

ORAL HYGIENE – INDIAN CONSUMER – 2021

Mask breath and mouthwash are gateway innovations to further growth for a category that has over-invested in its natural propositions.



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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Mintel's perspective

Market context

- COVID-19-related issues are a priority
- Oral care assortment deflates with the single focus on sustainability
- Shift in lifestyle priorities will create a 'clean beauty' effect

What consumers want and why

- Clean oral care consumers want: an injection of fun
- Consumers want: a mouthwash routine
- Consumers want: a solution for mask breath

Opportunities

- Use flavours to bring excitement to natural oral care offers
- Educate consumers on routines; associate this with oil-based mouthwash
- Address mask breath, bring the mask narrative into the conversation

Competitive landscape

- Big players dominate the market, ayurvedic brands also innovating
- Mintel Predicts: the category is expected to grow during and post-pandemic

IMPACT OF COVID-19 ON ORAL HYGIENE

- The outlook for the Indian personal care industry
- The outlook for the Indian oral hygiene industry
- The impact of COVID-19 on oral hygiene – SWOT analysis
- The marketing mix
- How consumers behaviour will change during COVID-19
- In summary: adapting to the "next normal"

KEY TRENDS

- The oral health landscape is on an uptick
- India has taken its foot off the gas in toothpaste launches
 - Graph 1: toothpaste launches, 2016-20

Oral Hygiene – Indian Consumer – 2021

- Sustainability stories on the rise
 - Graph 2: oral care products with ethical and environmental claims, 2016-20
- Ride the global wave of eco and plant-based claims
 - Graph 3: share of oral care NPD with vegan claim, 2016-20
- Masking up becomes new problem scenario
- Solving mask issues is a priority
- Mouthwash becomes a hero product
- Botanical/herbal claims can only carry the category so far; it needs to stretch
 - Graph 4: botanical/herbal, all-natural and no additives/preservatives claims, 2016-20
- The need to go beyond typical formats
 - Graph 5: change in launches across oral hygiene categories, 2016 and 2020

KEY DRIVERS

- Rise in population is leading to environmental stress
- Sustainability is crucial to capture Gen Z and Millennials
- Oral care's solution to plastic waste is a staid bamboo brush, is it enough?
- Chemical-free concerns are beginning to form a clean beauty narrative

GLOBAL TRENDS AND HOW THEY ARE PLAYING OUT IN INDIA

- Brands bringing science into play
- For the planet, for myself
- Inclination and need towards water-saving formats

CONSUMER INSIGHTS

- High penetration, yet more to go
 - Graph 6: oral hygiene product usage, 2021
- Clean comes first, then new scenarios
 - Graph 7: interest in oral hygiene innovations, 2021

Exciting the clean consumer

- Already clean; invigorate consumers with fruity flavours
- Offer a tangible benefit to appearance along with fruity flavours
 - Graph 8: attitude statements towards oral care, 2021
- Layer launches to dental ancillaries later
 - Graph 9: dental ancillary usage, 2021
- Profile of the clean oral care consumer
- Two-step approach: catch the low-hanging fruit first

Mouthwash Seekers

- Who are the Mouthwash Seekers?
- Regular toothpaste category is saturated, presenting an opportunity for mouthwash
 - Graph 10: oral hygiene product usage, 2021
- A feeling of boredom pervades potential mouthwash users
- More to mine in dental rituals
 - Graph 11: oral hygiene product usage, 2021
- Span innovations across time-based scenarios
 - Graph 12: interest in oral hygiene innovations, 2021
- Play the fresh breath appearance card
 - Graph 13: factors when choosing oral care products, 2021
- Natural, sensory benefits will matter
 - Graph 14: attitudinal statements, 2021

Ritual Expanders with interest in mouth fresheners

- Who are Ritual Expanders with interest in mouth fresheners?
- Large unmet gap in portable mouth sprays
 - Graph 15: oral hygiene product usage, 2021
 - Graph 16: interest in oral hygiene innovations, 2021
- Large unmet gap in portable mouth sprays
- Prioritise conversation towards cavities over fresh breath
 - Graph 17: factors considered when choosing oral care products, 2021
- De-emphasise appearance in education cycles
 - Graph 18: oral hygiene attitudes, 2021
- Consumer insight in summary – three potential segments to pursue

MARKET APPLICATIONS

- Opportunities: key focus areas

Fruity flavours energise the natural offer

- Stay relevant by innovating within flavours
- Enliven natural ingredients with moods
- Learn from children's fruity toothpaste ranges
- Make connections between flavours and benefits
- Be inspired by global and local flavours
- Play off local elements

Ritual mouthwash education

- Educate on usage occasions
- Tagging nighttime routines to mouthwash
- As different as day and night
- Position mouthwashes based on time and activity, in line with global innovations
- Build off an age-old ritual: oil pulling
- Indian brands relying on age-old science to educate consumers
- Position time-of-day claims with suitable ingredients

Take aim at breath

- Breath freshening: India missing a beat
 - Graph 19: breath-freshening claims in oral care launches, 2016-2020
- Don't ignore the most important change from COVID-19
- Take aim at mask breath
- Position as a solution to issues arising from mask wearing
- Make breath sprays easy to carry
- Build rituals, not products

Who's innovating

- Mint-flavored popping mouth freshener: disrupting the oral care market
- Consumer survey methodology

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