

Preventio Hub

State of Prophylaxis

Q2 2026 — Market, Technology, and Protocol Trends in Dental Prophylaxis

An independent quarterly report

Preventio Hub editorial team

Published: April 2026

This report synthesises editorial coverage published on preventiohub.com during the first four months of 2026 and places it in the context of the wider European and global dental prophylaxis market. All citations link to primary Preventio Hub articles or to named manufacturers' public product documentation. Preventio Hub is not affiliated with any manufacturer, distributor, or professional association. No sponsored content, no affiliate links, no advertising. Content is produced by an anonymous editorial team and reviewed for clinical accuracy before publication.

Citation: Preventio Hub editorial team. (2026). *State of Prophylaxis Q2 2026: Market, Technology, and Protocol Trends in Dental Prophylaxis*. Preventio Hub.

Abstract

The first two quarters of 2026 mark a visible consolidation of the combined tabletop system as the dominant hardware category in European dental prophylaxis. EMS's AIRFLOW Prophylaxis Master retains flagship status on the back of its Guided Biofilm Therapy (GBT) ecosystem, while Mectron, NSK, and now Hu-Friedy contest the mid-tier. On the consumables side, erythritol powder continues to displace glycine in peri-implant maintenance and subgingival workflows, with multiple credible third-party SKUs reducing EMS's pricing power. Protocol adoption remains fragmented: GBT is the dominant commercial protocol but individually trained oral prophylaxis (iTOP) and traditional scaling-and-root-planing workflows retain substantial clinical practice share. This report summarises the trends, the active product competition, and the most clinically relevant evidence developments observed during Q2 2026, with links to the underlying Preventio Hub reporting for each claim.

Contents

1. Executive Summary	p. 3
2. European Prophylaxis Market Overview	p. 3
3. Equipment: The Combined Tabletop Consolidation	p. 4
4. Consumables: Erythritol's Pricing Pressure on EMS	p. 6
5. Clinical Protocols: GBT, iTOP, SRP	p. 7
6. Q1–Q2 2026 Product Launches and Key News	p. 8
7. Clinical Evidence Updates	p. 9
8. Regulatory and Standards Context	p. 10
9. Outlook for H2 2026 and Early 2027	p. 11
10. References and Source Articles	p. 12

1. Executive Summary

The European dental prophylaxis market in Q2 2026 is defined by three visible shifts. First, the **combined tabletop system** — a single chassis integrating piezoelectric or magnetostrictive scaling with air polishing — has moved from premium-tier curiosity to the procurement default in mid-to-large practices. The EMS AIRFLOW Prophylaxis Master remains the category flagship, but the Mectron Combi Touch and NSK Varios Combi Pro2 have captured a meaningful mid-tier share, and Hu-Friedy's PWR Air entered the category at Chicago Midwinter 2026.

Second, **erythritol powder** has passed sodium bicarbonate as the default consumable for subgingival and peri-implant workflows. Six credible third-party erythritol SKUs are now available in European distribution, eroding the pricing power of EMS's proprietary AIRFLOW PLUS while preserving the clinical profile that erythritol was chosen for.

Third, **protocol adoption remains fragmented**. GBT is the dominant commercially promoted protocol and has the most coherent training infrastructure, but individually trained oral prophylaxis (iTOP) and traditional scaling-and-root-planing workflows retain substantial share in clinical practice — particularly in the Nordic region, Central Europe, and specialist periodontal practices.

The editorial conclusion: the market is maturing. Category-defining innovation (e.g., GBT's introduction in the late 2010s, erythritol's subgingival validation) has slowed, and competition has shifted to execution, price-performance, and ecosystem openness. Practices buying now are making protocol decisions as much as equipment decisions — and the smart procurement posture is to resist ecosystem lock-in unless the protocol commitment is genuine.

2. European Prophylaxis Market Overview

The European dental prophylaxis equipment market — covering air polishers, ultrasonic scalers, and combined tabletop systems — is estimated in the mid-single-digit billion euro range as of 2026, with the combined tabletop segment growing materially faster than handpiece-only air polishers and stand-alone scalers. The segment is broadly served by five flagship brands (EMS, Mectron, NSK, Acteon, Dentsply Sirona), a value tier dominated by Woodpecker, and recent entrants Hu-Friedy and W&H.

2.1 Category structure

The hardware market now splits along three increasingly distinct categories, each with its own buyer profile, price band, and clinical positioning:

Handpiece-only air polishers — units such as the NSK Prophy-Mate Neo, the Acteon Air-N-Go Easy+, and the Woodpecker AP-H attach to the dental unit's existing coupling. Price band roughly €500–1,800. Buyers: solo practitioners, specialist periodontal practices with existing scaling infrastructure, and budget-conscious general practices. See Preventio Hub's buyer's guide for the full comparison.

Combined tabletop systems — a single chassis integrating scaling and air polishing. Price band roughly €3,500–10,000. Includes the EMS AIRFLOW Prophylaxis Master, Mectron Combi Touch, NSK Varios Combi Pro2, and the new Hu-Friedy PWR Air. This is the category currently expanding fastest. See Preventio Hub's combined tabletop systems trend report.

Stand-alone scalers — ultrasonic devices without integrated air polishing, including the Dentsply Cavitron Plus (magnetostrictive) and various piezoelectric alternatives. Price band roughly €1,500–3,500. Buyers: practices that treat air polishing as an optional add-on rather than a default workflow step.

2.2 Regional dynamics

DACH, Iberian, and Nordic markets continue to lead combined tabletop adoption, driven by high GBT course availability and mature hygienist training pathways. UK adoption has accelerated in 2026, partly on the back of increased air polishing acceptance in NHS-private mixed practices. Central and Southeastern European markets remain more price-sensitive, with Woodpecker and Mectron taking the strongest share from EMS.

3. Equipment: The Combined Tabletop Consolidation

The defining trend of Q2 2026 is the consolidation of the combined tabletop system as the default procurement choice for mid-to-large practices. Our review coverage this quarter focused on the three combined tabletop flagships currently shipping in European distribution:

Product	Segment	Approx. price	Strongest-for
EMS AIRFLOW Prophylaxis Master	Premium	€8,000–10,000	GBT-committed clinics
Mectron Combi Touch	Mid-upper	€3,500–4,500	Multi-discipline practices
NSK Varios Combi Pro2	Mid-upper	€4,000–5,000	Reliability-first practices
Hu-Friedy PWR Air (2026)	Mid-premium	TBC	Early adopters / monitoring

Table 1. Combined tabletop flagships in European distribution, Q2 2026.

3.1 EMS AIRFLOW Prophylaxis Master: protocol moat intact

The Prophylaxis Master remains the category flagship, with the deepest combination of ergonomic execution, subgingival clinical evidence (via the Perio-Flow nozzle), and ecosystem depth. Preventio Hub's independent review concludes that the price premium is defensible only for practices genuinely committed to the GBT protocol; practices treating the unit as a conventional scaler-plus-polisher are paying for capacity they do not use. The ecosystem lock-in — proprietary powders, warranty terms that effectively require EMS consumables, and an educational programme tightly coupled to the device — is the single biggest strategic trade-off buyers must weigh.

3.2 Mectron Combi Touch: the open-ecosystem alternative

Mectron's Combi Touch has emerged as the most credible mid-tier alternative. It integrates piezoelectric scaling, air polishing, and endodontic irrigation in one chassis at roughly half the capital cost of the Prophylaxis Master, with an explicitly open powder ecosystem. For multi-discipline practices — particularly those combining hygiene, perio, and endodontic treatment under one operator — the three-handpiece chassis delivers material workflow benefits that single-purpose flagships cannot match.

3.3 NSK Varios Combi Pro2: the reliability play

NSK's Varios Combi Pro2 is the most conservative engineering choice in the category. It is quieter than both EMS and Mectron in clinical use, has the smallest operator footprint of the three flagships (~380mm wide), and leverages NSK's industry-leading handpiece reliability reputation. The caveat is service-network density outside core European markets — clinics in peripheral geographies should verify local repair turnaround before committing.

3.4 Hu-Friedy PWR Air: the 2026 entrant

Hu-Friedy's PWR Air launched at Chicago Midwinter 2026 and represents the first genuine new entrant in the combined tabletop category in several years. It is positioned at a mid-premium price point and targets the same buyer profile as Mectron and NSK. Reliability data at this stage is limited; Preventio Hub will publish a full review once the device has accumulated sufficient field hours in European distribution.

4. Consumables: Erythritol's Pricing Pressure on EMS

The consumables picture in Q2 2026 is dominated by one story: erythritol. The ~14µm sugar-alcohol-based powder, originally introduced by EMS as AIRFLOW PLUS, has become the default subgingival and peri-implant powder across the industry. What has changed in 2026 is the viability of third-party alternatives.

4.1 The third-party erythritol landscape

Preventio Hub's Q1 2026 erythritol powder comparison identified six credible SKUs in European distribution: the EMS AIRFLOW PLUS benchmark, plus five independent brands with comparable particle-size specifications and autoclave-safe packaging. Pricing of the independent SKUs is materially below the AIRFLOW PLUS reference, in several cases by 30–40%. The clinical profile on implants, titanium abutments, and zirconia surfaces is effectively identical, per published manufacturer validation data.

The strategic implication is that EMS's powder-based revenue stream — a meaningful component of total GBT-associated revenue — is no longer protected from price competition. Practices using non-EMS hardware have always had powder flexibility; what 2026 brings is that EMS hardware users now face warranty-permitted (or warranty-ambiguous) third-party options with genuinely equivalent clinical performance.

4.2 Glycine's shrinking niche

Glycine powder — once the standard subgingival air polishing consumable — continues to cede share to erythritol. The clinical case for glycine over erythritol is narrow: the ~65µm particle size is harder on soft tissue than 14µm erythritol, handling is more sensitive to moisture, and the price advantage has compressed as third-party erythritol has entered the market. Glycine retains a role in specific subgingival protocols and as a cost-optimisation option for supragingival-only workflows, but its trajectory is clearly downward.

4.3 Sodium bicarbonate: contraindication reminder

Sodium bicarbonate remains effective for heavy supragingival stain removal but is **contraindicated on implants, implant-supported restorations, and exposed root surfaces**. Published surface-damage evidence against titanium is conclusive. Practices should reserve sodium bicarbonate for verified supragingival, non-implant cases only.

5. Clinical Protocols: GBT, iTOP, SRP

Protocol adoption in dental prophylaxis is more fragmented than equipment discussions sometimes imply. Three protocols dominate European clinical practice, each with distinct clinical logic, training infrastructure, and commercial positioning:

5.1 Guided Biofilm Therapy (GBT)

GBT is EMS's eight-step commercially promoted protocol, tightly integrated with the AIRFLOW and PIEZON product lines. It represents the most coherent end-to-end prophylaxis workflow currently available, with substantial training infrastructure and a visible international certification programme. Practices committing to GBT are effectively buying a protocol-plus-equipment-plus-training package — the strategic question is whether that package value justifies the ecosystem pricing.

5.2 Individually Trained Oral Prophylaxis (iTOP)

iTOP is the Curaden-originated patient-centred prophylaxis concept. Unlike GBT, it is not device-coupled; it is a clinical philosophy emphasising patient self-care and individualised home-care protocols. iTOP and GBT are complementary rather than competing in many clinical practices — hygienists often apply iTOP principles to patient communication while using GBT hardware and workflow during the clinical session.

5.3 Scaling and Root Planing (SRP)

SRP — the traditional non-surgical periodontal therapy combining hand and ultrasonic instrumentation — remains the default periodontal protocol in much of specialist practice. Air polishing (particularly with erythritol) is increasingly integrated as an adjunct to SRP rather than a replacement, consistent with the current clinical evidence base. For Stage III/IV periodontitis and peri-implantitis, SRP-with-adjunctive-air-polishing is the most defensible current standard.

6. Q1–Q2 2026 Product Launches and Key News

6.1 Hu-Friedy PWR Air at Chicago Midwinter 2026

Hu-Friedy's entry into the combined tabletop category at Chicago Midwinter was the single most significant product event of Q1. The PWR Air is positioned at a mid-premium price point and targets the same buyer profile as Mectron and NSK, with Hu-Friedy's existing scaler tip library as a significant moat. Preventio Hub's launch coverage detailed the device's specifications and initial positioning; a full review will follow once European distribution units accumulate sufficient field hours.

6.2 Combined tabletop systems: the 2026 consolidation

Preventio Hub's Q1 2026 trend report documented the shift from handpiece-only air polishers toward combined tabletop systems. The drivers are workflow efficiency, operatory footprint consolidation, and the maturation of piezoelectric scaling technology in multi-modality chassis designs. Procurement data from European distributors corroborates the editorial observation: combined tabletop units are growing materially faster than handpiece-only air polishers.

6.3 European air polishing market 2026

Preventio Hub's European market report covered the distribution landscape, regional adoption differences, and the ongoing price competition between premium and mid-tier brands. The headline finding: price-performance parity has tightened, and the €3,500–5,000 mid-tier is now capable of serving the majority of clinical use cases that historically justified the €8,000+ premium tier.

7. Clinical Evidence Updates

Peer-reviewed evidence in dental prophylaxis evolves on a timescale of years rather than quarters, so Q2 2026 is better understood as a continuation of established trends than as a step-change moment. Three evidence-base observations are worth highlighting:

7.1 Erythritol vs glycine subgingival evidence

The peer-reviewed literature continues to accumulate in favour of erythritol over glycine for subgingival air polishing, particularly at pocket depths up to 9mm, with smaller particle size and more benign soft-tissue interaction cited as mechanistic drivers. Preventio Hub's erythritol-vs-glycine clinical evidence review synthesises the current literature and is maintained as a living article.

7.2 Patient comfort during prophylaxis

Patient-reported comfort differences between air polishing and traditional rubber-cup-plus-paste prophylaxis continue to favour air polishing in the recent literature. This has implications for patient retention and perioperative pain management in anxious-patient populations. The Preventio Hub patient comfort evidence summary captures the active literature as of early Q2 2026.

7.3 Sodium bicarbonate on implants: the contraindication holds

Recent surface-damage studies continue to confirm the contraindication of sodium bicarbonate powder on implants, titanium abutments, and zirconia restorations. Practices that still use sodium bicarbonate on implant surfaces — whether by oversight, habit, or cost optimisation — are creating cumulative micro-damage that is detectable in follow-up imaging. The Preventio Hub sodium bicarbonate implant evidence article documents the current surface-science literature in detail.

8. Regulatory and Standards Context

Q2 2026 did not introduce major EU-level regulatory changes that materially affect the prophylaxis equipment market. MDR-related classification of Class IIa medical devices remains the active regulatory framework for the combined tabletop category, and the MDR transition provisions continue to shape compliance costs for smaller manufacturers entering European distribution.

The most practically relevant regulatory topic in the quarter was the continuing divergence between US FDA classification and EU MDR requirements for the newer combined tabletop entrants. Manufacturers targeting both markets face meaningful compliance overhead, which has historically advantaged established European brands over US-first entrants (a dynamic that the Hu-Friedy PWR Air's launch strategy will test in coming quarters).

Sterilisation and reprocessing standards remain stable: EN ISO 17664 for reprocessing instructions and EN 285 / EN 13060 for autoclave validation continue to govern handpiece and tip sterilisation workflows. The dominant practical compliance issue remains operator-level: autoclave cycle documentation, traceability records, and water quality for handpiece internal lines are the three areas where practices most frequently fall short in inspection.

9. Outlook for H2 2026 and Early 2027

Three forward-looking observations shape Preventio Hub's editorial priorities for the rest of 2026 and early 2027:

9.1 Combined tabletop category consolidation continues

Expect further convergence of flagship specifications: handpiece weights, powder ecosystems, and user interfaces will continue to cluster around a narrow best-practice envelope. The competitive frontier will move toward software (workflow automation, integrated clinical records), training, and service network density rather than raw device specification.

9.2 Erythritol pricing reset

Expect EMS to respond to third-party erythritol price pressure, either through pricing adjustment, bundled consumables agreements, or strategic warranty term changes. The direction of travel is clear: the pricing premium of AIRFLOW PLUS relative to equivalent third-party erythritol is no longer sustainable at its current level.

9.3 GBT as protocol vs ecosystem

The strategic question for EMS in H2 2026 is whether GBT can be successfully decoupled from the AIRFLOW hardware monopoly. Practices increasingly want GBT training, certification, and clinical workflow without full ecosystem lock-in. How EMS navigates this tension — between protecting a lucrative integrated ecosystem and expanding protocol adoption — will shape the competitive landscape into 2027.

9.4 What Preventio Hub will cover next

Editorial priorities for the coming quarter include a full Hu-Friedy PWR Air review once field-hour data is available, an updated erythritol price-performance comparison, a Q3 2026 update to the combined tabletop category, and expanded coverage of peri-implant maintenance as a distinct clinical workflow within the prophylaxis category.

10. References and Source Articles

All references below link to primary Preventio Hub articles or to publicly available manufacturer product documentation. Preventio Hub maintains a "Never Invent" editorial rule: no specification, price, or clinical claim is published without a verifiable public source.

Preventio Hub source articles (cited in this report)

- Preventio Hub editorial team. (2026). *EMS AIRFLOW Prophylaxis Master Review: The GBT Flagship*. preventiohub.com/ems-airflow-prophylaxis-master-review/
- Preventio Hub editorial team. (2026). *Mectron Combi Touch Review: The Italian Combined Tabletop*. preventiohub.com/mectron-combi-touch-review/
- Preventio Hub editorial team. (2026). *NSK Varios Combi Pro2 Review: Japanese Engineering for Combined Tabletop Prophylaxis*. preventiohub.com/nsk-varios-combi-pro2-review/
- Preventio Hub editorial team. (2026). *Acteon Air-N-Go Easy+ Review: Compact Design, Big Ambitions*. preventiohub.com/acteon-air-n-go-easy-plus-review/
- Preventio Hub editorial team. (2026). *Dentsply Cavitron Plus Review*. preventiohub.com/dentsply-cavitron-plus-review/
- Preventio Hub editorial team. (2026). *NSK Prophy-Mate Neo Review*. preventiohub.com/nsk-prophy-mate-neo-review/
- Preventio Hub editorial team. (2026). *Woodpecker AP-H Review: Budget Tabletop*. preventiohub.com/woodpecker-ap-h-review/
- Preventio Hub editorial team. (2026). *Air Polisher Buyer's Guide 2026*. preventiohub.com/air-polisher-buyers-guide-2026/
- Preventio Hub editorial team. (2026). *Combined Tabletop Systems 2026 Trend*. preventiohub.com/combined-console-prophylaxis-trend-2026/
- Preventio Hub editorial team. (2026). *Hu-Friedy PWR Air Launches at Chicago Midwinter 2026*. preventiohub.com/hufriedy-pwr-air-chicago-midwinter-2026/
- Preventio Hub editorial team. (2026). *European Air Polishing Market 2026*. preventiohub.com/european-air-polishing-market-2026/
- Preventio Hub editorial team. (2026). *Erythritol Powder Brands Compared: 6 SKUs*. preventiohub.com/erythritol-powder-brand-comparison/
- Preventio Hub editorial team. (2026). *Erythritol vs Glycine: Clinical Evidence*. preventiohub.com/erythritol-vs-glycine-clinical-evidence/
- Preventio Hub editorial team. (2026). *Is Air Polishing Safe? Clinical Evidence*. preventiohub.com/is-air-polishing-safe/
- Preventio Hub editorial team. (2026). *Sodium Bicarbonate on Implants: Surface Evidence*. preventiohub.com/sodium-bicarbonate-implants-evidence/
- Preventio Hub editorial team. (2026). *Patient Comfort During Prophylaxis*. preventiohub.com/patient-comfort-prophylaxis-evidence/
- Preventio Hub editorial team. (2026). *How to Choose Prophy Powder*. preventiohub.com/how-to-choose-prophy-powder/
- Preventio Hub editorial team. (2026). *Subgingival Air Polishing Guide*. preventiohub.com/subgingival-air-polishing-guide/
- Preventio Hub editorial team. (2026). *GBT vs iTOP vs SRP: Protocol Comparison*. preventiohub.com/prophylaxis-protocols-compared/
- Preventio Hub editorial team. (2026). *Air Polisher 5-Year Cost of Ownership*. preventiohub.com/true-cost-ownership-air-polishers/

Editorial note

This report was produced by Preventio Hub's anonymous editorial team in April 2026. The publication receives no sponsored content, no affiliate revenue, and no manufacturer funding. Editorial independence is preserved through the anonymity of individual contributors and a policy of refusing paid placements, gifted equipment beyond short loan-and-return terms, and manufacturer-sponsored content of any kind. For the full editorial policy, see preventiohub.com/editorial/.

Suggested citation: Preventio Hub editorial team. (2026). *State of Prophylaxis Q2 2026: Market, Technology, and Protocol Trends in Dental Prophylaxis*. Preventio Hub.

Licence: This report is published by Preventio Hub. It may be quoted with attribution in non-commercial research and professional contexts. Full republication or derivative commercial works require written permission. Citations should reference "Preventio Hub editorial team" and the report DOI (to be registered on Zenodo).