

## Oral Care - UK - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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



“This category continues to experience some growth. A reduction in oral care routines is undermining true growth potential. A focus on reinvigorating interest in mouthwash through new usage propositions could benefit the overall category. The continued alignment of oral care with beauty can boost interest and spend amongst a younger, more appearance-focussed audience.”

– **Hera Crossan, Personal Care Analyst**

This report looks at the following areas:

- The evolution of whitening
- Boosting mouthwash usage
- Cutting through the noise

The oral care category has witnessed a steady downwards trajectory in terms of value growth in recent years resulting from a continued culture of savvy shopping on leading brands, as well as declining use of mouthwash. As such, despite growth in 2016, very little is expected in 2017.

Whitening is increasingly proving the name of the game when it comes to appealing to appearance-focused young adults, with oral care brands subsequently aligning new launches with the beauty sector. However, to grow the market further, companies need to consider the repositioning of existing product lines, both in terms of decluttering the sector and reinvigorating oral care routines, in order to boost engagement.

**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 - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

- The market
- Market value plateaus
  - Figure 1: Best- and worst-case forecast of UK value sales of oral care products, 2012-22
- Companies and brands
- Oral-B dominates tooth brushing...
  - Figure 2: Brand shares of UK value sales in the toothbrush segment, year to April 2017
- ...and improves sales performance in toothpaste segment
  - Figure 3: Brand shares of UK value sales in the toothpaste segment, year to April 2017
- Listerine struggles to counter falling interest in mouthwash
  - Figure 4: Brand shares of UK value sales in the mouthwash segment, year to April 2017
- Innovation soars
  - Figure 5: New launches in the UK oral care market, by product segment, January 2014-May 2017
- The consumer
- Electric toothbrushes gain momentum
  - Figure 6: Toothbrush usage in the last three months, March 2016 and May 2017
- Mouthwash struggles to stay relevant
  - Figure 7: Usage of other oral care products in the last three months, March 2016 and May 2017
- A lack of clear guidance could be harming oral health
  - Figure 8: Frequency of conducting oral care activities, May 2017
- Opportunity for brands to extend expert status
  - Figure 9: Oral care visits in the last six months, May 2017
- Harnessing interest from young adults
  - Figure 10: Actions taken for oral health in the last six months, May 2017
- Familiar whitening products most sought
  - Figure 11: Interest in whitening products and services, May 2017
- Instilling good habits in young adults
  - Figure 12: Attitudes towards oral care, May 2017
- What we think

### Issues and Insights

- The evolution of whitening
- The facts

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 - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

The implications  
Boosting mouthwash usage  
The facts  
The implications  
Cutting through the noise  
The facts  
The implications

### The Market – What You Need to Know

Market value plateaus  
Sales of mouthwash struggle  
Savvy shopping benefits multiple grocers and online  
Population growth could boost the category  
Harnessing lifestyle trends

### Market Size and Forecast

Market value plateaus  
Figure 13: UK retail value sales of oral care products, at current and constant prices, 2012-22  
Future growth muted  
Figure 14: Best- and worst-case forecast of UK value sales of oral care products, 2012-22  
Forecast methodology

### Market Segmentation

Regularity of tooth brushing keeps category value afloat  
Figure 15: UK retail value sales of oral care products, by segment, 2015 and 2016  
Sales of mouthwash continue to struggle

### Channels to Market

Savvy shopping on branded goods benefits multiple grocers  
Figure 16: UK retail value sales of oral care products, by outlet type, 2015 and 2016  
Amazon initiatives give online channels a boost  
Figure 17: Oral-B Genius Black Friday offer, November 2016  
Potential for subscription services

### Market Drivers

Population growth could benefit the category  
Figure 18: Trends in the age structure of the UK population, 2012-22  
The power of the selfie  
Daily grooming routines under pressure  
Figure 19: Daily beauty and grooming routines, December 2016  
Leveraging coffee trends  
Figure 20: Frequency of using coffee shops, October 2016  
Tobacco smoking rates continue to fall

**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 - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 21: Smoking status, November 2014 and October 2016

Financial confidence and Brexit

Figure 22: Changes in household finances, January 2015-May 2017

Benefits of flossing under question

NHS visits see an uplift...

Figure 23: Number (in thousands) of adult patients seen in the previous 24 months, child patients seen in the previous 12 months and the percentage of the population, at specified dates, June 2016-March 2017

...despite coming under increased pressure

### Companies and Brands – What You Need to Know

Oral-B performs well for tooth brushing and toothpaste

TePe storms ahead in the dental accessories segment

Lack of advertising dents value sales of denture products

Innovation soars

An increase in whitening claims

Adspend for electric toothbrushes rises

Colgate adjusts its advertising approach

Oral-B and Listerine have strong positive perceptions

### Market Share

Market leader Oral-B continues to perform well in tooth brushing...

Figure 24: Retail value sales of toothbrushes, by brand, years ending April 2016 and 2017

...and steals share for toothpaste

Figure 25: Retail value sales of toothpaste, by brand, years ending April 2016 and 2017

Value sales of Listerine mouthwash slide

Figure 26: Retail value sales of mouthwash, by brand, years ending April 2016 and 2017

TePe replaces Oral-B as leading dental accessories brand

Figure 27: Retail value sales of dental accessories, by brand, years ending April 2016 and 2017

Lack of advertising clout hampers growth of denture brands

Figure 28: Retail value sales of denture products, by brand, years ending April 2016 and 2017

### Launch Activity and Innovation

Growth in overall launch activity

Figure 29: New launches in the UK oral care market, by product segment, January 2014-May 2017

Figure 30: Examples of advanced toothpaste and toothbrush launches, 2016-17

True innovation rises, but could prove detrimental

Figure 31: New launches in the UK oral care market, by launch type, January 2014-May 2017

Figure 32: Examples of toothbrushes and toothpastes featuring 'new product' launch type, 2016

Own-label NPD sees an uplift

Figure 33: New launches in the UK oral care market, branded versus own-label, January 2014-May 2017

Figure 34: Examples of own-label dental ancillary launches, 2016

Colgate-Palmolive dominates launch activity

**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 - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Figure 35: NPD in the UK oral care market, by top 10 ultimate companies and other, 2016

## Whitening claims increase

Figure 36: Fastest growing product positioning claims in the dental ancillaries sub-category, 2015-16

Figure 37: Examples of oral care product launches featuring whitening claims, 2017

## Paint it black

Figure 38: Examples of oral care product launches featuring black formulae, 2016-17

## Colour-correction for whitening

Figure 39: PopWhite dental care system, 2017

## Decline in mouthwash NPD impacts claims

## Own-label contributes to increased kids' offerings

Figure 40: Own-label oral care launches for children, 2016

## Advertising and Marketing Activity

### Electric toothbrushes an increasing area of focus

Figure 41: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, January 2014-May 2017

### P&G and GSK increase share of adspend

Figure 42: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products\*, by leading companies, January 2014-May 2017

Figure 43: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, by top 10 brands and other, 2016

Figure 44: Quip Twitter feed, June 2017

### Colgate continues more targeted approach to build awareness

Figure 45: Colgate Max White campaign, in support of Britain's Next Top Model, May 2017

### Digital spend on the rise

Figure 46: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, by media type, January 2014-May 2017

### Nielsen Ad Intel coverage

## Brand Research

### Brand map

Figure 47: Attitudes towards and usage of selected brands, May 2017

### Key brand metrics

Figure 48: Key metrics for selected brands, May 2017

### Brand attitudes: Oral-B the stand-out brand

Figure 49: Attitudes, by brand, May 2017

### Brand personality: Arm & Hammer lacks positive brand image

Figure 50: Brand personality – Macro image, May 2017

### Listerine, Corsodyl and Oral-B viewed as more expert and effective

Figure 51: Brand personality – Micro image, May 2017

### Brand analysis

#### Oral-B is a strong all-rounder

Figure 52: User profile of Oral-B, May 2017

#### Corsodyl viewed as effective and caring

Figure 53: User profile of Corsodyl, May 2017

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 - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

Listerine has a good reputation

Figure 54: User profile of Listerine, May 2017

Arm & Hammer struggles with old-fashioned image

Figure 55: User profile of Arm & Hammer, May 2017

BlanX lacks brand image

Figure 56: User profile of BlanX, May 2017

### The Consumer – What You Need to Know

Electric toothbrushes gain momentum

Mouthwash struggles to stay relevant

A lack of clear guidance could be harming oral health

Opportunity for brands to extend expert status

Harnessing interest from young adults

Familiar whitening products most sought

Instilling good habits in young adults

### Oral Care Product Usage

Electric toothbrushes gain momentum...

Figure 57: Toothbrush usage in the last three months, March 2016 and May 2017

...whilst manual toothbrush usage plateaus

Mouthwash struggles to stay relevant

Figure 58: Usage of other oral care products in the last three months, March 2016 and May 2017

Penetration of floss rises, despite negative media attention

### Frequency of Oral Care Activities

A third of toothbrush users not following guidance

Figure 59: Frequency of conducting oral care activities, May 2017

Floss and mouthwash risk falling out of routines

### Behaviours around Oral Care

Opportunity for brands to extend expert status

Figure 60: Oral care visits in the last six months, May 2017

Older women make more oral care visits

Figure 61: Oral care check-up visits amongst women, by age group, May 2017

Ingrained habits are tough to break

Figure 62: Actions taken for oral health in the last six months, May 2017

### Interest in Whitening Products and Services

Consumers lean towards more familiar whitening products

Figure 63: Interest in whitening products and services, May 2017

A 'healthier' whitening proposition

Borrowing from beauty

Oil-pulling as an emerging trend

**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 - July 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

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

## Attitudes towards Oral Care

- Young adults believe white = healthy
- Figure 64: Attitudes towards oral care, May 2017
- Overwhelming choice
- Refusal to prepare may be a calculated risk
- Dental health is mental health

## Appendix – Data Sources, Abbreviations and Supporting Information

- Abbreviations
- Consumer research methodology
- Forecast methodology

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)