

Oral Care - US - May 2013

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"The oral care market can expect to see growth due to consumers' regular usage of these products along with a lack of competitive alternatives. However, market players will need to explore ways to refocus consumers' attention on branded offerings, methods of reinvigorating toothbrush sales, and new product benefits that consumers will be willing to pay for."

– Gabriela Mendieta, Home & Personal Care Analyst

In this report we answer the key questions:

- How can market players reinvigorate interest in branded offerings and reclaim their share?
- How can market players reinvigorate sales in the stagnant toothbrush category?
- What are some new areas of benefit exploration for companies and brands to pursue to deliver greater value to consumers?

The U.S. oral care market has grown modestly in the past few years, with the expectation that growth will continue into 2017. In 2012, the market achieved sales of \$6.4 billion, posting a 10% increase during 2007-12. Consumers continue to use oral care products, most commonly toothpaste and toothbrushes, on a daily basis in order to maintain their oral health and hygiene. The market also benefits from a lack of competitive alternatives.

However, though sales have continued to grow, this growth has been modest because consumers have developed an economizing mindset as a result of challenging economic circumstances. Shopping behaviors have changed and consumers display a preference for shopping at retailers that offer lower price points and deep discounts. Private label also has a strong presence in some product categories, offering consumers the same product benefits for a lower price. The products that have performed well in recent years are products such as toothpastes that offer consumers comprehensive care along with the integration of cosmetic benefits such as whitening. Consumers also display a strong interest in repairing the current state of their teeth and gums and further exploration and integration of this benefit could help accelerate growth in the coming years.

This report analyzes U.S. sales performance of oral care products in the past five years, the market forecast through 2017, and how consumers are shopping for products in this category. Personal oral care product usage, current oral health concerns, purchase factors, and interest in new product attributes and formats are also explored in this report.

This report builds on the analysis presented in Mintel's *Oral Care—U.S., June 2012*, as well as previous reports with this same title in June 2011, July 2010, June 2009, June 2008, January 2006, January 2005, April 2003, and May 2001. It also builds the *Oral Care –The Consumer—U.S., June 2007* and *Oral Care –The Market—U.S., April 2007* reports.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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