Global Dental Anesthesia Market Information, Product Type (Lidocaine, Mepivacaine, Prilocaine, Bupivacaine), Types of Anesthesia (General, Local), Mode of Administration (Maxillary, Mandibular), End-User (Specialized Dental Hospitals) Forecast to 2023

Market Scenario

Anesthesia are drugs inducing sensation loss that is reversible in nature. These drugs are different from painkillers or analgesics that relieve pain without the loss of sensation. According to the World Health Organization (WHO), about 60 to 90% of children suffer from dental caries. The two vasoconstrictors molecules, namely, epinephrine and levonordefrin are distributed widely in the U.S. Prilocaine, articaine, bupivacaine, and lidocaine are some of the epinephrine used as dental anesthetics.

The increasing trend towards dental health checkup, growing investments in dental research, advanced drug administration devices, growing economy, and increasing dental healthcare base are some factors responsible for the growth of this market. Moreover, the introduction of new products and the increasing geriatric population are anticipated to upsurge the market for global dental anesthesia. The stringent regulations by government, usage of traditional therapies, and ignorance to dental problems are anticipated to act as the restraints to the market.

The stringent regulatory requirements due to strict regulatory guidelines, availability of skilled anesthesiologist, and side effects of anesthetic drugs may affect the growth of the global dental anesthetic market.

The global market for Dental Anesthesia diagnosis and treatment is expected to grow at a CAGR of approximately 8.9% during the forecast period 2017–2023.

Intended Audience

- Dental anesthesia manufacturing companies
- Suppliers and distributors of dental anesthesia
- Healthcare service providers
- Hospitals and Academic Medical Centers (AMCs)
- Health insurance players
- Research and consulting firms
- Medical research institutes
- Venture capitalists
- Community centers
Segmentation

The global dental anesthesia market is segmented on the basis of product type, types of anesthesia, route of administration, and end-user.

On the basis of product type, the global dental anesthesia market is segmented into Lidocaine, Mepivacaine, Prilocaine, Bupivacaine 0.5% with Epinephrine 1:200,000, Articaine, and others. The Lidocaine is divided into Lidocaine 2% with Epinephrine 1:100,000, Lidocaine 2% with Epinephrine 1:50,000, and Lidocaine Plain. The mepivacaine is divided into mepivacaine 2% with levonordefrin 1:20,000 and mepivacaine 3%. The prilocaine is divided into prilocaine 4% with epinephrine 1:200,000 and prilocaine 4%. The articaine is divided into articaine 4% with epinephrine 1:100,000 and articaine 4% with epinephrine 1:200,000.

On the basis of type of anesthesia, the global Dental Anesthesia market is segmented into general anesthetics, local anesthetics, and others.

On the basis of the mode of administration, the global dental anesthesia market is segmented into maxillary anesthesia, mandibular anesthesia, and others. The maxillary anesthesia is categorized into local infiltration, field block, and nerve block. The local infiltration is further classified into supraperiosteal injection, intraseptal injection, and periodontal ligament injection. The field block is further classified into periapical injection. The nerve block is further classified into posterior superior alveolar, middle superior alveolar, and anterior superior alveolar.

The Mandibular anesthesia is categorized into nerve block, tissue, or skin. The nerve block is further classified into IAN, Akinosi, and Gow-Gates.

On the basis of end-user, the global dental anesthesia market is segmented into specialized dental hospitals, dental clinics, pharmacies and drug stores, e-commerce, and others.

Research Methodology

Sources: Annual reports, Press release, White paper, and Company presentation

Regional Analysis

The global dental anesthesia market consists of countries, namely, America, Europe, Asia Pacific, and the Middle East and Africa.

Americas dominated the global dental anesthesia market owing to the increasing healthcare
expenditure followed by Europe and Asia Pacific. For instance, in February 2017 Septodont Healthcare India Pvt. Ltd. acquired DLA from Dentsply. The company acquired dental anesthetics such as Citanest (Prilocaine), Mepivalem (Mepivacaine), and Lidostesim (Lidocaine) to the product portfolio. Moreover, this acquisition is expected to strengthen their presence in the Latin American region.

Europe holds the second position in the global dental anesthesia market, owing to the government support for research and development and availability of funds for research. For instance, in September 2017 AstraZeneca, a U.K.-based company signed a collaboration agreement with Aspen Global Incorporated (AGI) for gaining the rights to Aspen’s anesthetic profile outside the U.S. The anesthetic product portfolio includes Xylocard, EMLA, Marcaine, Naropin, Citanest, Carbocaine, and Diprivan. The agreement also implies AstraZeneca for manufacturing and supplying this medication to Aspen Global Incorporated for a period of five years.

Asia Pacific is the fastest growing region owing to the increasing cases of the dental problem and rising patient awareness regarding dental illness. Moreover, the improved lifestyle in growing economies such as China and India is projected to create opportunities in the dental anesthesia market in the Asian regions.

The Middle East and Africa holds the lowest share of the market, owing to limited medical facilities, deprived political conditions in Africa, and less availability of funds.

Key Players

Many key players are undertaking many strategies such as regional expansions, collaborations, divestments, and acquisitions. For instance, in March 2017 GlaxoSmithKline plc divested their anesthetics portfolio to Aspen Pharma. Moreover, GSK’s anesthesia portfolio consists of Nimbex, Tracrium Anectine, Mivacron, and Ultiva. The acquisition of these products has strengthened Aspen’s drug portfolio along with an increased customer base. Additionally, Aspen and GSK have entered into parallel agreements to terminate their collaboration in Africa and further exercise an option to acquire GSK’s remaining thrombosis business.

Some major players in the global dental anesthesia market include Astra Zeneca (UK), Septodont (US), Dentsply (US), Sirona (US), GlaxoSmithKline PLC (US), Gilead Sciences Inc. (US), Johnson & Johnson (US), F. Hoffmann-La Roche Ltd. (Switzerland), Baxter International Inc. (US), Abbott Laboratories (US), Hospira, Inc. (US), Hikma Pharmaceuticals PLC (UK), AbbVie Inc. (US), Fresenius Se & Co. Kgaa (Germany), and others.
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