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exocad reveals expanded program highlights for Insights 2026

Global digital dentistry event to feature top international experts and new program highlights

exocad Insights will take place from April 30 to May 1, 2026, in Palma de Mallorca, Spain.

exocad, an Align Technology, Inc. company and a leading dental CAD/CAM software provider, today announced extended program details for Insights 2026, taking place April 30–May 1, 2026, in Palma de Mallorca, Spain. Under the motto "Calling all heroes," the global event will bring together dental professionals from around the world for two days of knowledge exchange, product innovation, and highvalue clinical and laboratory education.

A powerful lineup of international speakers

The expanded 2026 program will feature expert voices in digital dentistry from across the laboratory and clinical spectrum:

- **Dr. Alexis Ioannidis (Switzerland)**, University of Zurich: exploring communicationdriven restorative workflows.
- **Caroline Kirkpatrick (Scotland)**, clinical dental technician: challenging conventional workflows and encouraging crownandbridge technicians to rethink the possibilities of removables.
- **Dr. Zhiqiang Luo (China/USA)**, University of Michigan School of Dentistry: addressing the transformative power of the "digital patient" in modern care pathways.
- **Seth Potter (Canada)**, digital designer and independent certified trainer for exocad: demonstrating how modern smile design can boost both treatment acceptance and business growth.
- **Michaela Sehnert (Germany)**, dentist and "Heroes of digital dentistry" testimonial: sharing strategies to strengthen patient communication and elevate esthetic outcomes.
- **Prof. Dr. Marco Tallarico (Italy)**, University of Sassari: presenting an interdisciplinary treatment workflow with exocad ART and exoplan.
- **Lukas Wichnalek (Germany/Mexico)**, dental technician: introducing a standardized method for esthetic patient data acquisition using TruSmile™.

Key leadership insights from exocad

The program will feature key leadership insights from exocad, including "exocad: What's new, what's next," presented by CEO Tillmann Steinbrecher, and Senior Marketing Manager Niloofar Sotouhi, followed by "The inside track: exocad's take on digital dentistry," a panel discussion with CTO Maik Gerth, CCO Novica Savic and Steinbrecher.

Exclusive iTero Diamond sessions

The Insights program will also feature exclusive sessions by Diamond Partner iTero:

- **Dr. Christian Coachman (Brazil)**, dentist and dental technician: The seven steps towards modern dentistry.
- **Andrea Piantoni (Italy)**, CEO–IDI Evolution, **Massimiliano Rossi (Italy)**, Head of Strategy and Marketing–IDI Evolution, **Dr. Federico Arosio (Italy)**, dentist, and **Zelko Relic (USA)**, Executive Vice President and Chief Technology Officer at Align Technology: ART: Advanced Restorative Treatment - Accelerating Remarkable Transformations Together.

Innovation expo, partner sessions and partner news

An innovation expo will feature manufacturers and distributors of dental materials, equipment, and CAD/CAM showcasing their latest technologies. On day two, the Diamond, Platinum and Gold partners will also hold dedicated sessions to showcase their innovations and present cases, with many planning product news and special updates specifically timed for Insights 2026.

New: Women in dentistry lunch

Insights 2026 will feature the inaugural "Women in dentistry lunch"—a networking and knowledgeexchange session focused on professional development, leadership, and visibility for women in dentistry. The program will include a panel moderated by Christine McClymont, Global Head of Marketing and Communications at exocad, and feature Marjorie Andrade, dental lab tech and digital nomad; Beth Collington, president of exocad America; and Michaela Sehnert, dentist and business owner. Participation requires prior registration.

Spotlight country 2026: China

For the first time, exocad introduces a rotating spotlight country concept. In 2026, China takes center stage with regionspecific innovations, expert insights, and dedicated sessions, celebrating one of the world's most dynamic digital dentistry markets.

Tickets, evening event and special activities

Team discounts are available on tickets. All tickets include access to lectures, breakout sessions, the innovation expo and the evening celebration "exoGlam night," and a set of new morning activities designed to help participants energize, inspire, and connect. Attendees can sign up for the chance to flow into the day with our application specialists doing Tai Chi or head out on a 5k run.

More information is available at:
exocad.com/insights2026

Rethinking Globalization

Baldo Pipitone
CEO Infodent S.r.l.

▹baldo.pipitone@infodent.com

When U.S. and Israeli forces launched coordinated airstrikes against Iranian political, military, and nuclear targets on 28 February 2026, initial attention focused on missiles, air defenses, and the immediate military balance. Within days, however, it became evident that the most significant consequences would not be confined to the battlefield. The real shockwaves would travel through shipping routes, energy markets, and financial systems.

In an interconnected world, economic structures built over decades for a stable era of globalization struggle to function when globalization itself begins to fragment. If the conflict continues, its economic repercussions are likely to spread across global markets, potentially triggering a third major price surge since the pandemic.

Over time, globalization has produced a tightly interwoven world economy, but it has also created critical points of vulnerability. The flows of manufactured goods, raw materials, and people that sustain global trade must pass through a handful of narrow maritime corridors. These chokepoints include the 40-mile-wide Strait of Malacca, through which roughly 80% of China's imported oil flows; the Panama Canal, only 91 meters wide at its narrowest point; the Bab el-Mandeb Strait between Yemen and Eritrea, which carries about 40% of trade between Asia and Europe; and the Strait of Hormuz, through which roughly one-fifth of the world's oil supply travels.

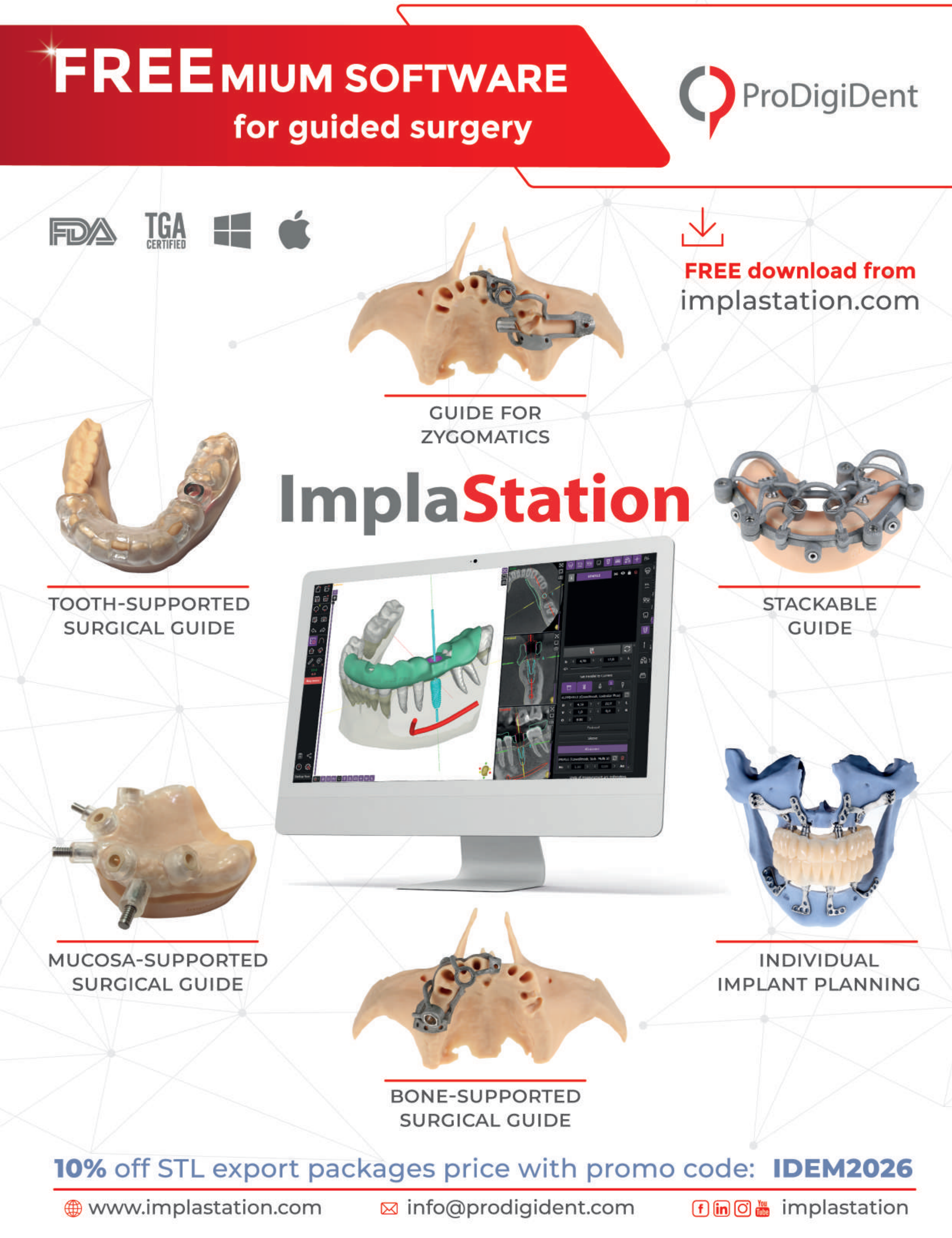
Whether caused by accidents, natural events, or deliberate action, disruptions in any of these passages can have similar global consequences. In 2024, for example, drought severely restricted traffic through the Panama Canal while Houthi forces disrupted shipping through Bab el-Mandeb. The combined impact forced shipping companies to reroute vessels away from both routes, contributing to roughly one-fifth of global inflation that year. Climate pressures, such as Central America's prolonged drought, further increase the likelihood and severity of such disruptions. Even before the conflict with Iran, global shipping patterns had already been altered by attacks on merchant vessels in the Red Sea, prompting major container lines to divert around the Cape of Good Hope. Escalation with Iran introduces a second shock: instead of navigating a single troubled corridor, shipping companies now face simultaneous disruptions in both the Red Sea and the Persian Gulf.

The conflict with Iran has transformed the Strait of Hormuz from a strategic feature on the map into one of the most critical transmission channels linking a regional conflict to the global economy. Even a temporary closure or severe restriction would force global trade onto longer and more expensive routes, increasing strain on already fragile logistics networks and causing delays throughout international supply chains. For policymakers, corporations, and investors, this situation raises a fundamental question: how much global economic risk is concentrated in just a few maritime chokepoints?

The Gulf Cooperation Council (GCC) region—Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates—plays a central role in this global logistics system, acting as a bridge connecting Africa, Asia, Europe, India, and the United States. Dubai sits at the heart of this network. Its main air-cargo airport—ranked the world's eleventh largest in 2024—serves as a major re-export hub, where goods are received, stored, and redistributed worldwide. As trade routes are disrupted, rerouting costs are likely to fall heavily on export-oriented economies and, ultimately, on consumers.

This dependence on a limited number of transport corridors underscores the need for long-term investment in more diversified and resilient supply chains. The Iran conflict and the closure of the Strait of Hormuz represent only the latest chapter in a broader pattern. A series of shocks—pandemics, energy crises, regional conflicts, and climate disruptions—has begun to reshape how governments and businesses assess risk. Several structural responses are already emerging. Many countries are diversifying their sources of energy while accelerating investments in renewable energy and efficiency, particularly in Europe and parts of Asia, to reduce dependence on any single region or transit route. Companies are reengineering supply chains to limit reliance on vulnerable passages such as the Red Sea and the Strait of Hormuz, even if this leads to higher operating costs. At the same time, firms and governments are placing greater emphasis on geopolitical risk analysis and scenario planning, combining insights from economics, security studies, and insurance markets.

In this context, the Strait of Hormuz represents far more than a narrow stretch of water. It has become a test of the resilience of the current model of globalization—and of how quickly companies and governments can adapt when a single maritime corridor becomes the focal point of the world economy.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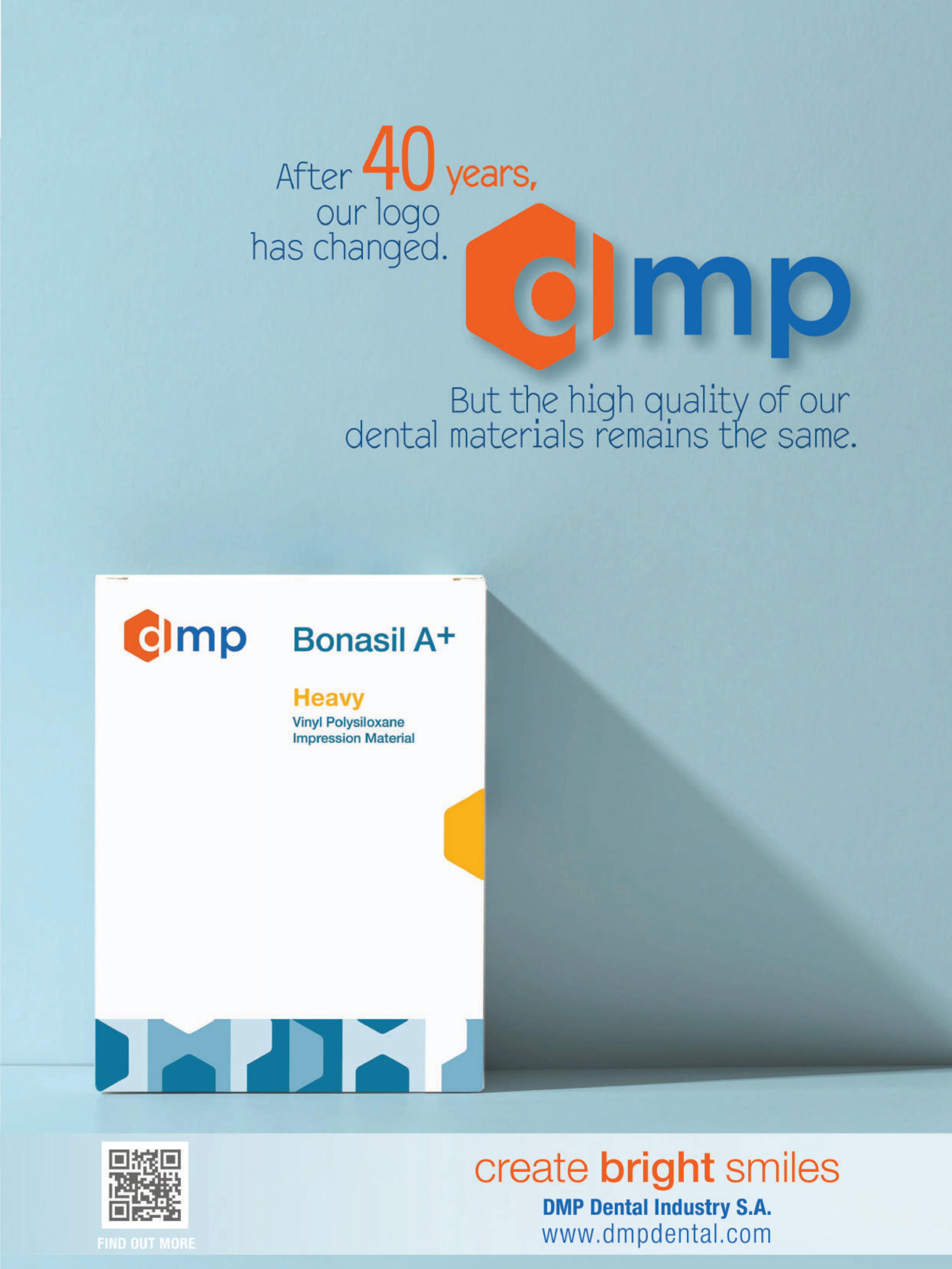
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HORICO: New IPR Bur System Drastically Simplifies Space-Gaining Requirement

IPR (interproximal reduction) is a mainstay in orthodontic treatment. The usual options for IPR are strips, discs, and burs. With strips, the practitioner must start off with an unfolded strip and once some space is created, move on to a thicker strip and work interproximally until the desired amount of space is achieved. This is time consuming, especially in the posterior regions, and can be uncomfortable for the patient.

Discs provide a quicker alternative to achieving space, but if not handled properly, can cause trauma to the teeth, tongue, lips, or cheek. In addition, because the discs are usually not flexible, the contact achieved may be too flat.

Burs offer another quick alternative to gaining space, but typical bur used for IPR is flame-shaped (figure 1). These can create an anatomical problem where the incisal portion of the contact is too wide or open. In addition, bur manufacturers rarely label their products with the exact diameter of the bur at each section, meaning that the tip of the bur will have a smaller diameter than the base of the bur, and the practitioner will not typically know any of those dimensions. If aligner prescriptions call for 0.2, 0.3, 0.4 or 0.5 mm of space between the contacts, typical burs used for IPR cannot easily create those specific amounts without constantly measuring the sites.

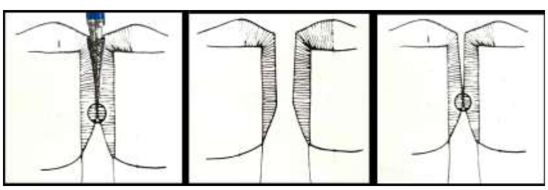


Fig 1. Tapered contact from flame-shaped IPR bur

Cali-Bur IPR Solution from HORICO

The new Cali-Bur IPR solution simplifies interproximal reduction (IPR) and addresses the challenges associated with bur-based space creation, particularly when using aligners. This issue was successfully resolved with the help of an idea from **Dr. Howard Fine**, Director of the Postgraduate Orthodontic Program at Touro College of Dental Medicine, NY.

It is a series of 3 burs with the following features (figure 2):

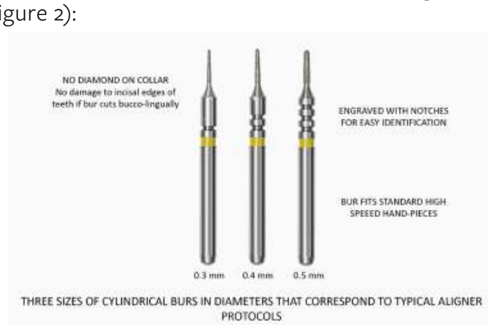


Fig 2. Features of Cali-bur system

1) The burs are practically **cylindrical**, meaning that the amount of enamel reduction is the same whether the bur is held horizontally or vertically (figure 3). In addition, the resultant contact will be flat instead of wider incisally, therefore being more anatomic. In addition, unlike discs, the burs can be used to contour the interproximal edges.
2) **The burs have diameters that correspond to the typical amounts dictated in aligner treatment protocols**: 0.3, 0.4 and 0.5 mm. This means that the bur will produce the exact amount of IPR desired without the need to measure the site.
3) The burs are notched for easy identification: one notch for 0.3 mm, two notches for 0.4 mm and three notches for 0.5 mm, to clearly identify the exact diameter.
4) The burs do not have diamond on the collar, unlike other burs designed for IPR (figure 3). This means that the bur will not cut the incisal edge as it passes through the contact point.

Fig 3. Cylindrical shape of Cali-bur means can be held vertically or horizontally

5) The burs are designed and manufactured in Germany, known for precision toolmaking.
6) The burs can be multi-use as desired, using typical sterilization procedures.

There are a few considerations for the practitioner to be aware of when using the Cali-Bur system. First, the burs should be used with copious amounts of water, to minimize friction and prolong the integrity of the bur. Second, the bur should be held straight to produce the desired flat contact, and the practitioner should use a swiping motion from buccal to lingual and/or gingival to incisal, again to reduce friction and maintain bur integrity. The bur can also be held horizontally as desired since the cylindrical shape means uniformity of diameter throughout the cutting surface of the bur.

In cases requiring significant IPR, this system can be a game changer. It is fast, easy, accurate, and most importantly, comfortable for the patient, especially in the posterior areas where this procedure can be difficult.

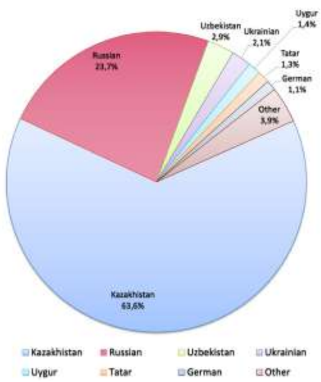
Kazakhstan: Economic Growth and Transformation in Healthcare and Dentistry

Kazakhstan stands as the largest and one of the most dynamic emerging markets in Central Asia, supported by its vast natural resources, strategic location between Europe and Asia, and ongoing economic reforms. Since gaining independence in 1991, the country has made significant progress in building a stable macroeconomic environment, attracting foreign investment, and positioning itself as a regional hub for trade, logistics, and energy. Despite these achievements, structural challenges persist, including economic dependence on extractive industries and regional inequalities in development.

At the same time, Kazakhstan's healthcare system has been undergoing a gradual transformation. Moving away from its Soviet-era, hospital-centered model, the government has introduced reforms aimed at improving efficiency, expanding access, and enhancing service quality. However, disparities between urban and rural areas continue to affect healthcare delivery and outcomes.

The dental sector reflects these broader trends, with a strong presence of private providers and a growing demand for modern technologies and services. While major cities benefit from advanced facilities, access remains uneven across the country. Together, these dynamics create both challenges and promising opportunities for international stakeholders.

Ethnic Composition of Kazakhstan Population



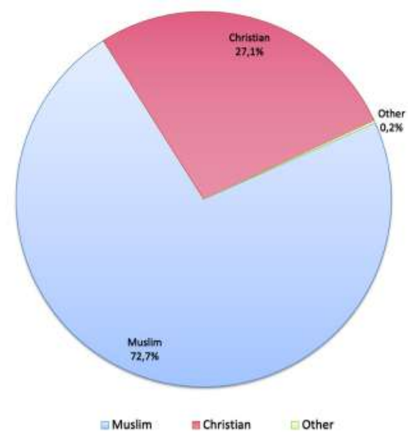
1. Economic, political and social overview

Kazakhstan is the largest country in Central Asia and one of the region's most important emerging markets. Since gaining independence from the Soviet Union in 1991, it has undergone a broad process of political, economic, and social transformation. Thanks to its strategic position between Europe and Asia and its vast territory of approximately **2.7 million square kilometers**, the country increasingly serves as a regional hub for trade, logistics, and investment.

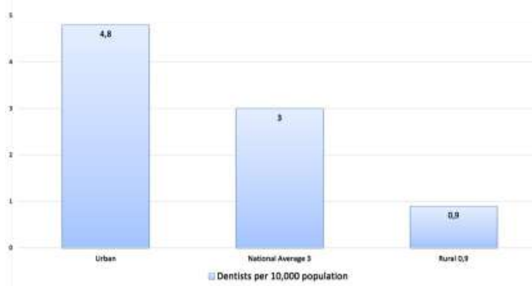
Kazakhstan has a population of around **17.6 million people** and a relatively young demographic structure, with a median age of just over 30. Its social fabric is marked by significant ethnic and cultural diversity, reflecting the country's historical role as a crossroads of civilizations. Ethnic Kazakhs form the majority, alongside a substantial Russian minority and other ethnic communities. This diversity is also reflected in religion, with Islam as the predominant faith, followed by Christianity, especially Russian Orthodoxy.

Economically, Kazakhstan is the largest economy in Central Asia, supported primarily by its abundant natural resources, including oil, gas, and minerals. With a GDP of around **USD 184 billion** and GDP per capita (PPP) above **USD 25,000**, the country has built a relatively solid macroeconomic base. At the same time, however, structural challenges remain,

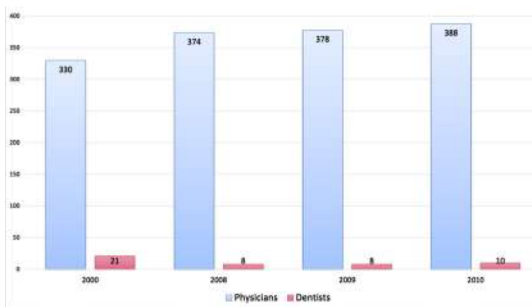
Religious Composition of Kazakhstan



Dentists Distribution



Health Workers per 100,000 Population



including dependence on the extractive sector, bureaucratic inefficiencies, and regulatory complexity.

2. Overview of the healthcare system

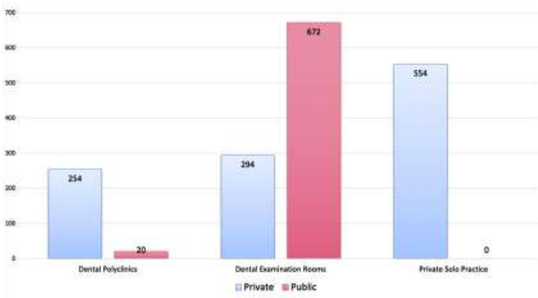
Kazakhstan's healthcare system has changed significantly since independence. Originally based on the Soviet model, it was historically centered on hospital care, with less emphasis on prevention and primary healthcare. Over the past two decades, the government has introduced reforms aimed at modernizing the sector, improving service quality, and increasing access to healthcare across the country.

Healthcare expenditure currently accounts for approximately **4.4% of GDP**, a level that remains relatively modest compared with many European countries. Nevertheless, Kazakhstan has invested in hospital infrastructure, equipment modernization, and workforce development. These efforts have contributed to improvements in service capacity, especially in the country's largest urban centers.

Despite this progress, major disparities persist between urban and rural areas. Cities such as **Almaty and Astana** concentrate the best-equipped facilities and a larger share of medical professionals, while many rural and remote regions continue to experience shortages of staff, limited access to specialized services, and weaker healthcare infrastructure. This uneven territorial distribution remains one of the key structural challenges for the system.

Kazakhstan has also worked to improve its business and institutional environment, which indirectly

Distribution of Dental Healthcare Organizations



supports healthcare modernization by making the country more attractive to foreign investors and international suppliers. For the health sector, this means a gradual opening to partnerships, imported technologies, and higher-value medical services.

3. Overview of the dental sector

Kazakhstan's dental sector is characterized by a strong role for private providers. While public dental services are still present, most dental care is delivered through **private clinics and individual practices**, especially in the main urban centers. This reflects a broader trend toward privatization in dentistry, where private operators often provide better-equipped facilities and a wider range of services.

The sector, however, remains unevenly developed. Access to quality dental care is significantly better in cities such as **Almaty and Astana**, while rural communities frequently face shortages of dental infrastructure and professionals. One of the main challenges is the unequal distribution of dentists, with urban areas showing much higher dentist-to-population ratios than rural regions. As a result, many people outside the major cities struggle to access even basic dental care.

Preventive dentistry also remains limited. Available data indicate that a substantial share of the population, particularly in rural areas, suffers from untreated cavities and delayed access to treatment. This suggests that oral healthcare is still often driven by urgent need rather than routine prevention.

From a market perspective, Kazakhstan offers interesting opportunities because the broader medical and dental technology sector depends heavily on imports. Domestic production is limited, and much of the equipment used by clinics and hospitals comes from abroad. This creates favorable conditions for international suppliers of dental technology, diagnostics, instruments, and treatment solutions, particularly as demand for modernization continues to grow.

Tajikistan: economic dynamics and challenges in the healthcare and dental sectors

Tajikistan offers a little-known yet insightful case for understanding emerging healthcare systems. Strong economic growth, high reliance on remittances, and significant territorial disparities shape access to services. Both the healthcare and dental sectors reveal structural challenges, while also presenting concrete opportunities for future development and reform.

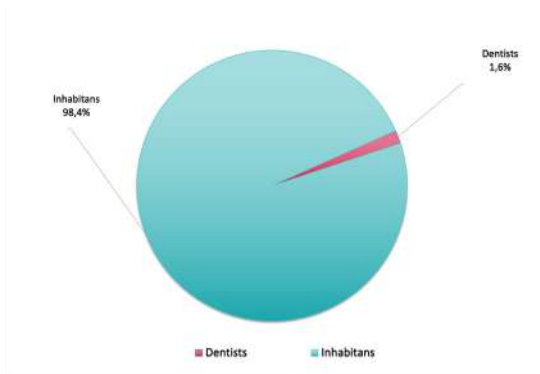
1. Economic, political and social overview

Tajikistan is a country that rarely appears in global headlines, yet it offers an interesting perspective for those analyzing emerging healthcare markets. Located in Central Asia, the country has experienced solid economic growth in recent years, with real GDP expanding by **8.4% in 2024** and maintaining a strong pace at **8.2% in the first quarter of 2025**, according to the World Bank. However, the structure of the economy reveals a distinctive characteristic: a large share of domestic demand is influenced by **remittances from citizens working abroad**, which represented roughly **49% of GDP in 2024**.

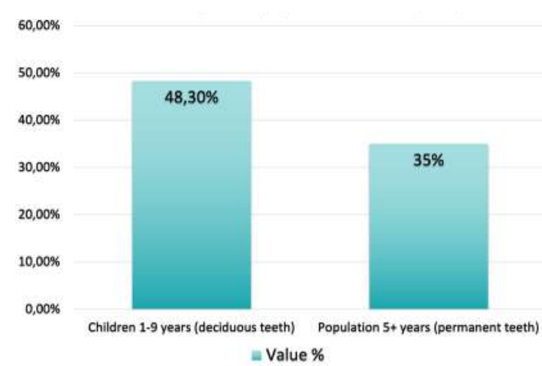
This dynamic creates an economy that operates on two interconnected engines. On the one hand, domestic sectors such as services and industry support growth; on the other, external income flows sustain household consumption. As a result, purchasing power can fluctuate depending on external economic conditions, affecting spending on services such as healthcare.

Socially and territorially, the country remains characterized by disparities between urban and rural areas, particularly in access to infrastructure and services. Tajikistan is also a highly mountainous country, which adds logistical challenges to the delivery of public services. These struc-

Dentists Percentage



Children vs general population caries (2019)



tural factors shape not only the economy but also how citizens access healthcare and other essential services.

2. Overview of the healthcare system

Tajikistan's healthcare system still reflects elements of its Soviet legacy, particularly in terms of central organization and the strong role historically played by the public sector. In recent years, however, the country has been undergoing a gradual reform process aimed at strengthening **Primary Health Care (PHC)** and expanding progress toward **Universal Health Coverage (UHC)**. According to the World Health Organization, these reforms focus in particular on the development of family medicine and the strengthening of first-level care services.

One of the main structural challenges of the system concerns financing. Public health expenditure remains relatively low compared with many other countries, estimated at **around 1.9% of GDP in 2021**. As a result, the system relies heavily on **out-of-pocket payments**, meaning that many healthcare services are financed directly by patients.

This financial structure significantly influences access to care. When healthcare costs fall largely on households, many services are postponed or reduced to urgent interventions. In addition, geographical and infrastructural constraints—particularly in remote and mountainous regions—can limit access to facilities and healthcare professionals. Strengthening PHC is therefore seen as a key strategy to improve early diagnosis, prevention, and continuity of care throughout the country.

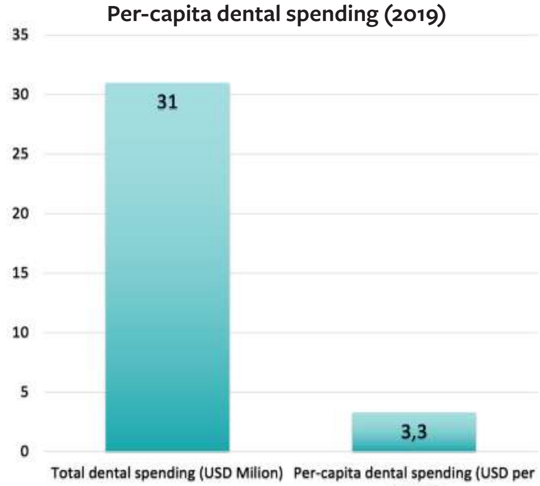
3. Overview of the dental sector

The dental sector in Tajikistan reflects many of the structural characteristics of the broader healthcare system. According to the **WHO Oral Health Country Profile**, the burden of oral disease in the country remains significant. In 2019, the estimated prevalence of **untreated caries in deciduous teeth among children aged 1–9 reached 48.3%**, while **untreated caries in permanent teeth among people aged 5 and older was estimated at 35.0%**. Severe periodontitis affected around **10.8% of the population aged 15 and above**, while **edentulism among adults aged 20+ was estimated at 8.6%**.

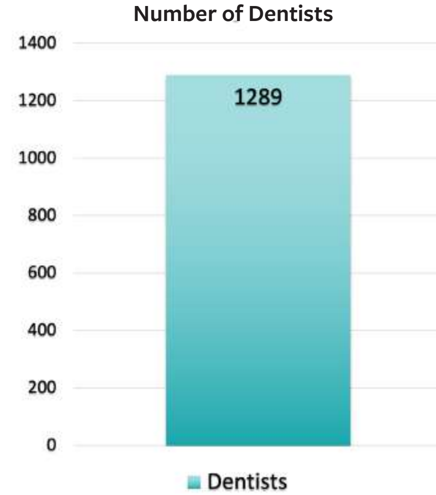
These figures highlight a substantial prevention gap and indicate that many patients enter the dental care pathway at a relatively advanced stage of disease. Access to services is further influenced by the organization of the healthcare system. In public primary care facilities, some basic oral health services—such as screening, urgent care, and basic restorative procedures—were reported as unavailable in 2021.

The dental workforce is relatively limited compared with European standards, with 1,289 dentists recorded in 2014, corresponding to a density of 1.6 dentists per 10,000 inhabitants. At the same time, total dental spending remains very low, estimated at USD 31 million in 2019, or USD 3.3 per capita. As a result, dental demand is often driven by urgent care needs rather than routine prevention.

Per-capita dental spending (2019)



Number of Dentists



Uzbekistan: growth, reform, and evolving healthcare dynamics

Uzbekistan is rapidly emerging as a key Central Asian economy, driven by demographic expansion and ambitious reforms. Sustained growth, healthcare modernization, and rising private sector participation are reshaping service delivery. However, structural inefficiencies, regional disparities, and reliance on out-of-pocket spending continue to influence access, including within the dental sector.

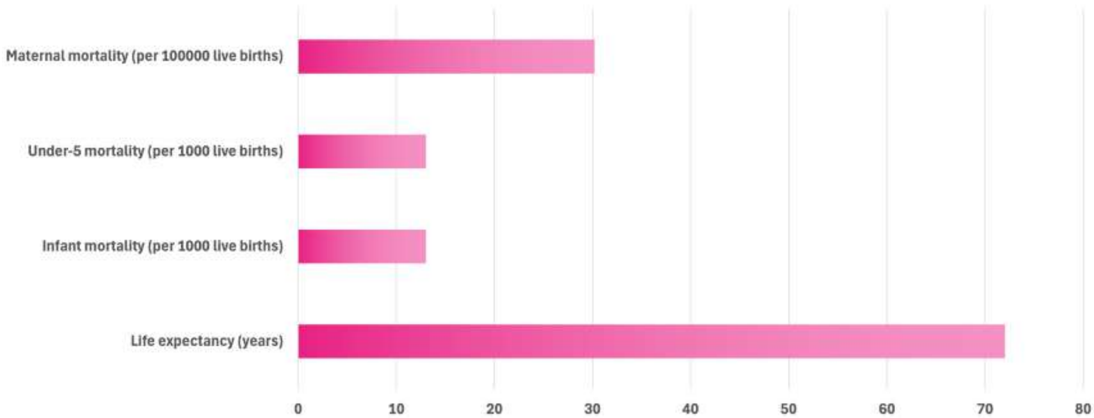
1. Economic, political and social overview

Uzbekistan is emerging as one of the most dynamic economies in Central Asia, supported by demographic growth, structural reforms, and increasing international openness. With a population of **36.36 million in 2024**, according to the World Bank, the country is the most populous in the region, and projections by the International Monetary Fund suggest it could reach **around 38.5 million inhabitants by 2026**. The demographic structure is relatively young, with approximately **63% of the population aged between 15 and 64**, creating favorable conditions for long-term economic development and consumer market expansion.

Over the past decade, Uzbekistan has undergone a significant process of economic transformation. Since **President Shavkat Mirziyoyev took office in 2016**, the government has implemented a broad reform agenda aimed at modernizing the economy, improving governance, and attracting foreign investment. These reforms are part of the national "**New Uzbekistan Development Strategy 2022–2026**."

Macroeconomic indicators confirm this momentum. GDP growth reached **6.5% in 2024**, while forecasts by the IMF suggest growth could remain close to **5.8–6% annually in the coming years**. Despite this progress, structural challenges remain, including the strong role of the state in key sectors and a continued dependence on imports of technology and industrial goods. Remittances from migrant workers abroad also remain an important source of income for households, representing about **14.4% of GDP in 2024**.

Key Health Indicators in Uzbekistan



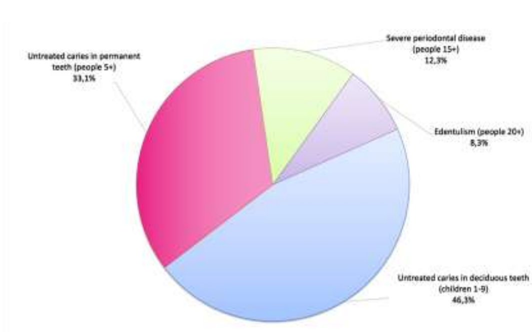
2. Overview of the healthcare system

Uzbekistan's healthcare system has been undergoing a gradual process of modernization in recent years. Like many countries of the former Soviet Union, the country inherited a highly centralized system characterized by a strong hospital orientation and relatively weak primary care services. Following decades of underinvestment after independence, the government has introduced a series of reforms aimed at improving efficiency, expanding access, and strengthening healthcare infrastructure.

According to the **WHO European Observatory on Health Systems and Policies**, current reforms focus on three main priorities: the modernization of healthcare financing, the strengthening of **primary healthcare services**, and the **digitalization of medical systems**. One of the most notable initiatives has been the introduction of a **pilot health insurance program in the Syrdarya region in 2021**, designed to test new mechanisms for financing healthcare and coordinating service delivery. The government intends to gradually expand this model nationwide.

Healthcare spending has increased in recent years, supporting the construction and modernization of hospitals and medical facilities. Nevertheless, important challenges remain. **The World Bank estimates that current health expenditure reached around 6.7% of GDP in 2023**, but a significant share of healthcare costs continues to be financed through **out-of-pocket payments** by households. In addition, healthcare infrastructure remains unevenly distributed, with better services concentrated in major urban centers such as Tashkent, while rural areas often face shortages of equipment and medical professionals.

Prevalence of Oral Diseases in Uzbekistan



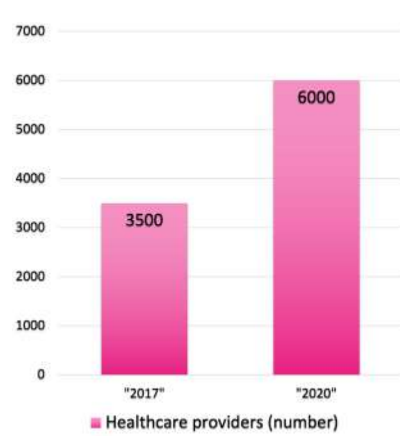
3. Overview of the dental sector

The dental sector in Uzbekistan reflects both the progress and the structural challenges of the broader healthcare system. According to the **WHO Oral Health Country Profile for Uzbekistan (2022)**, oral diseases remain widespread in the population. The most recent comparable estimates refer mainly to **2019**, indicating a high prevalence of untreated oral conditions.

Economic indicators also highlight the scale of the dental sector. Total dental expenditure was estimated at approximately **USD 218 million in 2019**, corresponding to **USD 6.6 per capita**. At the same time, productivity losses linked to untreated oral diseases were estimated at **USD 167 million**, illustrating the broader economic impact of oral health conditions.

Access to dental services remains uneven across the country. Rural regions often experience shortages of dental professionals and specialized services, while many patients seek treatment only when symptoms become severe rather than through regular preventive care. The expansion of private healthcare providers—growing from around **3,500 in 2017 to more than 6,000 by 2020**—suggests an increasing role for private dentistry as the healthcare system continues to evolve.

Growth of Private Healthcare Providers



How Middle East Energy Disruptions Could Reshape Investment Planning in ASEAN

For companies evaluating investment or expansion in Southeast Asia, the escalation involving Iran introduces a new variable that must now be embedded directly into project planning. The immediate effects are visible in higher crude benchmarks, maritime insurance premiums, and disruptions across key shipping corridors connecting the Middle East, Asia, and Europe.

However, the most important transmission channel for ASEAN investors is not the oil price alone. It is the extension of liquidity cycles across export-oriented economies as longer transit times and higher freight costs expand working capital requirements.

Higher energy prices increase import bills and fiscal pressure in net fuel-importing economies. War-risk insurance and rerouted shipping lanes raise logistics costs. A stronger US dollar increases the local-currency burden of foreign-denominated liabilities. These pressures interact across supply chains, financing structures, and industrial cost bases. For investors evaluating capital deployment in the region, the relevant question is therefore not whether volatility will affect ASEAN, but how the transmission mechanisms differ across individual economies.

Volatility transmits unevenly across ASEAN

ASEAN economies differ significantly in energy dependence, export concentration, fiscal flexibility, and currency management. As a result, geopolitical shocks rarely affect the region uniformly. Net energy importers experience inflation and fiscal pressure. Export-heavy manufacturing economies face extended cash conversion cycles as goods remain longer in transit. Financial hubs absorb capital flow volatility differently from industrial platforms.

These structural differences mean that sustained geopolitical tension is more likely to produce divergence in project performance than a synchronized regional slowdown. Investment outcomes increasingly depend on country-specific exposure rather than regional growth narratives.

Indonesia: Fiscal transmission with domestic demand cushion

Indonesia consumes approximately 1.6 million barrels of oil per day while producing roughly 600,000 to 700,000 barrels domestically, leaving a structural import gap. Elevated global benchmarks increase the national fuel import bill and place pressure on fiscal balances. During previous energy price spikes, government spending on fuel subsidies and compensation exceeded IDR 300 trillion (approximately US$20 billion), highlighting the scale of fiscal exposure when domestic price stability must be maintained.

Currency dynamics can amplify these pressures. Periods of global risk aversion have historically pushed the rupiah lower, increasing the local-currency burden of servicing US dollar–denominated corporate debt and raising the cost of imported industrial inputs. Energy-intensive industries such as cement, steel, and petrochemicals also face higher electricity tariffs when global fuel benchmarks rise.

At the same time, Indonesia benefits from one of the largest domestic consumer markets in Southeast Asia. Household consumption accounts for more than half of national GDP, creating a demand base that is less dependent on external trade cycles. Growth in digital services, infrastructure development, and urban consumption continues to anchor long-term economic expansion. For investors target-

ing domestic-oriented sectors, Indonesia's internal demand provides a structural buffer against external energy volatility.

Vietnam: Export liquidity exposure with supply chain momentum

Vietnam's economy is among the most export-oriented in Asia, with exports exceeding 90 percent of GDP. Electronics manufacturing alone contributes more than 30 percent of outbound shipments. This high level of integration into global supply chains makes Vietnam particularly sensitive to disruptions in maritime logistics.

Extended shipping durations increase the time that inventory remains in transit, forcing exporters to finance additional working capital to sustain production cycles. Even modest delays can expand liquidity requirements across electronics, textiles, and industrial manufacturing sectors.

Vietnam also faces exposure to global energy markets as industrial electricity demand increasingly relies on imported LNG. While exchange rate management provides a degree of stability, periods of capital outflow can still lead to controlled depreciation that raises hedging costs for foreign-funded projects.

Despite these vulnerabilities, Vietnam continues to benefit from structural supply chain relocation trends. Multinational manufacturers have steadily expanded operations in the country as part of broader diversification strategies away from single-country production models. Competitive labor costs, expanding industrial parks, and strong regional trade integration reinforce Vietnam's position as a major manufacturing hub even when logistics volatility increases.

Thailand: Manufacturing cost pressure with industrial ecosystem depth

Thailand's exposure to global energy volatility stems largely from its role as a regional manufacturing platform. The country imports most of its crude oil and relies heavily on LNG for electricity generation, making industrial power costs sensitive to global fuel prices.

Manufacturing sectors concentrated in Thailand's industrial corridors face margin pressure when electricity tariffs and logistics costs rise simultaneously. The automotive industry illustrates this sensitivity clearly. Contributing roughly 10 percent of national GDP and between 15 and 20 percent of exports, the sector depends on tightly coordinated international supply chains for both components and finished vehicles.

Freight volatility and extended transit times can disrupt these supply chains and reduce pricing flexibility in export markets. However, Thailand's long-established manufacturing ecosystem provides significant structural advantages. Dense supplier networks, experienced labor pools, and advanced logistics infrastructure create high switching costs for multinational manufacturers considering relocation. These industrial clusters often outweigh short-term cost fluctuations.

Malaysia: Energy revenue buffer with high-value manufacturing

Malaysia occupies a hybrid position within ASEAN's energy landscape. The country produces approximately 600,000 barrels of oil per day and is one of the region's largest exporters of liquefied natural gas. These hydrocarbon revenues provide a partial fiscal cushion during periods of elevated energy prices.

At the same time, Malaysia's economy remains deeply integrated into global electronics and semiconductor supply chains. Electronics manufacturing accounts for a significant share of national exports and competes internationally on cost efficiency. Freight volatility and shifts in global demand translate quickly into margin pressure for export-oriented firms.

Malaysia's resilience lies in its specialization in higher-value manufacturing segments. The country plays a critical role in semiconductor packaging, electronics assembly, and precision component production. This technological specialization reduces the likelihood of rapid relocation even when operating costs fluctuate, reinforcing Malaysia's position within the global technology supply chain.

Philippines: Inflation sensitivity with consumption-led growth

The Philippines is particularly sensitive to energy-driven inflation because the country imports most of its oil requirements. Rising global fuel prices quickly pass into domestic transport and electricity costs, contributing to broader price pressures across the economy.

During previous energy shocks, inflation rose above 6 to 8 percent, prompting significant monetary tightening by the central bank. Higher interest rates can slow investment in capital-intensive sectors such as property development and infrastructure while also raising financing costs for businesses.

However, the Philippine economy is less dependent on export manufacturing than several ASEAN peers. Domestic consumption accounts for a large share of economic activity, supported by a young population and expanding service industries. Remittances from overseas workers and revenues from the business process outsourcing sector provide additional sources of foreign exchange. These factors help sustain domestic demand even when global trade conditions weaken.

Singapore: Financial stability and regional coordination advantage

Singapore's exposure to geopolitical volatility differs fundamentally from that of other ASEAN economies. As a global trade and financial hub, the country is sensitive to shifts in shipping patterns and international capital flows. The Port of Singapore handles more than 30 million TEUs annually, making it one of the world's busiest maritime logistics centers.

Shipping disruptions can alter trade flows across regional supply chains, increasing coordination complexity for multinational firms operating across multiple ASEAN markets. At the financial level, Singapore absorbs the effects of global capital movements more directly than manufacturing economies.

However, Singapore's strong regulatory institutions, deep capital markets, and managed exchange rate regime provide a high degree of financial stability during periods of external volatility. These characteristics reinforce the country's role as ASEAN's primary treasury and funding center, particularly for companies managing regional operations.

What does country exposure mean for investment allocation

The country-level transmission channels outlined above suggest that sustained geopolitical volatility across ASEAN will not produce a single regional risk profile. Instead, it is likely to widen the dispersion of investment outcomes across sectors and economies.

Projects heavily dependent on imported energy inputs, extended global supply chains, or foreign-currency financing become more sensitive to volatility. Projects anchored in domestic demand, specialized industrial ecosystems, or financial coordination roles tend to demonstrate greater resilience.

For investors evaluating capital deployment in Southeast Asia, the strategic question therefore shifts from whether the region remains attractive to which types of investments within specific economies are better positioned to absorb external shocks.

ASEAN's structural investment thesis remains intact

Despite these transmission channels, the long-term fundamentals supporting ASEAN investment remain strong. The region's combined GDP exceeds US$3.6 trillion, and several major economies—including Indonesia, Vietnam, and the Philippines — continue to record growth rates well above those of advanced economies.

Foreign direct investment into ASEAN exceeds US$200 billion annually, reflecting sustained supply chain diversification and expanding consumer markets. Intra-ASEAN trade accounts for roughly one-quarter of total regional trade flows, reinforcing integrated production networks across Southeast Asia.

With a population exceeding 670 million people and a rapidly expanding middle class, the region continues to offer one of the most attractive long-term growth environments among emerging markets. Geopolitical volatility may alter cost structures and financing conditions, but it does not fundamentally weaken ASEAN's structural investment case.

Instead, it increases the importance of disciplined country selection, sector positioning, and financial resilience in determining investment outcomes.

Source: www.aseanbriefing.com/news/how-the-iran-conflict-should-change-energy-supply-chain-and-market-entry-planning-in-asean/

Dental Device Registration in China: 5 Key Points to Know

About the Author

Since 2015, Miriam Bandinelli has been a Senior Account Manager at Cisema — a full-service regulatory consultancy specializing in China and Asia Pacific markets, founded in Munich and Beijing in 2002. Based in Munich and specializing in Chinese NMPA, CML and CCC registrations, she supports international companies obtain their product certification and achieve regulatory compliance in China. She frequently writes and presents on China regulatory affairs and market pathways for life sciences products and can be contacted at bandinelli@de.cisema.com.

China's dental MedTech market is one of the fastest-growing globally, with strong demand across dental implants, imaging systems, high-performance equipment, and advanced materials. International brands — Italian manufacturers among them — continue to enjoy a strong competitive position, especially in premium and innovative categories where quality, precision, and brand reputation drive purchasing decisions.

To succeed in this expanding market, foreign manufacturers must understand the regulatory requirements of China's National Medical Products Administration (NMPA) and select the right partners for product registration, post-market compliance, and long-term operational strategy.

This article highlights five essential considerations for dental MedTech manufacturers entering the Chinese market.

1. Start Correctly: Classification, Feasibility, and Documentation Quality

Successful registration in China begins with accurate device classification. China uses a risk-based classification system, assigning devices to Class I, II, or III, with Class III representing the highest risk. The classification determines the registration pathway, testing requirements, clinical evidence expectations, timelines, and total cost.

Dental implants, biomaterials, and high-risk instruments typically fall into Class II or III by default, Class II and III devices require clinical trial data, either from China or overseas, unless exemptions apply or sufficient predicate device data is available.

Manufacturers, especially those already approved in the EU or US, should perform a feasibility analysis to assess whether existing clinical data and real-world evidence suffice for NMPA clinical evaluation or if a China-specific trial will be required.

In addition, a comprehensive QMS documentation package must be submitted, generally including:

- ISO 13485 certificate
- Detailed production quality control documentation
- China GMP evidence for high-risk devices

Preparing these materials early ensures timely progression through the registration process and reduces the risk of rejection.

2. Choose the Right NMPA Legal Representative in China

A critical early decision for any foreign manufacturer is selecting its NMPA Legal Agent — the mandatory local entity responsible for all regulatory communication with Chinese authorities and lifecycle management of the registered device.

Companies typically choose among three models for the NMPA Legal Agent:

The Distributor Model

Distributors may seem attractive initially, as they may fund or manage the registration. However, they gain access to sensitive technical documentation and maintain full control over the registration certificates. This creates significant strategic risks: distributors may restrict certificate access, block alternative sales channels, or limit the manufacturer's ability to switch partners.

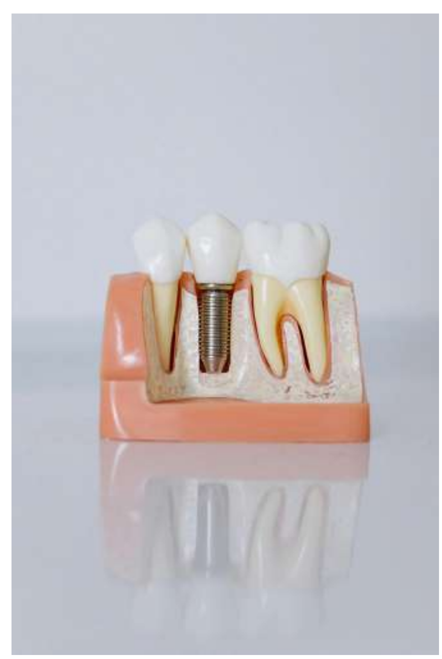
The Wholly Owned Subsidiary Model

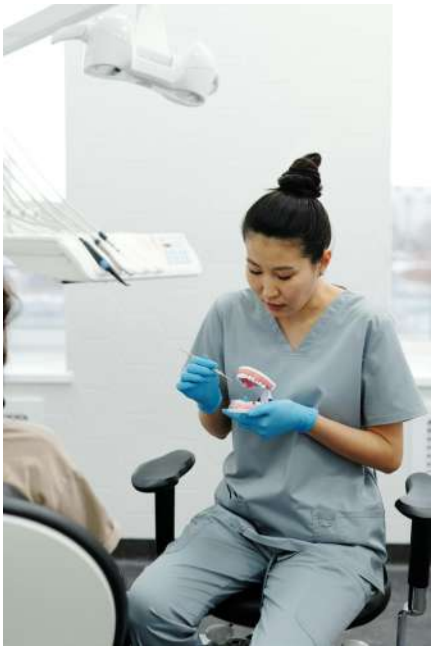
Establishing a Chinese subsidiary provides maximum control but requires substantial investment. A subsidiary must operate China-compliant post-market surveillance (PMS) systems and employ qualified regulatory professionals, which presents a significant barrier for SMEs or manufacturers with limited Chinese market exposure.

The Independent Regulatory Consultancy Model

For many companies — especially European SMEs like Italian dental device manufacturers — appointing an independent regulatory consultancy as the Legal Agent offers the best balance. The manufacturer maintains full certificate ownership and retains the option to work with multiple distributors. This model also ensures access to experts who manage both pre-market registration and post-market regulatory duties.

Manufacturers can change their NMPA Legal Agent if needed, typically within seven weeks, provided they have access to key documents such as the NMPA certificate and the Product Technical Requirements (PTR). Unfortunately, many manufacturers find that distributors have withheld these documents, delaying strategic transitions.





3. Assess China's Biocompatibility and Biological Safety Requirements

The biocompatibility requirement remains one of the most significant obstacles for foreign manufacturers, as China is known for having stricter and more prescriptive requirements than many other regions — especially for Class III devices in prolonged contact with oral tissues.

ISO 10993 tests conducted abroad, even in reputable labs, are rarely accepted by NMPA. Local testing in NMPA-accredited laboratories is therefore almost always required for Class II and III dental devices.Dental devices in China must comply with GB/T 16886 (China's adoption of ISO 10993) for biological safety, along with several dental-specific YY/T standards. For dental devices which involve mucosal or long-term contact, the risk of increased test complexity and number of required endpoints is very high.

Working with an experienced partner who can navigate the Chinese testing landscape, choose the right laboratory, coordinate every step, and secure a smooth issuance of the biocompatibility test report is critical for achieving a successful registration.

4. Understand China's Increasingly Strict Post-Market Requirements

China has shifted its regulatory emphasis from pre-market approval to whole-lifecycle supervision. This shift has led to rapidly evolving and increasingly strict PMS obligations such as:

- Adverse event reporting and continuous monitoring
- Compliance with China's current Good Manufacturing Practices (GMP)
- NMPA-initiated sampling inspections
- Overseas factory audits for high-risk devices
- Strict enforcement of updated mandatory standards (GB/YY)

Italian dental device makers, known for craftsmanship and innovation, often excel in pre-market compliance but must ensure equal rigor in PMS, documentation updates, and QMS adaptation to Chinese standards. Non-compliance in these areas has become significantly riskier, with sanctions now ranging from administrative fines to revocation of certificates, sales bans, and even 10-year prohibitions on manufacturing and distribution of medical devices in China.

A number of global dental manufacturers have recently received fines and even had to undertake product recalls for dental devices sold in the market for many years, because their certificates and especially the technical specifications listed in the certificate appendices have not been maintained. This has led to NMPA inspection testing failures.

To maintain certificate validity and uninterrupted market access, manufacturers must stay ahead of regulatory updates and communicate closely with their NMPA Legal Agent.

5. Explore Fast-Track Registration Pathways: GBA, Hong Kong & Hainan

While most dental devices enter China through the standard NMPA registration pathway, recent regulatory policies have created promising alternative routes — particularly for products with high clinical need and no domestic equivalent.

The Hong Kong–Greater Bay Area (GBA) Pathway

Manufacturers can obtain Hong Kong approval, which is faster, less expensive, and largely voluntary. Once approved and used in Hong Kong public hospitals, products can potentially be sold to designated medical institutions in the GBA, providing early revenue and real-world data (RWD) to support future national NMPA registration.

This pathway is ideal for companies seeking a staged entry into China, including Italian premium dental brands testing market acceptance.

Hainan's Boao Lecheng Medical Tourism Pilot Zone

Located on China's Hainan Island, the Hainan Boao Lecheng International Medical Tourism Pilot Zone enables hospitals to import unregistered medical devices (provided they have home-country approval) to treat Chinese patients seeking advanced technologies. Manufacturers can subsequently leverage the RWD generated in Hainan to strengthen NMPA submissions for nationwide approval.

Both pathways showcase China's focus on accelerating access to cutting-edge technologies, providing manufacturers of innovative implants, surgical systems, and advanced dental devices with faster market entry and domestic clinical evidence.

Conclusion

China offers exceptional growth opportunities for dental MedTech companies, particularly premium international brands known for innovation and quality. However, success in this market requires careful planning. When approached correctly — and supported by an experienced independent NMPA Legal Agent — the investment can deliver substantial long-term advantages in one of the world's most dynamic healthcare markets.

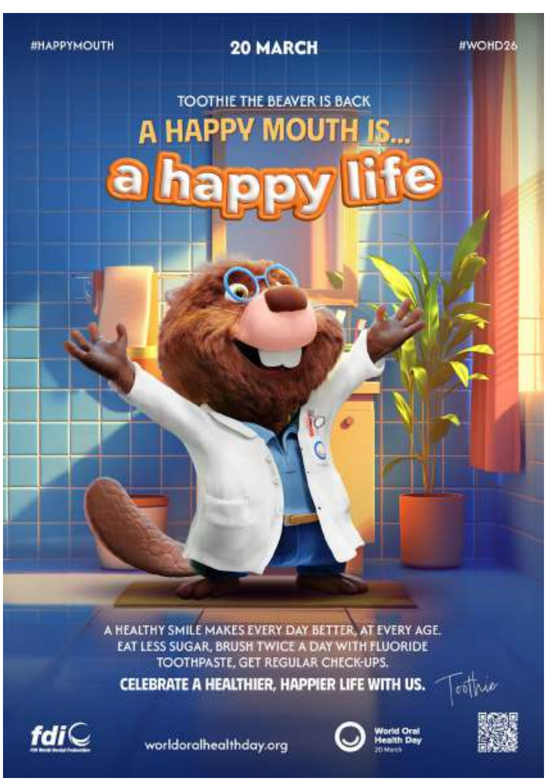
World Oral Health Day 2026: FDI urges governments to turn UN oral health commitments into action

FDI World Dental Federation

Landmark UN political declaration recognizes oral health as essential to tackling noncommunicable diseases

On World Oral Health Day (WOHD), FDI World Dental Federation (FDI) is urging governments to translate the oral health commitments recognized in the 2025 United Nations Political Declaration on Noncommunicable Diseases (NCDs) and Mental Health into concrete action.

Adopted on 15 December 2025, the Declaration marks a significant turning point for global oral health policy. Oral diseases affect nearly 3.7 billion people worldwide , almost half of the global population, yet they have historically received limited attention in global health strategies. Their inclusion in the NCD agenda reflects more than a decade of sustained advocacy by the global oral health community, including FDI and its partners.



www.worldoralhealthday.org

Governments must now translate this political commitment into national policies, sustainable financing and integrated health programmes that strengthen prevention and expand access to essential oral healthcare-particularly for populations facing the greatest barriers to care.

WOHD provides a global platform to mobilize policymakers, health professionals, civil society and communities to advance action on oral health. Celebrated each year on 20 March, the campaign highlights the critical role oral health plays in overall health, well-being and quality of life.

This year also marks the final chapter of FDI's three-year global campaign, "A Happy Mouth is...". The 2026 theme, "A Happy Mouth Is... A Happy Life," underscores the importance of oral health at every stage of life.

"From pregnancy, early childhood to older age, a healthy mouth supports people's ability to eat, speak, connect and live with dignity and confidence," said Dr Anna Lella , Chair of the World Oral

Health Day Working Group. "Yet oral diseases remain among the most common health conditions worldwide, even though they are largely preventable."

Oral diseases share many of the same modifiable risk factors as other

NCDs-including tobacco use, harmful alcohol consumption and unhealthy

diets high in sugar-making their integration into national NCD prevention strategies both practical and essential.

"The UN Political Declaration changed the policy landscape for oral health," said Assist. Prof. Dr Nikolai Sharkov , FDI President. "Policymakers and governments must now integrate oral health into universal health coverage efforts and national NCD strategies, while investing in prevention. Strong collaboration across sectors and stakeholders will be essential to reduce inequalities in access to care."

Achieving meaningful progress will depend on strong cross-sector partnerships, including the support of partners such as

Haleon (www.haleon.com)

Smile Train (www.smiletrain.org/)
Solventum (www.solventum.com/en-us/home/)
Dentsply Sirona (www.dentsplysirona.com)
who help advance global initiatives like World Oral Health Day.

"While global recognition is a significant step forward, partnerships are what allow real impact to scale. By working with organisations like the FDI and its global network of National Dental Associations, we're able to turn global momentum into meaningful action at a local level to deliver better everyday health - bringing initiatives like World Oral Health Day to life in communities around the world," said Jayant Singh , Global Head of Oral Health at Haleon.

"Everyone has a role to play in advancing oral health. When we join forces across sectors, we can expand access to life-changing cleft care for those who need it most," said Dr Mónica Domínguez , Director of Global Oral Health Programs at Smile Train.

Today's global moment of awareness is a reminder that the real challenge now is to sustain political momentum and turn this recognition into measurable progress for people and communities worldwide.

"Oral health is essential to overall well-being and quality of life. Real progress depends on collaboration, and when private, nonprofit, and public health sectors unite, we can strengthen prevention, expand access to care, and improve outcomes for people everywhere," said Karim Mansour , President Dental Solutions at Solventum.

The goal is clear: to eliminate disparities so that by 2030 oral health is recognized as a right accessible to all.

About World Oral Health Day
Celebrated annually on 20 March, World Oral Health Day (WOHD) was launched by FDI World Dental Federation (www.fdiworlddental.org/our-purpose) to raise global awareness on the prevention and control of oral diseases.

www.worldoralhealthday.org
#WOHD26 #HappyMouth
@worldoralhealthday
www.instagram.com/worldoralhealthday
@Toothiebeaver
www.instagram.com/toothiebeaver

Contact:
Francesca Nava, FDI Campaign and Social Media Manager
Email: **fnava@fdiworlddental.org**

NON PROFIT

From the Brink to Belief: Two years that changed Bridge2Aid

I've been involved with Bridge2Aid since 2006. Nearly two decades. Long enough to have seen incredible highs, quiet graft, moments of real pride – and, if I'm honest, moments where things felt pretty tough.

But nothing quite prepared us for 2023.

It was a hard year. A really hard one. Funding pressures, uncertainty, and some very real questions about sustainability meant the trustees had to face the most difficult decision any charity ever has to consider: do we continue, or do we close? At the time, I was a trustee – not CEO – sitting around the table with people who cared deeply about this organisation and the communities we exist to serve.

What stopped us walking away was people.

We knew the depth of support we had from the dental industry. We knew what Bridge2Aid meant to the hundreds of volunteers who had given their time, skills and hearts over our first 20 years. And we knew something else too: communities across East Africa were still being left behind when it came to access to oral health education and care. The need hadn't gone away – if anything, it was growing.

So instead of closing, we paused. And we asked some very difficult questions.

2024: Reflection, Challenge, and Change

2024 became a year of listening and reflection. We spent time with stakeholders. We met new local partners. We sat down with national decision-makers and asked ourselves whether what we were doing was still the right thing – and whether we were the right people to be doing it.

Those conversations led us to work much more closely with national oral health policy in Tanzania. With the Chief Dental Officer, the Tanzanian Dental Association and local partners, we began training a different cadre of healthcare worker – people already embedded in their communities, aligned with national systems, and able to create long-term change.

We piloted new programmes. We expanded and refined our Infant Oral Mutilation (IOM) awareness work. We deepened our collaboration with Bristol Dental School, exploring what ethical, socially accountable global engagement really looks like in practice.

And we strengthened our governance, inviting new trustees to join us – people with the skills, challenge and insight we needed for the next chapter.

It wasn't always comfortable. But it was necessary.

2025: Building Momentum

By 2025, our new strategy wasn't just words on paper – it was happening.

We built on what we'd learned and extended our academic partnerships, welcoming Leeds Dental School into the Bridge2Aid story. Our programmes became more focused, more locally led, and more firmly rooted in national priorities.

Slowly, steadily, things began to feel different. Stronger. Clearer. More hopeful.

January 2026: Looking around and taking it in

And now here I am, in January 2026, and I honestly can't quite believe how far we've come.

This has been a collective effort in the truest sense. Our small but mighty team. Our trustees. Our volunteers. Our supporters. Our Fundraisers. Our local partners. Our stakeholders. And the UK dental industry as a whole, standing with us and believing in what we're trying to do.

Right now, 45 incredible people are travelling to Tanzania with us across January and February. Forty-five people who have chosen to give their time, energy and skills because they believe that together we can improve access to oral health care for underserved rural communities.

This week, our fabulous Programme Manager for Tanzania – Annie – is working alongside a team from Ikigai/NSK on the ground in Morogoro supporting Dr Nila and helping shape our IOM and oral health awareness "train the trainer" programme. They even attended the opening ceremony this morning – a moment that quietly says this work matters.

Next week, 20 utterly intrepid cyclists take on the challenge of cycling from Kilimanjaro to the Ngorongoro Crater. They've almost reached their £50,000 fundraising target, and every single one of them has covered their own costs. That level of commitment still blows me away.

The week after that, 16 volunteers will be joining THEDI and Bridge2Aid in Mwanza for our dental training and outreach programme. This includes team members from Henry Schein Dental and Den-Tech.

And behind all of this are our Practice Unity Partners, (directly funding the training of local dental therapists), organisations who have chosen us as their charity partners, our regular donors and those taking on their own fundraising challenges – investing not in short-term fixes, but in people and systems that will last.

Looking ahead through 2026, we're also committed to further developing our partnerships with Bristol and Leeds Dental Schools – not only to strengthen ethical global engagement, but to ensure that people facing barriers to accessing oral health care in our own cities are not forgotten. Social accountability doesn't stop at borders, and the learning, relationships and responsibility flow both ways.

Sitting with Gratitude

As I sit here packing scrubs (donated by Happy Threads), folding t-shirts, sorting cycling tops and stuffing information packs for the next group heading out, I feel an overwhelming sense of gratitude.

Two years ago, we were asking whether Bridge2Aid had a future.

Today, I'm watching that future unfold in real time.

Together.

I wouldn't want to be doing anything else.

And none of this would be possible in Tanzania without the continued support of the Ministry of Health, the Tanzanian Dental Association, THEDI, Sibaba Dental Clinic, and funding partners like Colgate-Palmolive East Africa – walking alongside us as we work towards a world where oral health really is for everyone.

If you're reading this and wondering how you might be part of the Bridge2Aid story – we'd love to hear from you. You could volunteer your skills, fundraise for us, become a Unity Partner, choose us as your charity of the year, interact with us on our social media platforms, become a regular donor, or share information about our work with friends and colleagues.

To find out how you can get involved, email shaenna@bridge2aid.org.

And if you'd like to support our incredible cyclists as they push towards a staggering £50,000, please consider sponsoring them here:

https://www.justgiving.com/team/peaktoplains

Thank you for believing in this work – and in what we can achieve together.

Shaenna - CEO, Bridge2Aid
www.bridge2aid.org

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