

Oral Hygiene - Brazil - May 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The oral care segment has high penetration in Brazil, but there are opportunities for companies to develop more benefits, such as the addition of vitamins and sensitive teeth action. Supplementary oral care products and mouthwash are the two segments most suited to feature added benefit, being used at a high frequency by Brazilians.”

– Sheila Salina, Senior Analyst

This report looks at the following areas:

- Which segments of the oral care category are mostly used by Brazilians and with what frequency?
- Which factors (eg promotion, price, branding) influence consumers’ buying decisions the most?
- What brand attributes/claims are more relevant for Brazilian consumers?
- Which are the most common consumers’ attitudes and behaviors toward oral care products (related to health, well-being and appearance)?

The oral care category has grown significantly in Brazil in the last five years. The main reason for this growth has been consumers’ increasing usage of supplementary oral care products (eg dental floss and mouthwash) as well as specialized products (eg whitening strips). In addition, over the last two years, there have been more oral care products targeted at children being launched in the Brazilian market, which made it possible for companies to grow their market share through more affordable oral care products and new usage. Consumers today are increasingly looking at oral care products as necessity items, and being more interested in specialized products. Companies will face the challenge in the coming years of helping these consumers find the right products for them, and having a better awareness of what the product benefits are.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@mintel.com

DID YOU KNOW?

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

Oral Hygiene - Brazil - May 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition

Oral care market

Abbreviations

Executive Summary

The market

Figure 1: Retail sales in the oral care category, 2008-18

Companies, brands, and innovation

Colgate and GlaxoSmith experienced slight market share growth in 2013

Figure 2: Leading manufacturers' shares in the Brazil oral care market, 2012-13

The consumer

Most Brazilians use toothbrush and toothpaste at least twice a day

Figure 3: Frequency of oral care products use, March 2014

Consumers buy products by the same brand, but with different benefits

Figure 4: Buying habits in oral hygiene, March 2014

Cavity prevention and fresh breath are the main claims in the category, focused on health and well-being

Figure 5: Most important claims when buying oral care products, March 2014

Feeling healthy and clean is important to consumers when using oral care products

Figure 6: General attitudes toward oral care, March 2014

What we think

The Market – Key Issues

Products that provide relief to teeth sensitivity are highly valued by women

Variants with added vitamins and minerals could appeal to over 55s

Why young male adults value fresh breath just as much as cavity prevention?

Trend Application

Trend: Prepare for the Worst

Trend: Mood to Order

Who is innovating?

Key points

The toothbrush and toothpaste segments lead category launches

Figure 7: Launches in the Brazilian oral care market, by segment, 2009-13

Figure 8: New product launches by launch type in the oral hygiene retail market, 2012-13

Figure 9: Toothbrush launches, by claims 'antibacterial' and 'easy to use', Brazil, 2013

Figure 10: Toothpaste launches, Brazil, 2012-13

Innovations in oral care products for children are on the rise

Figure 11: Oral care product launches, by top 5 claims, Brazil 2009-13

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Oral Hygiene - Brazil - May 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 12: Launches of oral care products for children, Brazil, 2013:

New competitors enter the segment of oral care products for children

Figure 13: Share of top 10 leading companies in launches of oral care products, Brazil, 2009-13

Figure 14: Share of top 5 leading companies in launches of oral care products for children (aged 0-12), Brazil, 2012-13

Figure 15: Launches of oral care products in Brazil, by selected products with a 'specialized' or 'low-price' positioning, 2013-14

Market Size and Forecast

Key points

In 2013, category revenues matched growth experienced in 2011

Figure 16: Retail value sales of oral care market in Brazil, total and segments, 2009-13

The oral care category will grow moderately over the next 5 years through supplementary products

Figure 17: Retail sales in the oral care category, Brazil, 2008-18

Figure 18: Retail sales in the oral care category, by value, 2008-18

Factors used in the forecast

Market Share

Key points

Colgate and GlaxoSmithKline grow slightly in market share, focusing on the toothpaste segment

Figure 19: Leading manufacturers' shares in the Brazil oral care market, 2012-13

Companies and Brands

Colgate Palmolive

Marketing and promotional campaigns

Procter & Gamble Co.

Marketing and promotion

Johnson & Johnson

Marketing and promotion

The Consumer – Frequency of Use

Key points

Most Brazilians use brush and toothpaste at least twice a day

Figure 20: Frequency of oral care products use, March 2014

Just more than half of Brazilians, and more women than men, use mouthwash daily

Figure 21: Frequency of using oral care products, March 2014

Dental floss is used frequently, but main consumers are still part of socioeconomic groups AB

Figure 22: Frequency of using regular dental floss, by socioeconomic group, March 2014

The Consumer – Buying Behavior

Key points

Consumers buy oral care products by the same brand, but with different benefits

Figure 23: Figure: Oral care buying habits, March 2014

Figure 24: Launches in the oral care category, by type of launch, 2012-13

Special offers and multipacks are more relevant in the North-East region

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Oral Hygiene - Brazil - May 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 25: Oral care buying habits, by regions, March 2014

The Consumer – Most Important Factors when Choosing Oral Care Products

Key points

Cavity prevention and fresh breath are the category's main claims, focused on health and well-being

Figure 26: Most important factors when choosing oral care products, March 2014

Fresh breath can be further explored through sensations and its effects

Figure 27: top ten claims in oral care products, 2013

The Consumer – General Attitudes toward the Category

Key points

Feeling healthy and clean is important to consumers when using oral care products

Figure 28: General attitudes toward oral care products, March 2014

Antibacterial properties can be explored more in toothbrushes

Figure 29: Agreement with statement 'I worry about the germs in my toothbrush, all and by selected gender and age group, March 2014

Appendix – Market Size and Forecast

Figure 30: Retail sales in the oral care category, by value, 2013-18

Figure 31: Forecasting sales in value in retail of toothpaste in Brazil, 2013-18

Figure 32: Best- and worst-case forecasts for toothbrush sales, by value, Brazil, 2013-18

Figure 33: Best- and worst-case forecasts for mouthwash sales, by value, Brazil, 2013-18

Figure 34: Best- and worst-case forecasts for supplementary oral care products, by value, Brazil, 2013-18

Appendix – Frequency of Use

Figure 35: Frequency of oral care products use, March 2014

Figure 36: Frequency of oral care products use - Regular toothpaste, by demographics, March 2014

Figure 37: Frequency of oral care products use - Multipurpose toothpaste (eg with gum protection, preventing cavity or other specific benefits), by demographics, March 2014

Figure 38: Frequency of oral care products use - Whitening toothpaste, by demographics, March 2014

Figure 39: Frequency of oral care products use - Mouthwash, by demographics, March 2014

Figure 40: Frequency of oral care products use - Manual toothbrush, by demographics, March 2014

Figure 41: Frequency of oral care products use - Electric toothbrush, by demographics, March 2014

Figure 42: Frequency of oral care products use – Multipurpose dental floss (eg with gum protection, whitening claim or other specific benefit), by demographics, March 2014

Figure 43: Frequency of oral care products use - Regular dental floss, by demographics, March 2014

Figure 44: Frequency of oral care products use - Tongue scraper, by demographics, March 2014

Figure 45: Frequency of oral care products use - Whitening strips/kits, by demographics, March 2014

Appendix – Buying Habits

Figure 46: Buying habits, March 2014

Figure 47: Buying habits, by demographics, March 2014

Figure 48: Buying habits, by demographics, March 2014 (cont.)

Appendix – Most Important Attributes in the Category

Figure 49: Most important attributes when choosing oral care products, March 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Oral Hygiene - Brazil - May 2014

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 50: Most important attributes when choosing oral care products, by demographics, March 2014

Figure 51: Most important attributes when choosing oral care products, by demographics, March 2014 (cont.)

Appendix – Attitudes toward Oral Care

Figure 52: Attitudes toward oral care, March 2014

Figure 53: Attitudes toward oral care, by demographics, March 2014

Figure 54: Attitudes toward oral care, by demographics, March 2014 (cont.)

Figure 55: Attitudes toward oral care, by demographics, March 2014 (cont.)

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com