

## Oral Care - UK - June 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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



“Value sales growth in the UK oral care market has been increasingly undermined by falling sales in the mouthwash segment and a decline in new product launches. This underlines the importance of product innovation to the category if it is to return to a higher growth rate in the future.”

– Jack Duckett, Consumer Lifestyles Analyst

### This report looks at the following areas:

- Expanding own-label in the oral care market
- Tapping into the beauty and fashion market

Value sales growth in the UK oral care market has gradually slowed in recent years as a result of falling mouthwash sales and declining innovation. There is scope for own-label to expand its presence in the category, whilst independent brands can widen their appeal by further alignment with the beauty and personal care market.

Parents are largely mindful of their children's oral hygiene, although there remain opportunities to broaden the repertoire of oral care products used, such as encouraging flossing from an early age.

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
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

EMAIL:  
[reports@mintel.com](mailto:reports@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 Care - UK - June 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

## Table of Contents

### Overview

- What you need to know
- Products covered in this Report
- Excluded

### Executive Summary

- Growth in oral care market slows
  - Figure 1: Best- and worst-case forecast of UK value sales of oral care products, 2011-21
- Decline in new innovation mars sales growth
  - Figure 2: New launches in the UK oral care market, by launch type, 2013-16
- Bolstering own-label oral care
- Manual toothbrushes dominate
  - Figure 3: Usage of oral hygiene equipment in the last three months, March 2016
- Treating dental complaints
  - Figure 4: Oral care concerns experienced in the last 12 months, March 2016
- Pro-ageing claims could help brands engage with seniors
  - Figure 5: Factors negatively impacting appearance of teeth, March 2016
- Developing more thorough oral care habits in kids
  - Figure 6: Parents' attitudes towards children's oral care, March 2016
- What we think

### Issues and Insights

- Expanding own-label in the oral care market
  - The facts
  - The implications
- Tapping into the beauty and fashion market
  - The facts
  - The implications

### The Market – What You Need to Know

- Growth in oral care market begins to slow
- Mouthwash sales continue to sink...
  - ...whilst sales of dental accessories enjoy strong growth
- Supermarkets continue to perform well
- UK age profile continues to change
- Smoking rates decline
- War on sugar continues to rage
- Tooth decay still on the rise among children

### Market Size and Forecast

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: 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 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Oral Care - UK - June 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

Growth in oral care market begins to slow

Figure 7: UK retail value sales of oral care products, at current and constant prices, 2011-21

Further innovation generates more sustained growth

Figure 8: Best- and worst-case forecast of UK value sales of oral care products, 2011-21

## Segment Performance

Sales of toothpaste and toothbrushes on the rise

Figure 9: UK retail value sales of oral care products, by segment, 2014 and 2015

Mouthwash sales continue to sink...

...whilst sales of dental accessories enjoy strong growth

## Channels to Market

Supermarkets continue to perform well

Figure 10: UK retail value sales of oral care products, by outlet type, 2014 and 2015

## Market Drivers

Ageing population poses opportunities for oral care brands

Figure 11: Trends in the age structure of the UK population, 2010-20

Baby boom slows

Figure 12: Trends in the number of live births, England and Wales, 2004-14

Proportion of population visiting dentist stumbles

Figure 13: Number of patients and the percentage of the population seen by an NHS dentist in the 24 months to June 2011 and December 2015, England

Figure 14: NHS dental charges in England, 2011-17

Smoking rates decline

Figure 15: Proportion of people aged 16 and over who smoke cigarettes in Great Britain, by sex, 1980-2013

War on sugar continues to rage

Figure 16: Daily added (free) sugar intake, by age, UK, rolling programme 2008-12

Tooth decay still on the rise among children

Study finds children's toothpaste no different to regular

## Key Players – What You Need to Know

Colgate dominates toothpaste market

Corsodyl inches ahead of Colgate in mouthwash market

Decline in true innovation contributes to slowing value sales growth

Growth in mouthwash launches

Advertising investment continues to grow

## Market Share

Colgate dominates toothpaste market

Figure 17: Retail value sales of toothpaste, by brand, years ending March 2015 and 2016

Electric toothbrush brands perform well

Figure 18: Retail value sales of toothbrushes, by brand, years ending March 2015 and 2016

Corsodyl inches ahead of Colgate in mouthwash market

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: 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 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Oral Care - UK - June 2016

**Report Price:** £1750.00 | \$2834.04 | €2223.04

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

Figure 19: Retail value sales of mouthwash, by brand, years ending March 2015 and 2016

### Fixodent grows share of denture accessories market

Figure 20: Retail value sales of denture products, by brand, years ending March 2015 and 2016

### Brands begin to develop in dental accessories category

Figure 21: Retail value sales of dental accessories, by brand, years ending March 2015 and 2016

## Launch Activity and Innovation

### Growth in mouthwash launches

Figure 22: New launches in the UK oral care market, by product segment, 2013-16

Figure 23: Product launch examples from the mouthwash sub-category, 2015

### Decline in new innovation contributes to slowing value sales growth

Figure 24: New launches in the UK oral care market, by launch type, 2013-16

Figure 25: Examples of "new product" launches in the UK oral care market, 2015

### Electric toothbrush launches tap into fashion trends

Figure 26: Bruzzoni Global toothbrushes, January 2016

### Branded vs own-label

Figure 27: New launches in the UK oral care market, branded versus own-label, 2013-16

### Colgate leads launch activity

Figure 28: NPD in the UK oral care market, by top 10 ultimate companies and other (based on 2015), 2013-16

Figure 29: Product launch examples from Colgate-Palmolive, January 2015-March 2016

### Product claims

#### Dental ancillary product claims

Figure 30: Product launch examples in the dental ancillaries sub-category, 2014-15

Figure 31: Examples of launches in the dental ancillaries sub-category carrying "antibacterial", "odour-neutralising" and/or "breath-freshening" claims, 2015

#### Mouthwash aims for more natural perceptions

Figure 32: Top 10 fastest-growing product positioning claims in the mouthwash sub-category, 2014-15

#### Toothpaste claims also skew natural

Figure 33: Top 10 fastest-growing product positioning claims in the toothpaste sub-category, 2014-15

Figure 34: Examples of product launches in the toothpaste category carrying natural claims, 2015

#### Increase in toothbrush NPD aimed at kids

Figure 35: Top 10 fastest-growing product positioning claims in the toothbrush sub-category, 2014-15

#### Electric toothbrushes also tap into kids market

Figure 36: Philips Sonicare For Kids, August 2015

Figure 37: Buddies Tooth Brushing System, November 2015

Figure 38: ISSA mikro, April 2016

## Advertising and Marketing Activity

### Advertising investment continues to grow

Figure 39: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, 2013-16

### Transforming outdoor advertising

Figure 40: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, by media type, 2013-16

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: 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 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Oral Care - UK - June 2016

**Report Price:** £1750.00 | \$2834.04 | €2223.04

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

### Oral-B and Colgate lead advertising expenditure

Figure 41: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, by top 10 brands and other, 2015

Figure 42: Oral-B 'May the 4th be with you' campaign, May 2015

### Colgate takes beauty angle

Figure 43: Colgate Max White Toothbrush + Whitening Pen, 2016

### Corsodyl continues to shock

Figure 44: Corsodyl 'Dreams' campaign, March 2016

### Nielsen Ad Intel coverage

## Brand Research

### Brand map

Figure 45: Attitudes towards and usage of selected brands, April 2016

### Key brand metrics

Figure 46: Key metrics for selected brands, April 2016

### Brand attitudes: Colgate proves most trustworthy

Figure 47: Attitudes, by brand, April 2016

### Brand personality: Aquafresh deemed 'fun'

Figure 48: Brand personality – Macro image, April 2016

### Perceptions of Pearl Drops skew negative

Figure 49: Brand personality – Micro image, April 2016

### Brand analysis

#### Three quarters of all adults have used Colgate products in the last 12 months

Figure 50: User profile of Colgate, April 2016

#### Sensodyne enjoys strong differentiation

Figure 51: User profile of Sensodyne, April 2016

#### Aquafresh must do more to stand out

Figure 52: User profile of Aquafresh, April 2016

#### Educational campaigns could help boost Dentyl Active

Figure 53: User profile of Dentyl Active, April 2016

#### Perceptions of Pearl Drops skew negative

Figure 54: User profile of Pearl Drops, April 2016

## The Consumer – What You Need to Know

Bristle strength education

Electric toothbrush penetration rises

Replacing oral care equipment

Treating dental complaints

Non-alcoholic drinks deemed to have biggest impact on teeth

Pro-ageing claims could help brands engage with seniors

Developing more thorough oral care habits in kids

Branded vs own-label

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: 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 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Oral Care - UK - June 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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

### Usage and Replacement of Oral Care Equipment

#### Manual toothbrushes dominate

Figure 55: Usage of oral hygiene equipment in the last three months, March 2016

#### Bristle strength education

#### Electric toothbrush penetration rises

Figure 56: Usage of electric manual and electric toothbrushes, March 2015 and March 2016

Figure 57: Shelf image from London Boots store, May 2016

#### Dental floss usage declines

Figure 58: Usage of oral hygiene equipment in the last three months, March 2015 and March 2016

#### Men fall behind for dental floss usage

Figure 59: Usage of dental floss in the last three months, by gender, March 2016

#### Replacing oral care equipment

Figure 60: Regularity of replacing oral care equipment, March 2016

### Oral Care Complaints and Treatments Sought

#### Treating dental complaints

Figure 61: Oral care concerns experienced in the last 12 months, March 2016

#### Changing oral care habits

Figure 62: Oral care concerns most likely to see consumers make changes^ to their oral care habits, by gender, March 2016

### Factors Impacting Appearance of Teeth

#### Non-alcoholic drinks deemed to have biggest impact on teeth

Figure 63: Factors negatively impacting appearance of teeth, March 2016

Figure 64: Examples of oral care product launches offering sugar-neutralising benefits, January 2015-March 2016

#### Pro-ageing claims could help brands engage with seniors

Figure 65: Proportion of adults indicating that ageing has impacted the appearance of their teeth, by gender and age, March 2016

#### Nearly a quarter cite poor hygiene as cause of dental imperfections

Figure 66: Proportion of adults citing poor dental hygiene as having negative impact of appearance of their teeth, by gender and age, March 2016

### Attitudes towards Children's Oral Care

#### 62% of parents interested in dental care monitoring tools

Figure 67: Parents' attitudes towards children's oral care, March 2016

#### Developing more thorough oral care habits in kids

Figure 68: Parents' attitudes towards children's oral care, March 2016 (continued)

#### Tapping into pester power

Figure 69: Oral-B 'May the 4th be with you' campaign, May 2015

#### Encouraging regular dentist appointments

Figure 70: Parents' attitudes towards children's oral care – Regularity of taking children to the dentist, March 2016

#### Branded vs own-label

Figure 71: Parent's attitudes towards children's oral care – Branded vs own-label, March 2016

### Appendix – Data Sources, Abbreviations and Supporting Information

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: 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 |  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Oral Care - UK - June 2016

**Report Price:** £1750.00 | \$2834.04 | €2223.04

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

---

Abbreviations

Consumer research methodology

Forecast methodology

Brand research

Brand map

Correspondence analysis

---

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: 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 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)