LAB MANAGEMENT TODAY **LMT®**

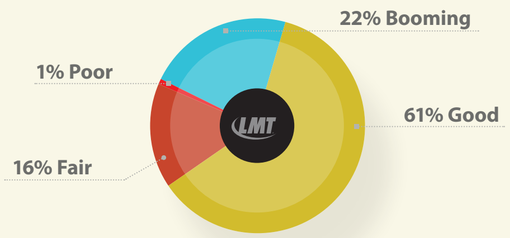
# Survey 2017 Snapshots:

Innovative research and timely surveys continue to earn LMT an unparalleled reputation as the go-to source for dental laboratory industry statistics and trends. Here are some highlights from our 2017 readership research.+

SOURCE: LMT Research Dept. ©2017

## Removable Prosthetics in High Demand

Thanks to growing demand coupled with a limited number of denture technicians, the removable prosthetics market looks bright. Forty-nine percent of our survey respondents say their removable business has **improved** in the past three years. Here's a look at how all respondents rate the current state of their business:




## Average Breakdown of Partial Denture Workloads:

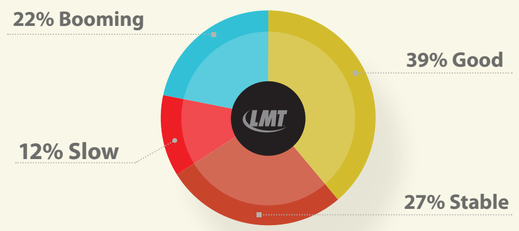
| | |
|---|---|
| Cast partials with conventional waxup | 70% |
| Flexible partial dentures | 22% |
| Cast partial dentures with 3D printed waxup | 6% |
| Milled partials | 1% |
| SLM-fabricated partials | 1% |

**8%**

of LMT survey respondents offer digitally fabricated complete dentures.

## Implant Market Continues to Thrive

The implant market has been strong for the past decade—and shows no signs of slowing down. In fact, 86% of survey respondents say their implant business has **improved** in the past three years. Here's a look at how all respondents rate the current state of their business:




## Implant Market Facts:

- On average, 26% of respondents' total workload is implant related.
- Of their total workload, 83% is fixed; 17% is removable.
- On average, 65% of respondents' dentist clients are sending implant work.

**78%**

of full service, C&B and removable respondents offer custom-milled abutments.

+ Each survey is based on a representative demographic cross section of the dental laboratory industry.

## Metal vs. Metal-Free C&B Workloads

PFMs had been the mainstay of C&B workloads for generations but, in 2015, metal-free C&B—including conventionally and digitally fabricated cases—finally surpassed metal based (60% vs. 40%) and has remained consistent since then.

On average, **61%** of respondents' C&B units are metal-free

**39%** of their C&B units are metal-based

## Digital C&B Workloads

**84%** of respondents' average digital C&B workload is metal-free

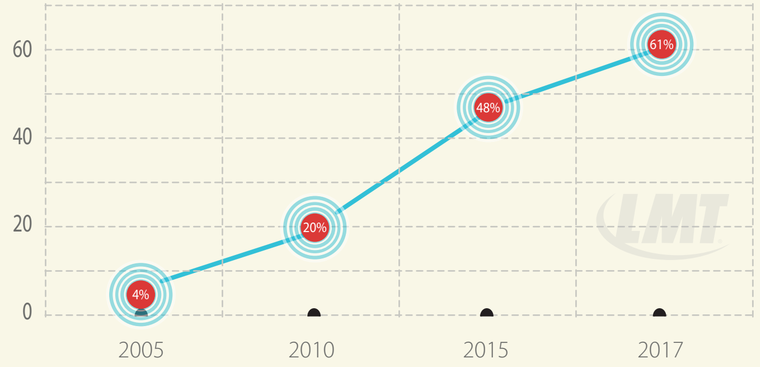
**16%** is metal-based

**23%**

of respondents are doing model-less cases. They're fabricating about a quarter of their cases without a physical model.

## Milled C&B Workloads on the Rise

CAD/CAM-milled restorations (made from all materials) are making up an increasingly larger percentage of C&B cases. In 2005, 4% of respondents' average C&B workload was milled restorations; today, it's 61%.




## Digital Equipment in Respondents' Laboratories*:

| | No Scanner | 1 Scanner | 2 Scanners | >2 Scanners |
|---|---|---|---|---|
| 1- to 5-Person Labs | 37% | 51% | 10% | 2% |
| 6- to 10-Person Labs | 7% | 41% | 31% | 21% |
| 10+-Person Labs | 0% | 16% | 22% | 62% |

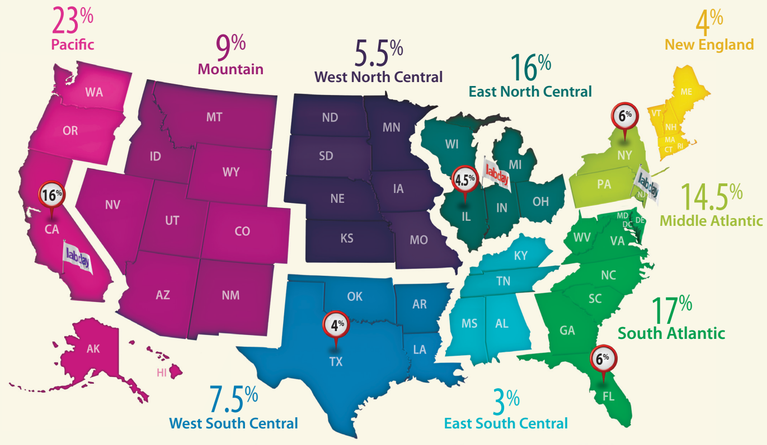
| | No Desktop Mill | 1 Desktop Mill | 2 Desktop Mills | >2 Desktop Mills |
|---|---|---|---|---|
| 1- to 5-Person Labs | 67% | 23% | 9% | 1% |
| 6- to 10-Person Labs | 44% | 30% | 15% | 11% |
| 10+-Person Labs | 30% | 13% | 30% | 27% |

| | No Stand-Alone Mill | 1 Stand-Alone Mill | 2 Stand-Alone Mills | >2 Stand-Alone Mills |
|---|---|---|---|---|
| 1- to 5-Person Labs | 88% | 9% | 2% | 1% |
| 6- to 10-Person Labs | 63% | 21% | 12% | 4% |
| 10+-Person Labs | 30% | 15% | 26% | 29% |

| | No 3D Printer | 1 3D Printer | 2 3D Printers | >2 3D Printers |
|---|---|---|---|---|
| 1- to 5-Person Labs | 85% | 14% | 1% | 0% |
| 6- to 10-Person Labs | 65% | 12% | 19% | 4% |
| 10+-Person Labs | 44% | 25% | 12% | 19% |

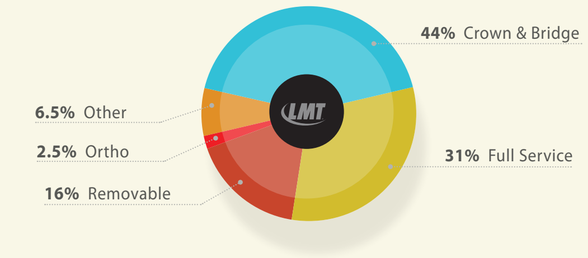
* Data based on C&B and full service lab respondents that offer digitally fabricated restorations.

## U.S. Dental Laboratory MARKET *by Region***

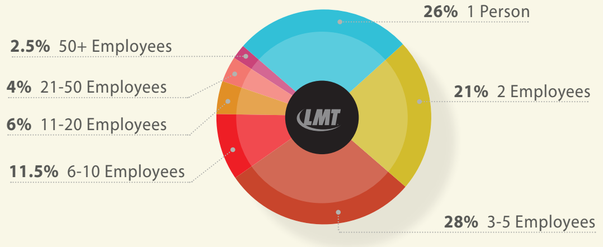



The states with the highest concentration of dental labs are CA, NY, FL, IL and TX.

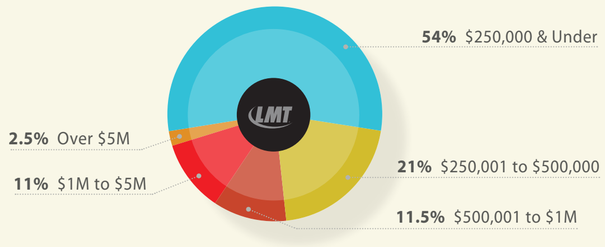
## U.S. Dental Laboratory DEMOGRAPHICS *by Specialty***




## U.S. Dental Laboratory DEMOGRAPHICS *by Size***




## U.S. Dental Laboratory DEMOGRAPHICS *by Annual Revenue***




** The charts in this column are based on a one-per-site analysis of commercial dental laboratories in the U.S.; the *U.S. Dental Laboratory MARKET by Region* map also includes denturists, in-house laboratories, dental offices and lab schools. Not represented: 1.5% of LMT's circulation is Canadian & Foreign. The demographic data is rounded to the nearest .5% and is based on LMT's circulation.

Design | Tarol Samuelson 2017