

Rimini Expodental 2025

Undersecretary of Health Hon. Marcello Gemmato Opens the ANDI Economic Outlook: A Look at the Evolution of the Italian Dental Profession

The traditional appointment with the Economic Outlook on the Dental Profession by the ANDI Research Center (ANDI-National Association of Italian Dentists) was opened by the Undersecretary of State for Health, Hon. Marcello Gemmato. He was joined by the Director General of Health Professions and Human Resources of the National Health Service at the Ministry of Health, Mariella Mainolfi, and the President of Federfarma, Marco Cossolo.

Aspirations, visions, and needs of different generations and territories in a dental field that is evolving and changing. A snapshot of the profession, analyzed by generational groups and geographical areas, supported by real-world data collected

through an annual survey administered by the ANDI Research Center to its members, and cross-referenced with data from ISTAT and the national pension system.

The 2025 Economic Outlook of the Dental Profession, covering the year 2024, is based on a representative sample of ANDI's 28,000 members, who account for well over half of all practicing dentists in Italy.

After an introductory speech by ANDI National President Carlo Ghirlanda, the core of the analysis was presented by the Coordinator of the Research Center, Roberto Calandriello.

The social context in which Italian dentists work, treat patients, and operate is defined by significant and fast-paced de-

mographic and economic changes. Declining birth rates and an aging population are well-established phenomena. Today's—and especially tomorrow's—patients have and will have specific needs and challenges. It is also worth noting that nearly 10% of the Italian population over the past 35 years is made up of foreigners.

Although Italy is the world's eighth-largest economy by GDP, its growth rate remains persistently stagnant. The main reasons include deindustrialization, stagnant wages, and the lingering effects of the economic crises of 2008, 2011, and 2020.

The 2025 Outlook for 2024 paints a generally reassuring picture: a professional landscape that is alive with change, driven lar-



gely by innovations introduced by dentists under the age of 45. Notably, the organizational structures within which dentists operate are undergoing rapid transformation.

The traditional solo-practice model continues to decline, affected by demographic aging, economic burdens, and bureaucratic pressure. A “flight from ownership” is underway.

For the first time, the outlook breaks down findings by generation, acknowledging the distinct characteristics of each age group. These generational differences should guide efforts to prevent conflict and foster collaboration in a shared professional space—a “common home” that gives identity to the collective dental profession, united under ANDI and the professional Order.

Costs are rising. Consequently, professional fees are increasing—but in a measured and responsible way, and at a slower pace than costs. Revenues are increasing as well, thanks in part to a rise in the number of procedures, regardless of the size of the dental practice.

The income distribution among dentists is shifting upward. Thus, **2024 can be seen**

as a year of stabilized, though softened, recovery. Performance slightly declined compared to 2023, a year of broad recovery following the stabilization of 2022. During the COVID-19 years (2020–2021), only the highest-earning practices weathered the storm well.

Territorial effect: Working in the North-East leads to 63.7% higher earnings on average than in the South and Islands; in the North-West, the increase is 55.6% (25.6% in the Center), due to better economic conditions and higher living costs. A similar pattern applies to provincial capitals, which see 6.7% higher income compared to other municipalities.

Gender effect: Male dentists earn 31.7% more than female dentists under equivalent conditions—highlighting the issue of the glass ceiling in the country.

Age effect: The older the dentist, the higher the income—mainly due to practice ownership. When controlling for practice type, the income gap with younger professionals is reduced but still present. Dentists aged 56–65 earn 39.0% more on average

than their younger counterparts, likely reflecting the benefits of experience and established patient networks.

Practice model effect: Practice ownership has a major impact. Compared to associate-only dentists, sole owners earn 147.6% more, and those who are both owners and associates earn 117.5% more.

Legal entity effect: Practices operating as professional companies (STP) or limited companies (Srl) yield better revenues - +47.0% and +45.1%, respectively - than sole proprietorships. Each additional practice in which a dentist works contributes to a 7.5% increase in revenue.

No statistically significant income effect was found from working in central versus peripheral locations, nor from being a second-generation dentist.

For more information on the study
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