

## Smiles and scalability: The evolving landscape of India's dental industry

The dental industry is witnessing steady growth driven by rising awareness, aesthetics-focused demand, and digital innovation. Backed by a strong workforce, it holds vast potential. But gaps in access, insurance, and regulation remain key hurdles, highlights **Kavita Jani**

With oral health increasingly recognised as a key component of overall well-being, the dental sector in India is beginning to command greater attention, both from consumers and investors.

Once considered a luxury or an afterthought in healthcare, dental care in India is now undergoing a transformation. From routine check-ups and cavity fillings or root canals, oral health is evolving into a preventive healthcare space. Moreover, dental care is now given importance for its cosmetic/aesthetic appeal rather than mere oral health and well-being.

### Market size

According to the General and Dental Healthcare Industry in India by the Indian Dental Association, the global dental market size was valued at \$ 36.32 billion in 2021. The market is projected to grow from \$ 38.84 billion in 2022 to \$ 63.93 billion by 2029, exhibiting a CAGR of 7.4 per cent during the forecast period. The market size of the Indian Dental market was approximated to be around \$ 2 billion.

Talking about the market size, Sameer Merchant, Managing Director and CEO, Laxmi Dental said, "Oral health in India is witnessing a significant transformation. With the Indian dental market expected to grow from \$ 653 million in 2022 to \$ 1,339 million by 2030 at a CAGR of 9.4 per cent, we are seeing a clear shift in both awareness and demand. This growth is being driven by higher disposable incomes, an ageing population, and increasing patient awareness around preventive and



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Managing Director and CEO,  
Laxmi Dental



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Chief Clinical Officer,  
Clove Dental



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CEO & Founder,  
Dentalkart

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With a growing appetite for cosmetic procedures, a rising burden of lifestyle-related oral diseases, and a strong pipeline of dental professionals, the sector is poised for significant growth.

### Gaps and challenges

While awareness of oral health and dental aesthetics is an observed phenomenon among the urban population, rural India faces problems such as a lack of awareness, having less disposable income on average, and a severe shortage of dental professionals, with dentist-to-population ratios below recommended standards. Dental care remains under-penetrated, particularly in rural and semi-urban regions where infrastructure is limited.

Merchant highlights, "A significant portion of the population still lacks access to quality dental care, with many relying on unverified sources rather than licensed practitioners. Awareness is another major hurdle; many individuals seek treatment only when issues become acute, and the concept of preventive dental healthcare is still not widely embraced."

◆ **Lack of awareness:** Oral health receives limited attention within the broader public healthcare system, leading to gaps in early diagnosis, routine care, and patient education.

Lt. Gen. Dr Vimal Arora,



Chief Clinical Officer, Clove Dental, states that oral Diseases affect 84 per cent of the Indian population in one way or another. "Oral cancer is one of the most common cancers in India and accounts for 60,000 cases every year. Despite this alarming trend of oral diseases, the majority of people seek dental care at an advanced stage," he explains. Dr Arora believes that the delayed diagnoses and higher treatment burdens are caused due to preventive dental care still being a relatively new concept for the general public.

That the key challenges are an exploding population, socio-economic variation and lack of awareness. "The Government has been struggling to provide healthcare infrastructure across the country due to its vastness. The Health Ministry has launched several health policies under universal healthcare; however, oral health remains under-prioritised in the government initiatives," he explains.

◆ **Urban vs rural penetration:** Dr Arora continues to explain the disparity that exists within the Indian dental landscape. "As the majority of the Indian population (66 per cent) dwells in rural regions where the dentist-to-population ratio ranges around 1:60,000 as against 1:7,500 as per the WHO," he states.

"India has the highest number of dental colleges in the world, and almost 30,000+ dental graduates pass out every year, and most of them find no jobs. Oral healthcare infrastructure is better in urban settings where the dental workforce is heavily concentrated," asserts Dr Arora. This unequal distribution of resources limits access to quality dental care for a significant portion of the Indian rural population.

### Emerging trends and growth opportunities

Dr Vikas Agarwal, CEO & Founder, Dentalkart, highlights the key indicators of growth in the Indian dental market. He explains that while the overall audience size remains relatively limited, the value per dentist is exceptionally high. Dr Agarwal explains, "This combi-

## Increasing oral health awareness, equitable workforce distribution, better insurance coverage, stronger regulatory frameworks and accessibility across urban and rural regions must be prioritised to ensure qualitative and quantitative growth

nation of high-value transactions and low practitioner density creates a unique opportunity: one that calls for better access, smarter procurement, and stronger clinical support." The surge in preventive and aesthetic procedures, investments in clinic digitisation, and greater patient awareness are strong indicators of long-term, sustainable growth.

◆ **Demand in urban areas:** He further analyses the rising demand from Tier 2 and Tier 3 cities. "Clinics in these regions are modernising faster than ever, driven by increased awareness, social media influence, and rising affordability," adds Agarwal. This awareness among the consumers also propels practitioners to invest in trusted consumables, equipment and latest innovations.

Agarwal mentions that dentists are also actively pursuing hands-on training, certification courses, and attending events platform which aggregates key workshops and conferences, to upskill themselves through integrated learning.

◆ **At-home services:** At-home dental services are becoming an increasingly popular model of business in the sector. For example, Cura Care, an at-home wellness services brand, raised Rs 5 crore in pre-seed funding in April of this year. Founded in January 2025 by an IIT Delhi alumni duo and an oral surgeon, the company offers at-home services like teeth cleaning, scaling, polishing, and whitening, delivered by DCI-certified dentists using customised portable dental units.

These services gained momentum post-pandemic as concerns about hygiene, travel, and waiting-room exposure led to increased demand for in-home healthcare. Although still a niche offering, at-home dentistry is gaining traction in metros and Tier I cities, especially

among the elderly, differently abled, and time-constrained working professionals.

◆ **Digital transformation:** Emerging technology and artificial intelligence (AI) are reshaping the healthcare industry, streamlining diagnostics, treatment planning, and patient engagement; dentistry is no exception. From diagnostics to treatment planning, new-age technologies are helping practitioners deliver faster, safer, and more accurate care. Among these, AI is emerging as a game-changer in everyday clinical workflows.

Dr Arora opines that AI is the future, and it has already begun to impact dentistry. "Machine learning algorithms can now analyse intraoral images/radiographs, which can detect oral diseases and even early signs of cancer with very high accuracy," he shares. The new AI modules enhance the accuracy of implant placement, minimising complications and maximising success. In orthodontics, he explains, "AI can predict tooth movements and thus optimise treatment timelines by designing aligners." All these tools have become a routine part of clinical practice, assisting dentists in faster, more consistent diagnosis and treatment planning.

He also added, "Robotics-assisted dentistry is still in very early stages, being used for precise, minimally invasive implant placements. These systems combine real-time data with haptic feedback and digital planning to improve outcomes and reduce human error. Soon, we can expect a hybrid model where dentists leverage AI for decision-making and robots for performing repetitive, high-precision tasks."

As AI adoption increases, it promises to make dental care more precise, accessible, and

patient-centric.

### Reach, relevance, and readiness: Strategy for growth

◆ **For B2B providers:** Dr Agarwal suggests focusing on three strategic pillars - reach, relevance, and readiness- to evolve as a B2B provider within the sector.

He explains, "Scaling last-mile logistics infrastructure through a pan-India network of micro-warehousing hubs will enable reliable fulfilment in both urban and underserved geographies."

Curating a globally sourced product portfolio with unique SKUs and providing access to the latest in dental innovation, the provider can maintain relevance. "By offering procedure-based bundles, we make purchasing intuitive and clinically relevant for dentists," adds Dr Agarwal.

To implement readiness, Dr Agarwal explains how Dentalkart implements a digital-first approach. "This includes tools like Smart Quotation Engines, AI-based auto-replenishment, and an in-app assistant for real-time procurement and support," he says. Dentalkart also hosts a CME-certified education platform and diagnostic-to-delivery support for clinics.

"Together, these initiatives position us not just as a supplier, but as a strategic partner in every clinic's growth journey," he concludes.

◆ **For dental practitioners:** Dr Arora explains the key ways in which patient awareness can be improved to bridge the barrier of ignorance and limited awareness.

He describes how Clove Dental conducts more than 2000 dental health camps every month across the country. "The camp dentist uses an intraoral camera and patient

education tools to bring awareness to the masses. The interest level goes up tremendously with the use of an intraoral camera when the person can see their teeth and oral cavity and can appreciate the description by the dental surgeon, along with measures to prevent and control dental diseases."

He says, "Patient awareness and expectations have shown a significant improvement in urban and semi-urban areas, and the dentist-to-population ratio of 1:5000 in these areas is conclusive enough that people are giving priority to their oral health."

Dr Arora states that an increasing number of people are seeking interventions which can make them look good and improve their smile. In addition, the focus is also towards improving the lifestyle rather than settling for routine treatments. The demand for fixed dentures (implants) and invisible braces (aligners) is also on the rise as compared to conventional removable dentures and wired braces.

### Conclusion

The Indian dental industry stands at a promising crossroads driven by growing demand, technological advancements, and increasing consumer awareness. As innovation reshapes diagnostics, treatment, and patient experience, the sector presents an opportunistic space for investments and market expansion.

However, to sustain this growth, systemic improvements will be necessary. Increasing oral health awareness, equitable workforce distribution, better insurance coverage, stronger regulatory frameworks and accessibility across urban and rural regions must be prioritised to ensure qualitative and quantitative growth. With strategic integration into national health policies and public health initiatives, the dentistry sector in India has the potential to evolve into a high-impact, high-volume vertical one that improves oral health outcomes and contributes meaningfully to India's broader healthcare goals.

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