

INDUSTRY INTELLIGENCE • 6 JUNE 2026

The State of Dentistry

A weekly read on where the money and the machines are moving across the global dental industry — and what it means for the operators and investors who run it.

\$1.04_B

ALIGN Q1 2026
REVENUE

-40%

DENTSPLY SIRONA,
ONE-YEAR STOCK

\$4.1_B

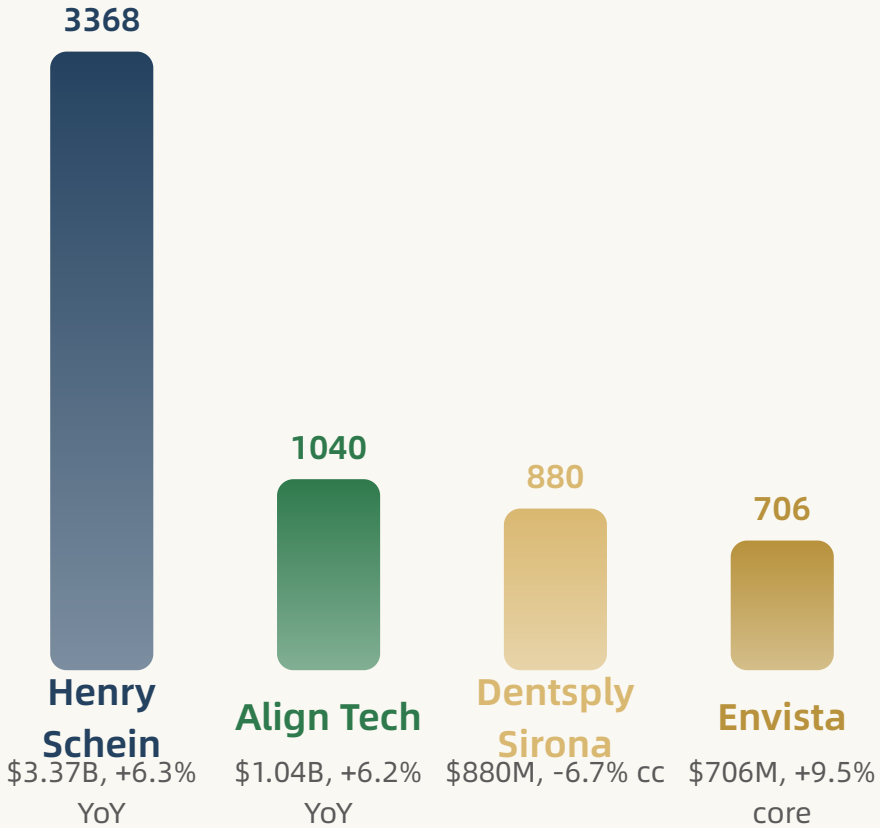
PATTERSON TAKE-
PRIVATE



01

Public Company Watch

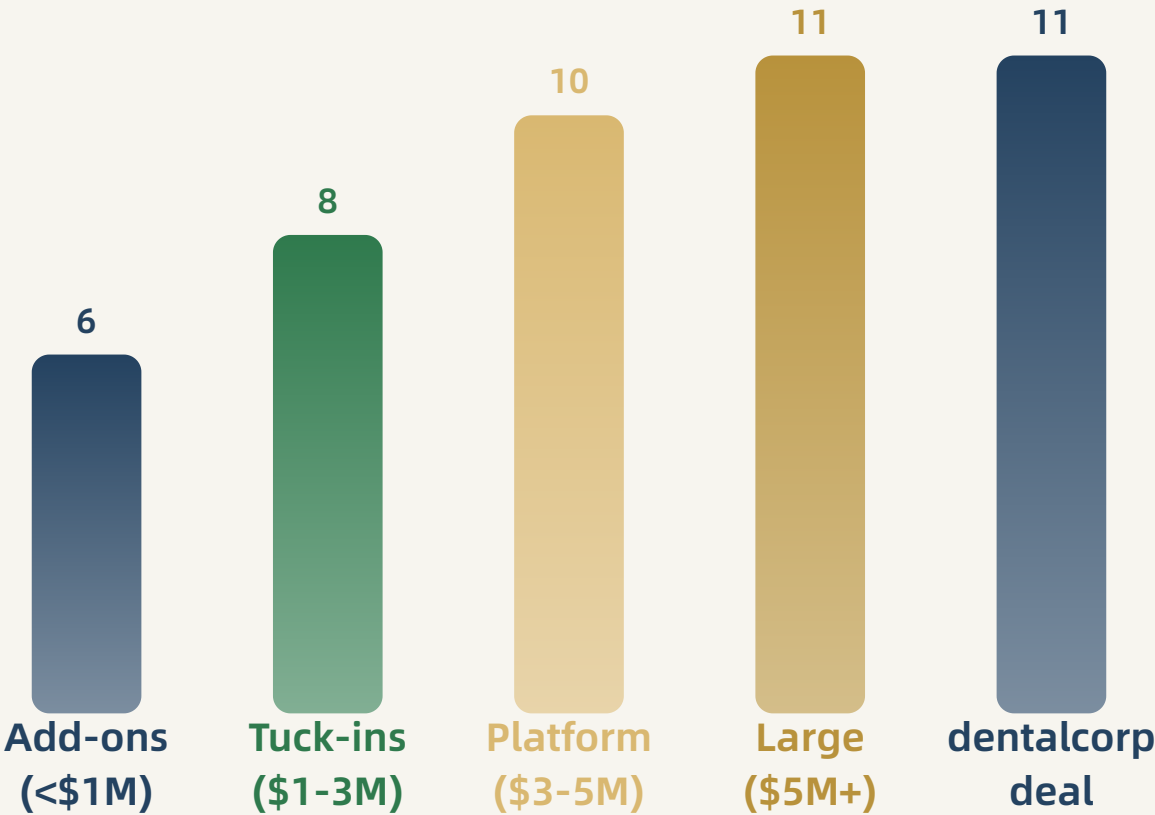
Five listed names, one recovery story: how the public dental tape splits in mid-2026



02

Deals & Capital

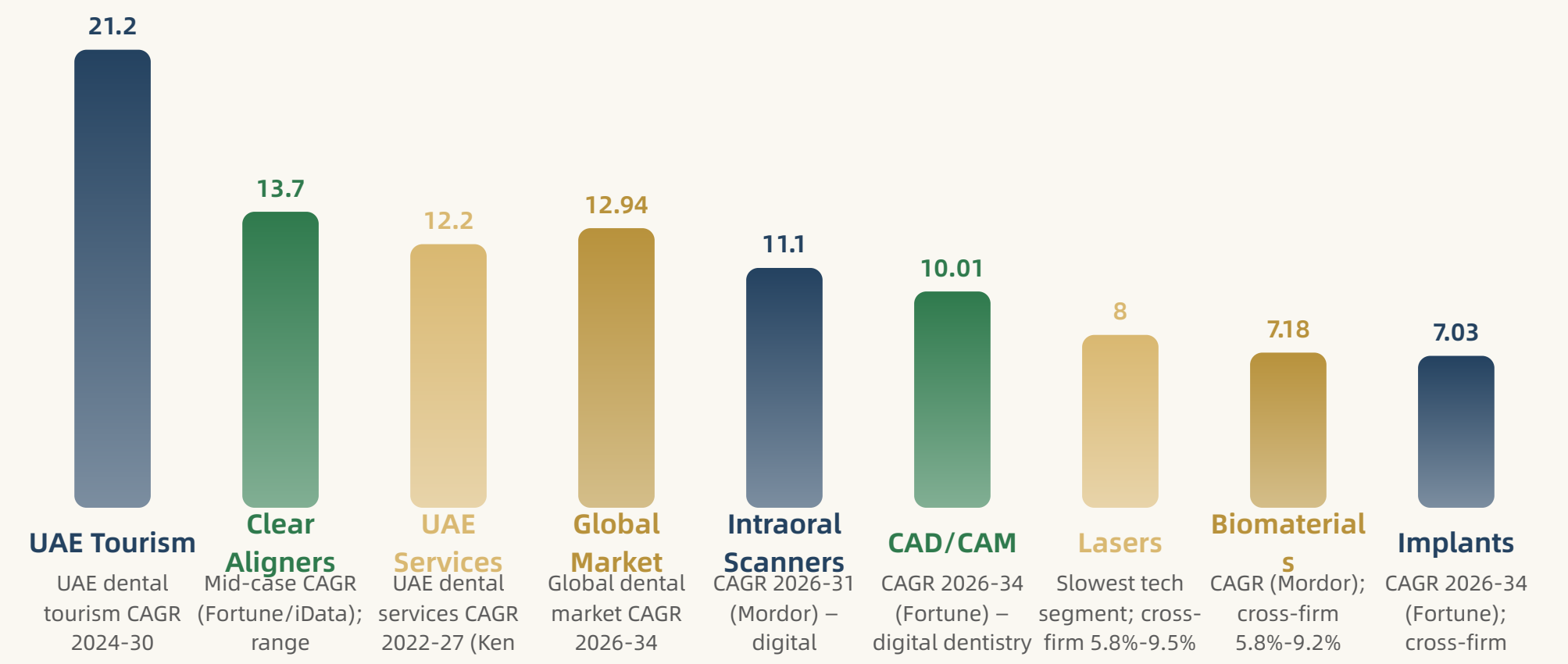
Capital stays, the easy gains are spent: dentistry’s 2024-2026 reset from land-grab to selective expansion



03

Market Sizing & Segment Growth

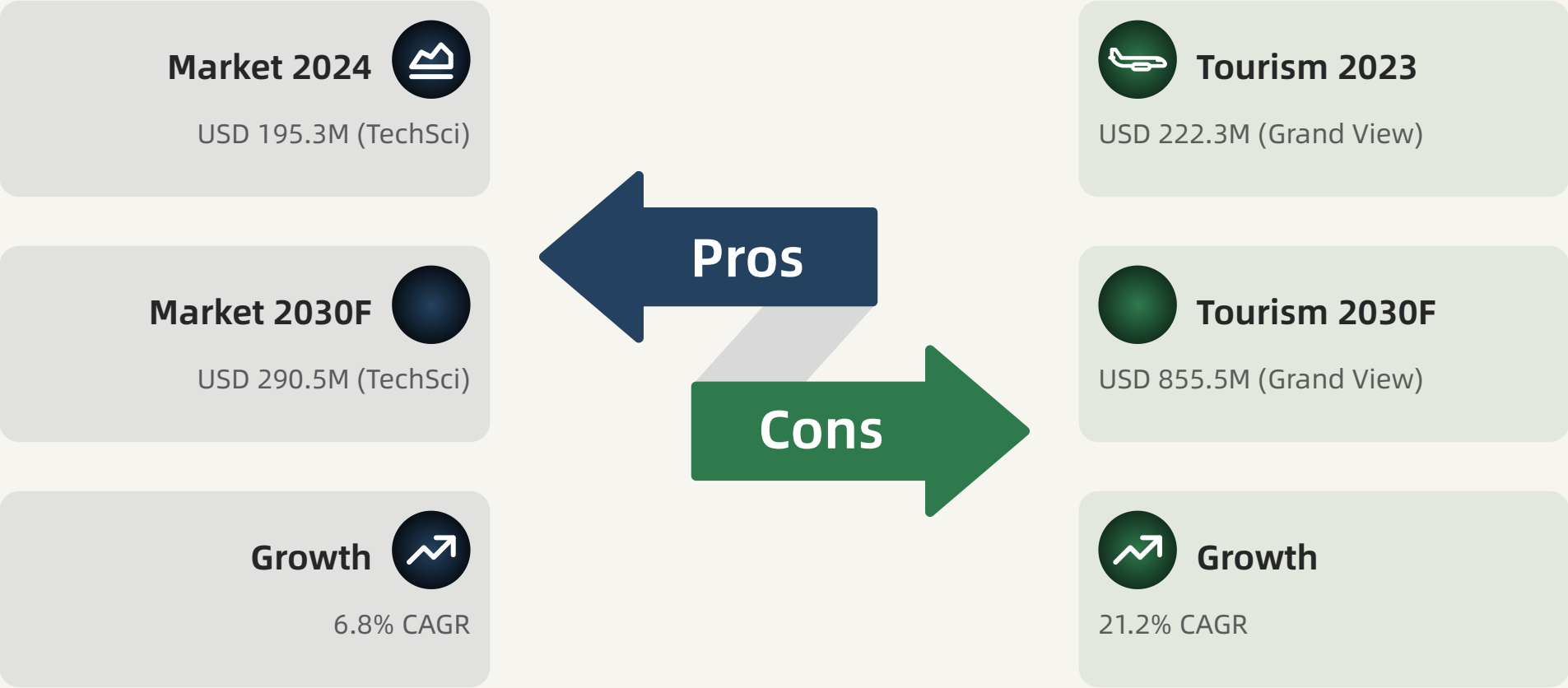
There is no single dental market number, only a band defined by scope — and a digital-aesthetic shift in where the money goes



04

Customers & Demand

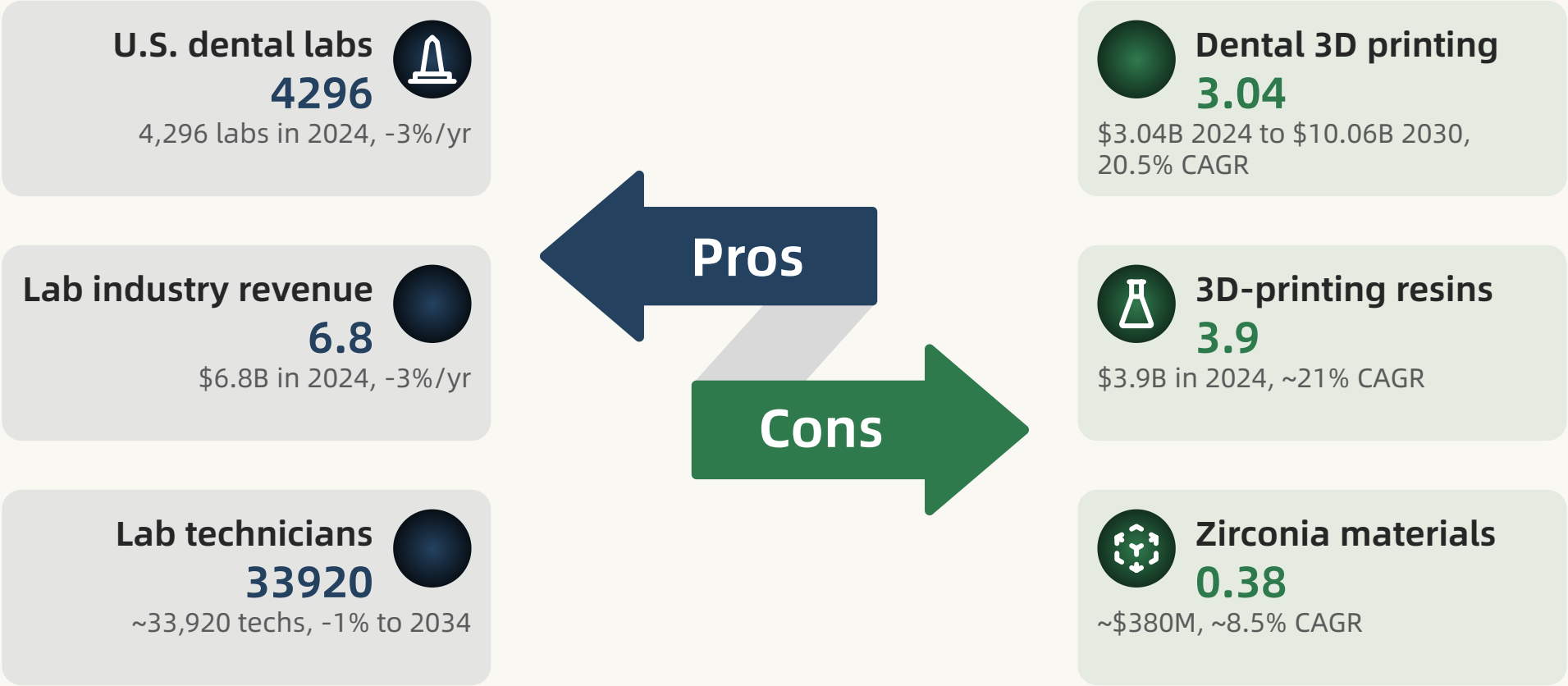
Two markets, two growth rates: the cash-pay elective layer is where UAE dental demand compounds



05

Suppliers & Supply Chain

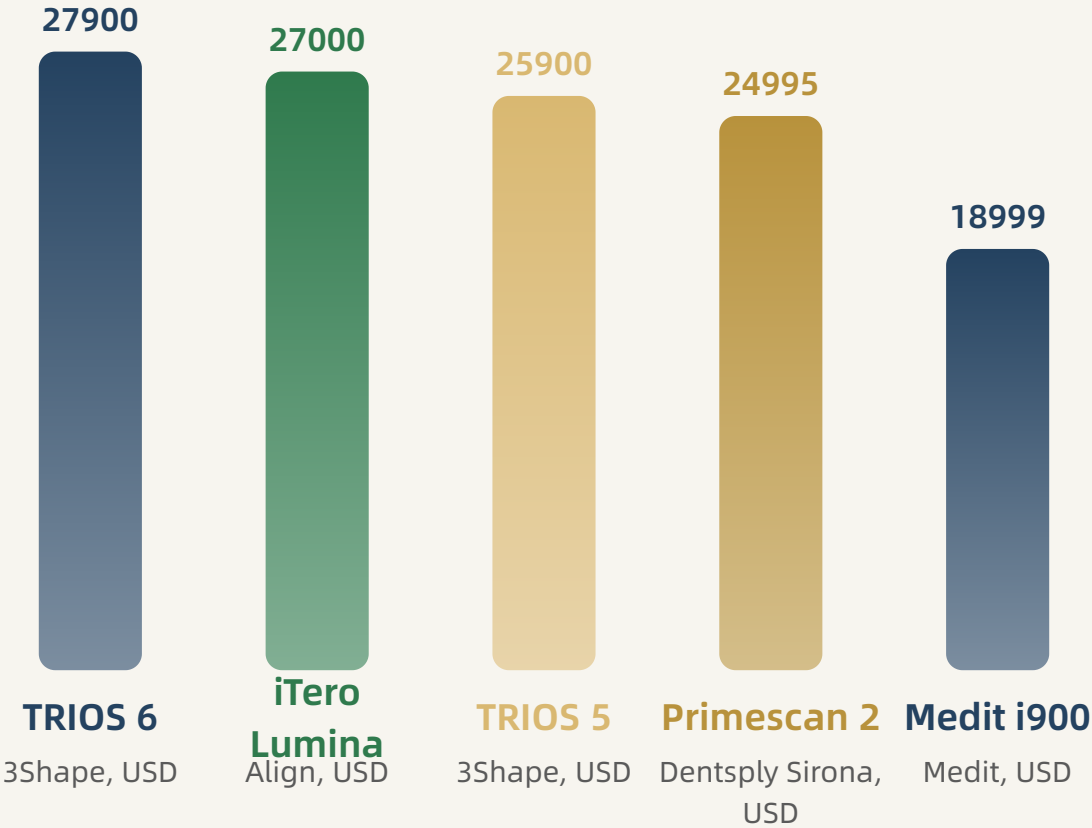
Distribution consolidates, manufacturers stall, and crown production moves off the lab bench



06

Product & Equipment Radar

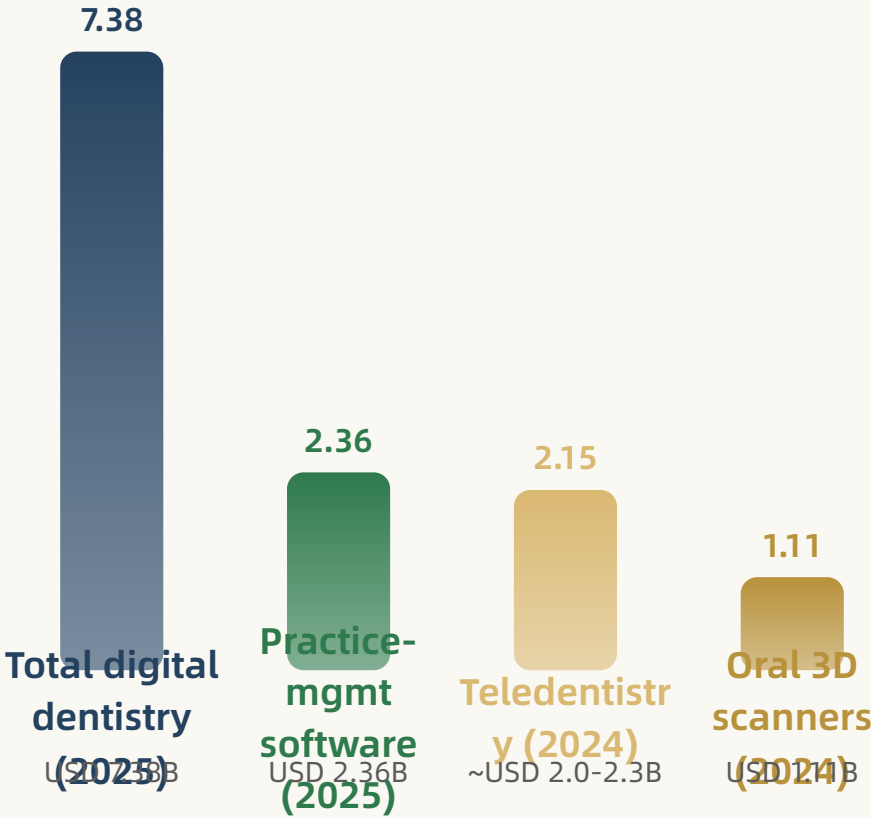
The two-tier scanner market and the subscription pivot



07

Technology & Digital Dentistry

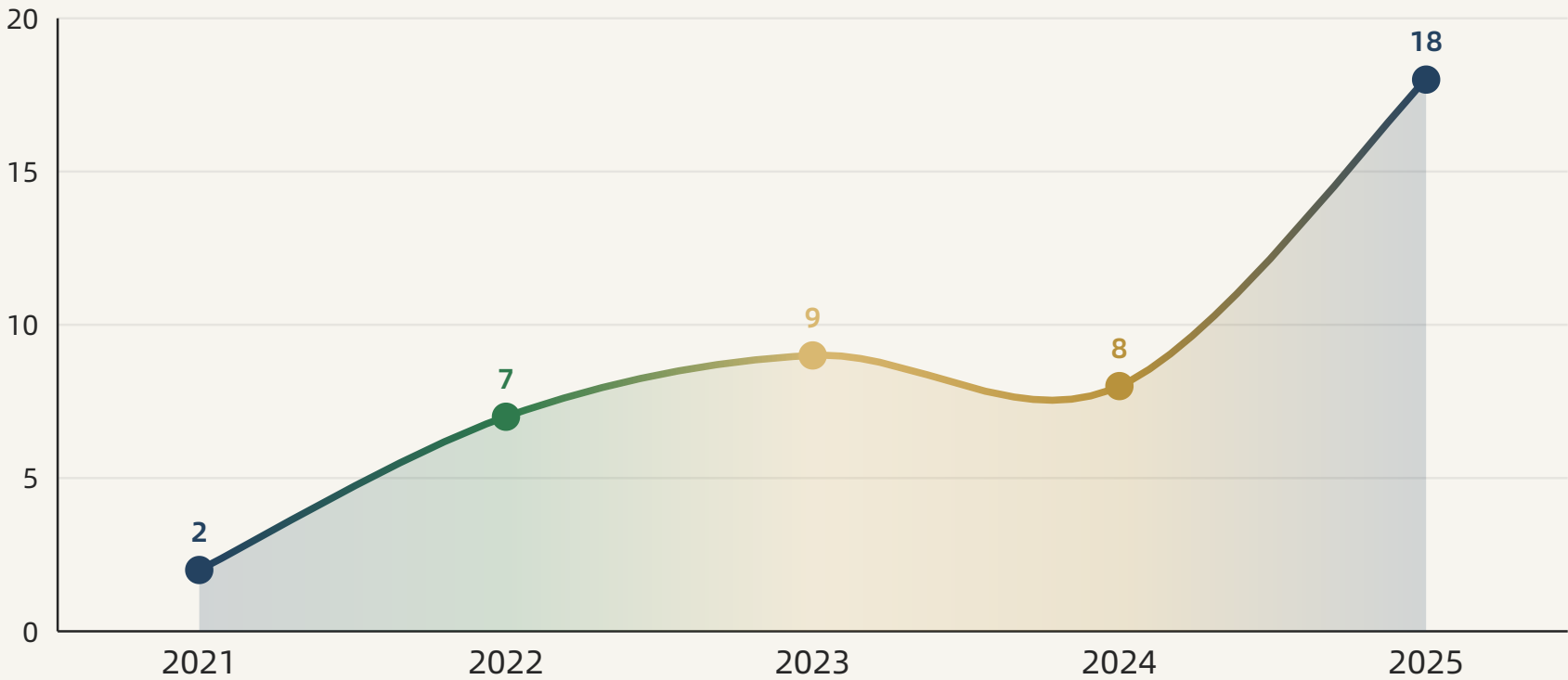
Imaging AI and revenue-cycle automation are paying back first; teledentistry stays stuck



08

Regulation & Policy

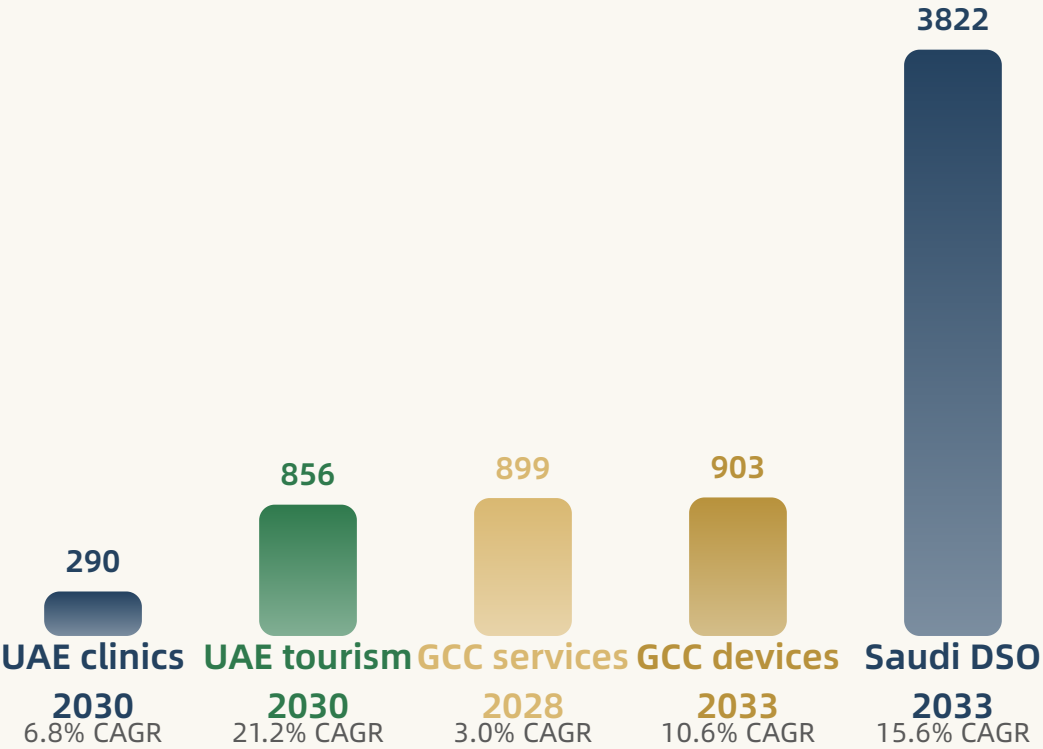
Three regulators, three price signals: the FDA’s predicate-driven AI lane, the EU’s MDR squeeze on implants, and the UAE’s federal device-and-licensing reset.



09

Regional Spotlight — UAE & GCC

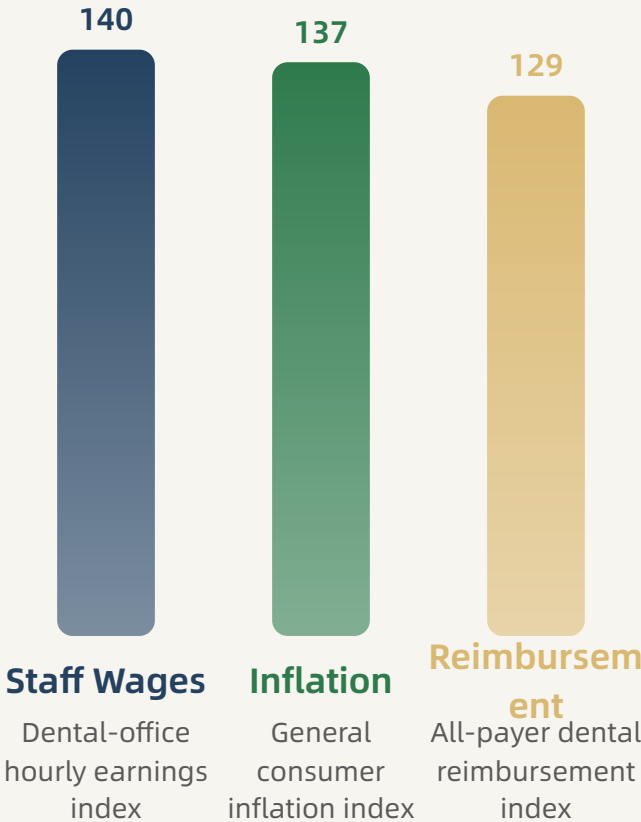
UAE & GCC: a premium, cash-pay, tourism-leveraged market sitting above a quiet scale frontier in Saudi Arabia



10

Practice Management & Economics

Margin compression, the overhead-by-scale consolidation engine, and the Gulf’s faster-running version of the same playbook



The State of Dentistry

Every figure in this deck is researched and fact-checked through the Dental Nation research engine, with full sources in the long-form report.

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