

Dental/DSO Industry Newsletter

Dental/DSO Industry Market Intelligence

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CALENDAR OF EVENTS

Live Patient Three Session Implant Continuum

FEBRUARY 23–28, 2025
Guatemala City

The Live Patient Three Session Implant Continuum is designed for dental professionals seeking to refine their implantology skills. The hands-on course provides a deeper understanding of treatment planning for implant cases, techniques for reflecting full-thickness flaps and suturing, as well as strategies for managing complications. Participants will also gain proficiency in placing single and multiple implants and completing the therapeutic process, ensuring they're equipped to handle all stages of implant treatment.

For more information, please click [here](#).

Pacific Dental Conference 2025

MARCH 6–8, 2025
Vancouver Convention Center

The Pacific Dental Conference is one of the largest dental conferences in Canada and a major event in North America. It features over 200 sessions and hands-on courses led by experienced speakers, offering a variety of educational opportunities for dental professionals. With nearly 300 exhibitors, the conference highlights the latest dental technology, products, and services to support your practice. Join us next March at the Vancouver Convention Centre for a conference focused on learning, networking, and industry advancements.

For more information, please click [here](#).

The Thomas P. Hinman Dental Meeting

MARCH 20–22, 2025
Georgia World Congress Center
Atlanta, GA

The three-day event offers educational programs, speakers, social events and a product exhibit hall. The Meeting is sponsored by the Hinman Dental Society, a non-profit organization, and excess revenue is invested and then gifted in the form of scholarships to individuals and institutions that foster dental education. The Society has provided more than \$11 million in total giving to date.

For more information, please click [here](#).

SmileCon 2025

OCTOBER 23–25, 2025
Washington, D.C.

Save the date for SmileCon 2025, where participants can join dental professionals on October 23–25 in Washington, D.C.

For more information, please click [here](#).



Please contact us if you would like to post information regarding our upcoming events or if you'd like to guest author an article for this newsletter.

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KEY FINDINGS

The second Trump administration is planning changes that will impact the dental industry, and ADA and other outfits are concerned.

The FDA also approved suzetrigine, a non-opioid pain manager, and DSOs are expected to see a sizeable number of mergers and acquisitions over the next few years.

As President Donald Trump begins his second term, [significant changes](#) in oral healthcare policies are anticipated. Advocates, including Melissa Burroughs of the CareQuest Institute for Oral Health, are focusing on several key areas for reform, such as expanding dental coverage under Medicaid and Medicare. There is also a call to improve access for veterans and address the affordability issues faced by millions of uninsured Americans. Additionally, efforts to raise awareness about the connection between oral health and overall health, including advocating for water fluoridation, remain a priority for policymakers aiming to integrate oral healthcare into broader health initiatives.

However, there are concerns within the dental community regarding potential disruptions to federal financial support under the Trump administration. The American Dental Association (ADA) [expressed alarm](#) over the administration's decision to pause critical funding for oral health initiatives. This pause could affect various programs managed by the National Institutes of Health (NIH), the Health Resources and Services Administration (HRSA), and the Centers for Disease Control and Prevention (CDC), all of which play vital roles in advancing oral health research, education, and care. Although a federal judge temporarily blocked the directive, the ADA is urging Congress to clarify and restore the status of these programs to avoid further disruptions.

Meanwhile, the ADA is [continuing to push](#) for greater integration of oral health into broader federal healthcare priorities. The association sent a comprehensive policy letter to President Trump, advocating for improved access to care and the promotion of evidence-based dental care practices. Key proposals include enhancing dental coverage under the Affordable Care Act and increasing dental leadership within military healthcare. The ADA also called for better support for veterans, updates to federal student loan programs for dental professionals, and expanded eligibility for health savings accounts to include preventive oral health products.

In the regulatory space, the ADA's Commission for Continuing Education Provider Recognition (CCEPR) is [simplifying](#) its Continuing Education Provider Recognition standards. This update, effective in 2026, reduces the number of standards from 14 to five and significantly cuts the criteria from 104 to 17. These changes are aligned with the guidelines of the Accreditation Council for Continuing Medical Education (ACCME) to ensure quality and integrity in continuing education for dental professionals. The move aims to streamline processes while maintaining high standards in dental education and practice.

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KEY FINDINGS (cont'd)

On the pharmaceutical front, the approval of [suzetrigine](#) by the FDA represents a significant step in non-opioid pain management. The drug, which targets sodium channels, offers a safer alternative for managing moderate to severe pain without the risks of addiction or overdose. With promising clinical results showing that over 80% of participants found it as effective as opioids but with fewer side effects, suzetrigine could provide a crucial option for pain management, particularly in post-surgical dental procedures. This approval marks a critical moment in efforts to combat the opioid crisis within the medical and dental fields.

In the business sector, dental service organizations (DSOs) are preparing for a [wave of consolidation](#) over the next few years. Leaders in the DSO sector predict an uptick in [mergers and acquisitions](#), fueled by the availability of private equity funds and an aging dental workforce. The trend is expected to accelerate as more dental professionals near retirement, creating a natural shift toward consolidation. However, industry experts emphasize the importance of strategic diligence to ensure that the consolidation leads to sustainable, high-quality care, rather than repeating mistakes from past models.

Elsewhere, the California Dental Association (CDA) [launched a relief fund](#) to support dental professionals affected by wildfires in Southern California. This initiative provides emergency grants to dentists and dental society staff who have been impacted by the recent fires, addressing immediate safety and recovery needs.

Sources: Beckers Dental & DSO Review, ADA News, Orthodontics Products, DentistryIQ, CDA.

GENERAL DENTISTRY NEWS

Family-owned dentistry thrives despite corporate expansion

Pediatric Dentistry of Columbus, founded by Dr. David Curtis in 1988, has remained a trusted provider despite the rise of corporate dental chains in the state and country. While corporate dental offices offer advantages like larger staff and multiple locations, Dr. Curtis emphasizes the importance of personal relationships built over decades. The practice has successfully expanded to multiple locations, proving that quality service and patient trust remain key to long-term success. Curtis added that his daughter, Dr. Katie Curtis Windham, recently joined his practice.

Source: WBCI FOX

FDA approves Suzetrigine, a non-opioid alternative for pain management

The FDA approved suzetrigine, marketed as Journavx, as the first non-opioid painkiller in decades for moderate to severe pain relief. This sodium-channel-targeting drug provides effective pain management without the risks of addiction, overdose, or sedation, making it a potential game-changer for post-surgical pain in dental and other medical settings. Clinical trials showed promising results, with over 80% of participants rating suzetrigine as effective as opioids but with fewer side effects. Suzetrigine currently treats only acute pain, while other emerging alternatives like LTG-001 may provide faster pain relief. Experts believe this approval marks an important step toward safer pain management options amid the ongoing opioid crisis.

Source: DentistryIQ

Oral healthcare policies could change under Trump's second term

As President Donald Trump begins his second term, experts are closely watching potential policy changes that could impact oral healthcare access and affordability. Melissa Burroughs, director of public policy at the CareQuest Institute for Oral Health, said key policies she'd like to see include expanding dental coverage under Medicaid and Medicare, improving access for veterans, and addressing affordability challenges for millions of uninsured Americans. Advocates are also pushing for greater awareness of the medical-dental link to drive policy changes that integrate oral healthcare into broader health initiatives. Burroughs says efforts to promote water fluoridation and maintain its scientific credibility also remain a focal point in oral health advocacy.

Source: Becker's Dental

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GENERAL DENTISTRY NEWS (cont'd)

ADHA approves two interim policies on anesthesia, licensure

The American Dental Hygienists' Association (ADHA) Board of Directors approved two interim policies on anesthesia administration and dental hygiene licensure. One policy states that only licensed dental practitioners with advanced education should administer local anesthesia, and the other affirms dental hygienists must complete an accredited program and meet all clinical and examination requirements. ADHA's Board of Directors says all policies will be reviewed for official adoption by ADHA delegates in June 2025.

Source: ADHA

Oregon passes dental licensure reform to remove stigmatizing mental health questions

Oregon's Board of Dentistry in Dec. 2024 voted to eliminate stigmatizing mental health questions from its dental licensure applications. After 18 months of advocacy led by the Oregon Dental Association (ODA), the new language removes invasive "have you ever" questions related to mental health and substance use treatment. The changes were supported by a broad coalition, including the Oregon Dental Hygienists' Association and several major dental organizations, and the updated licensure format, taking effect sometime in Feb. 2025, aligns with national efforts to combat discrimination against those seeking mental health treatment. The board says the reform aligns with the approach already used by the Oregon Medical Board and aims to reduce stigma, encourage dental professionals to seek help, and support overall clinician wellness.

Source: ADA

ADA concerned Trump Administration pause on federal financial assistance could impact oral health

The American Dental Association (ADA) is concerned with the Trump administration's directive to pause federal financial assistance programs, potentially disrupting crucial oral health initiatives. The ADA says pausing federal funding from agencies like the National Institutes of Health, Health Resources and Services Administration, and Centers for Disease Control and Prevention are essential to advancing oral health, education, and care delivery. The pause could delay critical programs, such as NIH grants, HRSA oral health programs, and CDC prevention efforts. While a federal judge temporarily blocked the directive, the ADA urges Congress to clarify the status of these programs and avoid further disruption.

Source: ADA

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GENERAL DENTISTRY NEWS (cont'd)

ADA advocates for integrating oral health into federal healthcare priorities

The American Dental Association (ADA) sent a 15-page policy letter to President Donald Trump, urging the integration of oral health into federal healthcare priorities. Key proposals in the letter include improving access to care, promoting evidence-based approaches, and advocating for adult dental coverage under the Affordable Care Act. The ADA also calls for enhancing dental leadership within military health care, supporting Veterans Affairs funding, and updating federal student loan programs for dental professionals, as well as expanding eligibility for health savings accounts to cover preventive oral health products, advocating for policies that improve oral health outcomes and patient access across the nation.

Source: ADA

CDA launches wildfire relief fund to aid dentists impacted by Calif. fires

The California Dental Association (CDA) Foundation established the Southern California Wildfire Relief Fund to support dental professionals impacted by recent wildfires. The fund is accepting tax-deductible donations to assist with safety and recovery efforts for affected dentists and staff. Eligible individuals, including dentists and dental society staff, can apply for disaster relief grants to address immediate and emergency needs. As of Jan. 16, nearly 30 dentists in the region have reported claims to The Dentists Insurance Company.

Source: California Dental Association

Future of Canada's National Dental Care Plan uncertain as election nears

With a federal election looming, the expansion of the Canadian Dental Care Plan remains stalled, leaving two-thirds of eligible Canadians without coverage. Health Minister Mark Holland insists the program will be completed but acknowledges the uncertainty surrounding its future. Opposition parties, including the NDP, are preparing to trigger an election as early as March, further jeopardizing the rollout. Without full implementation before the election, concerns grow that a new government could alter or scrap the program altogether.

Source: CBC News

ADA commission revises accreditation standards, streamlines continuing education requirements

The American Dental Association Commission for Continuing Education Provider Recognition (CCEPR) is streamlining its Continuing Education Provider Recognition (CERP) Standards, reducing them from 14 to five and cutting criteria from 104 to 17. The updated standards, effective June 1, 2026, align with the Accreditation Council for Continuing Medical Education's (ACCME) guidelines to ensure integrity and independence in continuing education. The changes aim to simplify recognition processes while maintaining high-quality, evidence-based education for dental professionals. Additionally, the ADA CERP application will be updated to reflect these changes and released in Jan. 2027.

Source: Orthodontic Products

DSO EXPANSION & CONSOLIDATION

Straine Dental Management, Dr. Scott Jolly acquire Ar. dental practice

Straine Dental Management (SDM) and Ar.-based dentist Dr. Scott Jolly expanded their partnership with the acquisition of Jolly's second dental practice in the state, located in Benton. SDM says the deal marks the company's 46th location and underscores the DSO's commitment to collaborative practice management and advancing dental care. SDM said it's proud to deepen its relationship with Jolly and his practitioners, and the collaboration exemplifies the success behind SDM's partnership model, where dentists play a crucial role in shaping the future of their practices.

Source: Straine Dental Management

Dr. Bob's Dental Care joins MB2 Dental to boost services

Dr. Bob's Dental Care, a multi-location dental group serving Western New York for decades, partnered with MB2 Dental. MB2 Dental, a Dallas-based dental partnership organization, collaborated with over 750 general and specialty practices across 44 states since its founding in 2007. The partnership aims to enhance operational support and long-term growth for Dr. Bob's Dental Care.

Source: Group Dentistry

Specialized Dental Partners expands with addition of San Gabriel Oral & Maxillofacial Surgery

Specialized Dental Partners added San Gabriel Oral & Maxillofacial Surgery in Georgetown, Texas, to its network. Led by Dr. Michaelanne Briggs and Dr. Grant Nakashima, the practice joins a group that now manages over 20 locations in Texas. The organization's broader network includes more than 200 offices across 35 states.

Source: Group Dentistry

Lone Peak Dental Group acquires two Vital Smiles locations in Ga.

Lone Peak Dental Group expanded into Ga. by acquiring two Vital Smiles pediatric dentistry practices in Albany and Norcross. These locations include 12 providers, with two orthodontists, marking the company's first presence in the state. The organization now operates over 75 practices across 15 states, serving more than 580,000 children each year.

Source: Group Dentistry

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DSO EXPANSION & CONSOLIDATION (cont'd)

Parkview Dental Partners expands in Fla. with Lifetime Smiles acquisition

Parkview Dental Partners acquired two Lifetime Smiles Dental Care practices in Sarasota and St. Petersburg, Fla, further growing its presence in the region. This follows its recent acquisition of Breezy Dental in Tampa. Lifetime Smiles Dental Care has served the area for ten years, with Dr. Christopher Donato as its owner.

Source: Group Dentistry

Allied OMS Expands in Texas with Parkway Oral Surgery Partnership

Allied OMS added Parkway Oral Surgery & Dental Implant Center in Houston, Texas, to its growing network as part of its strategic expansion. Parkway Oral Surgery is led by Dr. Laith Mahmood, while Allied OMS, founded in 2020, is led by CEO Dan Hosler. The addition strengthens Allied OMS's presence in Texas and other key U.S. markets.

Source: Group Dentistry

Freedom Dental Partners launches second DSO

Freedom Dental Partners launched its second non-traditionally structured DSO, which it says will empower dentist owners with entrepreneurial opportunities. With the launch of its second DSO, Freedom pointed to its first attempt with a Va. organization, which expanded 10 practices in 2024 to an additional six in 2025. CEO Avi Weisfogel said Freedom's Dental Partnership Platform offers a dentist more autonomy to run their practice, while also eliminating costs, mitigating risks, and allowing the doctor to receive financial upside.

Source: Freedom Dental Partners

PDS Health expanded network with 60+ new practices in 2024

Henderson, Nev.-based PDS Health has added over 60 dental and medical practices to its network in 2024, strengthening its focus on medical-dental integration. The expansion includes 59 dental practices and four primary care offices across 13 states, with the largest growth in California, Florida, and Texas. PDS Health now supports more than 1,000 offices across 24 states, reinforcing its position as a major integrated healthcare provider. The company's continued expansion aligns with its mission to improve patient care through collaborative healthcare services.

Source: Pacific Dental Services

OTHER DSO NEWS

Smile Partners scores investment to expand services

The company received a strategic investment through a continuation fund managed by Silver Oak Services Partners, with backing from BlackRock and Hollyport Capital. Smile Partners prioritizes a doctor-centric model, which it says has led to an over 90% doctor retention rate and bolstered expanding from 8 to 110 practices across five states. The invest will support Smile Partners' expansion plans in the U.S., as it seeks to double its footprint in the next three years while maintaining a 75% year-over-year growth rate. Smile Partners said it'll open more locations but it'll be emphasizing strategic affiliations over opening more clinics.

Source: Group Dentistry Now

DSO leaders predict accelerated consolidation in next five years

DSOs are preparing for significant consolidation over the next five years, with industry leaders predicting an increase in mergers and acquisitions starting in 2025. According to Weston Spencer, CEO of SPP Dental Partners, the growth of group dentistry and consolidation is expected to accelerate, driven by ample private equity funds ready for investment. Robert Rubino, CEO of Qualitas Dental Partners, highlights the aging dental workforce, with many practitioners nearing retirement, creating a natural shift towards consolidation. While leaders anticipate more partnerships, they also stress the importance of strategic diligence to avoid the pitfalls of past models and ensure long-term sustainability.

Source: Becker's Dental

Dentists' concerned over increasing amount of IDSO partnerships

Chip Fichtner, Co-founder and Principal of Large Practice Sales, says many dentists are turning to Invisible Dental Support Organizations (IDSOs) for a partnership that offers financial benefits and long-term equity growth, but there are significant concerns. While IDSOs provide lower costs, better recruitment, and higher reimbursement rates, dentists need to ensure they choose the right partner for full autonomy - both clinical and operational. Some IDSOs may remove dentists from key business decisions, limiting their control over staff, technology, and operations. Fichtner says dentists should carefully evaluate potential IDSO partners, considering the financial stability, management quality, and long-term equity potential of each, especially with a growing number of new IDSOs offering promising opportunities for generational wealth. Timing is also critical, with more younger dentists seeking partnerships to secure future value before retirement.

Source: Dental Economics

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OTHER DSO NEWS (cont'd)

CEO predicts surge in dental acquisitions in 2025 as market rebounds

After a slowdown in dental mergers and acquisitions in 2024 due to economic constraints, industry executives anticipate a stronger acquisition market in 2025. Jason Auerbach, DDS, co-CEO of Max Surgical Specialty Management, expects significant growth, particularly in the oral surgery sector, with a focus on high-quality practices. Max Surgical reached its 25-practice milestone in under two years and expects to maintain the momentum as the economy continues to build and recover.

Source: Becker's Dental

DSO market value expected to reach upwards of \$584B by 2032

The global DSO market, valued at \$137.77 billion in 2023, is projected to reach \$583.68 billion by 2032, driven by a 17.4% CAGR. The market's growth is fueled by increased awareness of oral health, rising dental conditions, and growing funding in the sector. Key drivers include DSOs' ability to reduce operational costs, improve productivity, and allow dentists to focus on patient care. With over 3.5 billion people affected by dental conditions globally, the demand for DSOs is set to rise, especially in North America, which currently holds the largest market share, followed by Europe due to the area's rising awareness of oral health.



Source: Polaris Market Research

PRIVATE EQUITY DEALS

Premier Dental Partners with Radial Equity, names CEO

The global dental manufacturer partnered with Radial Equity Partners, a private equity firm specializing in middle-market businesses, though terms of the agreement were not disclosed. As part of the deal, Perry Lowe will take over as CEO of Premier. Premier says the partnership aims to boost Premier's growth in the dental consumables market.

Source: Premier Dental Partners

PARTNERSHIPS AND INNOVATION

AI is revolutionizing dentistry with stress-free visits, better care, and a \$500B Future

Dr. Maria Sokolina, DDS says AI is transforming dentistry by reducing patient anxiety, improving efficiency, and enhancing treatment accuracy. She says AI-powered concierges are streamlining appointment bookings, insurance verifications, and multilingual support, and AI-driven diagnostics and treatment planning are slowly improving accuracy and catching dental issues early to ensure personalized aftercare. Sokolina says that with a \$500 billion investment by Oracle, OpenAI in AI dental tech, innovations will continue to drive and create more comfortable and efficient dental experiences.

Source: Forbes

Michigan dentists phasing out lead aprons for X-rays

Dental practices in Michigan are no longer using lead aprons during X-rays, aligning with updated ADA recommendations. Research shows modern digital X-rays use significantly less radiation, and outdated shielding methods may actually trap radiation or obstruct imaging. While some patients may still request lead aprons out of habit, experts assure that radiation exposure from intraoral scans is minimal, comparable to everyday activities like flying or sun exposure.

Source: Fox Detroit

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PARTNERSHIPS AND INNOVATION (cont'd)

Aspen Dental, vVARDIS partner to combat tooth decay

Aspen Dental partnered with vVARDIS, a biomimetic dental science company, to offer Curodont Repair Fluoride Plus and Curodont Protect at its practices. These non-invasive treatments help remineralize early-stage tooth decay, reducing the need for traditional cavity treatments. Curodont Repair Fluoride Plus targets demineralized areas, while Curodont Protect strengthens enamel and prevents cavities. Aspen says the partnership aims to provide advanced, painless solutions for early decay management and improve patient care.

Source: Aspen Dental

Imagen Dental Partners, Concorde Career Colleges collaborate to tackle Calif. dental hygienist shortage

Imagen and Concorde say they want to help facilitate the growing demand for dental hygienists in Calif. The partnership includes \$10,000 in scholarships for Concorde's Garden Grove, San Bernardino, and San Diego campuses, with plans to increase the amount to \$20,000 later in 2025. Imagen and Concorde say dental hygienist employment is projected to grow by 15.2% in Calif. from 2022 to 2032, and their partnership aims to expand the workforce pipeline through scholarships, with plans to even bring in students from Fla. and Texas.

Source: Imagen Dental Partners

Pearl, Carestream Dental partner to integrate AI-powered dental diagnostics across N.A.

The companies said their partnership will integrate Pearl's AI-powered Second Opinion software into Carestream Dental's CS Imaging platform in the U.S. and Canada. This collaboration aims to enhance diagnostic precision by providing real-time AI evaluations of dental X-rays directly within the imaging system. The integration should improve patient communication, elevate diagnostic accuracy, and streamline workflow for dental professionals. Both companies say they aim to make advanced AI solutions more accessible to providers.

Source: Carestream Dental

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LITIGATION

EPA appeals court ruling on fluoride regulation

The Environmental Protection Agency (EPA) appealed a court order requiring further regulation of fluoride in public water systems, following a coalition letter sent by the American Dental Association (ADA). The appeal challenges a U.S. District Court ruling that directed the EPA to engage with a regulatory response after a group sued the agency over concerns about fluoride's potential neurocognitive effects. The ADA and 12 other organizations argued that the court's decision misapplied scientific research on fluoride's safety and its role in public health, with the ADA continuing to advocate that community water fluoridation is an essential tool in preventing tooth decay.

Source: ADA

WSDA pushing for reform to prioritize patient choice in dental insurance

The Washington State Dental Association (WSDA) is advocating for dental insurance reform through state bills aimed at eliminating deceptive practices and prioritizing patient choice. Senate Bill 5351 and House Bill 1535 propose aligning dental insurance protections with medical insurance, ensuring patients can choose their dentists and access full benefits without corporate limitations. The WSDA is looking to require a portion of premiums to be spent on care, allowing independent reviews of denied claims, and addressing inequities in the system, and say their push for reform targets unfair practices by major insurers, particularly Delta Dental of Washington, which controls up to 90% of the state's market.

Source: ADA

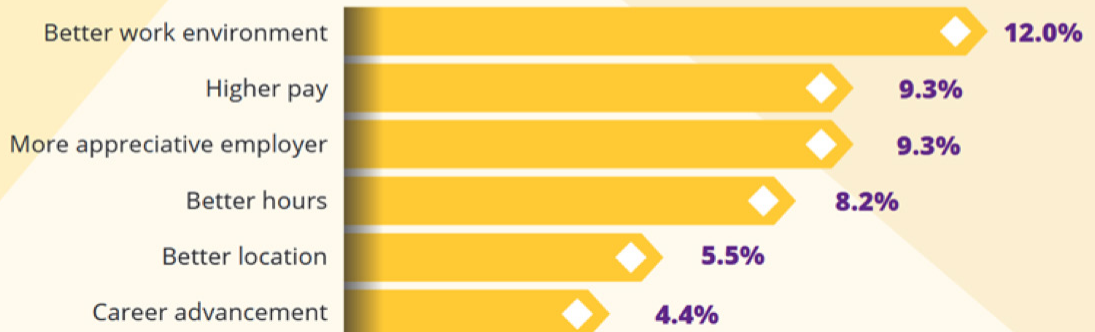
STAFFING

Dental assistant pay reaches 3-year high, but report finds ongoing dissatisfaction remains

In 2024, dental assistants saw a 7.1% increase in average income, reaching a three-year high of \$47,440, according to [Dentalpost's 2025 Salary Survey Report](#). The average hourly rate was \$26.96, with 66% of dental assistants receiving a raise in the past two years. However, despite these gains, 36.6% of dental assistants expressed dissatisfaction with their total compensation, saying its not keeping pace with their needs. However, dental assistants seem happy with their work, as nearly 55% said they're satisfied with their current work.

Motivations for Changing Jobs in 2024

Those who made the jump were most often motivated by the desire for a better work environment, a more appreciative employer, higher pay, and/or better hours — all among the top drivers for those in this position the year prior . Nearly three-fourths (**74.1%**) of transitioners reported that they achieved their goals.



Source: DentistryIQ

Delta Dental of Calif. named one of America's greatest workplaces for diversity in 2025

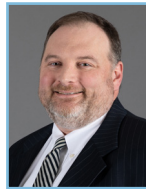
Delta Dental of California was recognized by Newsweek as one of America's Greatest Workplaces for Diversity in 2025, showcasing its commitment to fostering an inclusive and diverse workplace. This accolade is based on employee feedback, public data, and third-party research, with Delta Dental scoring 4.5 out of 5 stars for its DEI practices. The company previously earned recognition in 2023 for its diversity efforts, which it says reflects its ongoing dedication to supporting employees' unique perspectives, which Delta Dental says it'll continue to prioritize in the years ahead.

Source: Delta Dental of California

For more information regarding our Dental Industry/DSO Practice, or if you would like to contribute to the newsletter, please contact:



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