Appendix F: Price Trends

F.1 In this appendix, we set out the data collected and the analysis done to estimate price trends. We also present the results of our analysis.

Dental groups and Independents' data

Data

F.2 We obtained data from three of the four largest dental groups[1] and four of the other large dental groups identifying their top eight revenue generating private dental treatments, excluding white fillings and teeth whitening (top eight treatments).[2] For each treatment, the data included annual revenue and the total number of treatments performed in each year from 2021-2025. We also obtained equivalent information for the cheapest private option for white fillings and the cheapest private in practice option for teeth whitening.[3] We calculated an average realised price for each treatment in each year for each large dental group based on this data.[4] Due to data quality and availability, our analysis below only includes 2023-2025 data.

F.3 One of the four largest dental groups and some other large dental groups could not provide treatment level revenue data.[5] We asked these groups to provide an estimate of the average realised price across their practices for their top eight treatments, white fillings (cheapest private option) and teeth whitening (cheapest in practice option) for 2023, 2024 and 2025.

F.4 We also obtained estimates of the average realised price across their practices for white fillings (cheapest private option) and teeth whitening (cheapest private in practice option) for 2023, 2024 and 2025 from seven small to mid-size dental groups.[6] We obtained equivalent data on white fillings and teeth whitening from 105 independents through an online questionnaire.[7] To limit the information-gathering burden on small to mid-size dental groups and independents, we did not ask them to identify their top eight treatments. As we obtained price data from a relatively small proportion of the small to mid-size dental groups and independents in the market, the results should be considered as indicative.

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[1] Response to the CMA's information requests: [✂]
[2] The treatments identified were similar across the large dental groups, although there was some variation. For example, all the large dental groups who provided their data included an exam/checkup, hygiene, implant and crown among their eight highest revenue generating treatments.
[3] We used these two specific treatments as comparator treatments across all groups and practices and because both are provided privately. This allowed us to make comparisons using a consistent set of treatments.
[4] These figures represent realised prices, rather than listed prices. Realised prices may differ from list prices because patients do not necessarily pay the listed price.
[5] Response to the CMA's information requests: [✂]
[6] Response to the CMA's information requests: [✂]
[7] Response to the CMA's independent's questionnaire, published 13 July 2026, question 9.

F.5 The data was at treatment level, not at SKU (stock keeping unit) level.

Analysis

F.6 We analysed the data described above to estimate the average realised price changes for the large dental groups' top eight treatments, white fillings and teeth whitening, and for the small to mid-size dental groups and independents' white fillings and teeth whitening between 2023 and 2025.[8,9]

F.7 We compared the estimated realised price changes with the services consumer price index (services CPI), the consumer price index (CPI) and the change in average weekly earnings over the same period.[10] We obtained the services CPI index, the CPI index and average weekly earnings from the ONS website.[11]

Results

Common treatments

F.8 Table F.1 and Figure F.1 present the results of our analysis of realised prices for common treatments. They show, for each of the four largest dental groups and the average of the four largest dental groups and the other large dental groups, the average annual realised price change and the overall realised price change between 2023 and 2025. The results are an average of the price changes of the top eight treatments, teeth whitening and white fillings.

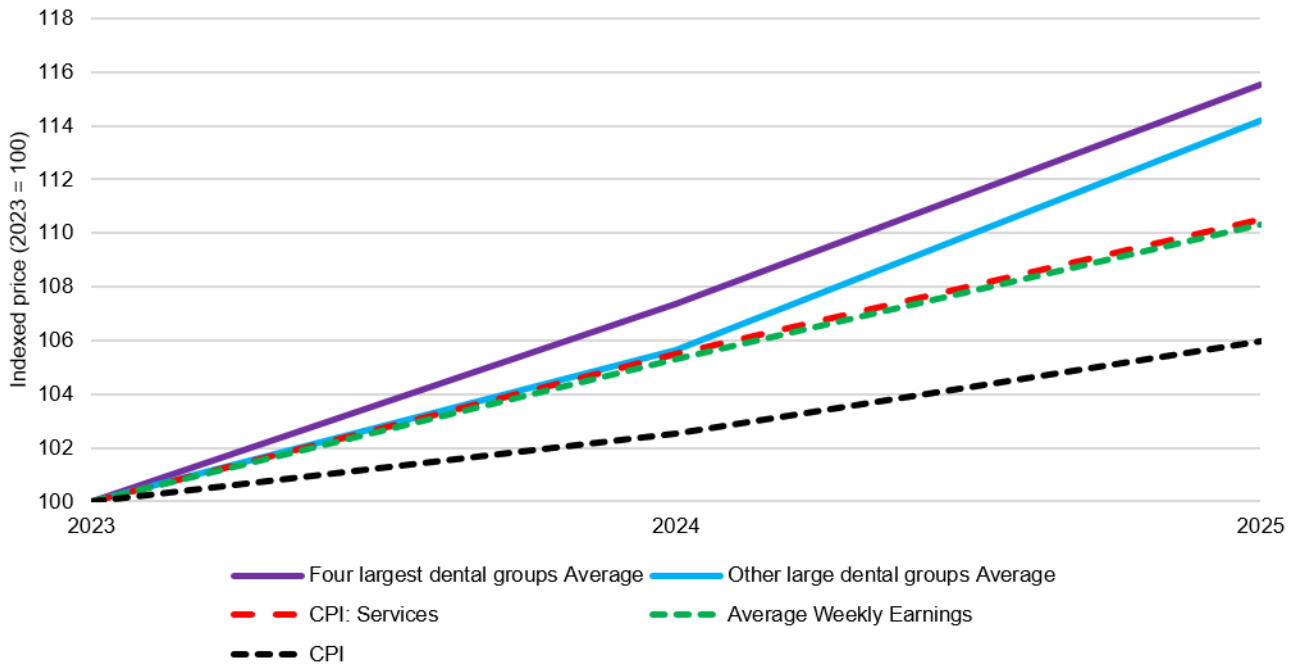
[8] Average price changes are calculated as simple (unweighted) averages. Price changes have not been weighted by revenue or the number of treatments. We also used simple averages when calculating four largest dental groups, large dental groups and small to mid-size dental groups' averages.
[9] All the large dental groups that responded listed a hygiene appointment as one of their top revenue generating treatments, so we also analysed hygiene appointments separately from the other top eight treatments.
[10] We calculated average annual CPI, services CPI and average weekly earnings changes using calendar year data. The resulting year on year changes are similar when calculated using financial year data.
[11] Office for National Statistics, Average weekly earnings in Great Britain: July 2026, accessed on 07/08/26. Office for National Statistics, Consumer price inflation time series, accessed on 11/08/26

Table F.1: Changes in realised prices for common treatments, compared with CPI, services CPI and average weekly earnings, 2023-2025

		%
Dental group	*Average annual price change*	*Total price change*
Bupa	[✂]	[✂]
mydentist	[✂]	[✂]
PortmanDentex	[✂]	[✂]
Rodericks	[✂]	[✂]
Four largest dental groups Average	7	16
Other large dental groups Average	7	14
CPI: Services	5	11
CPI	3	6
Average Weekly Earnings	5	10

Source: CMA analysis of dental groups and ONS data.
Note: [✂] data was not available in 2023, and as such, it is not possible to calculate total price growth from 2023-2025 for that group. [✂] price growth was [✂]% from 2024-2025.

Figure F.1: Indexed prices for common treatments among the large dental groups compared with CPI, services CPI and average weekly earnings, 2023-2025



Source: CMA analysis of dental groups and ONS data.
Note: [✂] data was not available in 2023, and its data is not included in this figure.

F.9 The results indicate that the realised prices of the common treatments increased more than both services inflation and general inflation on average for the large dental groups. Between 2023 and 2025, the four largest dental groups and other large dental groups increased their common treatments' prices by around 7% per year on average. Over the same period, services CPI and average weekly earnings increased by an average of 5% per year, and CPI by an average of 3% per year.

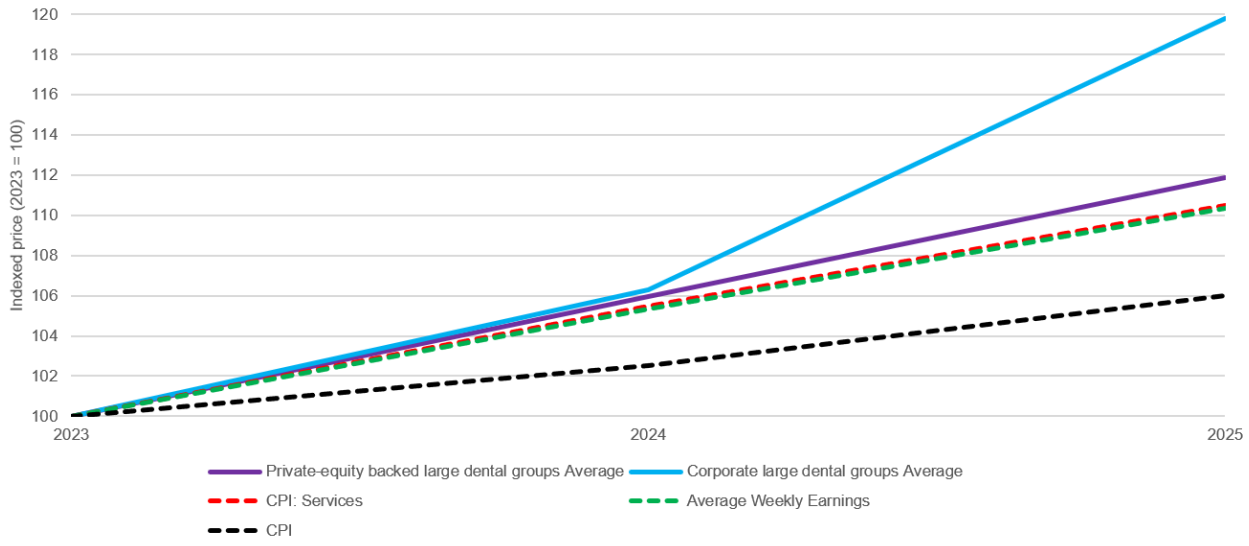
F.10 Table F.2 and Figure F.2 present the results of our analysis of realised prices for common treatments split between private equity-backed large dental groups and corporate large dental groups. They show the average annual realised price change and the overall realised price change between 2023 and 2025. The results are an average of the realised price changes of the top eight treatments, teeth whitening and white fillings. However, the analysis only includes four corporate large dental groups.

Table F.2: Changes in realised prices for common treatments compared with CPI, services CPI and average weekly earnings, 2023-2025

		%
Dental group	*Average annual price change*	*Total price change*
Private equity-backed large dental groups Average	6	12
Corporate large dental groups Average	9	20
CPI: Services	5	11
CPI	3	6
Average Weekly Earnings	5	10

Source: CMA analysis of dental groups and ONS data.
Note: the analysis includes seven private equity-backed large dental groups and four corporate large dental groups.

Figure F.2: Indexed prices for common treatments among the large dental groups, compared with CPI, services CPI and average weekly earnings, 2023-2025



Source: CMA analysis of dental groups and ONS data.
Note: the analysis includes seven private equity-backed large dental groups and four corporate large dental groups .

F.11 The results indicate that the realised prices of the common treatments increased more than both services inflation and general inflation on average for both private equity-backed large dental groups and corporate large dental groups. Between 2023 and 2025, the private equity-backed large dental groups increased their common treatments' prices by 6% per year, compared to 9% per year for the corporate large dental groups (although this is based on data from only four corporate groups). Over the same period, services CPI and average weekly

earnings increased by an average of 5% per year, and CPI by 3% on average per year.

Hygiene appointment

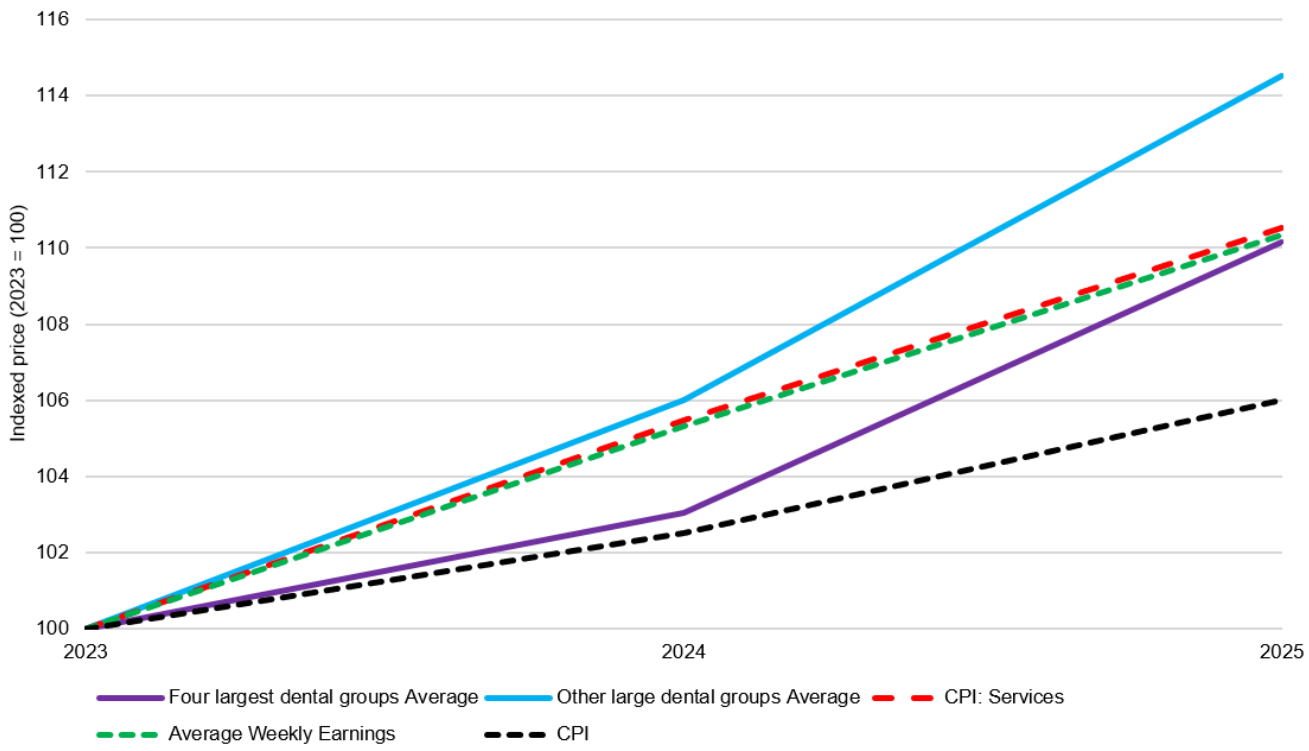
F.12 Table F.3 and Figure F.3 present the results of our analysis of realised prices of hygiene appointments.

Table F.3 Changes in realised prices for a hygiene appointment compared with CPI, services CPI and average weekly earnings, 2023-2025

Dental group	*2023 price (£)*	*2024 price (£)*	*2025 price (£)*	*Average annual price change (%)*	*Total price change (%)*
Bupa	[✂]	[✂]	[✂]	[✂]	[✂]
mydentist	[✂]	[✂]	[✂]	[✂]	[✂]
PortmanDentex	[✂]	[✂]	[✂]	[✂]	[✂]
Rodericks	[✂]	[✂]	[✂]	[✂]	[✂]
Four largest dental groups Average	78.37	74.62	80.74	5	10
Other large dental groups Average	68.16	72.10	77.72	7	15
CPI: Services				5	11
CPI				3	6
Average Weekly Earnings				5	10

Source: CMA analysis of dental groups and ONS data.
Note: [✂] data was not available in 2023, and as such, it is not possible to calculate total price growth from 2023-2025 for that group. [✂] price growth was [✂]% from 2024-2025.

Figure F.3: Indexed prices for hygiene appointments among the large dental groups, compared with CPI, services CPI and average weekly earnings, 2023-2025



Source: CMA analysis of dental groups and ONS data.
Note: [✂] data was not available in 2023, and its data is not included in this figure.

F.13 The results indicate that between 2023 and 2025, the realised price of a hygiene appointment increased more than services inflation and general inflation on average for the other large dental groups and above general inflation but broadly in line with services inflation on average for the four largest dental groups. On average, the four largest dental groups increased the realised price for hygiene appointments by 5% per year and other large dental groups increased the price for hygiene appointments by 7% per year. Over the same period, services CPI and average weekly earnings increased by an average of 5% per year, and CPI by an average of 3% a year.

F.14 The four largest dental groups had higher average realised prices for a hygiene appointment in 2025, at £81, compared with £78 for the other large dental groups.

White fillings

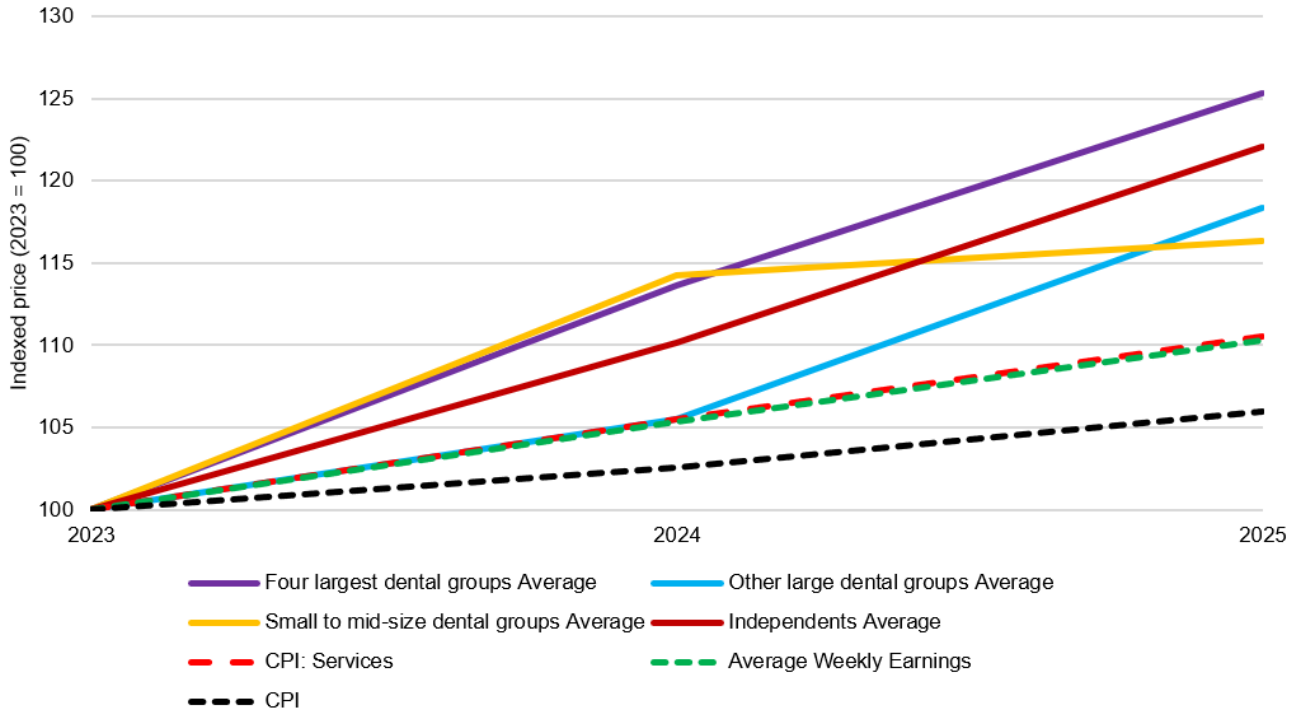
F.15 Table F.4, Figure F.4, and Figure F.5 present the results of our analysis of realised prices of white fillings from 2023 to 2025.

Table F.4: Changes in realised prices for white fillings compared with CPI, services CPI and average weekly earnings, 2023-25

Dental group	*2023 price (£)*	*2024 price (£)*	*2025 price (£)*	*Average annual price change (%)*	*Total price change (%)*
Bupa	[✂]	[✂]	[✂]	[✂]	[✂]
mydentist	[✂]	[✂]	[✂]	[✂]	[✂]
PortmanDentex	[✂]	[✂]	[✂]	[✂]	[✂]
Rodericks	[✂]	[✂]	[✂]	[✂]	[✂]
Four largest dental groups Average	134.31	141.50	153.78	12	25
Other large dental groups Average	117.72	125.84	138.24	9	18
Small to mid-size dental groups Average	124.19	141.20	143.89	8	16
Independents Average	118.36	129.77	140.95	10	22
CPI				3	6
CPI: Services				5	11
Average Weekly Earnings				5	10

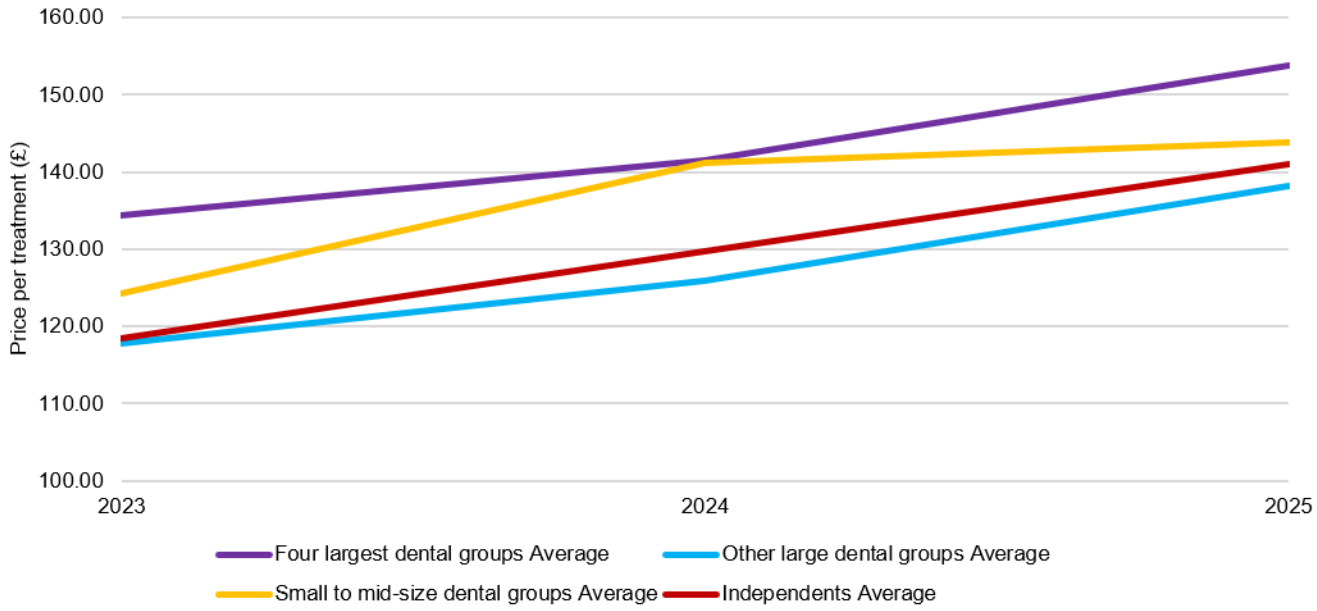
Source: CMA analysis of dental groups, independents and ONS data.
Note: [✂] data was not available in 2023, and as such, it is not possible to calculate total price growth from 2023-2025 for that group. [✂] price growth was [✂]% from 2024-2025.

Figure F.4: Indexed prices for white fillings, compared with CPI, services CPI and average weekly earnings, 2023-25



Source: CMA analysis of dental groups, independents and ONS data.
Note: [✂] data was not available in 2023, and its data is not included in this figure.

Figure F.5: The average price of a white filling, 2023-25



Source: CMA analysis of dental groups and independents.
Note: [✂] data was not available in 2023, and its data is not included in this figure.

F.16 The results indicate that between 2023 and 2025, the average realised price of a white filling increased more than both inflation measures and weekly earnings on average for the four largest dental groups, other large dental groups, small to mid-

size dental groups and independents. On average, the four largest dental groups increased the realised price for white fillings by 12% per year, compared with 9% for the other large dental groups, 8% for the small to mid-size dental groups and 10% for independents. Results for small to mid-size dental groups and independents should be considered as indicative (see paragraph F.4 above). Over the same period, services CPI and average weekly earnings increased by an average of 5% per year, and CPI by an average of 3% a year.

F.17 The four largest dental groups also had the highest average realised price for a white filling in 2025, at £154, compared with £138 for the other large dental groups and £144 for small to mid-size dental groups and £141 for independents.[12]

Teeth whitening

F.18 Table F.5 and Figure F.6 present the results of our analysis of the realised prices of teeth whitening from 2023 to 2025.

F.19 We have not included a graph comparing the average realised price of teeth whitening, given this service may vary significantly in its options and characteristics, which may affect the comparability of prices across firms.

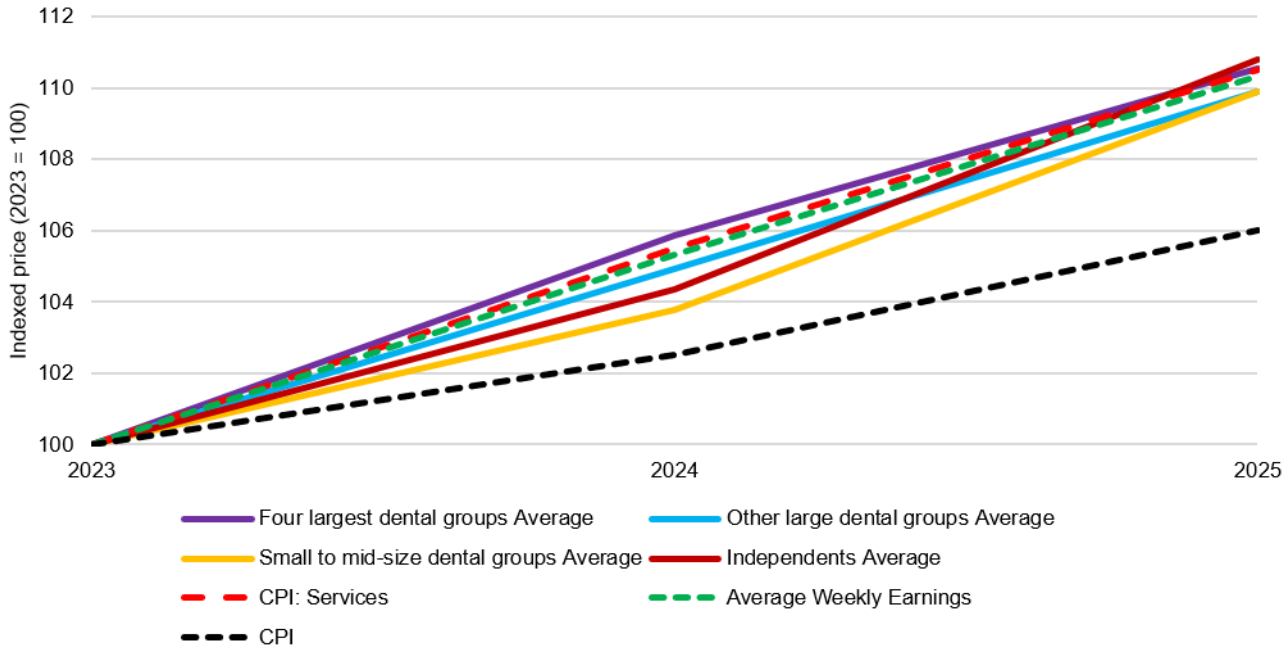
Table F.5: Changes in realised prices for teeth whitening compared with CPI, services CPI and average weekly earnings, 2023-25

Dental group	*2023 price (£)*	*2024 price (£)*	*2025 price (£)*	*Average annual price change (%)*	*Total price change (%)*
Bupa	[✂]	[✂]	[✂]	[✂]	[✂]
mydentist	[✂]	[✂]	[✂]	[✂]	[✂]
PortmanDentex	[✂]	[✂]	[✂]	[✂]	[✂]
Rodericks	[✂]	[✂]	[✂]	[✂]	[✂]
Four largest dental groups Average	268.65	246.18	258.58	5	11
Other large dental groups Average	297.52	293.01	306.38	5	10
Small to mid-size dental groups Average	317.56	325.06	343.03	5	10
Independents Average	320.48	333.59	353.77	5	11
CPI				3	6
CPI: Services				5	11
Average Weekly Earnings				5	10

Source: CMA analysis of dental groups, independents and ONS data.
Note: [✂] data was not available in 2023, and as such, it is not possible to calculate total price growth from 2023-2025 for that group. [✂] price growth was [✂]% from 2024-2025. The four large dental group average price is decreasing from 2023-25 despite positive total price growth due to the inclusion of [✂] data for 2024 and 2025 but not for 2023.

[12] Noting that prices also varied within the Four large dental groups, ranging from £[✂] to £[✂] in 2025.

Figure F.6: Indexed prices for teeth whitening compared with CPI, services CPI and average weekly earnings, 2023-25



Source: CMA analysis of dental groups, independents and ONS data.
Note: [✂] data was not available in 2023, and its data is not included in this figure.

F.20 Results indicate that between 2023 and 2025, the average realised price for teeth whitening increased above general inflation and roughly in line with services inflation for the four largest dental groups and for the other large dental groups, small to mid-size dental groups and independents. On average, the four largest dental groups, other large dental groups, small to mid-size dental groups and independents increased the realised price for teeth whitening by 5% per year. Results for small to mid-size dental groups and independents should be considered as indicative (see paragraph F.4 above). Over the same period, services CPI and average weekly earnings increased by an average of 5% per year, and CPI by an average of 3% per year.

Other pricing data

Dental payment plan provider

F.21 As part of our assessment of prices, we obtained data from a dental payment plan (DPP) provider on the monthly price of its most popular plan, the [✂] Plan.[13] The data covered the price of the plan on the 1st of January from 2021-2026 for each practice offering the plan. For this analysis, the practices were grouped into three

[13] The [✂] plan includes [✂] per year. [✂] of the DPP provider's customers are on the plan. The dataset covers the price of the plan for [✂].

categories: (i) four largest dental groups, (ii) other large dental groups and small to mid-size dental groups and (iii) independents.[14]

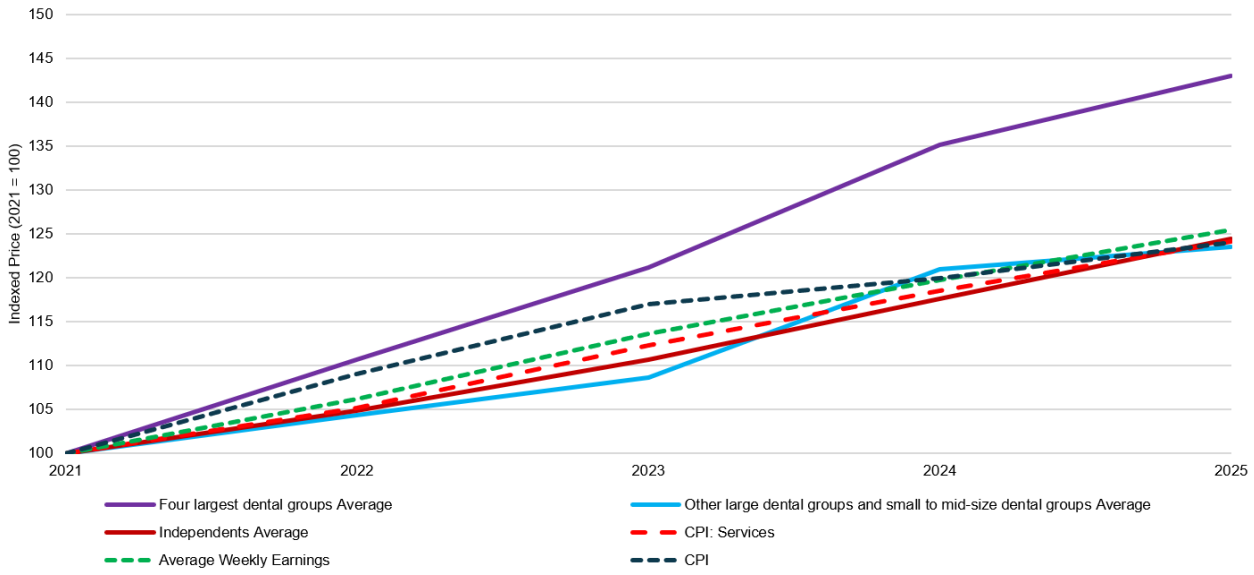
F.22 We compared changes in the price of the plan across the three categories. To do this, we calculated the percentage change year on year from 2021 to 2025 and the total change for the same period and compared this to services inflation.[15] Table F.6 and Figure F.7 present the results of our analysis.

Table F.6: Changes in the DPP provider's most common payment plan prices, 2021-25

Dental group	*2021 monthly price (£)*	*2025 monthly price (£)*	*Average annual price change (%)*	*Total price change (%)*
Bupa	[✂]	[✂]	[✂]	[✂]
mydentist	[✂]	[✂]	[✂]	[✂]
PortmanDentex	[✂]	[✂]	[✂]	[✂]
Rodericks	[✂]	[✂]	[✂]	[✂]
Four largest dental groups Average	15.98	22.85	9	43
Other large dental groups and Small to mid-size dental groups Average	16.19	20.00	5	24
Independents Average	14.91	18.56	6	24
CPI			6	24
CPI: Services			6	24
Average Weekly Earnings			6	25

Source: CMA analysis of [✂] data.

Figure F.7: Indexed prices for the DPP provider's most common plan, compared with services CPI and average weekly earnings, 2021-25



Source: CMA analysis of [✂] data.

F.23 The results indicate that between 2021 and 2025, the average price of the [✂] plan increased more than services inflation on average for the Four largest dental groups. On average, the Four largest dental groups increased the price of the [✂]

[14] As of [✂].
[15] We calculated the percentage change between 2021 and 2025, instead of 2026, as services CPI was not available for the year of 2026.

plan by 9% per year, compared with 5% for the other dental groups and 6% for the independents. Over the same period, CPI, services CPI and average weekly earnings increased by an average of 6% per year.

F.24 The Four largest dental groups also had the highest average price for the [✂] plan in 2025, at £23 a month, compared with £20 for the other large dental groups and small to mid-size dental groups and £19 for independents.

Insurance provider

F.25 We obtained claims data from an insurance provider.[16] This includes the average amount claimed for private dental treatments each year between 2021-2025 across 31 treatment categories.[17] This data does not allow a breakdown by the dental provider or group.

F.26 We compared the change in the average amount claimed for each treatment category from 2021-2025 and compared this to CPI and services CPI. The results suggest that the prices of seven of the treatments increased above and three broadly in line with both CPI and services CPI.[18] The prices of the remaining 21 treatments increased below both CPI and services CPI.[19] For example, the price of a white filling increased on average by 5.7% per year from 2021-2025, which was broadly in line with CPI and services CPI.[20]

F.27 [✂]. Given the size of the UK private dentistry market in 2024-25 was over £6 billion (see Chapter 2), we consider this to be a relatively small sample, and it has not been possible to assess how representative the data is (for example, the data cannot be broken down by provider or dental group). Moreover, the insurance provider submitted the amounts charged recorded in the data are based on unvalidated customer-entered data and may therefore be subject to input errors and inaccuracies.[21] We therefore consider limited weight can be given to this data when assessing price trends in the market.

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[16] The data records the amount submitted by a policyholder to the insurance provider as part of an insurance claim. The insurance provider did not independently verify whether the amount submitted accurately reflected the price charged by the dental provider. The insurance provider also provided the minimum and maximum amounts recorded for each treatment category to illustrate the range of submitted claim amounts. [✂]

[17] This includes: Accident/Emergency, Check-ups and Examinations, Hygiene and Scalings, X-Rays, Adult orthodontics, Anaesthetic, Apicectomy, Bridge, Child orthodontics, Crowns, Dentures, Extractions, Fillings, Fissure sealant or Topical Flouride, Glass ionomer filling, Implants, Inlays/Onlays, Mouth cancer treatment, Mouthguard, Overnight Hospital Stays, Periodontal, Pin for Fillings, Post for Crown, PPE, Repair or reline denture, Repair/Refix, Root Canal Treatment, Silver Fillings, Teeth whitening, Veneer, White Filling.

[18] These treatments are: Mouth cancer treatment, PPE, Repair/Refix, Post for Crown, X-Rays, Extractions, Repair or reline denture, and White Fillings.

[19] These treatments are: Accident/Emergency, Check-ups and Examinations, Hygiene and Scalings, Adult orthodontics, Anaesthetic, Apicectomy, Bridge, Child orthodontics, Crowns, Dentures, Fillings, Fissure sealant or Topical Flouride, Glass ionomer filling, Implants, Inlays/Onlays, Mouthguard, Overnight Hospital Stays, Periodontal, Pin for Fillings, Root Canal Treatment, Silver Fillings, Teeth whitening, Veneer.

[20] [✂]

[21] [✂] For example, the amount charged recorded in the data for Check ups and Examinations ranged between £0.01 and £8,200.

myTribe

F.28 myTribe published an article in August 2026 assessing the cost of private dental treatments across the UK, and provided a submission on its analysis in September 2026.[22] The analysis conducted by myTribe assessed the price changes of 446 dental practices from October 2024 to August 2026. The prices were collected from an online fee survey, and the same practices were analysed in October 2024 and August 2026. The sample is not representative of the UK population.[23]

F.29 myTribe found that prices for five commonly purchased treatments increased by between 5% and 11% between October 2024 and August 2026.[24] For example, the price of a white filling increased by 6% and a hygiene appointment both increased by 10% between October 2024 and August 2026. myTribe noted all items CPI rose by around 6% between August 2024 and July 2026.

F.30 We note that while myTribe analysed the prices listed on dental practice websites, our analysis of dental groups and independents data above is based on revenue and price estimates that should reflect the average prices paid by customers. Listed prices may differ from actual prices, for example because they may be expressed as minimum or 'from' prices and may not reflect discounts, treatment complexity or other variations. myTribe's analysis assesses the price changes of 446 practices from 2024 to 2026, which is considerably smaller than the number of practices covered by the CMA's analysis above.

British Dental Association (BDA)

F.31 The BDA submitted that that price of private dental treatments did not keep pace with inflation between 2021 and 2025, resulting in an estimated real-terms decline in prices of approximately 8%.[25]

F.32 The BDA surveyed members who were dental practice owners annually between 2021 and 2025 to examine changes in private dental treatment prices and practice costs. In each survey, practice owners were asked to report the average price charged for 15 private dental treatments.[26,27]

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[22] myTribe, How much does private dental treatment cost in 2026, accessed 13/08/26; [✂]. myTribe describes itself as an independent team of qualified insurance experts who provide a free insurance comparison service, guides and reviews, independent ratings and research – see About myTribe Insurance Experts | Research & Compare Cover.
[23] In particular, Scotland is under-represented in the sample.
[24] These treatments are: Hygiene appointment, Routine examination, Root canal treatment, Extraction and White filling.
[25] BDA's response to the CMA's Statement of Scope, page 16
[26] The 15 treatments included are: New patient examination, Recall examination, Radiograph (simple), Simple scale and polish, Hygienist simple scale and polish, Extraction (one tooth), Composite filling (small), Composite filling (posterior large), Amalgam filling (large), Molar endodontics, Upper metal denture (partial and medium-sized), Bridgework (per unit), Crown (bonded), Porcelain veneer (one tooth), Tooth whitening (both arches).
[27] [✂]

F.33 The BDA compared the results with the Consumer Prices Index including owner occupiers' housing costs (CPIH).[28] The BDA estimates that prices rose by approximately 14%, compared to growth in CPIH of 24% from 2021 to 2025. The findings suggest that while prices increased across all 15 treatments, the increases were below inflation. The largest resulting real terms decreases were a 16% decrease for a large amalgam filling,15% for tooth whitening of both arches, and 13% for a new patient examination.

F.34 The BDA's analysis and estimates of changes in the price of private dental treatments differ from the results of our pricing analysis.[29] However, we consider that limited weight can be placed on the BDA's analysis and findings. Having obtained and assessed the BDA's methodology, we note the following limitations, which we consider have significantly affected the results:

(a) [✂]. We consider that, without that adjustment, the 2025 sample was not nationally representative, with England under-represented and Northern Ireland, where prices are lower, over-represented.

(b) [✂].

F.35 We also note the BDA only surveyed dental practice owners who were BDA members.

ONS

F.36 The ONS publishes data on dental services inflation on its website. This data indicates that dental services inflation was on average at 5% per year between 2021 and 2025. Over the same period, services CPI and average weekly earnings increased by an average of 6% per year. [30]

F.37 We consider this data is not illustrative of changes in private dental prices. In particular, the data is based on a combination of the price of NHS dental charges and the price of one private treatment, a dental examination. We understand the data on the prices of the private dental examination is based on a sample of around 150 dental practices.[31]

[28] CPIH includes owner-occupiers' housing costs such as mortgage interest payments, council tax and maintenance and repair costs, whereas headline CPI excludes these costs. The BDA considered that CPIH provided a broader measure of the changes in prices experienced by households and an appropriate benchmark against which to assess changes in private dental treatment prices and laboratory costs
[29] The BDA have used CPIH for their analysis, while we used CPI and services CPI. However, the changes in CPIH services CPI and CPI, are broadly similar, around 24% for all measures from 2021 to 2025.
[30] Office for National Statistics, CPI ANNUAL RATE 06.2.2 : DENTAL SERVICES, accessed on 07/08/2026
[31] [✂]