

Oral Care - UK - July 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“In a sector where growth has ground to a halt, and is expected to remain flat for some time, oral care brands need to engage consumers more with their dental health and reduce reliance on special offers if they are to see value return.”

– Hera Crossan, Research Analyst

This report looks at the following areas:

- Whitening looks to be a lasting trend
- Category needs to promote standardised oral care recommendations
- Continued discounting risks undermining true innovation

Having peaked in 2016 at £1.08 billion, the size of the oral care market has shifted into decline; value sales stood at £1.07 billion in 2017, but are estimated to fall by 1% to £1.06 billion in 2018 as consumers continue to take advantage of discounting and promotions on branded goods, as well as trade down to own-label versions.

This may be a mature category, but consumers still illustrate uncertainty when it comes to use of core oral care products for themselves, or even for their children. This could be detrimental for long-term dental care, placing increased pressure on health services in coming years. However, brands are well placed to turn this around by offering more standardised help and guidance in the category, which could bring value growth back.

**BUY THIS
REPORT NOW**

VISIT:
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

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 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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 growth to be sluggish

Figure 1: Best- and worst-case forecast of UK value sales of oral care products, 2013-23

Companies and brands

Oral-B insulated from toothbrush market fall

Figure 2: Retail value sales of toothbrushes, % share by brand, year ending May 2018

Colgate's popularity could be denting its value growth

Figure 3: Retail value sales of toothpastes, % share by brand, year ending May 2018

Mouthwash falls across the board

Figure 4: Retail value sales of mouthwash, % share by brand, year ending May 2018

TePe stretches lead over Oral-B in ancillaries

Figure 5: Retail value sales of dental ancillaries, % share by brand, year ending May 2018

Denture products yet to benefit from ageing population

Figure 6: Retail value sales of denture products, % share by brand, year ending May 2018

Overall NPD activity rising

Figure 7: New launches in the UK oral care market, by product segment, January 2015-May 2018

The consumer

Consumers flow from manual to electric toothbrushes

Figure 8: Usage of toothbrushes, May 2017 and May 2018

Whitening kit usage trails interest in whitening

Figure 9: Usage of other oral care products, May 2017 and May 2018

Whitening kit frequency rises

Figure 10: Frequency of oral care, May 2018

Consumers show most interest in natural products

Figure 11: Interest in oral care products and services, May 2018

Under-35s seek better breath and whiter teeth

Figure 12: Behaviours around oral care, May 2018

Some claims hard to believe

Figure 13: Attitudes towards oral care, May 2018

Some parents lax on dental check-ups

Figure 14: Parents' behaviours around children's oral care, May 2018

Parents could benefit from more understanding around kids' dental care

**BUY THIS
REPORT NOW**

VISIT: 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

Oral Care - UK - July 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 15: Parents' attitudes towards children's oral care, May 2018

What we think

Issues and Insights

- Whitening looks to be a lasting trend
- The facts
- The implications
- Category needs to promote standardised oral care recommendations
- The facts
- The implications
- Continued discounting risks undermining true innovation
- The facts
- The implications

The Market – What You Need to Know

- Market size decreases
- Sales slide across the board
- Only online channel sees growth
- Ageing population boom yet to come
- Changes in tobacco and coffee consumption could impact sales
- Sugar awareness rises

Market Size and Forecast

- Market size slips further into decline...
 - Figure 16: UK retail value sales of oral care products, at current and constant prices, 2013-23
- ...which is expected to continue to 2023
 - Figure 17: Best- and worst-case forecast of UK value sales of oral care products, 2013-23
- Forecast methodology

Market Segmentation

- Sales slide across the board
 - Figure 18: UK retail value sales of oral care products, by segment, 2016 and 2017

Channels to Market

- Only online channel sees growth
 - Figure 19: Retail value sales of oral care products, by outlet type, 2016 and 2017

Market Drivers

- Ageing population boom yet to come
 - Figure 20: Trends in the age structure of the UK population, 2012-22
- Three in 10 adults unhappy with appearance of teeth
 - Figure 21: Proportion of adults who indicate that they are unhappy/very unhappy with appearance of their teeth, by gender and age, November 2017
- Smoking rate continues to fall

**BUY THIS
REPORT NOW**

VISIT: 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

Oral Care - UK - July 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 22: Proportion of current smokers and smokers who have quit, all persons aged 16 and over, 1976-2016

Coffee consumption levels out

Figure 23: Forecast of UK retail volume sales of coffee*, 2012-22

Sugar awareness rises...

...but stress could be keeping consumption high

Access to NHS dental services continues to reduce

Companies and Brands – What You Need to Know

Oral-B, Colgate and Listerine see value fall

Overall NPD activity rising

Whitening claims increase

Recorded advertising spend bounces back

Colgate the most recognised and used brand

Market Share

Oral-B insulated from toothbrush market fall

Figure 24: Retail value sales of toothbrushes, by brand, years ending May 2017 and 2018

Colgate's popularity could be denting its value growth

Figure 25: Retail value sales of toothpaste, by brand, years ending May 2017 and 2018

Mouthwash falls across the board

Figure 26: Retail value sales of mouthwash, by brand, years ending May 2017 and 2018

TePe stretches lead over Oral-B in ancillaries

Figure 27: Retail value sales of dental accessories, by brand, years ending May 2017 and 2018

Denture products yet to benefit from ageing population

Figure 28: Retail value sales of denture products, by brand, years ending May 2017 and 2018

Launch Activity and Innovation

Overall NPD activity rising

Figure 29: New launches in the UK oral care market, by product segment, January 2015-May 2018

Figure 30: Examples of dental ancillary launches, 2017-18

NPD in mouthwashes continues to slide

Figure 31: UltraDEX One GO on-the-go mouthwash sachets, 2018

True innovation continues to slow

Figure 32: New launches in the UK oral care market, by launch type, January 2015-May 2018

Figure 33: Examples of relaunched or repackaged oral care products from leading brands, 2017

Figure 34: NPD in the UK oral care market, by top 10 ultimate companies and other, 2017

Whitening claims increase in prevalence

Figure 35: Top 10 claims in the UK oral care market (based on 2017), 2016 and 2017

Figure 36: Examples of whitening toothpaste/powder launches, 2017

Advertising and Marketing Activity

Recorded adspend bounces back

**BUY THIS
REPORT NOW**

VISIT: 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

Oral Care - UK - July 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 37: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products, by product type, January 2015-May 2018

Colgate-Palmolive ups adspend to catch rivals

Figure 38: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products*, by leading companies, January 2016-May 2018

Figure 39: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products*, by top 10 brands and other, 2017

TV increases its domination

Figure 40: Recorded above-the-line, online display and direct mail total advertising expenditure on oral care products*, by media type, January 2015-May 2018

Figure 41: Corsodyl 'Journey' TV advert, 2017

Oral-B links with image filtering trend

Figure 42: Oral-B White Luxe Perfection toothpaste advert, October 2017

Nielsen Ad Intel coverage

Brand Research

Brand map

Figure 43: Attitudes towards and usage of selected brands, April 2018

Key brand metrics

Figure 44: Key metrics for selected brands, April 2018

Brand attitudes: Colgate and Aquafresh most trusted

Figure 45: Attitudes, by brand, April 2018

Brand personality: DenTek and CB12 seen as boring

Figure 46: Brand personality – macro image, April 2018

Sensodyne perceived as an expert

Figure 47: Brand personality – micro image, April 2018

Brand analysis

Sensodyne resonates with women

Figure 48: User profile of Sensodyne, April 2018

Colgate the most recognised and used brand

Figure 49: User profile of Colgate, April 2018

Aquafresh skews younger than Colgate

Figure 50: User profile of Aquafresh, April 2018

CB12 attracts affluent younger demographic

Figure 51: User profile of CB12, April 2018

DenTek yet to make an impact

Figure 52: User profile of DenTek, April 2018

The Consumer – What You Need to Know

Consumers flow from manual to electric toothbrushes

Whitening kit usage trails interest in whitening

Core oral care routines still not following guidelines

Consumers show most interest in natural products

Three in 10 interested in food and drink for oral care

Under-35s seek better breath and whiter teeth

**BUY THIS
REPORT NOW**

VISIT: 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

Oral Care - UK - July 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Some claims hard to believe

Parents could benefit from more understanding around kids' dental care

Usage of Oral Care Products

Consumers flow from manual to electric toothbrushes

Figure 53: Usage of toothbrushes, May 2017 and May 2018

Figure 54: Repertoire of toothbrush usage, May 2018

Mouthwash penetration remains flat

Figure 55: Usage of other oral care products, May 2017 and May 2018

Whitening kit usage trails interest in whitening

Flossing sticks gain ground

Frequency of Oral Care

Whitening kit frequency rises

Figure 56: Frequency of oral care, May 2018

Core oral care routines still not following guidelines

Interest in Oral Care Products and Services

Consumers show most interest in natural products

Figure 57: Interest in oral care products and services, May 2018

Three in 10 interested in food and drink for oral care

Figure 58: Clear drink launches in Japan, 2018

Lower interest in subscription and apps

Behaviours around Oral Care

Under-35s seek better breath...

Figure 59: Behaviours around oral care, May 2018

...and whiter teeth

Attitudes towards Oral Care

Some claims hard to believe

Figure 60: Attitudes towards oral care, May 2018

Caring for the environment

Children's Oral Care

Some parents lax on children's dental check-ups

Figure 61: Parents' behaviours around children's oral care, May 2018

Adopting 'healthier' lifestyle choices for children's dental health

Trust in children to brush properly

Figure 62: FunZone features in the Oral-B app, 2018

Figure 63: Parents' attitudes towards children's oral care, May 2018

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

**BUY THIS
REPORT NOW**

VISIT: 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

Oral Care - UK - July 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Consumer research methodology

Forecast methodology

Appendix – The Market

Figure 64: Best- and worst-case forecast of UK value sales of toothbrush and toothpaste products, 2013-23

Figure 65: Best- and worst-case forecast of UK value sales of mouthwash products, 2013-23

Figure 66: Best- and worst-case forecast of UK value sales of dental accessories and denture products, 2013-23

Appendix – Companies and Brands

Figure 67: New launches in the UK oral care market, branded versus own-label, January 2015-May 2018

**BUY THIS
REPORT NOW**

VISIT: 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