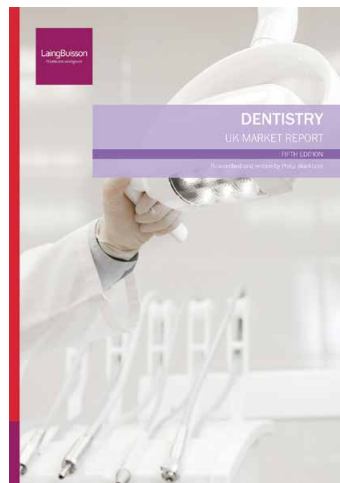
This growth is driven by demand for private dentistry, as cosmetic dentistry and facial aesthetics, hygiene services and other specialist treatments continue to be popular. There are also an increasing number of NHS patients paying for private treatment upgrades as part of their dentistry care plan.

At the same time, adults seen for dentistry on the NHS suffered its first decline for many years, and there has been a reduction in the number of exempt patients following a shift in welfare benefits and tighter monitoring of exemptions. In addition, fewer high value treatments are paid for by the NHS, while there has been a shift towards low value check ups, suggesting that the message of prevention being better than the cure is reaching a wider audience.

Optimism for long-term market growth is good, and near-term LaingBuisson predict that the market will continue to grow by an average of 2-2.5% in nominal terms over the next three years. This is expected to be driven by private dentistry, subject to solid economic growth, as hygiene services and cosmetic and aesthetic treatments continue to be popular, and long-term for increased complex and routine care for an ageing populations. This is supported by advancements in technology which offer customers wider and improved diagnosis and treatments.

This long-term optimism is reflected in the confidence that investors are demonstrating. There have been a number of new equity investments in the past year, and this trend is expected to continue. Also, corporate dentistry continues to increase its penetration in the UK, with existing groups consolidating and new national and local groups emerging.

The market does have notable challenges, however, most pertinently recruitment and retention of dentists highlighted by areas where NHS contracted activity is not being met, owing to insufficient labour time.



What the report covers

- Market Overview
 - 'High street'
 - NHS
 - Corporate
 - Dental plans
- Politics and Regulation
- Market Concentration
- Investment environment
- Market Potential

- Appendices
- Glossary
- Regulators
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