

# ORAL CARE – UK – 2024

As value sales of oral care rise in line with CPI, brands can drive growth by beautifying the category and positioning products as preventative solutions.



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# Oral Care – UK – 2024

## This report looks at the following areas:

- Current market dynamics, including key trends, growth drivers, and challenges within oral care
- Marketing and branding strategies used by leading companies to engage consumers and foster brand loyalty
- How brands/retailers can boost product repertoires with seasonal innovation and oral care wardrobes
- The impact of sustainability concerns on purchase activity
- Opportunities to target consumers at different life stages (including young adults and women during pregnancy)
- How technology can improve purchase journeys and user experiences in the category



As value sales of oral care rise in line with CPI, brands can drive growth by beautifying the category and positioning products as preventative solutions.

## Overview

Despite easing inflation, savvy shopping habits will continue to persist. Consumers are looking to save on larger investments, such as electric toothbrushes. However, general acknowledgment around the importance of preventative care can tempt consumers to trade up, particularly as NHS appointments remain challenging to secure.

Interest in veneers poses a threat to the oral care category. If people are switching spend and investing in cosmetic procedures, this will lessen the need to trade up when buying oral care products. Given that TV shows, such as Love Island, are driving searches around 'Turkey

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Teeth' on social media, brands can instead partner with these types of TV shows and position oral care products as more affordable alternatives to cosmetic procedures, such as veneers.

Seeking inspiration from facial skincare is an opportunity to drive growth. Oral care brands can callout hero actives and link ingredients to their benefits, and invest in research to help consumers offset the impact of lifestyle/diet choices that negatively impact oral health through NPD. Brands can also learn from skin longevity trends and focus innovation/marketing efforts on oral health as opposed to oral aesthetics.

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# Report Content

## EXECUTIVE SUMMARY

### Opportunities for the oral care market

- Drive value sales with preventative solutions
- Learn from facial skincare to elevate oral care
- Tap into the next generation of oral care users

### Market dynamics and outlook

- Oral care market size and forecast
- Market predictions
- Growth will slow as inflation eases

### What consumers want and why

- Consumers embrace electric toothbrushes
  - Graph 1: usage of toothbrushes in the last 3 months, 2022-24
- Alternative toothpaste formats gain momentum
  - Graph 2: usage of other oral care products in the last three months, 2023 and 2024
- Highlight the health benefits of using dental floss
  - Graph 3: barriers to using dental floss, 2024
- Price and convenience pose challenges for electric toothbrushes
  - Graph 4: reasons for using a manual toothbrush over an electric toothbrush, 2024
- Promote the usage benefits of oral primers
  - Graph 5: factors associated with negatively impacting oral health, 2024
- Preventative care is the preferred approach
  - Graph 6: oral care behaviours, 2024
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  - Graph 7: oral care behaviours, by generation, 2024

### Innovation and marketing

- Toothpaste accounts for a growing proportion of NPD
  - Graph 8: new product launches in the UK oral care category, by sub-category, 2021-24
- Blur the lines between oral care and OTC remedies

## MARKET DYNAMICS

### Market size

- Encourage spend beyond inflation

- Whilst premiumisation supports the category...
- ...savvy shopping still hinders growth beyond inflation

### Market forecast

- Growth set to slow as inflation eases
- Look for ways to drive genuine value growth
- Black Friday discounts risk eroding value sales
  - Graph 9: Google searches for 'electric toothbrush', 2019-24
- Combat the wisdom teeth pain point for younger consumers
- Learnings from the last income squeeze

### Market segmentation

- Toothpaste sees a boost from trade up mentalities
- NPD and eco priorities support the toothbrush/toothpaste segment
- Mouthwash gained traction for its anti-COVID-19 benefits
  - Graph 10: Google searches of mouthwash, 2019-2024
- Prominence of viral infections supports mouthwash spend
- Elongate the medicinal associations of mouthwash
- Combat taboos in denture products

### Channels to market

- Own-label spend supports grocery and H&B retailers
- Online-only retailers can offer more-personalised recommendations
- Discounters can build on their reputation for dupes

### Market share

- Tech and eco trends drive growth for toothbrush brands
- AI innovation supports Oral-B's growth
- Toothpaste benefits from significant surge in spend...
- ...but winning toothpaste brands are polarised
- Leading mouthwash brands see a boost in spend
- Major brands grow largely in line with the mouthwash segment
- Own-label sees value growth in dental accessories
- Major brands drive growth in dental accessories
- Poligrup and Steradent struggle in denture products

### Macro-economic factors

- Consumer sentiment: wellbeing is up, but the recovery has slowed
  - Graph 11: the financial wellbeing index, 2016-24
- Consumption of oral health stressors is common

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- Offer preventative solutions
  - Graph 12: trends in the age structure of the UK population, 2023-28
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- Searches for NHS dentists intensifies
  - Graph 13: Google searches of 'NHS Dentist', 2004-24
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  - Graph 14: causes of stress in the last 12 months, 2023
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- Offer refillable solutions in oral care
- Make gum protection easier
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## WHAT CONSUMERS WANT AND WHY

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  - Graph 16: usage of toothbrushes in the last three months, 2022-24
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  - Graph 17: usage of toothbrushes in the last three months, by gender, 2024
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- Promote the dosage benefits of tablets
- Position products as alternatives to professional treatments
- The future looks bright for oral care
  - Graph 19: repertoire of dental products used in the last three months, 2024

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- Spotlight the value in flossing
  - Graph 20: barriers to using dental floss, 2024
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- Commit to price freezes on replacement heads
  - Graph 21: reasons for using a manual toothbrush over an electric toothbrush, 2024
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  - Graph 22: agreement that it is easier to replace manual toothbrushes, by age, 2024
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- Promote usage of oral primers
  - Graph 23: factors associated with negatively impacting oral health, 2024
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  - Graph 24: factors associated with negatively impacting oral health, by gender, 2024
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  - Graph 25: behaviours related to oral care, 2024
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  - Graph 27: agreement with 'I would be willing to support my oral health by adapting my diet', by household income, 2024
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- Long-lasting claims gain momentum
- Oral care gets a medicinal makeover
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- Colgate recruits influencers

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