

THE FUTURE OF ORAL CARE: 2019

Global annual review: what's now and what's next for the oral hygiene market.



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Report Content

- What's in this report?
- Mintel's synopsis

IMMEDIATE FUTURE: THE NEXT 2 YEARS

Teeth whitening: the new anti-ageing

- Mintel recommends
- Consumers connect white teeth with youth
- Teeth whitening is important for every age group
- Global growth for oral care products with whitening benefits
- Address age-related issues in a positive, transparent, relevant way
- Empower your customers with relevant messages
- Promote whitening as a dental concern that can be easily monitored
- On-the-go whitening needs should fit with social lives
- Follow social media and image-filtering trends to appeal to younger consumers
- Cross into beauty territory to strengthen the anti-ageing message
- Whitening NPD blurs with beauty

The next steps for naturals

- Mintel recommends
- Natural oral care has a ready-made audience
- Oral care brands can do more
- Natural ingredients must clearly demonstrate efficacy
- Make superfoods and sustainability a focus
- Build on a natural health positioning
- Ride the 'clean' wave
- hello: farm-to-tube mint ingredients
- Innovate with new formats containing xylitol
- Brew up new tea trends
- Market additional health benefits of natural ingredients
- Natural innovations on the market

Improve the everyday routine

- Mintel recommends
- Convenience still influences oral care purchases

The Future of Oral Care: 2019

- Emphasise convenience through portability and multi-functionality
- Novel formats will add excitement
- Solid/powder oral care formats
- Foam/mousse oral care formats
- Edible/drinkable oral care formats
- Be mindful of a convenient AND waste-free approach
- Zero-waste brushing concepts evolve
- Focus on saving water and reducing consumption
- Highlight the benefits for the environment and the wallet
- Water-saving initiatives in oral care
- Colgate #EveryDropCounts campaign
- Promote standardised oral care recommendations
- Promote the harm-free benefits of electric/smart toothbrushes
- Encourage children to form good habits

PLANNING AHEAD: THE NEXT 5 YEARS

Diagnostics and devices

- Mintel recommends
- Improve tech-based oral hygiene through proof and education
- Build a community to encourage use
- Maximise the potential of online resources
- Use tech to engage with children
- Colgate Magik toothbrush
- Recognise the two oral care tribes
- Demographics versus psychographics
- Follow connected health trends
- Voice-activated beauty routines
- Everything is connected
- Use cryptocurrency to reward users and encourage better oral hygiene
- Cryptocurrency reward schemes

Health and mindfulness

- Mintel recommends
- Target the oral microbiome from a wellness approach
- Use gut health for inspiration
- Consumers need more help with oral care
- Link to wellness using green tea

The Future of Oral Care: 2019

- Focus on solving bad breath worries
- Bad breath is a common concern
- Moma minty porridge to combat bad breath
- Unlock a new sector of the breakfast market
- Gum or sensitivity issues affect half of your customers
- Detox the gums
- Explore CBD to promote health and wellness
- Everything you need to know about CBD
- CBD's gum health benefits?
- Take a holistic approach to oral care
- Holistic oral care routines – beyond brushing
- Be mindful and give back to others

MARKET OVERVIEW: KEY DATA

- Asia will see the biggest growth in 2019 sales
- Key market performance data
- US leads oral hygiene retail sales in 2019
- US leads oral hygiene retail sales in 2019
- Austria and Norway lead for oral hygiene spend per capita
- Fastest growth was in the emerging economies
- India and Turkey predicted to see growth in the next 5 years

CLAIMS

Toothpaste

- Natural claims grow in toothpaste launches
- Functional and natural toothpaste claims grow in APAC
- Natural claims grow for toothpaste in EMEA
- Natural/ethical toothpaste claims rise in North America
- Breath-freshening toothpaste claims fall in LATAM

Mouthwash

- Globally: fresh breath claims lessen as natural/functional/ethical claims grow in mouthwash
- Natural and ethical claims grow in mouthwash in APAC
- Breath-freshening claims fall but functional claims grow in mouthwash in EMEA
- Lift in natural claims in mouthwash in North America
- Mouthwash launches see vitamin/mineral-fortified claim drop off in LATAM

Toothbrushes

- Convenience is the main toothbrush claim globally but ethical is also growing
- Ease of use is a toothbrush focus in APAC as social media claims emerge
- Convenience and ethical claims appear on more toothbrush packs in EMEA
- Ease of use and antibacterial toothbrush claims have seen a big boost in North America
- LATAM toothbrush launches are results-driven

Dental ancillaries

- Convenience and functional a global focus for dental ancillaries as ethical considerations arise too
- APAC focuses on hygiene and convenience claims
- EMEA focuses on convenience and functional benefits
- North America focuses on packaging and convenience claims
- LATAM focuses on convenience claims

Flavours

- Globally: mint and mint varieties lead flavours
- APAC looks for variety in toothpaste flavours
- Fruit flavours show slight growth as variety appeals in EMEA
- Mint varieties grow in North America as coconut also emerges
- Bubblegum and fruit flavours prove popular in LATAM

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