

### Value Proposition

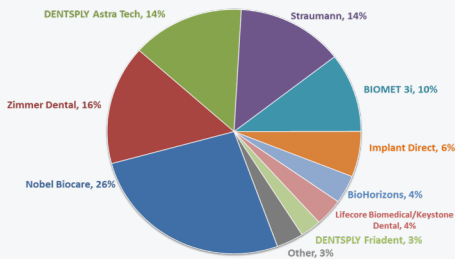
The effectiveness of this report lies in the data captured from hundreds of U.S. dental laboratories. The report provides robust, quantitative and statistically valid information with end-user reported trends, product usage and market shares. This allows companies to build solid business strategies and tactics from accurate information collected directly from dental laboratory management.

## U.S. Dental Laboratory Market Assessment and Trends Report

### Overview:

The U.S. Dental Laboratory Market Assessment and Trends Report is an annual dental industry report from the Key Group, a leading global healthcare market research firm specializing in primary research, web-centric surveys, and market intelligence. This report captures information on lab production and specific product brand usage that has not traditionally been measured or tracked. The U.S. dental lab industry has been experiencing rapid changes due to several key environmental factors such as: New technologies, automation, labor availability, aging population, patient demand for esthetics and globalization. It is critical for companies providing products and services to dental laboratories to make strategic business decisions based on contemporary Voice of Customer (VOC) data. Understanding a complex business environment such as the dental lab market is important and fact-based up to date information collected directly from key decision makers is vital in providing companies a sustainable competitive advantage.

### Market Share

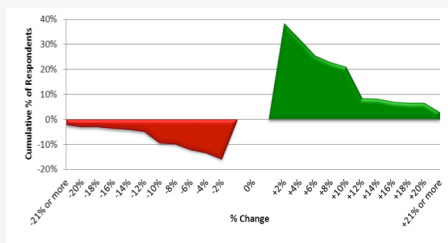


**Scheduled Publication Date: Annually - September**

### Methodology:

The information captured in this report is collected from approximately 300 U.S. dental labs randomly selected across predetermined dental lab size segments that mirrors the industry breakdown. The respondents completed a web-based quantitative survey.

### Growth Characteristics



### Topics Covered:

- Production**  
Crowns & Bridges  
Inlays & Onlays  
Veneers  
Dentures  
Implants  
Mini-Implants  
CAD/CAM

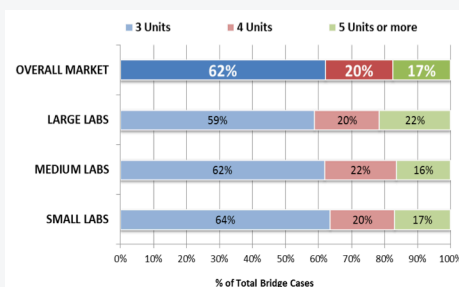
- Supplies**  
Porcelain Powders  
Pressable Ceramics  
Metal Alloy  
Denture Teeth  
Acrylics  
Waxes  
Gypsums

- Trends & Metrics**  
Market Share by Brand  
Digital Impression Usage  
Equipment Usage  
Outsourcing Strategies  
Forecasted Growth  
Year-to-Year Change  
Purchase Intent

### Final Report:

The report is delivered in a PowerPoint format where each slide can stand alone. The findings are presented in a variety of graphs and tables created to optimize data comprehension, uncover trends, spot outliers and gain a complete understanding of the information collected in the study. The data is cross-tabulated by dental lab size to determine any statistical differences between the segments.

### Segmentation Analysis



### Key Group Overview:

The Key Group is a leading healthcare market research firm with over 20 years of experience in the global dental industry. The company was founded with the goal of providing businesses with contemporary market research information and actionable insights that management can rely on to develop and implement tactics to achieve their strategic and financial objectives. The Key Group consists of a team of marketing executives, business strategists, market researchers and information technologists. Every member of the management team has a passion for solving business issues and meeting customer needs. Our success is built around senior leadership with decades of client side brand management and market research experience.

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