

Market Expansion of Dental Products in India: Emerging Trends and Demand Drivers

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Abstract

The Indian dental products market is witnessing a strong growth owing to the growing awareness pertaining to oral health, increasing disposable income of the consumers and various government health schemes. This study analyses that emerging market growth trends, market driver, market restraint and market opportunity in industry. Based on secondary data from market reports, government health surveys and academic literature. This research focuses on three major research objectives: to offer insights on existing market size along with growth prospects, key demand drivers and upcoming market trends, and to explore the barriers to market entry. Results show that the dental devices market will grow at a CAGR of 8.6% for the period 2024-2030, while the oral care products will register a CAGR of 5.18% during the same forecast period. Significant demand drivers are growing incidence of dental diseases in nearly 95% of the population of India, growing dental tourism industry, technological advancements in digital dentistry and the government schemes to promote National Oral Health Programmed. Promising growth exists for the market, although challenges remain in access to rural markets, affordability, and weak oral health systems. It is inferred from the study that market expansion is feasible through strategic measures emphasizing on preventive care, public private collaborations, and technology adoption.

Keywords: dental products market, India, market expansion, oral health, dental tourism, digital dentistry.

1. Introduction

The healthcare scenario in India is in a state of flux, such as oral health is now being recognized as a vital part of public health. The dental devices market including equipment, consumables and oral care product is a business-as-usual sector in Indian health economy. With a population of more than 1.4 billion and rising health awareness among consumers, the opportunity for growth and investment in this market is large. At the same time, the oral care industry, along with toothpaste, toothbrush and other hygiene items, peaked at USD 2.03 B in 2024 (Renub Research, 2024).

The growth in both segments is indicative of expansion in professional dental care as well as preventive health practices among consumers. A

number of situational elements make this an important ground for analyses. To begin with, an urgent crisis related to oral health is prevailing in India, where around 95% of the population is affected by periodontal diseases and only 2% of them visit dentists regularly (Nazir et al., 2016). This large unmet need to treat is both a public health challenge and a market opportunity. And, as the second biggest population in the world with an expanding middle class that has more disposable income and is becoming increasingly health conscious, India represents good potential for premium dental products adoption. Third, government policies, including the National Oral Health Programmed and Ayushman Bharat in particular have increased the availability of dental treatment especially in rural and underprivileged

regions, thereby generating demand for dental products and services..

The dental goods market is a part of a larger system that includes the manufacturers, distributors, healthcare providers and consumers. Companies like DENTSPLY Sirona, 3M India, and Envista lead the pack on the global front whereas Laxmi Dental is paving way for further expansion of its capacity through a ₹698 crore initial public offering in January 2025 (Mordor Intelligence, 2025). This level of competition ensures both international quality and efficient local production.

There are additional trends that help to differentiate India's market direction. Digital dentistry including computer-aided design/computer-aided manufacturing (CAD/CAM) systems, three-dimensional printing, and intraoral scanners are revolutionizing clinical practices. In addition, India has established itself as the top dental tourism country, with medical tourist arrivals to hit around 7.3 million in 2024 from 6.1 million in 2023 (Research and Markets, 2024). This wave creates a demand for quality dental instruments and consumables.

However, the market is facing major challenges. Rural India: Where 68.84% of India's population lives, Rural India has an abysmal dental infrastructure with <2% of the dentists reaching these villages (Kapoor & Singh, 2020). Cost is still a significant hurdle for adoption of high end dental products among the price-sensitive consumers. This study focuses on these issues using the following three objectives through a systematic analysis of secondary data. It tier 8 assesses the existing size of the market and its segmentation, growing forecast, scope and geography in the dental products market type. It also delineates highlights influential demand generators such as epidemiological incidents, government policies, technological innovation, and changes in social economics. Third, it explores developing patterns, including digital dentistry, dental tourism, and consumers' shifting preferences yours de regard.

2. Literature Review

Oral Health Epidemiology in India (ADF)

The prevalence of oral diseases in India is a matter of concern and it is the prime factor causing the requirement of oral care products and services. Nazir et al. (Studies show a cumulative incidence of 50% in 5-year olds, 52.5% in 12-year olds, 61.4% in 15-year olds, 79.2% in 35-44 year olds, and 84.7% in 65-74 year olds (Kapoor & Singh, 2017). These age-specific patterns reflect the general trend of progressive accumulation of dental disease over the life course, requiring lifelong preventive and curative treatments.

Market Size and Growth Projections

Several market analysts have reported the growth of the dental products market in India to be aggressive in all the segments. Dental Equipment Market size valued 408.40 Million in 2024 and the total revenue is expected to grow at 7.81 % CAGR to 846.97 Million in 2033 (IMARC Group, 2024). Other analysts have the market in 2023 at USD 397.7 million, growing to USD 708.3 million by 2030 at a 8.6% CAGR (Horizon Databook, 2024).

Dental consumables segment exhibited a value of USD 234.65 million in 2024, and it is predicted to reach USD 377.79 million by 2030 growing at a CAGR of 8.22% (Research and Markets, 2024). This division includes dental implants, crowns and bridges, dental biomaterials, orthodontic materials, and dentures. The Indian oral care market based on retail products such as toothpaste and toothbrushes is valued at USD 2.03 billion in 2024 and predicted to reach USD 3.2 billion by 2033 at a CAGR of 5.18% (Renub Research, 2024).

Certain niches within the market have especially good prospects. Custom-Made Crowns and Bridges Market Expected to Reach USD 3.1 billion by 2030 Rising at a 11. 8% CAGR (eHealth Magazine, 2025). The clear aligner market was valued at US\$ 133.6 million in 2023 and is expected to expand at a extraordinary CAGR of 23.0 % (eHealth Magazine, 2025).

Demand Drivers

The market growth for dental products in India is attributed to a combination of a number of factors. Government initiatives is a key driver especially National Oral Health Programmed announced under Ayushman Bharat. 80 crore oral cancer screenings under this program in 1,75,338 Ayushman Arogya Mandir are a outcome which is creating a new patient momentum in rural India and creating demand for diagnostic and therapeutic equipment (Mordor Intelligence, 2025).

The market is subject to the effects of demographic and socioeconomic changes. The growing geriatric population in India, wherein it is estimated that elderly i.e people aged 60 and above will make up for approximately one-fifth of the total population by 2050, is a key factor driving the demand for elderly dental care such as dentures, implants and periodontal solutions (Horizon Databook, 2025). In addition, higher disposable income especially in urban center's are making more money available for dental areas and cosmetic treatments.

Another important driver of the demand is technologic advances. Digital dentistry solutions, such as computer-aided design/computer-aided manufacturing (CAD/CAM) solutions, three-dimensional (3D) printing, and cone-beam computed tomography (CBCT), allow for greater diagnostic precision and treatment speed. The dental equipment subsegment is getting digitized at a rapid pace, with equipment expected to grow at a CAGR of 13.23% through 2030 - which is the maximum rate of growth among product categories (Mordor Intelligence, 2025).

Emerging Trends

Dental tourism is developing as a dominant factor affecting the market share. India has emerged as the leader in the dental tourism, where one can get the dental treatments with 70 – 90% savings as compared to the costs in west without compromising on the international quality standards (Medical Tourism Co., 2024). The current number of medical tourists arriving are 6.1 million and it is expected to reach 7.3 million

in 2024 and the dental procedures are making a significant portion (Research and Markets, 2024). The consumer trend is towards natural and herbal oral care products. Leading brands such as Patanjali, Dabur and Himalaya have seized upon this trend and launched ayurvedic variants with ingredients such as neem, clove and charcoal (Renub Research, 2024).

Increasing concerns about synthetic ingredients in toothpaste and mouthwash push the demand for chemical- and fluoride-free products. Products availability are being revolutionized through web- and app-based delivery channels. Online marketplaces like Amazon, Flipkart and Nykaa and direct-to-consumer brands are providing services like doorstep delivery, discounts and subscriptions on various products. Dental kart, which houses 22,000 SKUs, raised INR 85 crore in December 2024 to enhance logistics and broaden manufacturer reach (Mordor Intelligence, 2025).

Market Challenges

Although there are opportunities for growth, the market development is hindered by end users challenges. Rural penetration continues to be extremely limited, owing to a lack of infrastructure. 2% of the country's dentists cater to rural homes, and 68.84% of India's population lives there (Kapoor & Singh, 2020). In rural areas, it is estimated to be one dentist for every 200,000 people – again, significantly less than that in urban areas.

Adoption of the product is constrained due to affordability issues in all economic classes. Clinical practices and consumers- In both these groups, the purchasing power of people in India is very low. Small and medium-sized dental laboratories run on thin profit margins, curtailing their ability to invest in cutting-edge digital dentistry technologies (Workspace Report, 2024 iData Research).

Lack of awareness still exists in the midst of growing health awareness. Of those in the project OHO, 44.7% said they brushed their teeth two times a day, and 36.7% brushed before sleeping (Narang et al., 2025). In addition, more than half

of Indians with dental issues turn to untrustworthy sources and general advice, rather than seeking the help of a qualified dentist (eHealth Magazine, 2025).

3. Research Methodology

Research Design

This is a descriptive research design which is based on the secondary data sources for the analysis of market growth of dental products in India. The Descriptive method is suitable to describe the current situation in the market, spot trends and analyze the request drivers. Analysis of secondary data has some benefits such as being less time consuming, more cost effective and providing the best quality market research and epidemiological data.

Research Objectives

Three specific objectives are pursued in this paper study:

1. To study the size and segmentation of the India dental products market based on the type of product such as equipment, devices, consumables, and oral care for the period 2024-2030.
2. To assess the major factors influencing the demand such as epidemiological trends, government health policies, demographic changes, technological advances and socio-economic development.
3. To identify trends and challenge that impact the market in a new exciting way such as digital dentistry, growth of dental tourism, changing consumer taste, barriers to rural markets, and so on, and affordability constraints.

Data Sources

Secondary data was sourced in a systematic manner from a variety of reliable sources:

Market Research Reports: Industry reports from Mordor Intelligence, IMARC Group, Research and Markets, Renub Research, data Research, and Horizon Data provide quantitative market information, market growth projections, market segmentation analysis, and the competitive scenario.

Academic Literature: Peer-reviewed articles (e.g., Indian Journal of Dental Research) and other literature accessible through PubMed/MEDLINE supplies epidemiologic information on the oral health burden and patterns of dental service utilization.

Government Sources: Ministry of Health and Family Welfare, National Oral Health Programmed, census reports, and other similar types of sources' official document shared detail on schemes of the government, a profile of the population and the public health system.

Industry Publications: Healthcare media sources such as eHealth Magazine, which is an authoritative source and well-regarded in the community, share information on industry trends and new technologies.

Data Analysis Techniques

Descriptive statistics were the major form of data analysis. Market information was accumulated in terms of the product segments, time spans, etc., and regions. Growth rates were calculated and cross checked using different sources for consistency. The study also modeled for significant differences among market segments, locational variations (urban, rural), and age groups where relevant in the epidemiological data through cross tabulations. Thematic analysis was conducted for qualitative data on demand drivers, emerging trends and challenges in the market.

4. Data Analysis and Findings

Market Size and Forecasts of Growths Analyses predicts all segments of oral products shows a massive growth trend. The dental tools market exhibits stable growth, with a value of USD 408.40 million in 2024 and estimated figures of USD 708.3 million by 2030 at a CAGR of 8.6%. The global dental consumables market is expected to grow at a CAGR of 8.22% in the forecast period of 2024-2030, rising from a value of USD 234.65 million in 2024.

Digital dentistry is a high-growth sector. The digital dentistry revenue is estimated to grow to USD 68.8 million by 2028 at a CAGR of 5.4% (iData Research, 2024). Digital scanners alone

accounted for USD 0.11 billion in 2024 and is anticipated to surpass USD 0.24 billion by 2030. Our clear aligners report indicates a particularly strong positive trajectory and an increase CAGR of 23.0%, moving from USD 133.6 million held in 2023 over the forecast period, significantly surpassing global market growth rates.

The value of the oral care retail market was USD 2.03 billion in 2024, which is projected to reach USD 3.2 billion by 2033 with a CAGR of 5.18% (Renub Research, 2024). Toothpaste Accounts for the Majority Share in this Segment Due to Increasing Awareness Related to Dental Hygiene and Innovations in the Products. ID: 573638001 PMID: 35978899 Toothpaste dominates this category, as it is used in most households and is the product of first rinse.

Key Demand Drivers

Epidemiological aspects define the core demand driver. Huge 95% of the Indian population makes it to the periodontal disease and there is 76.4% of the population surveyed is affected by dental caries, the burden of the oral disease results significant demand for both preventive as well as therapeutic products. Age specific prevalence patterns of progressive disease accumulation highlight that the requirement for dental treatment need is lifelong.

Market growth is also propelled by government health policies. The National Oral Health Program's delivery of 32.80 crore oral cancer screening for patients is setting a record of creating unprecedented patient touch points, leading to generation of referrals for diagnostic equipment and treatment consumables. The treatment development Ayushman Bharat Digital Mission encourages use of digital imaging and documentation formats.

Market dynamics are influenced by the demographic change. The increasing elderly population in India creates demand for various geriatric dental products such as dentures, implants, and remedies for periodontal diseases. Economic trends also foster market growth as a result of rising disposable income levels especially in the rural regions and increasing

interest of the urban population in spending on dental aesthetics and preventive treatment. Development in technology contributes to the premium segment. With digital dentistry superior clinical results can be achieved,

The accuracy of the treatment is increased, treatment times are shortened, and patient satisfaction is enhanced. CAD/CAM technology allows for the fabrication of prosthetic on the same day, and 3D printing technology offer customized dental solutions. The peculiarity of dental tourism is one more driver of demand. The emergence of India as the leading destination for dental tourism coupled with a forecast of 7.3 million in medical tourist arrivals in 2024 has created demand for state of the art equipment and branded consumables with prices that are 70–90% lower than those in the West.

Emerging Trends

Digitalization is the largest factor transforming the Indian dental products market. With the opening of a digital dentistry department (CAD/CAM systems) at the Government Dental College in September 2024, public sector technology adoption was on demonstration (IMARC Group, 2024). Digital strands such as intraoral scanners and chairside mills facilitate streamlined clinical operations.

Shifting consumer preference toward natural and herbal products has a notable influence in the oral care segment. Ayurveda neem, clove and charcoal based products are growing strong. Zandu Care launched an ayurvedic offerings i.e. Dantveer Toothpaste in July 2024, following this Dabur India launched children's toothpaste range with herbal formulations in December 2024 (Renub Research, 2024).

E-commerce channels of distribution bring a paradigm shift in access to the products. Dentalkart's INR 85 crore funding in December 2024 shows similar investor confidence in digital distribution (Mordor Intelligence, 2025). Product innovation meets the changing needs of consumers through its range of specific formulations with benefits for sensitive teeth, gum care and cavity protection.

Market Challenges

Penetration in rural markets is still very limited due to infrastructure constraints. With less than 2% of the dentists in rural areas, where 68.84% of the Indian population lives, there are access barriers which hinder the expansion of the market. Essential dental equipment is often missing at community health centers, restricting the ability to provide oral health services.

Both healthcare providers and consumers are subject to affordability constraints. The small purchasing power of dental technician studios hinders the acquisition of modern technologies. Consumer Primacy in affordability challenges are most severe in the lower socioeconomic strata, where even basic needs are prioritized over oral care spending.

Gaps of awareness and behavior still exist. India 50% of the population use tooth brush only 2% visit dentists on a regular basis though 95% have periodontal disease (Nazir et al., 2016). Inadequate oral health literacy is evidenced by the fact that 50% of Indians with dental problems turn to quacks instead of qualified dentists.

5. Recommendations

1. For Manufacturers and Industry Players

Manufacturers need to build tiered product portfolios catering to different segments of the market. Premium products with sophisticated technologies are targeted for the urban affluent, while value products that cater to the most basic needs are targeted for the price-sensitive rural population. Investing in domestic production capacity lowers costs with the benefit of favorable exchange rates and cheap labor and simultaneously builds supply chain resilience.

Exploiting digital distribution channels provide a cost-efficient means of reaching the market. Manufacturers must create direct-to-consumer digital channels and partner with e-commerce marketplaces. Product innovation with herbal formulations, products for specific clinical indications and digital dentistry solutions will deliver the competitive edge. Well-established rural distribution systems with the potential for

growth through partnerships with cooperatives and cost-effective packaging solutions.

2. For Healthcare Providers and Dental Clinics

The public hospitals should progressively adopt the digital dentistry solution in the clinical and operational work aspects. Initial intraoral scanner purchases enhance the patient experience, while chairside CAD/CAM units allow for same-day delivery of prosthetics. Suburban clinics should strive for national accreditation to guide dental tourists to them in regional tourism networks. Providing preventive care plans to patients leads to sustainable patient/dentist relationships through recall systems, patient education, and preventive service packages. Pilot programs involving rural outreach via mobile dental units, teledentistry consultations, and collaborations with rural health clinics serve to close treatment voids while cultivating new markets.

3. For Policymakers and Government Agencies

National Oral Health Program over National or State-specific Programmed dental caries: Risk status recommendation dices in the implementation of core oral health activities, i.e., (1) screening all CHCs in the country should be prioritized to ensure they are all equipped with dental units, (2) dental therapists should be employed to increase the pool of service providers, and (3) mobile dental units should be developed to serve hard-to-reach areas. Government policies need to incentive domestic production by waiving customs duties, providing tax breaks and offering research grants.

Provision of oral health services

In insurance coverage facilitates utilization of services. The government should make basic oral health coverage compulsory in Ayushman Bharat and nudge private insurers to provide comprehensive dental insurance. Promoting a national program for oral health using mass media, school program and community based program at the mouth and behavioral deficiencies and bring demand the professional services.

6. Conclusion

The dental products market in India has good growth opportunities due to positive population dynamics, rising burden of diseases, supportive government healthcare policies, and advancements in technology. The market is expected to register CAGRs of more than 7% in most segments until 2030, with more advanced categories, including clear aligners and digital dentistry equipment, reporting even higher growth rates. This growth represents the participation of both rising consumer oral health awareness and health care delivery system restructuring.

In this regard, there were three broad goals of the present study. First, an assessment of the size of the market and the forecast growth rates indicated that significant growth was feasible for the equipment, consumables and oral care categories, the aggregate market worth potentially doubling in a decade. Second, determinants of demand were identified: epidemiological trends, governmental policies, demographic changes, economic development, technological progress, and dental tourism form an enabling milieu for the expansion of the Market. Third, trends shaping the future of the industry include the digital revolution, a preference for natural products, the increased use of e-commerce as a distribution channel and the consolidation of the company environment.

There are promising calls for growth but the potential is limited by various challenges. However, rural markets still are influenced by inadequate infrastructure and limited workforce. Both providers and consumers face affordability challenges, which have also hindered uptake of more advanced products and technologies. Lack of knowledge and poor health seeking behaviors contribute to high levels of unmet demand for dental services. Tackling those issues is a multi-stakeholder affair.

Several priorities are highlighted in the strategic advice. Producers need to create tiered product offerings, enable local production, utilize digital distribution, and focus on innovation. Providers of care should embrace digital technologies, join

dental tourism networks, develop preventive care programs, and test rural outreach models. Oral health program implementation needs to be enhanced by policy makers, encouraging domestic manufacture, included in insurance coverage and by comprehensive awareness ramping up.

The growth trajectory for the dental products market is in line with other national health priorities such as universal health coverage, non-communicable diseases prevention, and healthcare infrastructure strengthening. Oral health has a positive association with health outcomes, productivity, and quality of life [18,19], so it is an important component of well-rounded healthcare systems. Hence the development of markets is in the public interest both for economic and for public health reasons. Further research is also needed to analyze in detail individual market segments, to assess the impact of government interventions, to study patterns of technology adoption by dental practitioners and to investigate new business models in rural markets. Longitudinal studies of change in behaviors and patterns of treatment utilization would provide valuable information in terms of effectiveness of the intervention.

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