



Special IDS 2013

Highlights from the European
trade press conference concerning
the 35th International Dental Show





On 4th December 2012, the European trade press conference took place in Cologne in the run-up to the 35th International Dental Show, to be held from 12th to 16th March 2013.

Dr Martin Rickert, Chairman of the Association of German Dental Manufacturers (VDDI), reminded the audience about the first edition of what has now become the world's leading dental trade fair, held in 1923. Next year, the IDS will therefore be 90 years old.

While bringing together dentists, dental technicians, laboratories, students, trade dealers and manufacturers from all over the world, the IDS presents the latest innovations in products, treatments and techniques related to all the sub-disciplines of dentistry.

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IDS 2013

(Remarks by Katharina C. Hamma, Chief Operating Officer of Koelnmesse)

From 12th to 16th March, IDS will once again impressively assert its position as the leading global trade fair for the entire dental sector, including all of the global market leaders, that will present its products and services in Cologne at a trade fair whose depth and breadth are unique. The offerings will include products for dental practices and dental technology laboratories, measures for preventing infection, dental maintenance products and related services. Innovations for improving information, communication and organization will also be on show.

1,900 suppliers from over 55 countries are expected. The largest contingent will be coming from Germany, followed by contingents from Italy, the USA, South Korea, China, Switzerland, France and the UK. In addition, in March 2013 there will once again be 13 group presentations from abroad. The countries involved are Argentina, Brazil, Bulgaria, China, the UK, Israel, Italy, Japan, Pakistan, Russia, South Korea, Taiwan and the USA. Overall, it looks as though even more companies from abroad will be represented in Cologne in 2013 than at the last event. To date, 10% more registrations from abroad have been received than two years ago. Altogether, 68% of the companies exhibiting in Cologne will be from outside Germany.

In terms of gross exhibition space occupied, IDS 2013 will set a new record. The fair will occupy not only Halls 3, 4, 10 and 11 but also all of Hall 2.2, which was occupied only partially in 2011. As a result of this expansion, the fair will occupy 150,000 m² of gross exhibition space for the first time. That's 5,000 m² more than two years ago. Many exhibitors have once again expanded their stand areas, so the halls are already booked out. A waiting list was set up to handle further enquiries.

As the leading global fair for the dental sector, IDS is characterized by its broad international scope in terms of both supply and demand. In Cologne, exhibitors reach visitors from all over the world. At the last IDS, visitors came from smaller and distant countries – for example, from the Bahamas, Trinidad and Tobago, Zimbabwe, Togo, Madagascar, Qatar, Oman, Laos, Cambodia, Tajikistan, Polynesia and Micronesia. At the fair, the visitors will be able to gather information about the products and services of suppliers from all over Europe, North and South America, the Middle East and the Asia-Pacific region. International business of this calibre within the dental sector is possible only at IDS in Cologne, the sector's global meeting place for decision makers from the specialized dental trade, the dental industry and organisations for dentists and dental technicians.

Next year the trade fair concept of IDS will continue to focus on business activities and product information at the exhibitors' stands. All of the halls will be equally interesting; they aren't divided into thematic segments, because most of the exhibiting companies have an extremely diverse product range.

The Dealers' day will once again be staged on the first day of the trade fair (12th March 2013). On this day the focus will be on the specialized dental trade and importers that will be able to conduct their business activities undisturbed at the exhibitors' stands.

Once again there will also be a Speakers' Corner – a hosted visitors' forum for specialist lectures and product presentation by the exhibitors. At the last IDS, many exhibitors took advantage of this additional opportunity to make presentations. In fact, they showcased innovations and trends from their respective product and service ranges in around 75 presentations, which were a big hit with visitors.







Services for IDS visitors - Koelnmesse offers visitors a broad range of digital services to prepare for the trade fair in a targeted manner: The IDS website will include a current update of the IDS apps for iPhones, BlackBerry and other operating systems, free for users. The app features a mobile exhibitor search function and uses an innovative navigation system that leads visitors through the halls to the stands they are looking for. The app, continuously updated, also offers information about restaurant and catering options, services within the trade fair complex and the supporting programme. **Another digital service called Business Matchmaking 365 enables visitors and exhibitors to contact one another directly – not only before IDS 2013 begins but also after it has finished. In the run-up to the fair, visitors can also use the online schedule planner to send appointment inquiries to exhibitors via e-mail.** The online route planner will also put together an individual plan for a visit to the trade fair, including the optimal route through the halls. A database of innovations will be provided on IDS website. Starting in January, exhibitors will be able to enter initial information about their products into this database. As a consequence, information about innovations at IDS 2013 will be available in a clear and compact form in the run-up to the fair.

Lufthansa, once again the official airline of IDS, will offer flight tickets at discounted prices to exhibitors and visitors from more than 250 cities outside Germany in around 100 countries. The Cologne/Bonn Airport is also the central hub for low-cost carriers. In addition, visitors can travel to IDS by train on discount train tickets from Deutsche Bahn.

Hotel rooms and accommodation can be booked online via the IDS website. Koelnmesse cooperates with approximately 120 partner hotels in Cologne and the surrounding region. Altogether, approximately 80,000 rooms are available in Cologne and its surroundings.

Relevant topics and trends at the IDS 2013

Laser technology

- **“Applications for monochromatic light in the practice”** – use, specialty area and new technology.
- **“The latest trends in the various equipment classes”** – solid-state lasers, gas lasers and dye lasers; CO₂ laser (for soft-tissue surgery: frenectomies, vestibuloplasties and hyperplasia removals, smoothing apicectomy scars); erbium laser (for hard-tissue applications: caries removal and enamel conditioning, incisal ridge defects, lesions due to cleaning and multilayer constructions of dentin adhesives, minimally invasive child caries therapy);

diode lasers for gingival surgical procedures and endodontic treatments (for multimorbid patients, patients suffering from diabetes or subject to blood-thinning medication).

- **“Integrating laser technology into the existing concept of a dental practice”** – “The right laser opens up an attractive opportunity to broaden the range of therapies offered, to acquire new patients and to raise the practice's profile” (Dr. Markus Heibach, Executive Director of the VDDI). Surgery hygiene
- **“The current hygiene regulations and how they are implemented in the dental surgery”** – new set of regulations concerning matters such as the annual inspection of drinking water to determine if it contains Legionella bacteria.
- **“The latest trends in the area of equipment systems and dental supplies”** – innovations for cleaning and disinfecting instruments and surfaces, checking water quality in treatment units, sterilizing medical products and disinfecting hands; individually usable perfume concentrates increasing patients' comfort.
- **“Integration of surgery hygiene into a highly effective quality management system”** – latest generation of thermo-sterilizers and autoclaves making it easier to treat instruments and enabling users to integrate a modern system of online documentation; new dental softwares complete of training and coaching sessions.

Orthodontics

- **“Innovations in the field of orthodontia”** – innovative scanning technologies, no plaster models through digital dentition models and workflow, intraoral scanners.
- **“Technological advances for equipment and processes”** – rapid prototyping in jaw-related orthopaedics, functional analysis and orthodontia; cephalometric analysis by means of magnetic induction, alternative to the use of x-ray.
- **“Digitisation of the orthodontic surgery”** – digital technologies and networking of treatment processes.

Digital practice and laboratory

- **“Digital technologies in use in the dental practice and laboratory”** – treatment-related applications, software for accounting, purchasing and documentation; computer supported solutions for systematic quality management.
- **“New CAD/CAM processes”** – increasingly precise processes for centralized production; programs displaying results before treatment begins.
- **“Modern software for networking and work processes”** – software for ensuring data integrity, inventory control and billing in complete solution packages.

Implant-supported dental prostheses

Among the trends on display at the IDS 2013, there are optimized implant surfaces, individual abutments or software for guided implantation; modern software systems allowing 3D planning without a DVT unit in the practice; new products in the field of zirconium oxide implant for metal-free prostheses.

Ceramics & Aesthetics

- New possibilities for ceramic dental work: new techniques for colouring, such as ceramic infiltration with suitable dyeing liquids and painting systems with new primer liquids or special applicators.
- Main trends: highly translucent materials, especially zirconium oxide, and pre-coloured framework materials.

Prosthetics & implantology – collaborative surgery

- Cooperation between dentists and dental technicians to combine prosthetics and implantology: enhanced software, innovative materials and improved interfaces, drill templates made with the aid of computers and CAD/CAM-produced implant superstructures.
- Prosthetics manufacturing techniques screwed on to implants: bridges and bridge superstructures can now be created on the basis of a single dataset. Following consultation with the dental technician, specialized planning or cutting centres can supply labs with precise shapes that serve as an ideal basis for creating aesthetically perfect implants.



Alloys

- Increasing variety of gold-based alloys
- Networked manufacture of non-precious-metal frameworks and super-structures create alternatives to counteract the rising cost of gold, such as: ECO alloys with reduced gold component, non-precious metal alloys produced by SLM (selective laser melting) processes, silver-palladium and palladium-based alloys.

Endodontics

Modern concepts in diagnostics and therapies:

- Mechanical root canal preparation using rotating instruments allow to prepare and disinfect all accessible root canals all the way to the apex and is increasingly regarded as an alternative to hand preparation of root canals: modern nickel-titanium alloys are highly resistant to fractures; NiTi file systems which use disposable files are becoming increasingly popular; and in 90% of cases, only one file is needed for patient preparation. Electronically controlled drive units with optional reciprocating motion and torque control help to almost completely eliminate fractures when using the mechanised files.
- Chemical-mechanical disinfection of the root canal using ultrasonic principles or hydrodynamics reduce the number of germs present even in lateral canals. Composite-based sealer adhesives and cements, modern thermoplastic gutta-percha systems – for vertical condensation – are available for a subsequent bacteria-tight three-dimensional obturation allowing the reliable filling of even complex canal structures.

- Modern imaging techniques can deliver an exact visualization of complex multiple-root canals all the way down to the finest or obliterated places and provide exact control of the file position during canal preparation. Diagnoses made through digital X-rays, digital volume tomography (DVT) and computer tomography (CT) can be saved and used for online documentation of the course of treatment.

CAD/CAM

One of the main focuses will be CAD/CAM, increasingly used to desing crown, bridges and inlays without the use of chemicals. CAD/CAM has also led to the efficient processing of completely new materials such as zirconium oxide as a tooth-coloured restoration material. This high-performance ceramic is currently getting a further boost from the introduction of translucent versions which expand the range of aesthetic possibilities and make monolithic zirconium oxide restoration possible, particularly in the hidden areas of the molars.

The counterpart of the dominant cutting techniques, which chiefly consist of milling, are the constructive rapid prototyping methods, which will become increasingly popular in the future. These methods include the selective laser melting (SLM) technique and the gradual stacking of plastic structures. In the future, this technique could make high-performance plastics an attractive alternative to metals and ceramics. The rapid prototyping category also includes the well-known stereolithographic production of drilling guides for implantologists.

Digital dentistry systems once received a key impulse from implantology. In dental practices and labs, these systems are jointly used for "backward planning". Conversely, implantology is today getting fresh inspiration from the CAD/CAM sector: This advanced technology can be integrated into tried and tested prosthetic care concepts to improve the success rate and/or reduce manufacturing costs.

Outlook on the German Dental Industry

(Remarks by Dr Martin Rickert, Chairman of the Association of German Dental Manufacturers - VDDI)

The German dental industry once again succeeded in expanding its export business last year and this year. The domestic market is also showing stable development. The 200 member companies of the VDDI employed approximately 18,100 men and women in Germany and abroad in 2011, a slight increase on 2010. In 2011, member companies recorded total turnover of approximately 4.11 billion euros, an increase of 2.4%.

Nearly 2.435 billion euros of the total turnover was generated abroad, an increase of 4.8%. The German domestic market stabilised last year; the turnover of 1.674 billion euros (+0.1%) remained more or less at the 2010 level.

The export quota has now risen to around 59%, which means German companies have been able to further stabilise their position in the world markets and even significantly expand it in some markets.

In October 2012, VDDI surveyed its member companies concerning their current business situation.

- The companies described the overall business situation as generally positive in all three segments: facilities, equipment/instruments and materials.
- In terms of domestic turnover, "dentistry facilities" was the only segment in which the number of companies reporting a decline was slightly lower than that of firms posting increases. In terms of equipment and instruments, most companies recorded growth. The materials segment seems

to have experienced a slight increase in domestic turnover:

- **All regions performed well in terms of foreign turnover**, with most of the companies in Asia and Eastern Europe reporting growth. This positive trend is particularly pronounced in the segment for dental technician facilities; most of the companies producing dental instruments and dental materials also reported increases in turnover.
- **Most of the surveyed companies also reported positive developments for domestic incoming orders**; "technical dental materials" was the only segment in which the reported declines and increases were more or less equal.
- **The volume of incoming orders from abroad was solid across all regions**; most declines were reported from North America, where the market for technical dental equipment and instruments is weaker. Orders from this segment also decreased in the Middle East.
- **A growing number of respondents considered the current order volume too low**. This is especially true of the orders placed by dentists and dental technicians for equipment, instruments and materials.
- **Workforce numbers have remained relatively constant; only a few companies** offering equipment for dentists and dental technicians reported a lower number of employees.
- **Expectations regarding domestic turnover in the second half of the year are positive in all segments**. Most of the surveyed companies also expect to post solid growth rates for overall foreign turnover. They also believe workforce numbers will generally remain constant.

But despite all the positive news, some current developments are causing uncertainty among quite a few market participants.

The financial crisis in the EU is impacting healthcare systems

Market observers are currently concerned about possible declines and restrictions in the southern European economic regions that have been particularly impacted by the financial crisis. In these regions the healthcare markets will shrink due to cutting programs in the healthcare sector.

In some EU countries, noticeably fewer people have been going to doctors and dentists lately because of the desire to save money. Checkups and dental repairs are being postponed. It would be a mistake for dentists and dental technicians to join the wave of pessimism. Although the healthcare market is closely linked to the overall economy and healthcare policies, it is also affected by other factors.

For one thing, people still greatly value good health. Those who try to save money or healthcare are saving in the wrong place, and that applies to individuals and governments alike. According to an estimate, England loses around 15 million working days a year due to dental problems – and that causes tremendous economic damage.

Europeans currently spend around 79 billion euros per year on dental care. According to the study "The State of Oral Health in Europe" released in September, this figure could increase to approximately 93 billion euros by 2020. The euro figure cited includes payments by public, private and government-run insurance companies. Most of the money spent on oral and dental care in 2012 will be accounted for by Germany (approximately 22.07 billion euros), followed by Italy (16.74 billion euros) and France (11.67 billion euros).

These numbers make it clear that people and governments realize that oral and dental health is a very important component of overall health.

Looking back at the financial crisis of 2008-2009, it had a significant impact on the dental market. Nevertheless, the successful IDS 2009 fair in Cologne once again generated substantial momentum for the domestic market during and after the fair. It also helped European and international markets get off the ground again. Just two years later, there was a clear stabilisation in the various markets, and certain key sub-markets even posted renewed growth.

The VDDI was founded in 1916, when Europe was in the middle of First World War. The goal of its founders was to organize dental trade fairs. The first dental exhibition was held in 1923 – in the middle of a year marked by hyper-inflation. At that time, one US dollar was worth 4.2 trillion reichsmarks. The event in Berlin attracted 29 companies and laid the foundation for what would later become IDS.

In other words, it pays to take a long-term view in the healthcare market. Trade visitors use IDS to make direct comparisons of products and services. The fair is also the place to take the strategic decisions that will safeguard the future of their businesses. Even in this age of the Internet and distant access to incredible amounts of information, IDS still offers a kind of transparency that's more powerful than anything the World Wide Web can provide.

Personal encounters and discussions at IDS are indispensable. That's because the fair allows interested visitors to directly clarify all of their questions concerning products and details by talking to the people who developed them. An investment in office or lab is an investment in the professional and business future, as well as in investment in one's health is an investment in one's quality of life – an investment in the future.

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