HKIDEAS: Shaping the future of oral health

A welcome message by HKDA Vice President and Chairman of the Organising Committee of the HKIDEAS 2015, Dr Nelson Wong

The Hong Kong Dental Association is proud to present the Hong Kong International Dental Expo and Symposium (HKIDEAS) 2015 which will be held on 7–9 August 2015. It will be a continuation of our commitment to foster advancement and exchange of knowledge and skills in dentistry.

It is now the fifth time we host HKIDEAS since it was launched in 2010. The theme of this year’s Congress is “Shaping the Future of Oral Health.” We are honoured to have attracted once again prominent figures from the field who will deliver stimulating lectures for the three-day scientific programme that will cover the latest trends in various specialties in dentistry, ranging from best clinical practices, aesthetics, implantology to endodontics, periodontics and other areas of interest.

Alongside the scientific programme, the trade exhibition offers a perfect opportunity for manufacturers and dealers to showcase their latest state-of-the-art products and devices to all the participants. We also believe the great diversity of attractions in Hong Kong will impress every participant, giving them memorable and interesting experiences.

I sincerely look forward to seeing you at the HKIDEAS 2015. Your participation will make this event another outstanding success.

Growing CAD/CAM abutment adoption vs increasingly popular discount implants

The various countries in the Asia Pacific region are all expected to demonstrate an increasing demand for dental implant treatments as a result of growing consumer awareness, the ageing population, growing accessibility (such as through the National Health Insurance Service coverage in South Korea), as well as greater product availability and other influencing factors. Traditionally, premium implant companies have dominated the dental implant market globally. However, in recent years, discounted implants have become increasingly popular, especially in the Asia Pacific region.

The growth of the discount implant segment will emerge at the expense of the premium segment and as a result is set to limit market growth for dental implant fixtures by lowering the market’s overall average selling price (ASP). In contrast, the final abutment market is set to experience an increasing ASP owing to the growing adoption of CAD/CAM abutments in the place of stock abutments. While commoditisation of stock abutments has greatly depressed the ASP of the final abutment market, growing adoption of CAD/CAM abutments is set to stimulate the final abutment market by pulling the ASP upwards.

Therefore, the dental implant market is set to grow in all four countries included in the Asia Pacific region in this report, namely Australia, South Korea,
Japan and China, despite varying pricing trends.

In the Asia Pacific dental implant market, consumer awareness, cultural tendencies and domestic regulations vary greatly. South Korea represents the most highly developed dental implant market as a result of being home to a number of global leading dental implant companies. This in turn has led to a high level of consumer awareness and early accessibility to a variety of dental implant products. However, the dental implant market in South Korea is also highly discount dominant and led by domestic implant producer OSSTEM IMPLANT and as a result demonstrated the lowest regional dental implant ASP of US$86 in 2014.

In contrast, the Australian market remains highly dominated by leading premium implant companies, which collectively held over 70 per cent of the domestic market. Consequently, Australia demonstrated the highest dental implant fixture ASP in the region at US$94 in 2014. An increasing number of general practitioners are being trained in dental implant procedures in Australia, and general practitioners have been observed to be more cost sensitive relative to specialists. As a result of a growing number of general practitioners in the market, consumer preferences are shifting towards discounted solutions. Discount implant companies from the US and South Korea have recently been gaining market share in Australia. Throughout the forecast period, the premium segment of the market is expected to grow at far lower annual growth rates relative to the discount and value segments in Australia. By 2021, it is expected that discount implants will represent 43 per cent of the overall units in the Australian market.

The Japanese and Chinese markets for dental implants are also dominated by premium companies. In recent years, OSSTEM IMPLANT has had a significant impact on the Chinese market, however, especially as a result of the training programme offered by the company’s Advanced Dental Implant Research and Education Center. All segments of the dental implant market in China are expected to demonstrate double-digit annual growth. However, the discount market is set to grow far more dramatically throughout the forecast period. By 2021, discount implant fixtures are set to represent over 50 per cent of the overall units in the Chinese dental implant market.

The shift towards discount implants in Japan is expected to be far less dramatic, especially owing to cultural barriers that limit the success of Korean dental implant companies. The premium implant segment is expected to remain the dominant dental implant market throughout the forecast period. Unit representation of discount implants is expected to increase slightly from 11.5 per cent currently to 14.6 per cent by 2021.

The growing acceptance of discount implants has been driven by Korean companies. The regional market leader, OSSTEM IMPLANT, held a 21.9 per cent share of the total dental implant market for the Asia Pacific region in 2014. The company has invested significantly in marketing efforts, which has led to the growing popularity of its products. Throughout the forecast period, OSSTEM IMPLANT and other discount implant companies, such as MegaGen, Dentium and Neobiotech, are expected to capitalise on the growing popularity of discount implants. In contrast, premium implant companies, such as Straumann and Nobel Biocare, are expected to face increasing competitive pressures, especially in China and Australia.

**Emphasis on CAD/CAM**

In the dental implant market, the final abutment market is undergoing an opposing pricing trend relative to dental implant fixture segments. CAD/CAM abutments are being increasingly utilised in the place of cheaply produced stock abutments. CAD/CAM development has been relatively rapid in the Asia Pacific region in recent years. A growing number of CAD/CAM milling centres have emerged to produce CAD/CAM abutments for the dental implant market. The overall region is set to demonstrate significant growth in the CAD/CAM segment for final abutments. In contrast to the dental implant fixture market, where discount products are gaining share, the overall final abutment market is set to demonstrate an increasing ASP. CAD/CAM abutments are relatively more expensive than stock abutments, which have traditionally dominated the market. The shift towards CAD/CAM abutments is set to be most significant in China. For the overall region, units of CAD/CAM abutments are set to grow at a compound annual growth rate of 22.1 per cent. By 2021, CAD/CAM abutments are forecast to represent 31.6 per cent of the overall abutment units in Asia Pacific.

**Conclusion**

Overall, the dental implant market, including fixtures and abutments, is set to grow at a compound annual growth rate of 11.5 per cent for the Asia Pacific region. The unit growth will far outweigh the ASP effects, and the dental implant market will grow to reach a higher penetration ratio for the overall Asia Pacific region.

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**Fig. 3:** OSSTEM IMPLANT, a Korean discount dental implant company, led the Asia Pacific market for dental implant fixtures and final abutments in 2014. The company is expected to continue to capitalise on the growing popularity of discount implants.---Fig. 4: Growing CAD/CAM abutment market vs declining unit share of stock and custom cast abutments. (Source: iData Research Inc.)
The DTI publishing group is composed of the world's leading dental trade publishers that reach more than 650,000 dentists in more than 90 countries.
HKIDEAS Hong Kong 2015—Floor plan

Registration: Hall 5F&G Concourse, Level 5, Phase 1, HKCEC
Exhibition: Hall 5G, Level 5, Phase 1, HKCEC

*The floor plan is subjected to change without prior notice.*
HKIDEAS Hong Kong 2015—Exhibitors

Company name | Booths
---|---
3M Unitek & Evergreen Dental Supplies Company Limited | C17
A.R. Medicom Inc (Asia) Limited | C03
Advance Dental Consulting Ltd. | C16, C18, C19
APC 2016 | G08

Company name | Booths
---|---
Bauhinia Dental Limited | A08, A10
Being Foshan Medical Equipment Co., Ltd. | A05
Bode-Well Limited | E18, F15, F17
Carestream Health Hong Kong Limited | B06

Company name | Booths
---|---
Carl Zeiss Far East Co., Ltd. | A06, B05
Colgate-Palmolive (H.K.) Ltd. | F02, F03, F05, F06
Cooper Trading Company | A02, B01, B03
Dental Clinic | F24, F26, G03, G04
Dental Tribune International GmbH | C04
DENTSPRY Asia | C20, E17, E19
Dents HK Ltd. | C01
Dentsply Asia | D20, E17, E19
Dentz HK Ltd. | C01
Dentz HK Ltd. | C01
Dental Clinic | F24, F26,
Dental Management System | G03, G04

Company name | Booths
---|---
Foshan Hongke Medical Instrument Factory | A01
Foshan Roson Medical Instruments Co., Ltd. | A11
Foshan Wenjian Precision metal Co., Ltd. | F19
Foshan Wenjian Precision metal Co., Ltd. | F19
FOTONA D.D. | F10
Fosun Foshan | F02
Foshan Roson Medical Instruments Co., Ltd. | A11
Foshan Wenjian Precision metal Co., Ltd. | F19
Fosun Foshan | F02
Foshan Roson Medical Instruments Co., Ltd. | A11
Foshan Wenjian Precision metal Co., Ltd. | F19
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Building on their successful introduction at IDEM Singapore 2014, the supporting forums for technicians, hygienist & therapists as well as for new dentists will be back at IDEM Singapore 2016:

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- General Dentistry and Oral Health
- Preventive Dentistry
- Oral Surgery & Oral Medicine

The floor plan and exhibitors list are subject to change. Last update was 22 July, 2015.
HKIDEAS 2015—Scientific programme

Friday, 7 August

9:30–10:30
Periodontal medicine: A New Frontier for Periodontology,
Hall 5F (Parallel Session A)
Speaker: Prof. Mark Bartold

Photodynamic Therapy for Periodontitis,
Hall 5G (Parallel Session B)
Speaker: Prof. Michael Wilson

9:30–12:45
2nd Cross-Strait Forum on Dental Service for the Elderly,
Meeting Room

New Trends in Oral Health Care for the Elderly in Taiwan
Speaker: Prof. Chun-pin Lin

The Development of Geriatric Dentistry in Hong Kong
Speaker: Dr Frankie So

10:30–11:15
Break

11:15–12:45
Managing Dental Hypersensitivity to Improve Quality of Life,
Hall 5F (Parallel Session A)
Speaker: Prof. Liang-jiun Seow

Towards Functional Foods for Oral Health Care: Isolation,
Identification and Evaluation of Food Components with Anti-caries
and/or Anti-gingivitis Activities, Hall 5G (Parallel Session B)
Speaker: Prof. Michael Wilson

12:45–14:15
Lunch Break

14:15–15:45
Challenges in Modern Implant Practice: The Multidisciplinary
Team Approach, Hall 5F (Parallel Session A)
Presenters: Dr Alfred Lau & Prof. Nikos Mattheos

Restorations Utilizing Bulk Filling Technique, Hall 5G (Parallel Session B)
Speaker: Prof. Chooi-Gait Toh

15:45–16:30
Break

16:30–18:00
Clinical Challenges and Solutions, Hall 5F (Parallel Session A)
Speakers: Drs Jeffrey Chang, George Polk & Edmond Fok

Monitored Anaesthesia Care in the Dental Clinic,
Hall 5G (Parallel Session B)
Speakers: Dr John Low

15:45–16:30
Implant Treatment of the Periodontally Compromised Patient,
Hall 5F (Parallel Session A)
Speaker: Prof. Saso Ivanovski

Saturday, 8 August

9:30–10:30
Augmentation procedures: Simple and predictable?
Hall 5G (Parallel Session A)
Speaker: Prof. Bilal Al-Nawas

Conservative, conventional and unconventional endodontics,
Hall 5G (Parallel Session B)
Speaker: Dr Patrick Tseng

12:45–14:15
Lunch Break

14:14–15:45
Simplifying Root Canal Preparation — The Next Generation,
Meeting Room
Speaker: Dr Patrick Tseng

15:45–16:30
Break

Sunday, 9 August

9:00–10:00
Meeting the Challenges of Infection Prevention and Infection
Control in Clinical Dentistry, Hall 5F (Parallel Session A)
Speaker: Professor Laurence Walsh

Tough Class III Malocclusions Made Easy, Hall 5G (Parallel Session B)
Speaker: Dr John Lin

10:30–11:15
Break

11:15–12:45
Meeting the Challenges of Infection Prevention and Infection
Control in Clinical Dentistry, Hall 5F (Parallel Session A)
Speaker: Prof. Laurence Walsh

Tough Class III Malocclusions Made Easy, Hall 5G (Parallel Session B)
Speaker: Dr John Lin

12:45–14:15
Lunch Break

14:15–15:45
Clinical Challenges and Solutions, Hall 5F (Parallel Session A)
Speakers: Drs Jeffrey Chang, George Polk & Edmond Fok

Monitored Anaesthesia Care in the Dental Clinic,
Hall 5G (Parallel Session B)
Speakers: Dr John Low

15:45–16:30
Implant Treatment of the Periodontally Compromised Patient,
Hall 5F (Parallel Session A)
Speaker: Prof. Saso Ivanovski

17:00–18:30
Implant Treatment of the Periodontally Compromised Patient,
Hall 5F (Parallel Session A)
Speaker: Prof. Saso Ivanovski
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