Wellness- and beauty-focused innovations, specialised formulas and more disruptive eco products are aiming to add value to oral care.

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A year of innovation in oral care, 2021

Report Content

- What we have seen
- Our pick of the most innovative launches in this review
- Innovation opportunities in oral hygiene
- Global retail market overview: oral hygiene, 2021

EUROPE, MIDDLE EAST & AFRICA (EMEA)

- EMEA retail market overview: oral hygiene, 2021

Europe: premiumise beyond functional benefits

- Tap into self-care, beauty and COVID-19-related trends
- Continued blurring with beauty adds value
- Tap into self-care trends with pleasurable and disruptive flavours and colours
- More unusual wellness innovations stand out
- Tap into holistic health trends: focus on immunity and probiotics
- Innovations tap into holistic health trends: focus on immunity support and probiotics
- Expand the focus on fresh breath
- Antibacterial messaging can expand

Europe: eco-friendliness remains key and can expand to focus on formulas as well as packaging

- Continue to disrupt the sustainable oral care segment
- Continued fast growth for eco claims
  - Graph 1: oral care innovations by top six fastest-growing claims, 2016-17 vs 2020-21
- On-trend tablet formats stress plastic-minimising, refillable and natural benefits
- Toothpaste accessory facilitates use and focuses on reducing waste
- Eco toothbrush NPD: use recycled and plant-based plastic...
  - ...and replaceable heads for manual brushes
- Disruptive eco NPD focuses on carbon-footprinting, local-sourcing, refill and concentrated propositions
- Spotlight on MEA

ASIA PACIFIC (APAC)

- APAC retail market overview: oral hygiene, 2021

APAC: develop more disruptive concepts and benefits

- Add value with beauty, superior benefit and wellness themes
- Efficacy-focused claims already dominate, making it harder for brands to stand out
A year of innovation in oral care, 2021

- Disrupt with on-trend beauty ingredients...
- ...and formats, textures and terminology
- Australian skincare brand blurs the boundaries between beauty and oral care
- Tap into BPC and self-care trends by harnessing the mood-boosting merits of scent...
- ...and engaging flavours
- Above-average probiotic NPD aligns with wellness and microbiome trends
- Colgate’s specialised toothpaste for diabetics taps into health and wellness trends
- More disruptive benefits stand out: for hypersensitivity and internal cuts
  - Graph 2: share of mouthwash launches in oral care, 2016-21
- More disruptive benefits stand out: focus on superior breath freshening
- Foam textures promote convenience and superior dental hygiene

APAC: natural and eco innovations and opportunities
- Continue to tap into natural and eco trends and provide transparency
- Fastest-growing claims stress naturalness and eco-friendliness
  - Graph 3: oral care launches by top four fastest growing, 2016-17 vs 2020-21
- Powerhouse Ayurvedic and herbal formulas on display
- Sustainability claims are active in ANZ : eco-friendly packaging for toothbrushes and floss handles
- Be inspired by paper-based handles disrupting the razors market
- Waste-minimising refill concepts make moves in toothpaste
- Tablet formats are emerging to expand the eco message

THE AMERICAS
- Americas retail market overview: oral hygiene, 2021

Americas: tap into on-trend themes to add value and engagement
- Bring luxury to oral care
- Appearance-focused whitening formulas better link to lifestyle, diet and beauty
- Wellness and mindfulness concepts expand into oral care
- Wellness and mindful concepts expand into oral care
- Rights and empowerment move into oral care

Americas: eco and natural trends evolve to maintain consumers' interest
- More disruptive innovations must emerge as the natural and eco space gets busier
- Appeal to the US and Brazilian consumer interest in natural and eco oral care
  - Graph 4: top three fastest-growing claims in oral care, 2016-17 vs 2020-21
  - Graph 5: top five fastest-growing claims in oral care, 2016-17 vs 2020-21
- Non-toxic hydroxyapatite and nano-hydroxyapatite make inroads in toothpaste
- The focus on plastic waste continues: offer manual toothbrushes with replaceable heads...
...tap into refill trends...
...and use recycled plastic packaging or alternatives
Bamboo makes inroads in Brazil and brands can look to razors for alternative material inspiration