

Oral Care - UK - 2021

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This report looks at the following areas:

- The impact of COVID-19 on oral care and trends lasting after the pandemic.
- The value of individual segments and brand performance in 2020.
- Launch activity and opportunities for innovation in oral care in 2021.
- Usage of oral care products and frequency of toothbrush replacement.
- Retailers used for buying oral care products and the value of retail channels in 2020.
- Interest in eco-friendly oral care and areas to drive growth.

Although the oral care category continued to be in value decline in 2020, consumer interest in sustainability provides opportunities to revive growth; 25% of oral care buyers are interested in buying and willing to pay more for solid oral care products with no plastic packaging while 21% are interested in buying and willing to pay more for concentrated toothpaste/mouthwash that you dilute before use.

The COVID-19 pandemic exacerbated value decline in 2020, with 12% of oral care users feeling less motivated to take care of their teeth/oral health. As consumers adapt to limited access to dental professionals during the pandemic, self-treatment trends will grow, presenting opportunities for brands to step up with expert advice via virtual consultations and innovation in specialist products.

A threat to the category is the continued disengagement from the toothbrush segment. As more consumers switch to using electric toothbrushes, lower replacement frequency of toothbrush heads has reduced spend in the segment.

Opportunities come in the increased focus on emotional wellbeing, which presents opportunities for brands to position oral care as a method of self-care. Growing interest in beauty-positioned oral care provides opportunities



“The oral care category continued into decline in 2020 as savvy shopping behaviours remained ingrained. Relaxed attitudes towards oral care during long periods of social distancing also impacted value.”

– Emilia Greenslade, OTC & Personal Care Research Analyst

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too, such as through beauty collaborations and innovation in lipstick/teeth-whitening duo formats as well as beauty ingredients (eg hyaluronic acid).

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Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: Market context**
- **Economic and other assumptions**
- **Products covered in this Report**
- **Excluded**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on oral care**

Figure 1: Short, medium and long-term impact of COVID-19 on oral care, 2021

- **The market**

- **Market size and forecast**

Figure 2: Forecast for the value of the UK oral care market, 2016-26

- **Shift retailer focus from cost to added-value benefits**
- **Companies and brands**
- **Explore specialist claims and flavour innovation in toothpaste**

Figure 3: Retail value sales of toothpaste, by brand, 2021

- **Sustainability positioning grows stronger in manual toothbrushes**

Figure 4: Retail value sales of toothbrushes, by brand, 2021

- **Consumers invest in added benefits in mouthwash**

Figure 5: Retail value sales of mouthwash, by brand, 2021

- **In-store accessibility remains key for dental accessories**

Figure 6: Retail value sales of dental accessories, by brand, 2021

- **Denture-cleaning products benefit from indulgent lockdown snacking**

Figure 7: Retail value sales of denture products, by brand, 2021

- **The consumer**

- **Use the interest in bristle types to drive value for toothbrushes**

Figure 8: Usage of toothbrushes in the last three months, 2021

- **Mouthwash takes the spotlight amidst COVID-19**

Figure 9: Usage of other oral care products in the last three months, 2021

- **Innovate toothbrush replacement indicators to drive replacement frequency**

Figure 10: Frequency of toothbrush replacement, 2021

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Full Report PDF

Infographic Overview

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- **Online will continue to gain traction post-COVID-19**
Figure 11: Channels of purchase for oral care products, 2021
- **Pharmacies can leverage technology to promote expertise**
Figure 12: Retailers used to purchase oral care products, 2021
- **Keep authenticity in mind when innovating in eco-friendly oral care**
Figure 13: Interest in eco-friendly oral care product innovations, 2021
- **Support consumers looking to self-treat**
Figure 14: Oral care behaviours in the last 12 months, 2021

ISSUES AND INSIGHTS

- **COVID-19 will fuel self-treatment trends**
- **Stand out amongst the rising eco-ethical competition**
- **Education is vital to revive the toothbrush segment**

THE MARKET – KEY TAKEAWAYS

- **Value deteriorates further in 2020 due to relaxed COVID-19 behaviours...**
- **...but self-treatment trends will revive demand going forwards**
- **Position oral care as self-care to appeal to teens and tweens**

MARKET SIZE AND FORECAST

- **COVID-19 curtails spend in 2020**
Figure 15: Short, medium and long-term impact of COVID-19 on oral care, 2021
- **Relaxed attitudes towards oral care impact value in 2020**
Figure 16: Forecast for the value of the UK oral care market, at current and constant prices, 2016–26
- **Preference for self-treatment will guide future growth**
Figure 17: Forecast for the value of the UK oral care market, at current prices, 2016–26
- **Market drivers and assumptions**
Figure 18: Key drivers affecting Mintel's market forecast, 2016–25
- **Value and convenience remain key drivers**
Figure 19: UK retail value sales of oral care, 2007–17
- **Forecast methodology**

MARKET SEGMENTATION

- **COVID-19-relaxed behaviours impact some segments**

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

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Figure 20: UK retail value sales of oral care products, by segment, 2019 and 2020

- **Savvy behaviours continue to impact toothbrush/paste**
- **Hygiene and convenience demands drive spend on mouthwash**

CHANNELS TO MARKET

- **Multiple grocers benefit from convenience during the pandemic**

Figure 21: UK retail value sales of oral care products, by outlet type, 2019 and 2020

- **Online gains momentum in 2020**

MARKET DRIVERS

- **Consumer confidence picks up as lockdown eases**

Figure 22: Trends in how respondents would describe their financial situation, 2018-21

- **Consumer sentiment around Brexit is improving**

Figure 23: Impact of Brexit on consumer sentiment, net positive sentiment, 2016-21

- **Brexit will have a bigger impact on dentistry**

- **Keep oral care top of mind amidst fewer dental visits**

Figure 24: Number of adult patients seen in England under the NHS over the previous 24 months, 2017-20

- **Support the ageing population's increased oral health concerns**

Figure 25: Trends in the age structure of the UK population, 2015-25

- **Design for the teens & tweens population**
- **Target the growing base of coffee drinkers**
- **COVID-19 fuels healthy eating trend amongst some**

COMPANIES AND BRANDS – KEY TAKEAWAYS

- **Protective and preventative positioning gains attention amidst COVID-19**
- **NPD and marketing activity targets eco-conscious Gen Z and Millennials**
- **Quality is key, benefitting brands**

MARKET SHARE

- **Specialist claims and flavour disruption are key in toothpaste**

Figure 26: Retail value sales of toothpaste, by brand, 2020 and 2021

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Full Report PDF

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- **Low toothbrush replacement frequency impacts Oral-B and Colgate**

Figure 27: Retail value sales of toothbrushes, by brand, 2020 and 2021

- **Consumers seek preventative benefits and excitement from mouthwash**

Figure 28: Retail value sales of mouthwash, by brand, 2020 and 2021

- **Accessibility benefits TePe, whilst lockdowns drive self-treatment**

Figure 29: Retail value sales of dental accessories, by brand, 2020 and 2021

- **Hygiene concerns lead to gains for Steradent**

Figure 30: Retail value sales of denture products, by brand, 2020 and 2021

- **Quality remains a priority driving consumers towards brands**

LAUNCH ACTIVITY AND INNOVATION

- **Mouthwash regains attention in NPD, strengthening hygiene claims**

Figure 31: New product launches in the oral care market, by product segment, 2018-21

Figure 32: Examples of NPD in mouthwash with botanical/herbal claims, 2020 and 2021

- **Brands add plant-based varieties to toothpaste ranges**

Figure 33: New product launches in the oral care market, by launch type, 2018-21

Figure 34: Examples of new varieties/range extensions in the toothpaste segment with natural/botanical ingredients, 2020

- **Leading brands widen sustainability stance**

Figure 35: New product launches in the UK oral care market, by top ultimate companies, 2020

Figure 36: Examples of NPD by Colgate and Wisdom featuring sustainability claims, 2020

- **Brands continue to innovate in specialised products**

Figure 37: Examples of NPD by Oral-B and Sensodyne featuring gum caring and teeth sensitivity claims, 2020 and 2021

- **Aquafresh innovates in flavour, whilst Poligrip taps into comfort trends**

Figure 38: Examples of NPD by GSK in the oral care market, 2020 and 2021

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Executive Summary

Full Report PDF

Infographic Overview

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- **Toothbrush brands innovate replacement indicators to drive usage**

Figure 39: Examples of NPD in toothbrushes with bristle replacement indicators, 2020 and 2021

- **Eco-friendly claims reach new levels in 2021**

Figure 40: Top 10 claims in the UK oral care market, by 2020, 2019 and 2020

Figure 41: Examples of oral care products launched with eco-friendly claims, 2021

- **Oral care strengthens crossover with beauty**

Figure 42: Examples of NPD in oral care with beauty claims, 2021

- **Protective and preventative positioning grows**

Figure 43: Examples of NPD in oral care featuring preventative and protective features, 2020 and 2021

ADVERTISING AND MARKETING ACTIVITY

- **TV advertising remains most common in oral care**

Figure 44: Total above-the-line, online display and direct mail advertising expenditure on oral care products, by media type, 2018-21

- **Oral care goes online to reach Gen Z and Millennials**

- **COVID-19 puts community spirit in the spotlight**

- **Toothpaste dominates advertising spend**

Figure 45: Total above-the-line, online display and direct mail advertising expenditure on oral care products, by product type, 2020

- **Oral-B pushes for a premium image in toothbrushes**

Figure 46: Total above-the-line, online display and direct mail advertising expenditure on oral care products, by top ultimate companies, 2020

- **Sensodyne empowers those experiencing tooth sensitivity**

- **Listerine ingrains mouthwash as a core aspect of oral care**

- **Nielsen Ad Intel coverage**

BRAND RESEARCH

- **Brand map**

Figure 47: Attitudes towards and usage of selected brands, 2021

- **Key brand metrics**

Figure 48: Key metrics for selected brands, 2021

- **Brand attitudes: Arm & Hammer is seen to offer high quality**

What's included

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Full Report PDF

Infographic Overview

Powerpoint Presentation

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Figure 49: Attitudes, by brand, 2021

- **Brand personality: Aquafresh is perceived as fun**

Figure 50: Brand personality – macro image, 2021

- **Sensodyne is considered to be innovative and effective**

Figure 51: Brand personality – micro image, 2021

- **Brand analysis**

- **Sensodyne is seen as an expert**

Figure 52: User profile of Sensodyne, 2021

- **Flavour innovation drives perceptions of Aquafresh as fun and youthful**

Figure 53: User profile of Aquafresh, 2021

- **Fixodent has strong brand loyalty amongst users**

Figure 54: User profile of Fixodent, 2021

- **Arm & Hammer can use natural image to promote usage amongst younger adults**

Figure 55: User profile of Arm & Hammer, 2021

- **Wisdom's new eco range could carve a stronger brand positioning**

Figure 56: User profile of Wisdom, 2021

- **Reading word clouds**

THE CONSUMER – KEY TAKEAWAYS

- **Empower consumers to care for their teeth amidst COVID-19**
- **Engage consumers in toothbrush selection to drive usage**
- **Packaging and authenticity are demands when it comes to sustainability**

IMPACT OF COVID-19 ON CONSUMER BEHAVIOUR

- **Concerns towards oral health are heightened**

Figure 57: Behaviours around oral care, 2021

- **A relaxed approach to personal hygiene divides 16-34s**

Figure 58: Worry about oral health and feeling less motivated to take care of oral care, by age, 2021

- **Educational initiatives will allay parents' concerns**

Figure 59: Worry about oral health and feeling less motivated to take care of oral care, by parents of children aged 18 and under, 2021

- **Easing of restrictions will revive routines going forwards**

Figure 60: Concerns over the risk of being exposed to the coronavirus/COVID-19, any worry (worried and extremely worried), 2020-21

- **Health trumps financial saving as a priority, favouring brands**

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Figure 61: Changes in priorities when purchasing beauty/grooming products since the start of the COVID-19 outbreak, 2021

- **'Zoom boom' puts the focus on appearance features**
- **Health focus will drive interest in natural ingredients and the microbiome**
- **Emotional wellbeing will remain a priority**

Figure 62: Planned changes to beauty/grooming routines once COVID-19 is no longer a concern, 2021

USAGE OF ORAL CARE PRODUCTS

- **Educate on bristle type as consumers shift away from medium**

Figure 63: Usage of toothbrushes in the last three months, 2019-21

- **Price barrier prevents 16-24s from using electric toothbrushes**

Figure 64: Usage of electric toothbrushes in the last three months, by age, 2021

- **COVID-19 hygiene concerns drive interest in mouthwash**

Figure 65: Usage of other oral care products in the last three months, 2019-21

- **A simple routine is favoured**
- **Lockdowns drive use of teeth-whitening kits amongst 16-24s**

Figure 66: Usage of whitening strips/kits in the last three months, by age, 2020 and 2021

FREQUENCY OF TOOTHBRUSH REPLACEMENT

- **Drive awareness of toothbrush replacement indicators**
- **Subscriptions could appeal to 25-34s' frequent replacement**

Figure 67: Frequency of toothbrush replacement, 2021

Figure 68: Replacement of toothbrushes once a month of more, by age, 2021

RETAILERS USED FOR ORAL CARE PRODUCTS

- **Online shopping makes its mark in 2020**
- **Make online shopping easier for the over-75s**
- **Shift the focus from cost to added-value benefits at supermarkets**

Figure 69: Channels of purchase for oral care products, April 2021

Figure 70: Channels of purchase for oral care products, by age, 2021

Figure 71: Retailers used to purchase oral care products, 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

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- **Beauty-positioned oral care drives shoppers to BPC retailers**
- **Pharmacies could leverage technology to drive footfall**
- **Deliver cost-saving benefits with subscriptions**

INTEREST IN ECO-FRIENDLY INNOVATION IN ORAL CARE

- **Green innovation is an expectation**

Figure 72: Interest in eco-friendly oral care product innovations, 2021

- **Swapping out plastic for eco-friendly alternatives**
- **Address the limitations of using toothpaste tablets**
- **Keep hygiene concerns in mind**
- **Educate consumers on green formulas to engage**
- **Take ethical initiatives beyond sustainability**
- **Consumers seek authenticity with green supply chain practices**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

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Infographic Overview

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