**DENTISTRY UK MARKET REPORT 2014**

**FOURTH EDITION**

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**LaingBuisson's HEALTHCARE MARKET REVIEW 2013-2014**

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The fourth edition of this LaingBuisson report provides the definitive review of the UK primary care dentistry market, currently worth £5.9bn per annum. This dynamic market remains in a state of flux as government spending on NHS dentistry under a new commissioning structure and continued austerity, is yet to show its hand, and the private dentistry market looks to bounce back following its contraction during the economic depression.

**DENTISTRY UK MARKET REPORT 2014** analyses NHS and private primary care dentistry demand and supply as it stands, and provides unique market statistics on dentistry spending by government and by individuals in the UK, the latest for 2013/2014, and offers expert insight about future trends which are to shape the primary care dentistry market and key data projections.

The report publishes original key spending and activity statistics for the UK primary care dentistry sector derived from LaingBuisson’s fourth Survey of Primary Care Dental Practitioners carried out in late 2013 (endorsed by The Dental Fusion Organisation). Combined with its three previous survey (in 2009, 2003 & 1996), LaingBuisson offers informative comparisons on the changing face of dentistry trends, which provide the backbone for dentistry projections going forward.

A key section of this new Dentistry report analyses corporate dentistry (provision by dentistry groups) as a distinct market sector, providing current 2013/2014 market values, corporate dentistry market shares and comparatives, recent growth of corporate dentistry and the annual rate of corporatisation, profitability of dentistry groups, market share estimates for the Top 40 UK groups, and detailed profiles of all leading dentistry groups (over 30 included) with comprehensive financial information.

The market for dental plans is another highlight of this new report, offering the latest market values and trends for dental capitisation and dental insurance, based on LaingBuisson’s unique annual Survey of UK Dental Plan Providers, future trends analysis, and a profile of all the dental plan providers operating with a significant share in the UK.

This expert report is essential reading for dentistry providers, investors, commissioners and policy makers, dental plan providers, dental companies and corporates, researchers, regulators, and dental associations and representatives.

Executive Summary & Highlights
- Market trends and dynamics
- NHS & private dentistry demands
- Key market components
- Supply trends
- Future prospects

Demand for Dentistry
- Patient benefits
- Penetration of dentistry demand
- Spending on services (per capita estimates)
- Future demands

NHS Primary Care Dentistry
- Spending comparisons by country
- NHS primary care dentistry in England, Scotland, Wales & Health Service dentistry in Northern Ireland
- Activity - registrations, patients seen, treatments
- Spending - NHS and private
- Regional analysis

Government Policy
- Review of Coalition reforms for dentistry, and future prospects
- New CQC regulations
- Historical review of government policy - Conservativers & Labour
- Government policies in Scotland, Wales & NI

Private Primary Care Dentistry
- Private dentistry demand trends
- Factors which influence private demand
- Private supply trends
- Future trends & prospects

Dental Plans
- Key statistics on volumes, spending & price inflation
- Market players & profiles

Market Reports, Forums, Conferences, Newsletters, Data, Consultancy...

As the country's leading provider of healthcare intelligence, LaingBuisson's products and services are used by healthcare experts working in a range of roles-from chief executives, financial directors and business development managers of Independent health and care providers to key decision makers in private equity, the advisory community and the teams of both regional and national government making.

In addition to Market Reports, LaingBuisson publishes business newsletters and holds a number of well-attended annual conferences and Forum events which bring together delegates from every area of health and social care across the private, public, and voluntary sectors.

For readers interested in the DENTISTRY UK MARKET REPORT 2013, LaingBuisson has a range of complementary products available:

- LaingBuisson’s Survey of Primary Care Dental Practitioners
  - Key survey results - average patient activity & gross fees across dentists
  - Growth in NHS and private activity
  - Average dental practice (chairs & occupancy)
  - Availability of private dentistry capital plans
- Supply of Dentists
  - Key supply statistics - dentists practising in the UK
  - NHS primary care dentists - growth trends, regional supply, dentist penetration by region
  - Dental education - undergraduate application trends, student trends
  - Dental workforce projections
  - Dental care professionals & dental specialists
  - Income & profitability of private care dentists - official figures & LaingBuisson estimates
- Corporate dentistry
  - History pre- and post-2006
  - Size of corporate dentistry market
  - Growth between 2010 & 2014
  - Past & future consolidation trends
  - New corporate entrants
  - Financing & profitability of corporate dentistry
  - Detailed profile of more than 30 leading dentistry groups
- Office of Fair Trading
  - Review of the recent investigation of Dentistry by the Office of Fair Trading
- Financial Appendix
  - Detailed analysis of the statutory accounts of major providers
- LaingBuisson's Survey of Primary Care Dental Practitioners

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The healthcare experts
DENTISTRY UK MARKET REPORT 2014

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This report offers a fresh perspective on the UK three core health cover markets: private medical, health cash and dental benefits. The 2013 edition continues to address the impact of recessionary forces on the health cover marketplace and looks ahead to future prospects of the market in the light of significant changes in selling techniques.

Published June 2013

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