

Oral Care - China - 2023

Report Price: £3695 | \$4995 | €4400

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

This report looks at the following areas:

- Market overview and segment performance of China's oral care market
- Competitive landscape of China's oral care market and analysis of market winners/disruptors
- Opportunities of targeting orthodontic appliances users
- Changes in oral health issues and product usage
- Consumer attitudes and preferences for oral care product flavours

According to the consumer data in this Report, only 2% of surveyed consumers are currently wearing orthodontic appliances. However, the willingness to try is strong, because about one in five respondents plan to wear them in the future. With rising awareness of oral health and government incentives (eg collective buying of related consumables), orthodontic appliance wearers are expected to grow into an important consumer group with distinguished oral care demands.

With near saturation penetration of basic oral cleaning products such as toothpaste and manual toothbrushes, it will become more and more difficult to gain growth without charging a premium. This requires brand-new concepts to fulfil consumers' advanced needs and meanwhile poses challenges to brands and manufacturers to upgrade their ingredients, formula, technologies as well as develop their story-telling skills.

Seeking breakthroughs from relatively niche product types, such as breath spray and mouthwashes, is a way to find a place in the market. For long-term development, equipping oneself with comprehensive product lines might be inevitable to maximise the sources of revenue. Besides, targeting specific consumer groups with distinguished demands, such as children and orthodontic appliance users, is also an approach that leans into professionalism.



"Rising awareness of oral health propelled market growth despite the pandemic, and will continue to drive it in the future. Brands and manufacturers can expand the usage of currently niche products through novel flavours to increase revenue. Developing professional products can win the affinity of more knowledgeable consumers."

– Tina He, Research Analyst

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- What you need to know
- Key issues covered in this Report
- Covered in this Report
- Subgroup definitions (by monthly household income):

EXECUTIVE SUMMARY

- Issues and Insights
- Orthodontic appliance users are expected to grow and impact the market
Figure 1: Example of an oral care brand targeting orthodontic appliance users, China
- 'Yellowing teeth' calls for more specific solutions than general whitening
Figure 2: Examples of whitening products targeting yellow teeth, China, 2022 and 2023
Figure 3: Example of oral care brand educating consumers on yellowing teeth, China, 2022
- Gourmet flavours in prospect
Figure 4: Examples of toothpaste with gourmet flavours and emotional values, China, 2023 and 2022
Figure 5: Example of an breath spray with gourmet flavours, China, 2022
- Market Summary
- The market continued to grow, though impacted by pandemic outbreaks
- Rising awareness of oral health prepares consumers for professional products
- Potential increase in orthodontic appliance wearers drives market growth
- What we think

MARKET SIZE AND FORECAST

- Strong growth continued though slightly impacted by the pandemic
Figure 6: Best- and worst-case forecast of retail value of oral care market, China, 2017-27

MARKET FACTORS

- Pandemic outbreaks in 2022 injured overall spending confidence
- But still, oral care awareness continued to rise

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

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

- **Government buying potentially lowers the costs of orthodontic treatments**

MARKET SEGMENTATION

- **Toothpaste and toothbrushes were faced with stagnancy**
Figure 7: Value sales and growth rate of total oral care market, by segment, China, 2018-22
- **Ancillaries and mouthwashes grew at high speeds**

MARKET SHARE

- **Comprehensive products lines helped brands compete in this market**
Figure 8: Leading manufacturers' share in value sales of oral care market, China, 2021-22
- **Possible breakthroughs by starting from niche product types**
- **New players from adjacent categories enhanced the competition**

MARKETING ACTIVITIES

- **Empower consumers with product co-creation**
Figure 9: Example of consumer co-creation of oral care product flavours, China, 2022
- **Protect the oral health of foodies**
Figure 10: Examples of oral care brands protecting the oral health of foodies, China, 2022
- **Link CSR to product innovations**
Figure 11: Example of linking CSR to oral care product innovation, China, 2022

NEW PRODUCT TRENDS

- **Compared to mature markets, mouthwash and dental ancillary launches are more active in China's market**
Figure 12: New product launches in oral care market, by subcategory, China, Japan, South Korea, USA and UK, 2022
- **Dental ancillaries gained strong growth, also covering children**
Figure 13: New product launches in oral care market, by subcategory, China, 2018-22
Figure 14: Example of a dental ancillary product targeting children, China, 2022
- **'Probiotic' claim became even more popular, especially in dental ancillaries**
Figure 15: Top claims of new oral care launches, China, 2018-22

What's included

Executive Summary
Full Report PDF
Infographic Overview
Powerpoint Presentation
Interactive Databook

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Figure 16: Examples of dental ancillary products with probiotic claims, China, 2022

- **'Breath-freshening' and 'whitening' remained strong claims of toothpaste**

Figure 17: Top claims of new toothpaste launches, China, 2018-22

Figure 18: Example of a whitening toothpaste with new technologies, China, 2022

Figure 19: Example of toothpaste claiming both whitening and suitable for sensitive teeth/gums, China, 2022

- **Free-from claims came to the centre of mouthwashes**

Figure 20: Top claims of new mouthwash launches, China, 2018-22

- **Oral spray targeted more specific user groups and occasions**

Figure 21: Examples of oral spray targeting specific demographics, China, 2022

- **Flora, beverage and dairy flavours on the rise**

Figure 22: Top fragrance component groups of new oral care launches, China, 2018-22

Figure 23: Examples of oral care products with flora and beverage flavours, China, 2022

- **Solid toothpaste features convenience and thorough cleaning effects**

Figure 24: Example of a solid toothpaste product, China, 2022

USAGE OF ORTHODONTIC APPLIANCES

- **One in five respondents plans to wear orthodontic appliances**

Figure 25: Usage of orthodontic appliances, 2022

- **Current and previous wearers are prone to females, young people, high earners, tier 1 city consumers**

Figure 26: Usage of orthodontic appliances – 'I am currently wearing', 'I have worn, and planning to wear it again' and 'I have worn, and not planning to wear it again', by selected demographics, 2022

- **Potential new wearers have a similar profile, but expect more low earners**

Figure 27: Usage of orthodontic appliances – "I have not worn it, but planning to try", by selected demographics, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

ORAL HEALTH ISSUES

- **'Bleeding gums' eases, while 'yellowing teeth' needs further improvement**

Figure 28: Oral health issues, 2022

- **'Yellowing teeth' is more of an issue than 'teeth not bright/white enough'**

Figure 29: Teeth appearance concerns, 2022

- **Young females are concerned with oral appearances and periodontal problems**

- **High earners have stronger awareness and higher standards**

Figure 30: Oral health issues – have experienced, by monthly household income, 2022

- **Protruding oral health issues of current and previous orthodontic appliance wearers**

Figure 31: Oral health issues – have experienced, by orthodontic appliances usage, 2022

Figure 32: Example of an oral care product targeting orthodontic appliance users, China

PRODUCT USAGE CHANGE

- **Basic cleaning becomes more frequent**
- **Popularity of mouthwash and breath spray, especially among females**
- **Niche products are embraced by high earners**
- **More heavy users in current and previous orthodontic appliances wearers**

Figure 34: Product usage change – have used in the last 6 months, by usage of orthodontic appliances, 2022

Figure 35: Gaps between previous/current orthodontic appliances users and non-users (as benchmark) in product usage – have used it in the last 6 months, 2022

ORAL CARE BEHAVIOURS

- **Oral care routines become more frequent and refined**
- **Well-known brands are attractive, while those with medical background have potential**
- **'Anti-bacterial' and 'for sensitive teeth/gum' more appreciated by females and high earners**

Figure 36: Oral care behaviours, 2022

ATTITUDES TOWARDS ORAL CARE

- **Emotional values attached to oral care**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Figure 37: Attitudes towards oral care, 2022

- **Confident in the whitening products, but concerned about sensitivity**

PREFERRED FLAVOURS OF ORAL CARE PRODUCTS

- **Herbal, fruity and floral are popular flavours for all product types**

Figure 38: Preferred flavours of oral care products, 2022

- **Gourmet is not to be neglected, especially for those seeking novelty**
- **Consumers aged 25-39 have specific tastes for oral care flavours**

BEAUTY PERSONAS

- **Who are they?**
- **Beauty Mavens pursue trendy and niche products, and Functionalists upgrade cleaning products**

Figure 39: Product usage change – 'more often', by beauty persona, 2022

- **For whitening, Beauty Mavens prefer products; Enthusiastic Experimenters are concerned about sensitivity issues**

Figure 40: Attitudes towards oral care – selected items, by beauty persona, 2022

APPENDIX – MARKET SIZE AND FORECAST

Figure 41: Total value sales and forecast of oral care market, China, 2017-27

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Did you know?

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

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.