

Reinventing Oral Care

January 2023

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INTRODUCTION

Scope

Key findings

STATE OF THE INDUSTRY

Oral care maintains its momentum despite COVID-19

Polarisation in per capita spend between developed and developing markets

China dominates growth between 2016 and 2021

Focus on health and hygiene will benefit oral care

Economic uncertainty adds to the substantial inflation increases

Global stagflation will impact key oral care markets

CATEGORY PROSPECTS

Toothpaste and power toothbrushes offer future potential

Blurring of categories, with whitening toothpaste becoming prominent

Emerging Asian markets with a focus on health and hygiene will provide opportunities

Consumers trade up to power toothbrushes for a better clean

Affordability pushes growth of power toothbrushes in China

Mouthwash/dental rinses see a revival after COVID-19

COMPETITIVE LANDSCAPE

Growth of top five players slows down, challenged by regional disruptors

Colgate-Palmolive benefits from its sheer size

Yunnan Baiyao champions functional ingredient

Market penetration strategy helps multinational companies maintain top ranking

TOP TRENDS SHAPING ORAL CARE

Megatrends in oral care provide strategies for innovation

Demographic shifts will impact business decisions

Gum health should be explored for ageing markets

Preventative and wellness positioning could benefit oral care

Young consumers drive beauty's association with oral health

Gen Z – the consumer that everyone is vying for

Oral care turns to a beauty and lifestyle positioning to appeal to the Gen Z consumer

“Clean beauty” trend could compromise dental health

Conscious consumers demand sustainable products

Toothpaste tubes continue to be a key area of innovation

Smaller players and retailers also join the bandwagon

Replaceable heads in manual toothbrushes provide two benefits

Proactive actions needed in recyclability of electric toothbrushes

Oral care could accelerate waterless innovation

Consumer behaviour combined with water scarcity ranking can help map opportunities

South Africa and Poland are ripe for waterless innovation

Toothpaste and mouthwash tablets need to reach more consumers

Subscription-based eco-friendly oral care companies could provide opportunities

ORAL CARE MARKET ATTRACTIVENESS SCORECARD

Market Attractiveness Scorecard identifies potential in key emerging and developing markets

Extended claims and premiumisation to benefit markets with high potential

Growing oral health awareness through government policies will boost demand

Lower social economic potential implies focus needs to be on ageing consumers

Understanding local trends can help companies capitalise in emerging markets

CONCLUSION

Key findings

Oral care's non-discretionary status will enhance growth prospects

APPENDIX

Euromonitor International definitions: Oral care

Euromonitor International definitions: Oral care (2)

Oral Care Market Attractiveness Study: Methodology

Oral Care Market Attractiveness Study: Ranking 11-20

Overview of Beauty Survey

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