

## Oral Care - US - 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.



“Oral care sales are expected to grow modestly into 2018. However, there are ways for companies and brands to accelerate sales growth, which include influencing consumers to adopt more complex oral care routines, provide better outreach to underserved consumer segments, and grow toothbrush sales.”

– Gabriela Elani, Home & Personal Care Analyst

### This report looks at the following areas:

- Influence consumers to adopt more complex oral care routines
- Better outreach to underserved consumer segments
- Grow toothbrush sales

The key topics of focus for the 2014 report include understanding which oral care products consumers are using most frequently, their decision between name brands versus private label for certain types of oral care products, and what product attributes they consider to be the most important when choosing which oral care products to buy and use. The report also puts a strong emphasis on determining which types of tactics should be employed to drive category growth at a more accelerated pace, such as strategies that can be implemented to encourage consumers to expand their current oral care routines. And finally, this report will also explore consumers' attitudes toward dentists and children's healthcare.

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

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[oxygen@mintel.com](mailto: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 Care - US - 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

### Scope and Themes

What you need to know

Definition

Data sources

Sales data

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

### Executive Summary

The market

Figure 1: Total US retail sales and fan chart forecast of oral care products, at current prices, 2008-18

Market factors

Consumers still want to save money despite economic outlook

Many consumers don't have dental insurance or access to dental services

Segment performance

Figure 2: Total US retail sales and forecast of oral care products, by segment, at current prices, 2010-15

Market players

Figure 3: Share of MULO sales of oral care products, by leading companies, 2013

The consumer

Toothpaste and manual toothbrushes enjoy highest household penetration

Figure 4: Usage of oral care products, November 2012-December 2013

Consumers try to stick with name brands

Figure 5: Brand and private label preferences, February 2014

"Nice to have" product benefits can differentiate products on shelf

A number of consumers not going to the dentist often enough

Figure 6: Attitudes concerning the dentist, February 2014

What we think

### Issues and Insights

Influence consumers to adopt more complex oral care routines

The issues

The implications

Better outreach to underserved consumer segments

The issues

The implications

Grow toothbrush sales

**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 | APAC +61 (0) 2 8284 8100

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

# Oral Care - US - 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 issues

The implications

## Trend Application

Trend: Non-Standard Society

Trend: Guiding Choice

Trend: Mood to Order

## Market Size and Forecast

Key points

Oral care sales are growing modestly

Sales and forecast of oral care products

Figure 7: Total US retail sales and forecast of oral care products, at current prices, 2008-18

Figure 8: Total US retail sales and forecast of oral care products, at inflation-adjusted prices, 2008-18

Fan chart forecast

Figure 9: Total US retail sales and fan chart forecast of oral care products, at current prices, 2008-18

## Market Drivers

Key points

Consumer confidence is growing, but consumers still look to save

Figure 10: University of Michigan's index of consumer sentiment (ICS), 2007-13

Median household income continues to decline

Figure 11: Median household income, in inflation-adjusted dollars, 2002-12

Hispanic and Black families present opportunity for the market

Figure 12: Population, by race and Hispanic Origin, 2008-18

Many consumers don't have dental insurance

Continued awareness of link between general health and oral health

## Segment Performance

Key points

Toothpaste, mouthwash, and floss/accessories growth drivers for market

Figure 13: Segment share of total US retail sales of oral care products, 2013

Toothpaste segment continues to see gains

Figure 14: Total US retail sales and forecast of toothpaste, at current prices, 2008-18

Mouthwash/rinses experience steady growth

Figure 15: Total US retail sales and forecast of mouthwash/rinse, at current prices, 2008-18

Toothbrush sales flat

Figure 16: Total US retail sales and forecast of toothbrushes, at current prices, 2008-18

Floss/accessories/tools show strongest gains across category

Figure 17: Total US retail sales and forecast of floss/accessories/tools, at current prices, 2008-18

Bleaching/whitening kits rebound slightly, but will likely continue to struggle

Figure 18: Total US retail sales and forecast of bleaching/whitening kits, at current prices, 2008-18

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 | APAC +61 (0) 2 8284 8100

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

## Oral Care - US - 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.

### Retail Channels

#### Key points

Most oral care purchases take place through "other retail channels"

Sales of oral care products, by channel

Figure 19: Total US retail sales of oral care products, by channel, at current prices, 2008-13

### Leading Companies

#### Key points

Oral care market remains highly competitive

MULO manufacturer sales of oral care products

Figure 20: MULO sales of oral care products, by leading companies, 2012 and 2013

### Brand Share – Toothpaste

#### Key points

P&G leads segment with gains in both sales and share

Colgate-Palmolive struggles to grow sales in toothpaste category

Sensodyne continues to drive sales for GlaxoSmithKline

MULO sales of toothpaste

Figure 21: MULO sales of toothpaste, by leading companies, 2012 and 2013

P&G sees gains in household penetration and brand loyalty

Figure 22: Key purchase measures for the top brands of toothpaste, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

### Brand Share – Mouthwash/Rinse

#### Key points

Johnson & Johnson leads segment despite declines

MULO sales of mouthwash/rinse

Figure 23: MULO sales of mouthwash/rinse, by leading companies, 2012 and 2013

Johnson & Johnson enjoys highest penetration rate

Figure 24: Key purchase measures for the top brands of mouthwash/rinse, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

### Brand Share – Toothbrushes

#### Key points

P&G leads struggling toothbrush segment

Colgate-Palmolive saw biggest growth in sales, segment share

Philips and Church & Dwight struggle to post gains

MULO sales of toothbrushes

Figure 25: MULO sales of toothbrushes, by leading companies, 2012 and 2013

Category leader P&G posts biggest gains in brand loyalty

Figure 26: Key purchase measures for the top brands of toothbrushes, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

### Brand Share – Floss/Accessories/Tools

#### Key points

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 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

# Oral Care - US - 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.

P&G dominates MULO sales of floss/accessories/tools

Private label sales remain mostly flat

MULO sales of floss/accessories/tools

Figure 27: MULO sales of floss/accessories/tools, by leading companies, 2012 and 2013

Brands and private label see gains in brand loyalty

Figure 28: Key purchase measures for the top brands of floss/accessories/tools, by household penetration, 52 weeks ending Dec. 29, 2013 (current) and Dec. 29, 2012 (year ago)

## Brand Share – Bleaching/Whitening Kits

Key points

Sales of bleaching/whitening kits grow due to P&G growth

MULO sales of bleaching/whitening kits

Figure 29: MULO sales of bleaching/whitening kits, by leading companies, 2012 and 2013

## Innovations and Innovators

New flavor profiles shake up the oral care market

Whitening options continue to be plentiful

Greater variety of portable oral care options

Expanded oral care options for babies and toddlers

## Marketing Strategies

Overview

A white smile in one day

Figure 30: Crest 3D Luxe ad

Figure 31: Colgate Optic White ad

Promoting the full range of oral care products for better oral health

Figure 32: Colgate Total Ad

Figure 33: Crest Pro-Health ad

Figure 34: Carolina on Crest Pro-Health Toothpaste ad

## Social Media

Key points

Market overview

Key social media metrics

Figure 35: Key performance indicators, selected oral care brands, April 21, 2013-April 20, 2014

Brand usage and awareness

Figure 36: Brand usage and awareness of oral care brands, February 2014

Interaction with brands

Figure 37: Interaction with oral care brands, February 2014

Leading online campaigns

Viral videos

Social good

What we think

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 | APAC +61 (0) 2 8284 8100

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

## Oral Care - US - 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.

### Online conversations

Figure 38: Crest topic cloud, by relevance, January 2014

Figure 39: Online mentions, selected oral care brands, April 21, 2013-April 20, 2014

### Where are people talking about oral care brands?

Figure 40: Mentions by page type, selected oral care brands, April 21, 2013-April 20, 2014

### What are people talking about online?

Figure 41: Mentions by topic of conversation, selected oral care brands, April 21, 2013-April 20, 2014

## Oral Care Product Usage

### Key points

#### Toothpaste and manual toothbrushes most widely used products

Figure 42: Usage of oral care products, by gender and age, November 2012-December 2013

#### Multipurpose toothpaste enjoys most daily use

Figure 43: Oral care product usage – Daily usage, February 2014

#### Younger consumers embrace greater number of products

Figure 44: Oral care product usage – Daily usage, by gender and age, February 2014

#### Income impacts product use

Figure 45: Oral care product usage – Daily usage, by household income, February 2014

## Shopping for Oral Care Products

### Key points

#### Most purchase their own oral care products

Figure 46: Oral care purchase responsibility, February 2014

Figure 47: Oral care purchase responsibility, by gender and age, February 2014

#### Toothpaste commands strongest brand loyalty

Figure 48: Brand and private label preferences, February 2014

#### Older consumers stick with name brands

Figure 49: Brand and private label preferences – Toothpaste, by gender and age, February 2014

Figure 50: Brand and private label preferences – Mouthwash, by gender and age, February 2014

Figure 51: Brand and private label preferences – Manual toothbrushes, by gender and age, February 2014

Figure 52: Brand and private label preferences – Floss/dental accessories, by gender and age, February 2014

## Product Attributes

### Key points

#### Cleaning effectiveness, price, and prevention top product attributes

Figure 53: Important product attributes, February 2014

#### Price has slight edge over effectiveness of cleaning among younger shoppers

Figure 54: Important product attributes, by gender and age, February 2014

## Attitudes Concerning Dentists

### Key points

Nearly a quarter of consumers say they don't go to dentist often enough

**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 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Oral Care - US - 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 55: Attitudes concerning the dentist, February 2014

Figure 56: Percentage of US adults who have visited the dentist over the previous 12 months, 2008 and 2013

**Older adults wish they had better dental coverage**

**Visiting the dentist causes anxiety for some**

Figure 57: Attitudes concerning the dentist, by gender and age, February 2014

**Less affluent consumers most likely to say they aren't visiting the dentist as often as they should**

Figure 58: Percentage of US adults who have visited the dentist over the previous 12 months, by annual household income, 2008 and 2013

Figure 59: Attitudes concerning the dentist, by household income, February 2014

### Children's Oral Care

**Key points**

**Confusion regarding children's oral health**

Figure 60: Attitudes concerning children's oral care, by parents/guardian with children in household, February 2014

### Race and Hispanic Origin

**Key points**

**Product usage varies by race/ethnic origin**

Figure 61: Oral care product usage – Daily usage, by race/Hispanic origin, February 2014

**Blacks and Hispanics highly brand loyal**

Figure 62: Oral care purchase responsibility, by race/Hispanic origin, February 2014

Figure 63: Brand and private label preferences – Toothpaste, by race/Hispanic origin, February 2014

Figure 64: Brand and private label preferences – Mouthwash, by race/Hispanic origin, February 2014

Figure 65: Brand and private label preferences – Manual toothbrushes, by race/Hispanic origin, February 2014

**Cleaning effectiveness and price matter most to Blacks and Hispanics**

Figure 66: Important product attributes, by race/Hispanic origin, February 2014

**Hispanics and Blacks less likely to have seen dentist in past year**

Figure 67: Percentage of US adults who have visited the dentist over the previous 12 months, by race/ethnicity, 2008 and 2013

Figure 68: Attitudes concerning the dentist, by race/Hispanic origin, February 2014

### Appendix – Other Market Tables

**Segment performance**

Figure 69: Total US retail sales of oral care products, by segment, at current prices, 2011 and 2013

**Retail channels**

Figure 70: Total US retail sales of oral care products, by channel, at current prices, 2011-13

### Appendix – Other Useful Consumer Tables

**Oral care product usage**

Figure 71: Usage of oral care products, by household income, November 2012-December 2013

Figure 72: Types of power toothbrushes used, by race/Hispanic origin, November 2012-December 2013

Figure 73: Types of power toothbrushes used, by household income, November 2012-December 2013

Figure 74: Types of power toothbrushes used, by gender and age, November 2012-December 2013

Figure 75: Kinds of toothpaste used, by race/Hispanic origin, November 2012-December 2013

**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 | APAC +61 (0) 2 8284 8100

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

## Oral Care - US - 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 76: Kinds of toothpaste used, by household income, November 2012-December 2013
- Figure 77: Kinds of toothpaste used, by gender and age, November 2012-December 2013
- Figure 78: Frequency of power toothbrush brand use in average day, by race/Hispanic origin, November 2012-December 2013
- Figure 79: Frequency of power toothbrush brand use in average day, by household income, November 2012-December 2013
- Figure 80: Frequency of power toothbrush brand use in average day, by gender and age, November 2012-December 2013
- Figure 81: Frequency of manual toothbrush brand use in average day, by race/Hispanic origin, November 2012-December 2013
- Figure 82: Frequency of manual toothbrush brand use in average day, by household income, November 2012-December 2013
- Figure 83: Frequency of manual toothbrush brand use in average day, by gender and age, November 2012-December 2013
- Figure 84: Frequency of mouthwash/dental rinse brand use, by race/Hispanic origin, November 2012-December 2013
- Figure 85: Frequency of mouthwash/dental rinse brand use, by household income, November 2012-December 2013
- Figure 86: Frequency of mouthwash/dental rinse brand use, by gender and age, November 2012-December 2013
- Figure 87: Frequency of dental floss/flosser brand use, by race/Hispanic origin, November 2012-December 2013
- Figure 88: Frequency of dental floss/flosser brand use, by household income, November 2012-December 2013
- Figure 89: Frequency of dental floss/flosser brand use, by gender and age, November 2012-December 2013
- Figure 90: Oral care product usage, February 2014
- Figure 91: Oral care product usage – Regular usage, by gender and age, February 2014
- Figure 92: Oral care product usage – Regular usage, by household income, February 2014
- Figure 93: Oral care product usage – Daily usage, by repertoire of types of name brand, February 2014

### Shopping for oral care products

- Figure 94: Brand and private label preferences – Toothpaste, by household income, February 2014
- Figure 95: Brand and private label preferences – Mouthwash, by household income, February 2014
- Figure 96: Brand and private label preferences – Manual toothbrushes, by household income, February 2014
- Figure 97: Brand and private label preferences – Floss/dental accessories, by household income, February 2014

### Product attributes

- Figure 98: Important product attributes, by household income, February 2014
- Figure 99: Important product attributes, by parents/guardian with children in household, February 2014
- Figure 100: Important product attributes, by repertoire of types of name brand, February 2014

### Attitudes concerning dentists

- Figure 101: Attitudes concerning the dentist, by repertoire of types of name brand, February 2014

### Children's oral care

- Figure 102: Attitudes concerning children's oral care, by gender and age, February 2014
- Figure 103: Attitudes concerning children's oral care, by household income, February 2014

### Race and Hispanic origin

- Figure 104: Usage of oral care products, by race/Hispanic origin, November 2012-December 2013
- Figure 105: Oral care product usage – Regular usage, by race/Hispanic origin, February 2014

## Appendix – Social Media

- Figure 106: Online mentions, selected oral care brands, April 21, 2013-April 20, 2014

### Brand analysis

- Figure 107: Crest key social media indicators, April 2014

**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 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Oral Care - US - 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 108: Colgate key social media indicators, April 2014
- Figure 109: Oral-B key social media indicators, April 2014
- Figure 110: Listerine key social media indicators, April 2014
- Figure 111: Scope key social media indicators, April 2014
- Figure 112: Philips Sonicare key social media indicators, April 2014

### Brand usage or awareness

- Figure 113: Brand usage or awareness, February 2014
- Figure 114: Crest usage or awareness, by demographics, February 2014
- Figure 115: Colgate usage or awareness, by demographics, February 2014
- Figure 116: Listerine usage or awareness, by demographics, February 2014
- Figure 117: Scope usage or awareness, by demographics, February 2014
- Figure 118: Oral-B usage or awareness, by demographics, February 2014
- Figure 119: Philips Sonicare usage or awareness, by demographics, February 2014

### Activities done

- Figure 120: Activities done, February 2014
- Figure 121: Crest – Activities done – I have looked up/talked about this brand online on social media, by demographics, February 2014
- Figure 122: Crest – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014
- Figure 123: Crest – Activities done – I follow/like the brand on social media because, by demographics, February 2014
- Figure 124: Crest – Activities done – I have researched the brand on social media to, by demographics, February 2014
- Figure 125: Colgate – Activities done – I have looked up/talked about this brand online on social media, by demographics, February 2014
- Figure 126: Colgate – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014
- Figure 127: Colgate – Activities done – I follow/like the brand on social media because, by demographics, February 2014
- Figure 128: Colgate – Activities done – I have researched the brand on social media to, by demographics, February 2014
- Figure 129: Listerine – Activities done – I have looked up/talked about this brand online on social media, by demographics, February 2014
- Figure 130: Listerine – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014
- Figure 131: Listerine – Activities done – I follow/like the brand on social media because, by demographics, February 2014
- Figure 132: Listerine – Activities done – I have researched the brand on social media to, by demographics, February 2014
- Figure 133: Scope – Activities done – I have looked up/talked about this brand online on social media, by demographics, February 2014
- Figure 134: Scope – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014
- Figure 135: Scope – Activities done – I follow/like the brand on social media because, by demographics, February 2014
- Figure 136: Scope – Activities done – I have researched the brand on social media to, by demographics, February 2014
- Figure 137: Oral-B – Activities done – I have looked up/talked about this brand online on social media, by demographics, February 2014
- Figure 138: Oral-B – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014
- Figure 139: Oral-B – Activities done – I follow/like the brand on social media because, by demographics, February 2014
- Figure 140: Oral-B – Activities done – I have researched the brand on social media to, by demographics, February 2014
- Figure 141: Philips Sonicare – Activities done – I have looked up/talked about this brand online on social media, by demographics, February 2014
- Figure 142: Philips Sonicare – Activities done – I have contacted/interacted with the brand online on social media to, by demographics, February 2014
- Figure 143: Philips Sonicare – Activities done – I follow/like the brand on social media because, by demographics, February 2014
- Figure 144: Philips Sonicare – Activities done – I have researched the brand on social media to, by demographics, February 2014

**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 | APAC +61 (0) 2 8284 8100  
 EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)

## Oral Care - US - 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.

Appendix – Trade Associations

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 | APAC +61 (0) 2 8284 8100  
EMAIL: [oxygen@mintel.com](mailto:oxygen@mintel.com)