

Dentistry - UK - 2023

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This report looks at the following areas:

- The COVID-19 legacy issues and how it has challenged NHS provision.
- The value of the various market segments including NHS, private GDS and private cosmetic dentistry.
- The major changes in the structure of the industry including the emergence of more very large corporate dentists but the rationalisation of one partly for NHS recruitment issues.
- The continued opportunities for consolidation in a highly fragmented sector and the role third party finance plays in the development of corporate dentists
- Consumer attitudes to dentistry.

The dentistry industry continues to undergo major structural change as the highly fragmented industry is reshaping into corporate providers. 2022 and 2023 has seen the merger of four mid-market groups of practices, creating further large corporates. At the same time one of the largest groups has announced some rationalisation of its practices citing recruitment issues as a primary driver.

COVID-19 had a major impact on the dentistry sector, and the legacy is one of compounded problems in the NHS sector with growing numbers of dentists moving away from the NHS to private practice. Many practices are no longer accepting new patients. The vacuum caused has an amendment to the NHS contracts, but it has not been well received and further more fundamental change is needed.

Technological development is creating new methods and materials for the dentists to use, improving both the patient visit experience and offering faster and superior treatments. With continued social pressure on appearances, the public is increasingly conscious of the appearance of their teeth and oral care, driving both the technology and the market size.



“The dental sector is changing at pace following the pandemic. More patients are seeking affordable dental care, while a growing number of dental technicians are seeking a better balance between NHS and private work. At the same time technology is evolving and changing the way in which dentistry is delivered.”

– Terry Leggett, Principal Analyst

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While demand for cosmetic dentistry has been slightly subdued by the cost of living issues, and there continues to be a rise in dental tourism, demand in private GDS has continued to grow with treatment not viewed as discretionary for the vast majority of cases. Yet the access issues to the NHS has created a void amongst those financially challenged, leading to horror stories of DIY dentistry.

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- **British Dental Conference & Dentistry Show**
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