

ORAL CARE – INDIAN CONSUMER – 2024

Elevate oral care from a basic hygiene practice to a wellness-focused routine. Premiumise using whitening claims and captivate interest by offering novel flavours.



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Oral Care – Indian Consumer – 2024

This report looks at the following areas:

- Usage frequency of various oral care products
- The dominance of herbal/natural claim in the oral care space
- Usage of various types of toothpaste among Indians
- Factors considered while buying oral care products
- Attributes in oral care products consumers are willing to pay more for
- Attitudes and behaviours regarding oral care



Elevate oral care from a basic hygiene practice to a wellness-focused routine. Premiumise using whitening claims and captivate interest by offering novel flavours.

Overview

The oral care category enjoys near-universal adoption amongst Indians. **34%** of consumers use a toothpaste more than once daily, while **59%** use it once daily, hinting at potential to increase usage frequency. Opportunities lie in expanding product repertoire **beyond the basic three** (toothpaste, toothbrush, tongue scraper) to address specific needs.

This report captures a segment of advanced users (who use toothpaste more than once a day OR use more than six types of oral care products). Advanced users link oral care to overall wellbeing, creating opportunities for brands to innovate with novel ingredients and stand out in the saturated herbal/natural category.

Whitening remains the top desired benefit, with a premium attached. Brands can target male once-a-day brushers by highlighting whitening benefits. The trend of enhancing oral care

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regimens with cosmetic benefits, such as teeth whitening, aligns with the global movement towards [integrating skincare concepts into dental hygiene](#) practices to drive growth.

The near-monopoly of mint flavours in the Indian oral care market presents a significant opportunity to [introduce novel flavour profiles](#) and reignite consumer interest.

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Report Content

EXECUTIVE SUMMARY

- Mintel's perspective

Key issues covered in this report

- Overview
- The outlook for the oral care category
- Link oral health to overall wellbeing for advanced users
- A look at oral care's link with overall wellbeing with the help of AI
- Emphasise beautifying benefits to enhance oral care usage with men
- Use novel flavours to stand out in benefit-led oral care category

KEY TRENDS AND MARKET FACTORS

- What you need to know

India is experiencing upbeat activity in the field of oral care

- India is innovating in oral care
 - Graph 1: oral care product launches by top ten markets, 2019-23
- Innovation in India centres around toothpaste
 - Graph 2: oral care product launches by sub-category, 2019-23
- New DTC players are re-shaping the landscape

New claims are commanding a higher price

- Functionality remains a focal point but new claims are gaining ground
 - Graph 3: oral care product launches by top ten claims, 2019-23
- Whitening is also increasingly being discussed on social media
- Oral care is premiumising
 - Graph 4: oral care product launches by price groups in USD, 2019-23
- Mass brands are premiumising through whitening claims

Men show increased readiness to explore the beauty realm

- Men are investing increased time and money into grooming
- Conversations about men's grooming have become more prominent on social media
- Indian brands are innovating 'for men'

WHAT CONSUMERS WANT AND WHY

- What you need to know
- Oral care category enjoys near-universal penetration among Indians
 - Graph 5: usage of oral care products in the last six months, 2024
- Largest minority of Indians use three oral care products: toothbrush, toothpaste and tongue scraper
 - Graph 6: any usage of oral care products by repertoire of different oral care products used, 2024
- Pairing whitening benefits with herbal ingredients can draw a premium from majority of users

Extend oral health to holistic health for 'advanced' users

- Uncovering the 'advanced' oral care users
- Advanced oral care users: demographic profile
- Advanced users have a wider range of oral care products in their usage repertoire
 - Graph 7: usage of oral care products in the last six months, total vs advanced oral care users, 2024
 - Graph 8: repertoire of oral care products used in the last six months, total vs advanced users, 2024
- Advanced users are more likely than others to use specialised toothpastes
 - Graph 9: types of toothpaste used in the last six months, by advanced oral care users, 2024
- Link oral health to overall wellbeing
- Adopt a wellbeing point of view
- Innovate with health-boosting ingredients to premiumise oral care for advanced users
- Tap into emerging probiotic trend in oral care
 - Graph 10: oral care product launches with probiotic and prebiotic claims, 2019-23
- Premiumise using probiotics to attract advanced oral care users
- Ingredient alert: nano-hydroxyapatite preserves good bacteria and aids in remineralization
- Improve the oral hygiene and self-care routine with oral health VMS
- Link the role of herbal ingredients to overall health
- Take inspiration from APAC markets that are innovating with botanical ingredients tailored for both oral hygiene and holistic wellness
 - Graph 11: oral hygiene launches by top five botanical ingredients, 2019-23
- Innovate with natural/herbal formulas in oral care to offer holistic wellbeing
- Take natural ingredient approach in oral care by exploring coconut oil
 - Graph 12: % of launches in oral care products with 'coconut oil-derived' ingredient claims, 2019-23
- Coconut oil creeps across oral care categories
- Incorporate antioxidants and vitamins

Emphasise beautifying benefits to enhance oral care usage with men

- Compared to women, men demonstrate a lower level of commitment to oral hygiene
 - Graph 13: usage of toothpaste in the last six months, by gender and age group, 2024

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- Attract Indian men to extensive oral care regimes with beautification
 - Graph 14: top five factors considered while buying oral care products, by gender, 2024
- Make it easier for young men to attain whitened teeth
 - Graph 15: attitudes towards oral care products, by gender and age group, 2024
- Delve into innovative ingredients/formats to deliver teeth whitening
- Cater to the need for teeth whitening products "made for men"
- Minimise time commitments while expanding benefits
- Case study: differentiated whitening products for the day and night
- Tag 'whitening' along with 'breath freshening' claims
- Introduce skincare ingredients to enhance oral usage especially amongst young men
 - Graph 16: attributes in oral care products that consumers are willing to pay more for, by gender and age, 2024
- Disrupt with on-trend skincare ingredients

Use flavours to add value in oral care

- Uplift consumers' mood with novel flavours
- Case study: Spicita enriches oral care rituals using novel flavours
- Innovate with exciting flavours for those residing in Tier 2 cities
 - Graph 17: flavour attributes willing to pay more for, by city tier, 2024
- Use novel flavours to stand out among a sea of mint
 - Graph 18: oral care product launches in the last five years, by flavour component, 2019-23
- Expand the range of fruity flavours in oral care
- Create excitement by exploring floral flavours in oral care
- Offer indulgent treat-like flavours without the guilt
- Look to other categories to push flavour boundaries
- Tier 2 residents reminisce through herbal flavourings
 - Graph 19: attitudes towards oral care products, by employment and parental status, 2024
- Explore herbal and spice flavours in oral care
- Elevate a traditionally mundane category with collaborations
- Flavour watch: green tea

APPENDIX

- Consumer survey methodology
- Social data research methodology
- TURF analysis
- Repertoire analysis

About Mintel India Consumer

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02

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03

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