



The Economic Future of Implant Dentistry . . . Is So Bright We Have to Wear Shades



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The placement and restoration of dental implants presents our profession with a significant opportunity for practice and professional growth. Since the 1960s, dental implants have been successfully used in Europe, but were not introduced into the United States until the early 1980s. The surgical success of dental implants has become quite predictable. Concomitantly implants are now able to be placed esthetically as well.

Despite the technological and esthetic success of dental implants, the market penetration in the United States is only 2% [QA: Please reference where you got this information]. The implant penetration rate in the United States is 3.5 implants per 1,000 people [QA: Please reference where you got this information]. Switzerland and Sweden are significantly more advanced with a per capita implant ratio of 6 implants per 1,000 [QA: Please reference where you got this information]

According to a Millennium Research Group study in 2005, the US market accounts for \$370 million in implant sales.

What is the Potential Market for Implant Dentistry in the United States?

Currently, the US population is 285 million people. Many patients have lost teeth because of not seeking dental care or because of the failure of conventional dental care [QA: Edit ok?]. In addition, it is estimated that there are more than

20 million completely edentulous patients in the United States [QA: Please reference where you got this information]. There are also another 15 million patients who are edentulous on 1 arch and another 100 million who are partially edentulous [QA: Please reference where you got this information]. The pool of potential implant patients approaches 130 million. Also, another 2 million people loose teeth each year in sporting accidents [QA: Please reference where you got this information]. There is currently a huge untapped potential of implant patients.

What is the Current Number of Implants Placed in the United States?

According to a Millennium Research Group study in 2005, the US market accounts for \$370 million in implant sales. This represents an annual placement of approximately 800,000 implants. For the purposes of this example, consider the average implant patient

receives 2 implants. This would yield a total yearly number of 400,000 implant patients treated (800,000 implants placed/2 implants per patient). If the average implant surgical fee is \$1,500, then the total dentist yearly revenue stream for implant placement would be \$1.2 billion. Calculate an additional \$1,500 per implant for the final restoration and the yearly

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dentist revenue stream increases by another \$1.2 billion. That equals a grand total of \$2.4 billion in dentist revenue for just implant treatments alone. This is in addition to the \$370 million received by the implant manufacturers.

Dentists are placing and restoring more implants than ever before. In 2002, 80% of general practitioners (GPs) said they were restoring dental implants [QA: Please reference where you got this information]. In 2003, this increased to 94%. The current yearly growth rate for implant dentistry is 18% an increase from 10% in the 1990s [QA: Please reference where you got this information]. It is predicted by the Millennium Research Group that growth will continue at 18% to 20%. By 2009, the number of implants placed annually will increase by 250% with more than \$900 million predicted in sales by implant manufacturers. If the same numbers mentioned above are used, the anticipated dentist revenue for implant procedures in 2009 is expected to approach \$6 billion. Despite the huge potential for a dentist implant driven income, the current amount of implants that are being restored are minimal compared to what is possible.

What is the Current Number of Implants not Placed in the United States?

As previously mentioned, there is a potential population of 130 million patients. For ease of calculation, let us round this number to 100 million untreated implant patients. This leaves a total of 99.6 million of untreated implant patients (100 million - 400,000). If each of these patients receives an average of 2 implants, the grand total of potential implants to be placed is 200 million. The potential dentist revenue stream for implant placement and restoration of this group is a mind boggling \$600 billion (calculate 200 million implants multiplied by \$3,000 [\$1,500 for implant placement and \$1,500 for implant restoration]). Currently, the total dollars spent in the United States for dental care is approximately \$50 billion [QA: Please reference where you got this information].

GPs surveyed in the November 2003 issue of *Dental Products Report* indicated that an increasing number of patients were inquiring about dental implants. An educated public is clearly demanding for dental implants to be offered and considered for treatment; however, dentists often prescribe conventional crown and bridge procedures rather than dental implants. Despite the fact that almost 100% of all dentists now restore implants, 58% stated that they restored an average of less than 1 implant a month. Do the

math. There are 144,000 GPs in the United States. If they restore 1 implant per month, the yearly total would be 1,728,000 (144,000 X 12); however, the annual number of implants placed in the United States is 800,000 [QA: Please reference where you got this information]. This yields a yearly average of 5.5 implants restored per GP, less than one half implant per month. This pales in comparison to the amount of crown and bridge procedures the average GP produces.

Implants are Growing

Is there room for growth? Yes. Implants are growing, despite the lack of use in the marketplace. The high success rate of implants, as well as the ability to maintain bone support and to improve esthetics, has contributed to the increase. Favorable demographics and an aging baby boomer generation have also led to an increasing number of implants that are being placed. Aging baby boomers are more likely to pay for technologically advanced high-end treatment options.

Well educated upwardly mobile patients tend to propel the implant market. They know what they want and are not hesitant to ask professionals for it. Patients are not intimidated by the practitioner. However, not all patients are well educated or aware of the availability of dental implant treatment options. It is the dentist's responsibility to offer patients all the options that are available. In fact, in several states it is the law. In California dentists have been sued by patients who were not told about dental implants and had conventional crown and bridge performed instead.

From a business perspective, implants seem to be an ideal product. Implants have benefits such as, a high success rate, patients need and desire these, and implants are profitable and relatively easy to restore. In addition, restorative dentists do not have to anesthetize patients or use a high-speed handpiece. Clearly, one obstacle to dental care has been removed. Then why are more implants not being done?

There must be a paradigm shift to lower the barriers to implant dentistry. Many dentists were not taught how to perform dental implants in school and are still practicing the same "standard of care" as when they graduated. With all new technology, there is a learning curve. However, with implant dentistry, it is not a steep or particularly challenging one.

Benefits of Implants

Implants offer benefits for both the patient and the dentist. There are some reasons that may help to remove some of the barriers toward using more implant dentistry.

Implants offer significant patient advantages over traditional crown and bridge. Implants do not decay nor require endodontics. The success rate for dental implants exceeds that of 3-unit bridges. Adjacent teeth are preserved and patients are able to floss. Implants also allow segmentation of cases. Splinted full-mouth rehabilitations are avoided and cases are able to be "broken up" by incorporating dental implants. Should problems with implant restorations occur in the future, the entire bridge does not have to be removed and redone. Bone is preserved and stabilized by incorporating implants, which patients appreciate.

Dentists can benefit from an incredible opportunity by incorporating implants into their practice. George F. Priest, DMD, has compared and analyzed the production revenue for a single tooth implant vs a 3-unit bridge in *Dental Economics* in 2004 [QA: What issue?]. He concluded that the chairtime for a single tooth implant was 1 hour, whereas the 3-unit bridge required 3 hours. The net production per hour was \$300 higher with the single implant procedure compared to the 3-unit bridge. Priest's economic analysis provided compelling evidence that the restoration of single tooth implant prosthesis may be the most profitable procedure a restorative dentist could perform, with a net production of \$1,000 per hour. Additionally, stress was reduced because the patient did not have to

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be anesthetized, and it was not necessary to prepare the teeth with a high-speed handpiece.

Conclusion

Clearly dental implants, as an option for tooth replacement, offer a win-win solution for both the patient and dentist. Patients not only need them, they desire and want them. Dentists realize greater profits with a decrease in stress. Implant dentistry is perhaps the most predictably performed dental procedure.

To excel in implant dentistry education is paramount. The dentist, staff, and patient must all be educated. Numerous opportunities

exist to enhance the knowledge base. Courses, mentoring, collaboration with local colleagues, study clubs and literature are all viable options for increasing ones knowledge base.

Syms says, "An educated consumer is our best customer." [QA: Please reference Syms] An educated patient is the one who will embrace and direct their own dental care. It begins and ends with education.

In the April 2006 issue of *Contemporary Esthetics*, we will explore the newest technologies that are available in implant dentistry.

