

On complementing each other

Straumann has teamed up with Z-Systems to extend its ceramic implant portfolio: the Basel-based implant manufacturing giant has obtained exclusive distribution rights for the new Z-Systems zirconia-based implant line. At this year's International Dental Show, Frank Hemm, Head Marketing & Education at Straumann, and Rubino Di Girolamo, CEO of Z-Systems, spoke with Georg Isbaner, managing editor of *ceramic implants*, about their collaboration, what it means for the future of the two companies and how the new implant line from Z-Systems complements Straumann's PURE implant range.

Mr Hemm, Mr Di Girolamo—please could you give us some insight into the new collaboration between Straumann and Z-Systems?

Hemm: The cooperation is already fairly advanced. Straumann now holds a 34 per cent stake in Z-Systems and we have signed a worldwide distribution agreement that provides Straumann with exclusive worldwide distribution rights for the new Z-Systems implant line. After IDS 2019, we will begin distribution in Europe—starting with the diameters that are already available. However, I should emphasise that the collaboration goes beyond a mere distribution agreement. The fact that we are now a large minority shareholder in Z-Systems underscores the fact that we want to strengthen the mutual ties between our two companies.

What does the new collaboration mean for joint customers in Europe and especially in Germany?

Di Girolamo: If you were to come to us asking about the SNOW implant, we would naturally refer you to Straumann. There are no conflicts of interest, quite the opposite: I think that the new collaboration has many clear positive effects. The fact that Straumann is now helping to support sales strengthens confidence in both the new product and the existing ones.

Hemm: Of course, there are some overlaps in our customer bases, but the exchange among the two companies works very well.

The capital injection from Straumann will presumably help to support and accelerate for Z-Systems' broad product pipeline. What are the next steps for Z-Systems?

Di Girolamo: We will complete our fifth generation by developing a tissue-level implant with same internal geometry and screw technique. We will then focus on the sixth generation, which has already been placed in pilot surgeries. For this new generation, we will develop a different exterior design and use smaller diameters. These will be the major developments in the near future.

“The new metal-free line from Z-Systems is the perfect complement to PURE.”

Until now, the big challenge has been to screw ceramic to ceramic. How have you solved this problem?

Di Girolamo: The material properties of zirconium dioxide only allow ceramics to be screwed with ceramics if you work very precisely. It is of utmost importance that the individual composite parts, i.e. the abutment, implant and connecting screw, fit extremely accurately. Otherwise tensions arise that ceramic cannot absorb very well. With the help of new tools, we can now achieve extremely high level of precision that was not possible two or three years ago. Our previous design, the BL, for example, still had an integrated metal part because it was not then



Straumann® Ceramic Implant Systems

Discover PURE SNOW white.



Fig. 1: From left: Georg Isbaner (Editorial Manager of *ceramic implants*), Frank Hemm (Head Marketing & Education at Straumann) and Rubino Di Girolamo (CEO of Z-Systems).

possible to achieve the necessary precision. In the meantime the machine industry has made significant progress and it is now possible to work with ultra-high precision.

Hemm: Z-Systems provides us with all-ceramic solution—implant, abutment and connecting screw, which we had not yet been able to offer—our PURE two-piece version still uses a metal insert. The possibility of being able to offer a completely metal-free solution with a bone-level design that complements PURE was one of the factors that made Z-Systems so attractive.

Speaking of PURE: is the new Z-Systems implant line a replacement or a complement?

Hemm: We will continue to market and develop our PURE range, which offers a soft-tissue level parallel-walled design in both monotype and two-piece versions. The advantage of PURE is that it has exactly the same geometry as our existing implants and can be placed with the existing Straumann instruments. Z-Systems complements it by offering a bone-level design with apical taper. This enables us to cater for individual customer requirements for bone-level implants and for higher primary stability with the apical taper. In this respect, the new metal-free line from Z-Systems is the perfect complement to PURE.

So far, ceramic implants have been predominantly used for single-tooth restorations. Do you think that it will also be possible to carry out multi-unit work with ceramics in the future?

Di Girolamo: We have 17 different abutments for the SNOW implant, including bridges. We are fully convinced by the quality and prosthetic capabilities and I am sure that we can go even further with ceramics.

Hemm: Today, we have customers who use ceramics in all indications. However, I have the impression that dentists are still somewhat cautious about using ceramics. They are gradually exploring the various treatment options beyond single tooth replacement, to partial gaps, and full-arch solutions. The prosthetic possibilities already exist, that's for sure.

Z-Systems certainly offers the widest and most advanced ceramic portfolio. What do you say to critics who don't believe the hype surrounding ceramic implants?

Di Girolamo: Right from the beginning, we have focused on developing and manufacturing products of the highest quality, stability and durability. Straumann follows the same principle. If quality manufacturers adhere to these principles, ceramics will eventually become standard.

Hemm: We do not want our customers to compromise on osseointegration or stability with ceramics. We have demonstrated the strength of our PURE implant system in stability tests. We have also proven scientifically that a ceramic implant with the ZLA surface is comparable in terms of osseous healing to a titanium implant with an SLA surface. The two-piece design was important to us

for prosthetic flexibility. In addition, it is vital that ceramic implants are compatible with existing procedures, instruments, and digital workflows including digital pre-planning programmes. Our ability to assure this will hopefully persuade dentists to adopt this material, which is still relatively young. Of course, our customers do not want to compromise on product quality, treatment outcomes

“We want to invest in a strong partner who has expertise in a specific area.”

or well-established workflows. With PURE, we are able to meet these requirements and with Z-Systems we are also well on track.

Let's talk about education: will there be a need for further education programmes that focus entirely on ceramics?

Di Girolamo: I think dentists should at least do some kind of additional training, because some things cannot be transferred from titanium to ceramic implantology. Here, of course, we rely heavily on Straumann, as they have comprehensive training programmes.

Hemm: We take this topic very seriously. Straumann stands both for science and education. In this context, our partnership with the International Team for Implantology (ITI) deserves special mention. As with other product launches, our programmes follow the “train the trainer” concept. We will train a small number of practitioners who will then be able to instruct the broader user base.

Ceramic implantology is positioned mainly in the premium segment. Is Straumann planning to make ceramic implants more accessible through Neodent?

Hemm: Price is certainly a factor that constrains ceramic implants today. This is partly because production costs are significantly higher in comparison with titanium implants. This is why we are developing other processes to reduce manufacturing costs. The most suitable alternative technique is injection moulding, which we are currently developing with Neodent to reduce costs while maintaining consistent quality, high stability and surface characteristics. I believe this will make ceramic implants more affordable and will enable us to mass produce. Today, the grinding process of one ceramic piece relatively time consuming. If demand for ceramic implants suddenly exploded, we wouldn't be able to meet it with currently available production methods.

In the past, Straumann's initial investments have often ended with full acquisitions. What are the plans for Z-Systems?

Hemm: Not every Straumann investment ends in a full acquisition. The main reason for such collaborations is because we want to invest in a strong partner who has expertise in a specific area—for example Dental Wings in the digital field, or Z-Systems in ceramics. If someone else can do something better than we can, it is highly likely that we will complement each other perfectly. In addition, I think it is important for both companies to maintain continuity in leadership and to provide the right incentives. It is important for our colleagues at Z-Systems to continue working and fighting for their company. It is vital for every company to keep its brand identity—which is why you don't see a Straumann “Village” here at IDS 2019. Instead, Neodent, Medentika and our other brands have their own booths. It is important that we do not consume companies by investing in them, but keep their individual brand identity. With regard to Z-Systems, it is by no means set in stone that our collaboration will end in a majority shareholding or a takeover.

In your opinion, how will the ceramic implant market develop in the near future?

Di Girolamo: We believe that the share of ceramics in the medium and upper segment will increase massively over the course of the next ten years. By continuously developing application technologies, we believe that we can achieve a market share of up to twenty per cent during this period.

Thank you for the interview.

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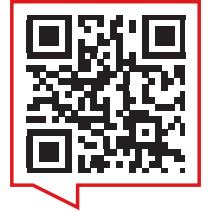
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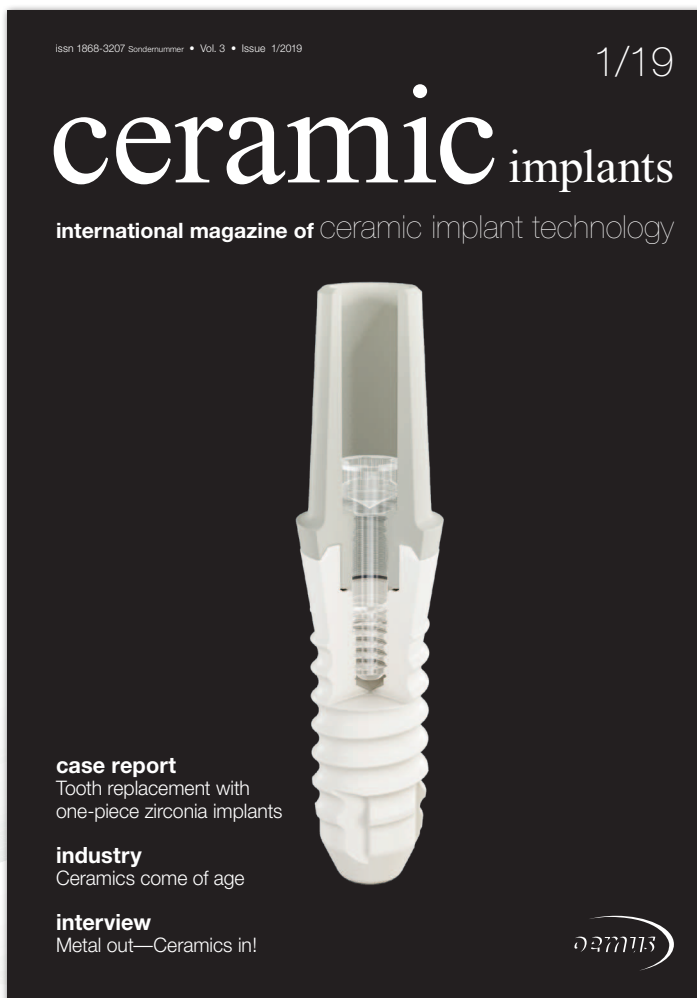
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