BZAEK Survey results on the supply of analogue X-ray films

Replies: 21

Countries: Czech Republic, Malta, Denmark, Spain, Hungary, Finland, The Netherlands, Portugal, Norway, Ireland, Lithuania, Belgium (VVT), Iceland, Slovenia, Italy (ANDI), Latvia, Slovakia, Austria, Switzerland, Cyprus, France

Country	What proportion of dental practices in your country still use analogue dental X-ray systems?
Czech Republic	We don't know exactly, but we think according to registrations - less than 5%, coming to zero.
Malta	nil
Denmark	Analogue dental X-ray systems still in use: probably ~0–10% of dental practices (most likely toward the lower end)
Spain	5%
Hungary	There are no official nationwide statistics on the exact proportion of analogue dental X-ray systems in Hungary. However, the most recent national survey of Hungarian dental practices indicates that approximately 16% of practices still use exclusively analogue (film-based) dental radiography, while about 84% have adopted digital radiographic systems or digitize analogue images. Although analogue systems are still present, digital radiography has become the standard in the majority of Hungarian dental practices.
Finland	Very few
The Netherlands	Although the exact percentage is unknown, the proportion of practices still using analogue dental X-ray systems is expected to be negligible. This is supported by preliminary data from a recent KNMT survey (2025), in which only 1 of the 173 participating dental practice owners (0.6%) reported not having digital radiographic equipment. However, the absence of digital radiographic equipment does not necessarily imply the use of analogue X-ray systems, as it may also indicate that no X-ray equipment is available within the practice. In addition, current Dutch guidelines on radiographic diagnostics in oral healthcare focus exclusively on digital radiography and do not address the use of analogue X-ray systems, which is consistent with the view that analogue systems are no longer commonly used in routine dental practice. Although no comprehensive national data appear to be available, organisations such as INDENT (the Dutch association of dental companies) and the VGT (the Dutch Association of Dental Wholesalers) may be valuable sources of supplementary information, as they may have insight into market developments and the extent to which analogue radiographic systems remain in use within Dutch dental practices.
Portugal	We don't have reliable data to quantify the proportion of dental practices in Portugal that still use analogue dental X-ray systems. However, based on current practice, we presume that their number is relatively small.
Norway	Very few, but the exact proportion in Norway is not known. 4% of dental clinics with CBCT reported to have intraoral films available in a 2025 national survey. All of these clinics used digital intraoral receptors as well. It is not known whether any dental practices in Norway use analogue films only any more. If such clinics still exist, the porportion is very, very low.

Ireland	2%
Lithuania	There is no reliable data. However market representatives suggest that only very small number of dental practices are still using analogue dental X-ray systems
Belgium	We couldn't get exact data but the use of analogue dental X-ray must be very low
Iceland	1% (or less)
Slovenia	less than 10%
Italy	10% (estimate)
Latvia	analog xray - below 50% of clinics
Slovakia	It should be zero, because dental X-ray films are banned from 2018 in Slovakia, but regarding my answer to the next question, where is a supply, there is probably some demand.
Austria	We don´t have any valid data on this.
Switzerland	10%
Cyprus	Very low
France	Less than 1% actually

Country	Are you aware of any supply shortages or announced production discontinuations affecting analogue dental X-ray films, including intraoral films and panoramic films (15 × 30 cm and 12.5 × 30 cm)?
Czech Republic	It is not reported problem - we think because of minimal use
Malta	no
Denmark	Yes. The current picture is not a complete discontinuation of analogue dental X-ray film, but there are clear signs of market contraction, price pressure, and vulnerability of specific film formats, especially panoramic/extraoral films.
Spain	No
Hungary	No official nationwide shortage or production discontinuation of analogue dental X-ray films has been reported in Hungary. However, the availability of analogue intraoral and panoramic films has gradually decreased due to the global transition to digital radiography. While film products, including 15 × 30 cm and 12.5 × 30 cm panoramic films, remain available through distributors, the number of manufacturers and suppliers has declined, which may occasionally result in longer delivery times or reduced product availability.
Finland	We are aware that there have been challenges with the availability of X-ray films. These products are not always readily available from suppliers' stock, and delivery times can sometimes be quite long.

The Netherlands	No nationwide shortages of analogue dental X-ray films have been reported in the Netherlands. Analogue dental X-ray films, including intraoral and panoramic films, remain available through Dutch dental suppliers. However, the availability appears to be limited. Several suppliers indicate that certain film types are only available on a special-order basis, are (temporarily) out of stock, have extended delivery times, or are no longer available. No formal announcements regarding supply shortages or production discontinuations affecting analogue dental X-ray films have been reported.
Portugal	We are not aware of any widespread supply shortages or announced production discontinuations affecting analogue dental X-ray films, including intraoral films and panoramic films (15 × 30 cm and 12.5 × 30 cm). However, analogue systems are still used in some educational institutions for undergraduate pre-clinical training, so continued availability of these films remains relevant in this context.
Norway	No. The dental supply distributors are selling analogue x-ray films, but we do not know if there is a shortage.
Ireland	ECo30 Discontinued
Lithuania	We are not aware
Belgium	No, we still can order
Iceland	No
Slovenia	no
Italy	No; the reduction of the market has not caused any reported shortages
Latvia	yes
Slovakia	Not aware of any mentioned above. Dental suppliers in Slovakia still offer plenty options of intraoral films to this day. They do not provide any panoramic films.
Austria	Since the manufacturer of T-Mat G has ceased production, only remaining stock is available for purchase in Austria.
Switzerland	Yes
Cyprus	Difficult to find films and developing liquids
France	Actually we do not have this information

Country	Which manufacturers and suppliers of analogue dental X-ray films are currently active in your country, and how broad is the range of products available?
Czech Republic	We have Czech producer FOMA and some imports
Malta	N/A
Denmark	We have no knowledge of that.

Spain	Carestream Dental. INSIGHT is a high-sensitivity film, classified as Class F under certain processing conditions; it is available in paediatric (No. 0), periapical (No. 2), double-film, bite-wing (No. 3) and occlusal (No. 4) formats. ULTRA-SPEED is Class D and is also available in paediatric, periapical, bite-wing and occlusal formats. For extraoral use, T-MAT G film continues to be available for panoramic/cephalometric imaging in 12.7×30.5, 15×30 and 18×24 cm sizes.
Hungary	The Hungarian market for analogue dental X-ray films is now a niche market. Only a small number of manufacturers—primarily FOMA Bohemia and Carestream Dental—continue to supply analogue dental films through Hungarian or European distributors. The available product range remains sufficient to support practices that still use film-based radiography, including intraoral films and panoramic films (15 × 30 cm and 12.5 × 30 cm), but the variety of brands and products has decreased significantly as most dental practices have transitioned to digital radiography.
Finland	Dental Film, Carestream with small range of products available.
The Netherlands	Carestream appears to be the main manufacturer still actively supplying analogue dental X-ray films to the Dutch market. Their products are distributed through several dental suppliers, such as Sordent, Basiq Dental, Minilu, Plandent, Henry Schein Dental and Dentalair. As mentioned before, several suppliers indicate that certain film types are only available on a special-order basis, are (temporarily) out of stock, have extended delivery times, or are no longer available.
Portugal	Several dental equipment and dental materials suppliers in Portugal still provide analogue dental X-ray films.
Norway	Carestream, Agfa and Kodak are active in Norway. Intraoral dental and occlusal, extraoral panorama and ceph are available.
Ireland	Kodak IP21. DMI, Henry Schein, Medray. Small range
Lithuania	Dentalfilm Srl - Ergonom X, ECO-30; CARESTREAM X-ray - E-speed, T-Mat G/RA 15x30cm,
Belgium	???
Iceland	None
Slovenia	do not know
Italy	
Latvia	AGFA, KODAC - (E/F or D standard) - but range are coming shorter. self developing films (italy) usage also are going down
Slovakia	INTRAORAL ONLY: http://www.anton.sk/rtg-filmy-a-chemia/dentalne-rtg-filmy-a-chemia/ offer KODAK and PRIMAX https://eshop.dentamed.sk/e-shop/ordinacia/prislusenstvo-k-rtg/rtg-filmy/ offer AGFA, FOMA DENTIX, EMMENIX, ERGONOM.X https://www.dentall.cz/kategorie/946/rtg-filmy has SKYDENT, ERGONOM.X

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Austria	There are no producers of analogue dental X-ray films left in Austria. All dealers only have remaining stock left for purchase.
Switzerland	Agfa and Carestream (Kodak) have stopped production. Some dental suppliers still have some in stock.
Cyprus	Agfa
France	Manufacturers and suppliers are not selling anymore analogue dental X-Ray fims, There is no market anymore.

Country	Which distribution channels are used in your country to obtain analogue dental X-ray films (e.g. dental supply distributors or online retailers), and what is the approximate share of each?
Czech Republic	Main dental depots
Malta	dental distributors
Denmark	In our country, analogue dental X-ray films are primarily obtained through dental supply distributors, which represent the largest share of the market. A smaller proportion is purchased through online retailers and specialised medical/dental equipment suppliers.
Spain	Supply distributors
Hungary	No official statistics are available on the distribution channels for analogue dental X-ray films in Hungary. Based on the structure of the Hungarian dental supply market, it is estimated that approximately 70–80% of analogue dental X-ray films are purchased through specialised dental supply distributors, 15–20% through dental equipment dealers, 5–10% through Hungarian or European online retailers, and less than 5% directly from manufacturers. The market is characterised by distributor-based procurement rather than direct purchasing from manufacturers.

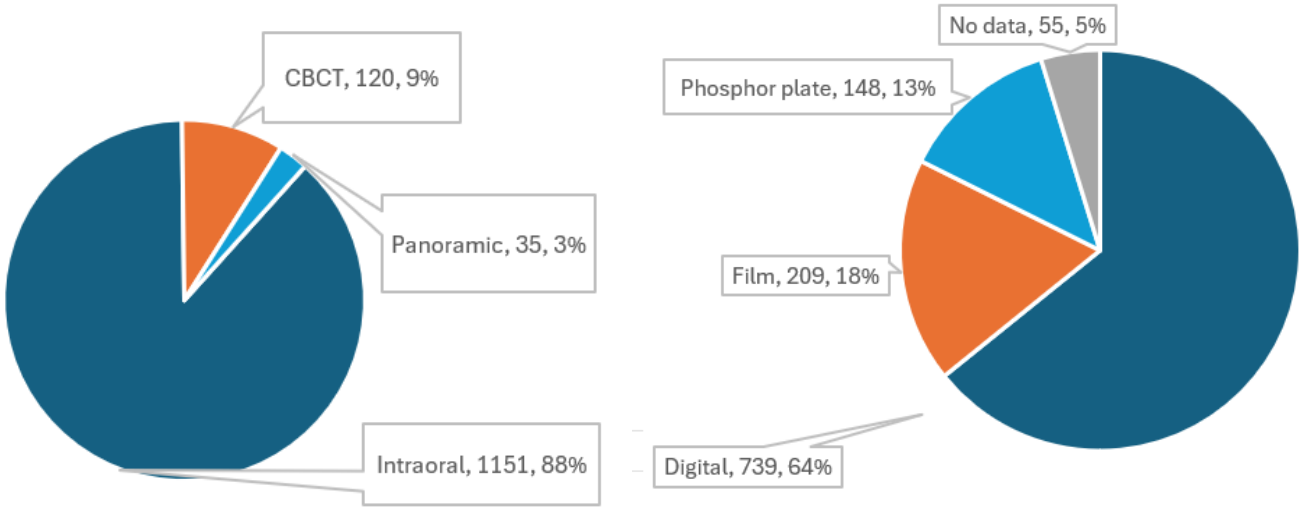
Finland	Mainly dental supply distributors. We don't have the information about the shares.
The Netherlands	In the Netherlands, analogue dental X-ray films can be obtained through specialised dental supply distributors (dental depots) serving dental practices. Examples include Sordent, Basiq Dental, Minilu, Plandent, Henry Schein Dental and Dentalair. Products can be ordered through the suppliers' online ordering platforms and webshops. No public data on the market share of individual distribution channels for analogue dental X-ray films in the Netherlands could be identified.
Portugal	Dental supply distributors and dental materials suppliers are the main distribution channels used in Portugal. We do not have reliable data to estimate the market share of each channel.
Norway	We have no information about this.
Ireland	Unknown
Lithuania	Dental supply distributors. There is no reliable data on market details
Belgium	Both
Iceland	Unknown
Slovenia	dental supply distributors
Italy	Dental supply distributors are more commonly involved; ralely present on online retainers
Latvia	mainly via dealers (local), e-comercy max 10%
Slovakia	I assume that all dental depos mentioned above and some them have a direct personnel supply network. I do not have data on dental x-ray film market share.
Austria	Due to the discontinuation of production there are no distribution channels left.
Switzerland	most dental offices order online (~80%)
Cyprus	both dental supply distributors or online retailers, for self developing films
France	There is no market anymore.

Country	Have there been reports of supply problems or of an accelerated transition to digital X-ray technology as a result of developments in the market for analogue dental X-ray films?
Czech Republic	We are nearly 100% digital, so it is a question of some old low volume praxis
Malta	all use digital
Denmark	We are not aware of any reports of supply problems.
Spain	There is no shortage of analogue supply, but there is a clear shift towards digital

Hungary	There have been no official reports of nationwide shortages of analogue dental X-ray films in Hungary. However, dental professionals have experienced reduced product availability, fewer manufacturers and distributors, occasional longer delivery times for certain film formats, and declining availability of servicing for analogue processing equipment. These market developments, together with the clinical and economic advantages of digital imaging, have contributed to an accelerated transition from analogue to digital dental radiography in recent years.
Finland	The transition to digital X-ray techology has been going on already for several years. The driving force has been the advantages offered by digital technology rather than the developments in the market foranalogue dental X-ray films.
The Netherlands	No major supply problems of analogue dental X-ray films have been publicly reported in the Netherlands. Although there is no information available concerning an accelerated transition to digital X-ray technology as a result of developments in the market for analogue dental X-ray films, a reduced product availability over time may have encouraged a shift towards digital technologies.
Portugal	We are not aware of specific supply problems with analogue dental X-ray films. However, there has been a gradual transition towards digital X-ray technology, mainly driven by technological developments and the advantages of digital systems.
Norway	Norway had a majority proportion of digital dental x-ray users already at the turn of the millennium and the transition to digital x-ray is pretty much complete.
Ireland	Only a small percentage of Dental Care providers use analogue, the vast majority have transitioned to digital
Lithuania	We are not aware
Belgium	NO
Iceland	No, the move toward digital radiography has been a longer-term technological development, rather than a response to a documented shortage of analogue film.
Slovenia	we do no now
Italy	no; the technological shift was not caused by supply limitations, but by clinical and market trends that made digital x-rays more commonplace
Latvia	no any reports. all new equipment is modern and digital
Slovakia	No reports. Our chamber facilitated the switch to digital before the analogue ban by inspiring colleagues with modern info through various theoretical lectures and practical courses.
Austria	Dental equipment companies are reporting a trend towards switching to imaging plate scanner. We have not received any feedback from dentists on this matter.

Switzerland	Yes. This is a problem for older dental offices.
Cyprus	Yes
France	Analogue dental X-ray films are an old story for French dentists…

Additional information from Latvia:



Information provided by the Latvian State Radiation Centre on the equipment in Latvia.