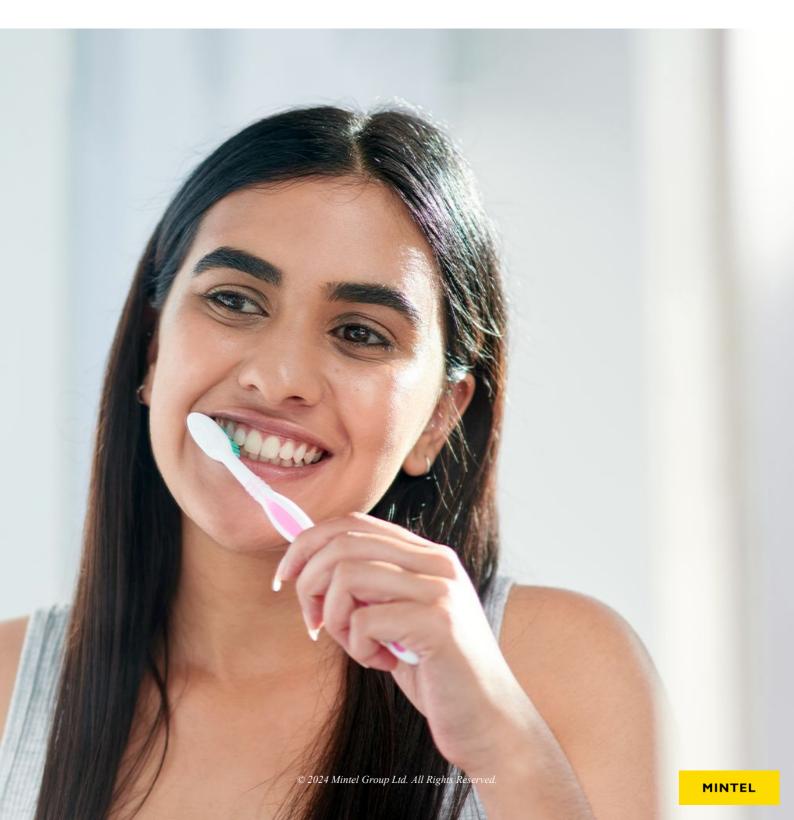
# ORAL CARE – INDIAN CONSUMER – 2024

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



Tanya Rajani, Principal Analyst, Beauty & Personal Care, India



# 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 Al
- · 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

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  - 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

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- · Conversations about men's grooming have become more prominent on social media
- Indian brands are innovating 'for men'

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- · Repertoire analysis

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- Take advantage of the gaps and opportunities that exist today, tomorrow and beyond.

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