

DENTAL TRIBUNE

— The World's Dental Newspaper · ASEAN Edition —



Eating disorders and dentistry: Identifying early signs in the dental office

Study analyses tooth survival after root canal therapy in US population

Dental sales a mixed bag as war and supply difficulties bog down pandemic recovery

In The Hot Seat

An Interview with Desmond Chong, the President of Malaysia Dental Industry Association (MDIA)

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EDITOR'S MESSAGE

It's the month of July! We are grateful for your ongoing support for Dental Tribune ASEAN. As we are approaching the middle of the year, we've seen a few major events happening across the globe. On Jun 23, the World Health Organization declared the outbreak of monkeypox as a Public Health Emergency of International Concern due to the increasing number of cases which exceeds 17,000 in 75 countries.

Consumer Association of Penang (CAP) stated that stern action should be taken against fake dentists and inspections should be done by the authorities at dental clinics every six months. The unhygienic procedure performed by fake dentists is dangerous as many of them claim to have learned their skills from YouTube and such. It's also believed that they acquire the tools needed from hardware stores or suppliers from other countries that are deemed not intended for medical use.

On a side note, do check out our first-ever interview with Desmond Chong, the President of the Malaysia Dental Industry Association where we talked about how MDIA started its journey, milestones, and vision. MDIA also shared their outlook on Malaysia's



Susan Tricia
Editor

dental industry post-pandemic and matching grant worth RM10 million to develop the medical device industry to encourage investment and export market.

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Publisher

FBI Publications (M) Sdn. Bhd.

Marketing Communication

Nur Izyan binti Dzulkifli
izyandzul@fireworksbi.com

Publication Manager

Vanny Lim
vanny@fireworksbi.com

Assistant Editor

Athira Zawana
atthirah@fireworksbi.com

Creative Designer

Muhammad Fadzil
design@fireworksbi.com

Board of Directors

Kenny Yong
Susan Tricia

Official Magazine of



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Malaysia Publishing Partner

FBI Publications (M) Sdn Bhd



Add: 9-3, Jalan PJU 5/6, Dataran Sunway, 47810, Petaling Jaya, Selangor

Tel: +603-6151 9178

Email: my@fireworksbi.com

International Headquarters

Publisher and Chief Executive Officer

Torsten R. Oemus

Chief Content Officer

Claudia Duschek

Dental Tribune International GmbH

Holbeinstr. 29, 04229 Leipzig, Germany

Tel.: +49 341 4847 4302 | Fax: +49 341 4847 4173

General requests

info@dental-tribune.com

Sales requests

ASEAN region:

vanny@fireworksbi.com

asean.dental-tribune.com

International:

mediasales@dental-tribune.com

www.dental-tribune.com

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S W I S S  M A D E

Eating disorders and dentistry:

Identifying early signs in the dental office

By Iveta Ramonaite, Dental Tribune International



According to the Oral Health Foundation, dental teams can play a crucial role in identifying and acting on early signs of eating disorders. (Image: Paradise studio/Shutterstock)

According to some eating disorder organisations and charities, between 1.25 and 3.40 million people in the UK are affected by an eating disorder. The condition can have a tremendous effect not only on a person's mental health and body image but also on his or her oral health, and a patient's mouth can thus serve as a major indicator of disordered eating. In this regard, the Oral Health Foundation has recently highlighted the role of dentists, dental hygienists, dental therapists and dental nurses in recognising the warning signs and symptoms of eating disorders.

According to various studies, eating disorders are among the deadliest mental illnesses. In the UK, around 275,000 people have binge eating disorder, 235,000 bulimia and 100,000 anorexia. Purging through vomiting often leads to enamel erosion, whereas binge eating may increase the risk of dental caries and tooth loss caused by excessive sugar consumption. Additionally, people with eating disorders often absorb insufficient vitamins and other nutrients, and malnourishment too can be reflected in the mouth. Other dental problems related to eating disorders include sensitive teeth, dry mouth, halitosis and enlarged salivary glands.

Dentists have an important role

In light of the National Smile Month campaign aimed at championing the importance of having good oral health, the Oral Health Foundation has recently stated that dental professionals are well placed to identify eating disorders early during regular dental check-ups.

Brooke Sharp, a clinical advice coordinator at Beat, an eating disorder charity based in the UK, stated that eating disorders often go undetected for a long time, since it is difficult to identify the disorder by just looking at a person. However, since there are physical indicators of an eating disorder that are visible in the mouth, she believes that dentists may be among the first to observe these.

As noted by Chief Executive of the Oral Health Foundation Dr Nigel Carter, OBE, it is already the case that dental professionals examine the hard and soft tissue of the mouth and look for signs of tooth erosion during routine dental examinations. They also have the opportunity to spot possible injuries to the mouth from the insertion of foreign objects to cause the person to vomit.

**“The UK needs a far better strategy for diagnosing eating disorders early”
— Dr Nigel Carter, Oral Health Foundation**

Commenting on the issue, Dr Carter said in a press release: “The UK needs a far better strategy for diagnosing eating disorders early. The sooner an eating disorder is suspected or recognised, then the more effective treatment will be.”

Sharp stated that the charity is already taking action to provide dental professionals with the necessary tools for recognising eating disorders and advising patients on the next steps: “At Beat, we are currently working on a webinar series to educate different health sectors about health, which includes dentists, dieticians, and pharmacists. The aim of this training will be to help professionals identify the signs of an eating disorder and understand how to support their patients.”

However, she noted that, although dental teams may encounter patients with eating disorders, it is not their responsibility to treat the condition. Instead, they should direct patients to professional help: “Whilst it's important to increase awareness of eating disorders, it is never the role of dentists to diagnose or treat the eating disorder, and patients must always be signposted to specialist support,” she concluded.

Study indicates denture wearers may be more at risk of nutritional deficiencies

By Anisha Hall Hoppe, Dental Tribune International



A retrospective longitudinal study conducted by the Regenstrief Institute and the Indiana University School of Dentistry indicates that full or even partial denture wearers might be at risk of nutritional deficiencies. (Image: Shutterstock/Krakenimages.com)

Although prosthodontic treatment is the primary means of helping either completely or partially edentulous patients, nutritional counselling too might be warranted for patients who have received dentures, according to a recent retrospective longitudinal study by Regenstrief Institute in Indianapolis and the Indiana University School of Dentistry.

The study linked laboratory values of nutritional biomarkers with dental records. The laboratory tests included complete blood count, basic metabolic profile, and lipid and thyroid panel tests. The research team compared the nutritional state of 3,519 study subjects who had received removable partial or complete conventional or implant- or abutment-retained dentures with the nutritional state of 6,962 members of a control group who had not received or required prosthodontic intervention. In addition to age and sex, the authors considered other factors available in the electronic records, including race, treatment history, and insurance status. The study used records spanning from 1 January 2010 to 31 December 2018 of patients who had been treated at Indiana University School of Dentistry clinics, and nutritional markers over the course of two years were compared.

Noticeable findings included significant decreases in serum albumin, creatinine and blood urea nitrogen (BUN) in completely edentulous patients after they had received their dentures and an increased estimated glomerular filtration rate (eGFR) in the same group. Those who had dentures also had decreased serum albumin, protein and serum calcium compared with controls. For partially edentulous patients, there was a decrease in thyroid-stimulating hormone, BUN and total

cholesterol. Records for patients who were edentulous in either the maxillary or mandibular arch indicated decreased BUN and eGFR as well.

The authors suggested that lowered levels of serum albumin in denture wearers could have a connection to older patients having problems with chewing and swallowing and in patients who already struggle with chronic inflammation and malnutrition. Generally, serum albumin and prealbumin decrease only in patients who experience severe malnutrition, and the study authors recommended further studies to explore the connection between albumin levels and prosthodontic intervention.

Senior author Dr Thankam Thyvalikakath, a research scientist at Regenstrief Institute and director of the dental informatics core at the Indiana University School of Dentistry, shared her perspective in a press release. She said: “Dentures are a significant change for a person. They do not provide the same chewing efficiency, which may alter eating habits. Dentists need to be aware of this and provide advice or a referral for nutrition counselling. These patients need support during the transition and possible continued monitoring.”

The study authors concluded that serological testing could help with monitoring the health and nutritional state of denture wearers and that patients should be offered nutritional counselling when receiving their prosthodontic treatment.

Although serum albumin, calcium, protein and creatinine decreased in denture wearers, the mean values of haematological markers remained within normal ranges, excluding triglyceride, low-density lipoprotein and total cholesterol. Weight and body mass index were above the normal range. The study authors noted that the latter values indicated overweight patients in both the control and study groups and were consistent with the local population in Indiana.

The risk of undernutrition is not a new consideration, but the use of electronic records enabled a much more feasible approach to evaluating the health and progress of a larger selection of patients.

The study, titled “Nutritional assessment of denture wearers using matched electronic dental-health record data”, was published online in the Journal of Prosthodontics on 23 March 2022, ahead of inclusion in an issue.



A new US study has found that the overall median survival time for teeth after undergoing root canal therapy is 11.1 years. (Image: VanoVasaio/Shutterstock)

Study analyses tooth survival after root canal therapy in US population

By Brendan Day, Dental Tribune International

Though there have been many studies on the survival rate of endodontically treated teeth, only a relatively small proportion of these have analysed these outcomes outside of an academic clinical setting. Using data from a large group of general dental practices across the US, researchers have been able to glean a deeper insight into just how long teeth tend to survive after undergoing root canal therapy and predictors of that survival time.

The study was conducted by a team led by Dr Thankam Thyvalikakath, a research scientist at Regenstrief Institute and director of the dental informatics core at the Indiana University School of Dentistry, both in Indianapolis. The team used de-identified data of 46,702 patients who had received root canal therapy from members of the National Dental Practice-Based Research Network, a consortium of dental practices and organisations throughout the US. According to the researchers, this study is the first of its kind in the US to analyse such records from patients at community dental practices.

Analysis of the data found that the overall median survival time for teeth after undergoing root canal therapy was 11.1 years and that 26% survived for more than 20 years. The researchers also demonstrated that these survival times differed depending on

follow-up treatments and other factors. Teeth that received root canal therapy along with a subsequent filling and crown had a median survival time of 20.1 years, whereas those that received no additional restorative work after the therapy survived for an average of just 6.5 years.

Another significant predictor of tooth survival time after root canal therapy was the presence of dental insurance at any point during dental care. In a press release, Dr Thyvalikakath noted that these findings could “inform dental insurance coverage by demonstrating the value of crowns and permanent restoration options”.

“Oral health is a public health issue that significantly affects people’s overall health. Leveraging dental records can help us better understand ways to improve treatment, identify causal relationships and maintain the health of teeth and gums,” she added.

The study, titled “Root canal treatment survival analysis in National Dental PBRN practices”, was published online in the Journal of Dental Research on 12 May 2022, ahead of inclusion in an issue.



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Jönköping University aims to create new dental programme to address dentist shortage in Sweden

By Anisha Hall Hoppe, Dental Tribune International



Jönköping University in Sweden has announced that it has applied to the federal government for permission to launch the first new dental programme in half a century and that it has the support of local governments and other universities in its efforts. (Image: Shutterstock/Frame Stock Footage)

Sweden has too few dentists in 18 of its 21 regions, and this is expected to continue until at least 2035. To close this gap, Jönköping University has submitted an application to create a new dental programme in conjunction with Linköping University and Jönköping county regional council. Once in full swing, the programme will provide 30 new study places each semester.

The new programme is modelled after a similar successful initiative undertaken in Norway and will also utilise national dental service clinics to provide the clinical hours for the dentists in training. Technology is the core of the new programme, and dental simulators will be used for manual skill practice before working on real patients. A new centre for odontology and oral health science is in the works as well.

Prof. Agneta Marell, president of Jönköping University, commented on the importance of the initiative: “Together, we will contribute to strengthening both the quality and relevance of education, research and technological innovation. This will also facilitate the clinical research that is conducted at the participating clinics, at the same time as providing more career paths in the field of dentistry.”

The new dental students will spend their first two years studying medicine through Linköping University, with the aim that the foundation in medicine will better prepare them for holistic treatment planning. The dental department at Jönköping county regional council will provide additional support and teaching and research staff for the new programme.

The first new dental programme in more than 50 years, Jönköping University’s proposed programme will benefit from the cooperation of more than half of Sweden’s other regions.

Though it is still awaiting approval from the Swedish Higher Education Authority, with the rise of urbanisation in Sweden, the need for dentists, particularly in less densely populated areas is pressing. Remarking on the value of the new programme, Prof. Marell said, “In this way we can address the shortage of dentists, increase the availability of good dental care and contribute to a more equal distribution of dental care throughout the country.”

Parties to the Minamata Convention on Mercury further strengthen phase-down approach to dental amalgam

By Dental Tribune International



Parties to the Minamata Convention on Mercury recently approved limitations for the use of mercury in dental settings. (Image: Shutterstock/Goffi)

To date, more than 100 countries have ratified the Minamata Convention on Mercury, a global treaty to curb the effects of mercury on the environment and human health. Parties to the convention recently rejected a controversial proposal from the Africa region's delegation for an all-out ban on dental amalgam and instead approved two new provisions that add limitations to the use of mercury in a phase-down approach.

It was during the second segment of the meeting of the Conference of the Parties to the Minamata Convention on Mercury in late March that limitations were approved on the use of mercury in bulk form by dental practitioners and in patients under the age of 15 as well as in pregnant or breastfeeding women, instead of supporting an overarching ban on dental amalgam.

Although mercury-free alternatives exist, clinically, economically and practically, they are still less than optimal. Therefore, continued investment is needed to accelerate the development of innovative restorative materials, to increase their durability and affordability and to move them from the laboratory to the market. If this is not done, dental practitioners will witness a negative impact on the provision of quality treatment for dental caries and an increase in tooth extractions, threatening to widen oral healthcare inequalities. Evidence on the health and environmental impact of new restorative materials is also needed.

As there is no solution to every situation faced by the parties as they implement a phase-down approach, organisations such as FDI World Dental Federation emphasise the importance of adapting strategies to national contexts and in line with Part II of Annex A of the convention. The section referred to stipulates that any efforts to phase down the use of dental amalgam should consider relevant international guidance and domestic circumstances and that parties must adopt at least two of the nine measures. The measures include promoting insurance policies that favour amalgam alternatives, encouraging research and development of quality mercury-free restorative materials for dentistry and establishing national objectives for oral health promotion.

In order to be well prepared for the next meeting of the parties in Geneva in Switzerland in 2023, it is recommended that parties should work together with their ministries of environment, ministries of health, national dental associations and chief dental officers to understand the challenges and the feasibility of any recommended approaches. The World Health Organization states that setting up a national coordination committee under the leadership of the respective ministry of environment and ministry of health could create an environment conducive to consensus building for the healthcare sector.

An Interview with Desmond Chong, the President of Malaysia Dental Industry Association (MDIA)





1. Malaysia Dental Industry Association (MDIA) gathers all Malaysia's dental dealers from the dental industry. Briefly share with us MDIA's history and milestones.

MDIA (formerly known as MDDA) is officially registered with the Registrar of Society (ROS) on 2 September 2015 by a group of dental dealers who are markedly passionate about the future of the dental industry, growing to a total of 88 members in 2021. MDIA is the sole national association representing suppliers of dental products & devices in both industries (For dental clinics, laboratories & hospitals used) and consumers (For individual use such as toothpaste, etc) in Malaysia's dental industry.

MDIA started Malaysia International Dental Show (MIDS) on 23-25 September 2016, being the 5th edition in 2022, is the leading international show of its kind to be held in Malaysia and the region, this time organized by both the dental school of the university together with the trade association, namely MAHSA University and MDIA.

Our member companies also play a vital & important role in providing oral healthcare professionals with essential education and training to ensure the safe and effective use of modern technology of the dental device.



MDIA's Vision

To bring professionalism, respect, and ethics to the dental industry in Malaysia.

MDIA's Mission

To ensure the benefits of modern, innovative technology and reliable dental materials & devices, and services are delivered effectively and ethically to provide and improve better oral health outcomes for the Malaysian community at large.

6 Objectives

- (1) To unite all members of the dental industry in a common endeavor to develop the dental industry in Malaysia for the benefit of the members.
- (2) To assist and uphold the member benefits and rights in terms of industrial, business relationships, disputes, social economy, legal and regulatory matters.
- (3) To conduct and coordinate training and education for the dental industry.
- (4) To represent, communicate and collaborate with the relevant ministries and various associations on all matters related to the dental industry.
- (5) To organize conferences, seminars, workshops, and trade exhibitions related to the dental industry and obtain the approval of CPD points from the relevant authorities.
- (6) To represent and promote Malaysia's dental industry and the association regionally and internationally.
- (7) To assist members to obtain funds and grants for business operation and expansion.
- (8) To provide and organize voluntary activities, charitable work, and community welfare.



2. Do share with us MDIA's overview and outlook of Malaysia's dental industry as we exit the pandemic.

The dental industry has been doing fairly well even during the pandemic as we are one of the industries that are allowed to operate. Overall, our members grow even during the pandemic. However, those under the government project had some reduction because of the budget limitation and as the government may fund different areas. So, those doing government projects may have slowed down during the period, and some of them had switched to private. The growth is there and currently, we have almost 1000 graduates. Imagine the numbers after they have completed their study in the government, they will come up either for the private or set up their clinic. Thus, we can see the growth of clinics in the past two years. The classic example is in Taiwan, where the number of the clinic is increasing. The government has also been allowing licenses for dental schools. That is the trend now. It will be good for the supplier because you'll have more deliveries visa to supply more things. Overall, the dental industry perspective is good.

3. In your view, how does the new generation of dentists view dental as a profession?

There are two ways to become a dentist nowadays; through government or private universities are more accessible. The new and young dentists are quite innovative now. They are willing to invest in technology they'll buy new machines such as X-ray machines, intra oral scanners, 3D printers, etc. All of these are more affordable now. However, it's a challenge to get ROI in the initial stage but good to provide better treatment and patient experience in the longer term.





4. MDIA recently had an initial meeting on medical device associations for a matching grant worth RM10 million to develop the medical device industry to encourage investment and export markets. Do share a little bit on this.

Recently we had a meeting between the government and various medical device associations including dental to support the development of the industry mainly to encourage investment and export markets. The dental industry is quite a small industry compared to the medical. The 10 million will channel go to medical more as dental players are mostly traders which means they will need present as a manufacturer. 95% of dental players are traders or distributors, and very few manufacturers. The government grant will support more manufacturers. If you are a trader, it'll be a little bit difficult because the government will encourage the local manufacturing products. As for this, I'm encouraging all the members to go into manufacturing although it will take time and effort. Malaysia has its advantage in term of operating cost as well as upcoming regional ASEAN markets.



5. As we're already started shifting to endemic, what are the latest trends in the dental industry that you could share with us?

Some direct-to-patient dental treatments are happening online such as on Facebook or WhatsApp. The procedure continues with meeting at the hotel with a low-cost treatment which is dangerous because they don't have the proper license, skills, sanitizing and dental equipment. They usually learn the skills from YouTube which is quite dangerous. Our members are not allowed to sell equipment to these individuals/ companies as we have proper medical device registration with the relevant authority to provide to dental professionals only. The worse scenario is they can buy it online easily from unregistered suppliers from overseas. In my view, this is one of the most dangerous trends now. The other trend would be the treatment that de-emphasize the role of doctors, they use the doctors as the partner to kickstart the treatment. The clinic appointment will only be for two or three visits, the company will take over the rest of such by checking through the monitoring in an application. This will create an issue of who will be fully responsible for the treatment, whether is the doctor or the company? This trend will need the government and the industry to monitor and come out the suitable guidelines to protect the patients.

Dental sales a mixed bag as war and supply difficulties bog down pandemic recovery

By Jeremy Booth, Dental Tribune International



Dental companies faced a difficult economic environment during the first quarter of this year, driven by supply chain disruptions, waning consumer confidence and fallout from the war in Ukraine. (Image: mykhailo pavlenko/Shutterstock)

Dental companies may have expected a widespread ebbing away of the SARS-CoV-2 pandemic to bring them out of the financial woods. However, the resulting supply chain crisis has choked the world's ports, and the war in Ukraine has caused consumer price indexes and inflation to soar. Owing to these factors, the first quarter of this year arguably provided a stiffer operating environment than that of two years ago, and economic headwinds appear to have finally caught up with clear aligner therapy.

The first quarter was a challenge for the dental giants Dentsply Sirona, Align Technology, Envista Holdings and the Straumann Group—the latter being the strongest performer during the three-month period ended 31 March.

Sales of clear aligners appeared to be unshakeable at the beginning of the pandemic, but this idea was contradicted by minimal—albeit, symbolic—consecutive dips for the world's largest clear aligner manufacturer. Align had recorded six consecutive quarters of sequential revenue growth prior to the first quarter of this year, when total sales of US\$973.2 million (€914.0 million) represented a 5.6% decline compared with the prior quarter.

In a webcast call with analysts, Align Technology President and CEO Joseph Hogan listed three factors that had resulted in a

challenging quarter: the continued impact of the COVID-19 pandemic, particularly the strict measures in place in China; a difficult economic environment driven by inflation, waning consumer confidence and supply chain disruptions; and fallout from the war in Ukraine.

Hogan explained that industry data showed a decrease in orthodontic demand. He said: “[The] data from about 700 ortho practices, covering more than 1,000 orthodontists across 1,600 locations in the United States and Canada, showed weakening underlying patient demand trends in the first quarter for both adult and teens and across wires and brackets and clear aligner products.”

Hogan added that new patient visits in North America during the period were down by 7.6% year on year.

Dentsply Sirona navigating troubled waters

Dentsply Sirona's revenue for the first quarter was down 6.1% year on year. In the first quarter of 2021, the company topped one billion in sales, and a year later, this had decreased to US\$965 million. Operating income of US\$93 million represented a decline of 39.5%.

Dentsply Sirona reported preliminary earnings with the US Securities and Exchange Commission and did not submit a

Form 10-Q. The company was therefore not in compliance with the listing rules of the Nasdaq stock exchange, where its stock is listed under the XRAY ticker symbol, and was given a period of 60 days to detail the steps it will take to regain compliance. Dentsply Sirona said in a statement in mid-May that it was unable to file its Form 10-Q owing to a pending investigation into its use of incentives to sell products to distributors in the third and fourth quarters of last year. It received a filing of delinquency from Nasdaq.

These events follow an April leadership reshuffle at the dental giant that included the unceremonious dismissal of Donald Casey as board member and CEO of the company and the appointment of John Groetelaars as interim CEO.

Groetelaars said that it had been a challenging quarter, ending with a disappointing result. He said that US sales had been weaker than in the prior quarters and that COVID-19 restrictions in China, supply chain issues and disruptions resulting from the war in Ukraine were hampering the manufacturer. Dentsply Sirona earns roughly 5% of its revenue in China.

Barbara Bodem, the company's interim chief financial officer, noted that currency exchange rates and increased investments in research and development had contributed to the drop in operating income. "We attribute approximately 60% of the year-over-year decline to the transitory macro challenges of foreign exchange, inflationary pressures, and the impact of COVID in China," Bodem told analysts, noting that earnings per share for the first quarter were US\$0.52 versus US\$0.72 in the comparable period last year.

Straumann Group outperforms

Straumann reported revenue of CHF589 million (€573 million), a year-on-year increase of more than 25% compared with the CHF469 million that it banked for the same period last year. Straumann's sales increased by double digits (on an organic basis) in all regions where it operates, and its sales grew most quickly in the Latin America region.

In Latin America, Straumann's sales for the quarter increased by 56.1% to reach CHF39.3 million. Sales of CHF267.2 million for the Europe, Middle East and Africa region represented an increase of 24.7%, and those for North America—at CHF170.1 million—were up by 23.2%. Sales for the Asia Pacific region amounted to CHF112.3 million, and this represented Straumann's narrowest regional growth margin of 21.7%.

Straumann said in its results that patient volumes had remained strong in most countries during the three-month period, except in China, where local lockdowns to contain the spread of SARS-CoV-2 had interrupted patient flow.

CEO Guillaume Daniellot commented that digital solutions, led by intra-oral scanners, had helped sales, and the company attributed some of its success during the quarter to a strong performance from its dental support organisation business in North America and to sales of premium dental implants in the region. In Latin America, orthodontic sales grew rapidly and sales of the Straumann Virtuo Vivo intra-oral scanner drove revenue growth.

Sales growth in China was constrained by COVID-19 lockdowns, Straumann said, but the impact of this had been partially compensated for by strong sales in fellow Asia Pacific markets Japan and Australia and expansion in India. "Across the region, premium implants and orthodontics contributed strongly to the overall performance," the company said.

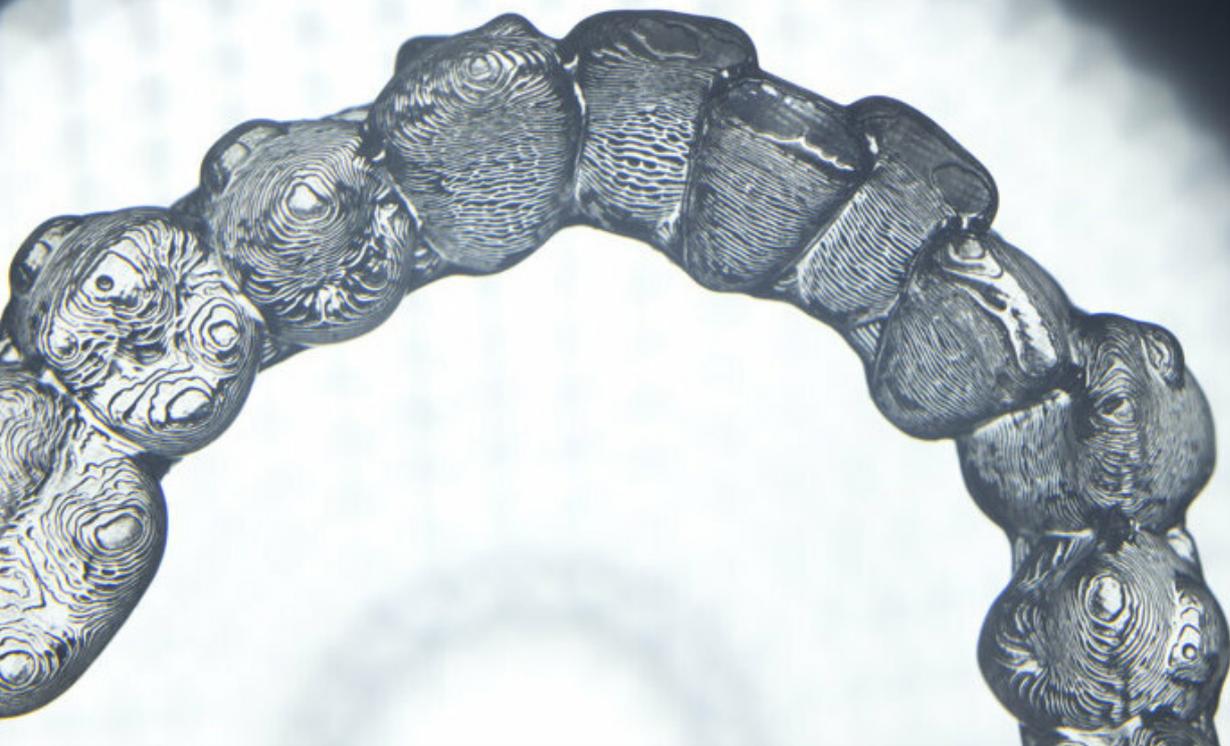
Envista leads way to differentiated portfolio and remains upbeat on dental

During the quarter, Envista further aligned its portfolio with faster-growing segments of the dental industry. In January, it completed the sale of its KaVo treatment unit and instrument business to Planmeca and announced that it would purchase Carestream Dental's intra-oral scanner business.

The company's revenue from the first quarter amounted to US\$631.4 million and represented a year-on-year increase of 5.4% in core sales growth. Sales of specialty products and technologies were US\$397.1 million, compared with US\$366.5 million in the first quarter of last year, and sales of dental equipment and consumables decreased to US\$234.3 million from US\$246.1 million. Operating profit for these two segments during the period showed little year-on-year change, being US\$70.3 million and US\$45.5 million, respectively.

CEO Amir Aghdaei said in Envista's earnings announcement that the company had performed well in what had been a "challenging macro environment" and that it had made progress towards its goal of transforming its portfolio and building a strategically differentiated dental company. "With the closing of the acquisition of Carestream Dental's intra-oral scanner business, we have now added a suite of world-class scanners and software solutions that further differentiate our portfolio and support our vision of digitising, personalising, and democratising dental care," Aghdaei said.

Signalling the company's ongoing optimism about the dental sector, Envista announced in May that it would acquire Osteogenics Biomedical, a leader in the development of regenerative solutions for periodontists, oral and maxillofacial surgeons, and clinicians involved in implant dentistry. The transaction is expected to close in the third quarter of this year.



Spotlight on Invisalign: The COVID-19 pandemic, waning consumer confidence and fallout from the war in Ukraine are among the factors that have slowed down growth at the world's leading clear aligner manufacturer. (Image: edwardolive/Shutterstock)

Sales slowdown puts the brakes on Align Technology's record run

By Jeremy Booth, Dental Tribune International

Align Technology performed notably well in 2020, even as the pandemic took a bite out of income streams, and the company broke its own sales records in 2021, banking a staggering US\$4.0 billion (€3.5 billion) in revenue for that year. The first quarter of this year marked the end of the Invisalign manufacturer's record run, however, and sequential declines in revenue and product shipments have shaken the company's stock price.

Align recorded six consecutive quarters of sequential revenue growth prior to the three-month period beginning in January 2022. From January to March, total sales of US\$973.2 million (€914.0 million) represented a 5.6% decline compared with the prior quarter. On a sequential basis, clear aligner revenue for the period was down by 0.7%, revenue from systems and services by 24.2% and clear aligner case shipments by 5.1%.

The company shipped 598,800 Invisalign cases during the period, including 175,200 cases for teenage patients, the latter representing a sequential drop of 3.6%.

Despite these negative figures, Align's total revenue during the period still represented an increase of 8.8% (compared with the first quarter of 2021, when the company's sales more than doubled), and year-on-year gains of 7.5% and 15.6% were recorded for sales of clear aligners and systems and services. Analysts commented, however, that Align's fourth-quarter 2021 results had already hinted at a potential slowdown in sales and that its recent report appeared to describe a continuing trend.

News of the sequential dips caused the company's stock (Nasdaq: ALGN) to fall. The latest earnings report was released on 27 April, and the stock price had fallen from US\$360.43 to US\$304.66 by the end of trading on the following day. By 25 May, the stock had recovered from a 30-day low of US\$256.11 to reach US\$270.18; however, it remained down by more than 50% compared with a 52-week high of US\$737.45.

In a webcast call with analysts, Align Technology President and CEO Joseph Hogan said that three factors had resulted in a challenging quarter. These were the continued impact of the



Zacks Equity Research said last year that a US\$1,000 investment in Align Technology made in June 2011 would have generated a 2,668.46% gain as of June 29, 2021. (Image: NATNN/Shutterstock)

COVID-19 pandemic, particularly the strict measures in place in China; a difficult economic environment driven by inflation, waning consumer confidence and supply chain disruptions; and fallout from the war in Ukraine.

Hogan noted that Align had discontinued all its operations in Russia that were not essential to continuity of orthodontic care being provided there and was adhering to international sanctions placed on Russia by Western nations.

Commenting on the key Americas region, where Invisalign case volumes were down by 1.5% year on year and 4.3% sequentially, Hogan explained: “The latest data from the Gaidge practice analysis tool that collects and consolidates data from about 700 ortho practices, covering more than 1,000 orthodontists across 1,600 locations in the United States and Canada, showed weakening underlying patient demand trends in the first quarter for both adult and teens and across wires and brackets and clear aligner products.” New patient visits in the region during the period were down by 7.6% year on year, Hogan added.

For the Europe, Middle East and Africa region, where case volumes had increased by 2.1% year on year, Hogan said that growth had been driven by sales in Italy and the region covering Austria, Germany and Switzerland.

Case volumes in the Asia Pacific region increased by 4.7% year on year. The company’s result in the region was affected by lockdowns in China, but boosted by sales in Japan and Taiwan and growth in the emerging markets of South Korea, India and Thailand.

John Morici, Align’s chief financial officer, told analysts that the pressures that the company faced from January to March had not eased during April and had increased uncertainty in all markets in which Align operates. “We also anticipate capital equipment sales will be increasingly constrained throughout the year as practices adjust to these headwinds,” Morici said.

Hogan added that Align’s flagship product Invisalign is a “unique mass customisation business operating in real time with no inventory or distribution at the front end of our market. Consequently, fluctuations in the macroeconomic environment are felt faster at Align than [any that] I have ever experienced anywhere in my career.”

Digitally visualise clear aligner treatment results with new Align Technology outcome simulator

By Dental Tribune International



Dentist delivering an Invisalign treatment consultation using Align's Invisalign Outcome Simulator Pro tool on an iTero Element 5D Plus imaging system. (Image: Align Technology/Business Wire)

Align Technology has introduced a new digital tool that uses advanced algorithms to provide in-face visualisation of a patient's potential future smile after clear aligner treatment. The tool is available on iTero Element Plus Series imaging systems, and the company says that a realistic simulation of treatment results can be ready in just minutes, transforming the consultation process.

The Invisalign Outcome Simulator Pro is the next generation of advanced patient communication tools from Align Technology. The manufacturer of clear aligners, imaging systems and software said in a press release that the tool enables dentists to show patients what the potential results of their Invisalign treatment would look like, using the viewing options of either in-face visualisation or 3D dentition view. Align said that the tool expands its existing Invisalign Outcome Simulator technology to include the benefits of the company's ClinCheck in-face visualisation tool that combines a photo of a patient's face with his or her 3D-treatment simulation, thus creating a more personalised view of potential treatment outcomes.

Dr Jonathan Fitzpatrick, an aesthetic and restorative dentist based in Glasgow in Scotland, said in the press release that the tool had transformed his consultation process. "It's been a real game-changer in driving case acceptance as the emotional impact from a patient seeing their smile transformation in their own face is incredibly powerful," commented Dr Fitzpatrick, who participated in a limited market release of the tool. He added: "I recently had a patient who came in for a hygiene appointment and ended up accepting an Invisalign treatment after seeing the in-face visualisation of their potential future smile."

Align said that the Outcome Simulator Pro supports streamlined workflows and helps dentists to make the most of patient chair time. The tool requires two sets of digital patient images: photos, which can be captured on a mobile device using the Invisalign Practice App, and digital scans taken on the iTero Element Plus Series scanner. Outcome Simulator Pro then starts automatically, working in the background and enabling dentists to continue the consultation using other iTero tools while the treatment simulation is generated.

Yuval Shaked, executive vice president and managing director of iTero scanner and services business at Align, said that the tool demonstrates the company's commitment to offering greater efficiency and added value to dentists and orthodontists. Shaked commented: "It is an exciting new development that furthers Align's vision of an integrated platform of digital products and services, providing a seamless solution for doctors to efficiently and effectively treat their patients with Invisalign clear aligners and to build their practices through a holistic, end-to-end digital treatment experience."

Align said that the tool is currently in limited market release and that it will be available on all iTero Element Plus Series scanners and imaging systems from the second half of this year.



Straumann Group to acquire Berlin clear aligner manufacturer PlusDental

By Jeremy Booth, Dental Tribune International

The dentist-led clear aligner treatment solutions provider PlusDental is to become part of the Straumann Group. The full acquisition will add a growing European clear aligner provider to the Swiss dental giant's portfolio, which already includes the ClearCorrect brand and a majority stake in DrSmile.

PlusDental combines consumer marketing expertise with dentist-led treatments, complementing Straumann's strategic priority to invest in the orthodontics segment. With PlusDental under its wing, Straumann will expand its footprint in the dentist-led consumer orthodontics segment by increasing its market coverage in countries such as the Netherlands, Sweden and the UK.

Straumann said that the acquisition will further strengthen its strategic consumer expertise and unlock further growth potential. PlusDental has built up a broad network of clinics across Europe, and this network will accelerate Straumann's expansion, especially in the aforementioned markets.

Guillaume Daniellot, CEO of Straumann, commented: "With its high-quality medical, tech- and data-driven approach, the PlusDental business will further add to our medical expertise in the orthodontics space to ensure high-quality care can be offered to health consumers. In addition, this will enable us to offer dentists further opportunities to offer convenient, clinically based, quality treatments to patients which will help them grow their practices."

Eva-Maria Meijnen, Lukas Brosseder and Dr Peter Baumgart, co-CEOs of PlusDental, added: "We are looking forward to working together with the Straumann Group. This is a very exciting opportunity as both companies share the vision of high-quality dentistry and putting patients first. Together we will provide access to dental care to many people in the future."



PlusDental is a growing provider of dentist-led clear aligner treatment solutions and Straumann Group has announced that it will pay around CHF 135 million (€131 million) to acquire the company. (Image: Alexandr Grant/Shutterstock)

PlusDental offers clear aligners for treating mild and moderate malocclusions in the anterior region. The company develops and manufactures aligners in its dental laboratory in Berlin in Germany, based on assessment by registered dentists. The company attracts patients seeking aesthetic dental treatment to its website through targeted advertising. PlusDental combines consistent digitalisation and high medical standards with the goal of making innovative dentistry accessible to more people. In addition to working with experienced partner dentists across Europe, the company is supported by an independent medical advisory board.

Basic terms of the signed purchase agreement were disclosed. Straumann will pay approximately CHF 135 million (€131 million) to purchase the company. The transaction is subject to regulatory approval and is expected to close in the coming weeks.



Something to smile about? SmileDirectClub wants to become profitable by 2024 by attracting orthodontic customers from higher-income households. (Image: Vladimir Trynkalo/Shutterstock)

SmileDirectClub slashes net loss, signals major strategy change for 2022

By Jeremy Booth, Dental Tribune International

SmileDirectClub (SDC) became the public face of direct-to-consumer (D2C) orthodontics when it experienced phenomenal growth between 2014 and 2019. However, its business model of retail shops and lower-cost D2C therapy left it exposed to the pandemic's economic headwinds, and David Katzman, SDC's chairman and CEO, has signalled that the company is already in the midst of a major strategy change that will result in the test marketing of a new product offering within the next 12 months.

SDC began 2022 with a strong result. In the first quarter, it only lost US\$73.0 million (€68.1 million). This was around US\$22 million less than it lost in the previous quarter, when its net

loss from continuing operations totalled US\$95.6 million, and a far cry from earlier deficits. In the third quarter of 2019, for example, the company posted a net loss of US\$387.6 million. According to Katzman, SDC has enough liquidity and cash to fuel its growth plans, and it aims to become profitable by 2024.

What made the three-month period a success for the company was the US\$152 million that it posted in total revenue—a sequential increase of more than 20%—steady shipments of 76,254 unique clear aligner cases and the initiation of what SDC calls the “right-sizing” of its operational structure, which began in February. A closer look at the company's most recent balance



US\$5,000 to US\$8,000 price tag for clear aligners,” and added: “From day one, these customers have been a massive tailwind to our business in the Americas and rest of the world.”

“We know that traditional orthodontic customers come from higher-income households” – David Katzman, CEO, SmileDirectClub

Katzman commented in the recent call that accelerated inflation during the first quarter had further constrained non-discretionary spending among this demographic and that this had had a significant impact on the company’s ability to grow. He said: “While we believe strongly in our mission to democratise access to care and in our ability to achieve our long-term growth targets with this demographic, we also believe that the quality of our product, the convenience of our telehealth offering, and the awareness of our brand, provides the right to win by taking share from traditional wires and brackets as well as other more expensive clear liner therapies.” He added: “We know that traditional orthodontic customers come from higher-income households.”

SDC has previously mentioned that it aims to re-evaluate its international footprint and to move into the higher-price bracket of clear aligner therapy through its challenger campaign—directly challenging competitor brands such as Invisalign. However, until this point, the company has remained tight-lipped about the details that such a transition would entail. Katzman said the higher-income consumers whom it wants to attract have different needs to those of its current key demographic, including that of starting treatment with a general practitioner. He said that SDC would continue to invest in its retail stores and grow its partner network of dentists, “allowing [higher income consumers] to start their journey the way they seem to prefer, which is through a neighbourhood GP office supplemented with our convenient telehealth platform and our advanced connected tools”.

SDC would adapt its service model for this purpose, Katzman said, in order to improve the appeal of its product offering. He noted: “While we are not ready to share the specific details of this premium offering, the team is working diligently to get a test in market as soon as possible and begin rolling out in late 2022 or early 2023.”

SDC has a partner network of dentists that currently consists of 673 global practices that are live or pending training, and it has branded oral care products on shelves at more than 16,300 retail stores around the world.

sheet reveals that, on a sequential basis, it decreased its general and administrative expenses by more than US\$10 million and that it incurred a similar amount of additional expenses for restructuring and related costs. Interim Chief Financial Officer Troy Crawford told analysts in early May that SDC had paid around US\$20 million during the quarter for expenses related to the severance and retention of team members and to the exit of the company from some geographical areas.

Company information states that SDC now operates in the US, Canada, Australia, the UK, Ireland and France, indicating that it has exited at least three markets. The company announced its expansion into New Zealand in late 2019, and into Germany and Hong Kong in 2020.

SDC has struggled during the pandemic, largely owing to a combination of factors which have constrained the spending of the company’s key demographic, which typically has a median household income of US\$68,000. Katzman said in November that this demographic “historically could not afford the



US-based Henry Schein aims to expand its dental distribution business in Switzerland through the acquisition of dental distribution company Condor Dental. (Image: rafapress/Shutterstock)

Henry Schein to acquire Condor Dental and expand its operations in Switzerland

By Dental Tribune International

Henry Schein has signed a definitive agreement to acquire the privately held dental distribution company Condor Dental in a transaction that the healthcare distributor says will enhance its ability to serve pan-European dental support organisations.

Henry Schein has served the Swiss dental implant market since 2004 through its Basel-based subsidiary CAMLOG Biotechnologies, and the addition of Condor Dental to Henry Schein will expand its dental distribution business in Switzerland.

Condor Dental is based in the Swiss town of Vouvry and was established in 1978. Its sales last year were approximately US\$18.0 million (€15.9 million), the majority of which was from dental consumable merchandise and the customisation of dental practices and dental laboratory installations. Once the transaction closes, Condor Dental will join Henry Schein's international distribution group, and CEO Yves Mailliard will continue to lead the company.

"We look forward to welcoming the Condor Dental team to the Henry Schein family," said Stanley M. Bergman, chairman of the board and CEO of Henry Schein. "Our companies share

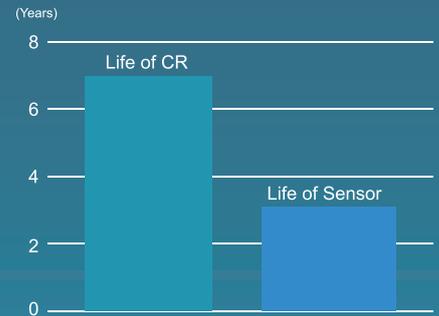
the same values and emphasis on delivering an exceptional customer experience. Condor offers a comprehensive product portfolio and has multiple opportunities for growth in one of Europe's most attractive dental markets," Bergman added.

Andrea Albertini, president of Henry Schein's international distribution group, said that Condor Dental is a highly regarded company that has been serving dental professionals for over 40 years. "With the support of Henry Schein's operational expertise, Condor Dental will be better resourced to strengthen its position in the marketplace and improve the level of services and solutions offered to dental practitioners," Albertini commented.

Condor Dental is owned by MCCB Holding, a healthcare holding company.

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SINGAPORE | Fireworks Trade Media Pte Ltd (HQ)

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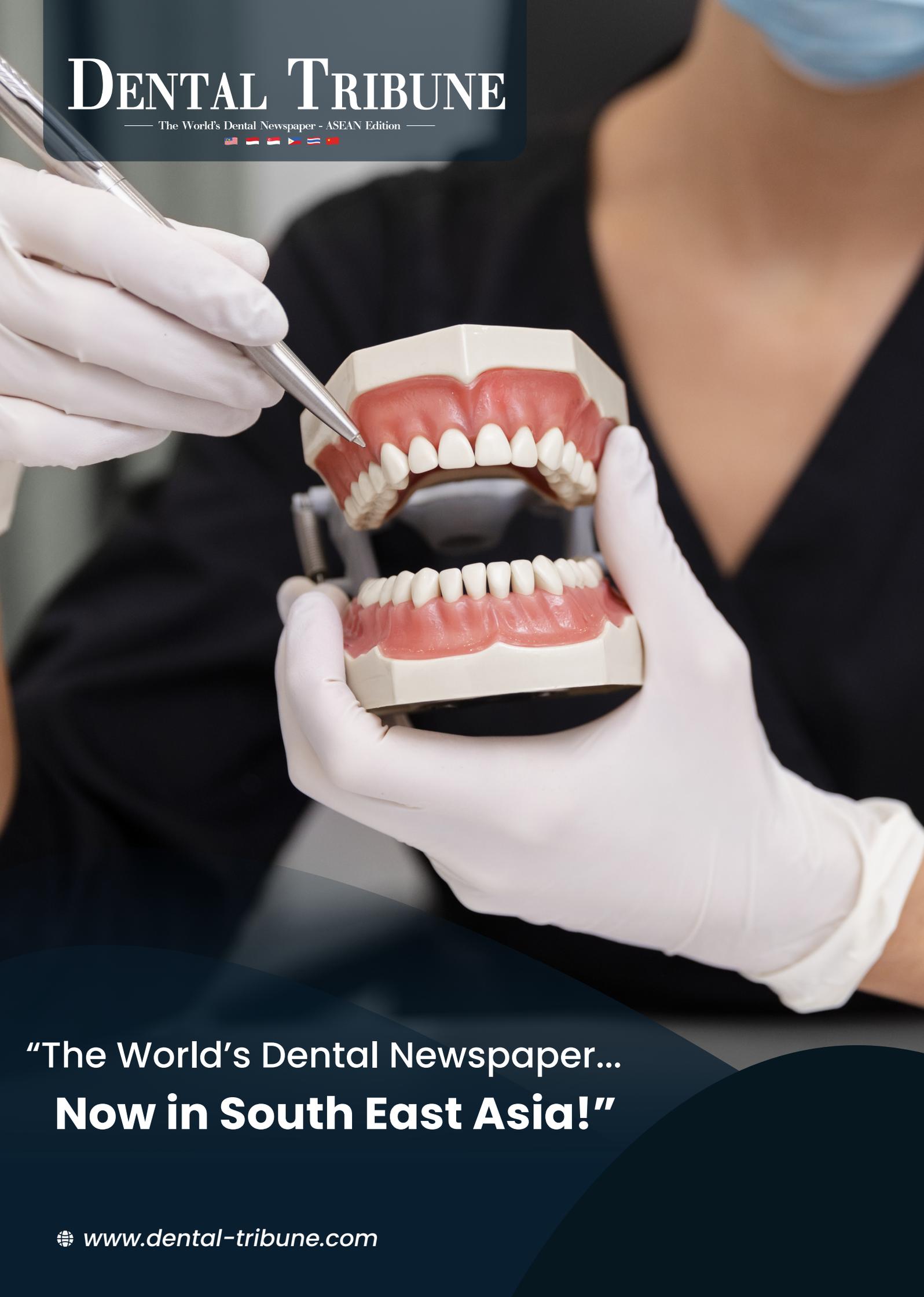
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