

India Oral Care Industry Outlook to 2018 - Driven by Premiumization of Toothpaste and Mouthwashes

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Abstracts

The industry research publication titled 'India Oral Care Industry Outlook to 2018 – Driven by Premiumization of Toothpaste and Mouthwashes' presents a comprehensive analysis of market size by value of oral care products in India. The report entails the market share analysis and company profiles of major players in the toothpaste, toothbrush, mouthwash and other oral care products market. The future analysis and segmentation of oral care products (toothpaste, toothpowder, toothbrush, mouthwash, dental floss and oral care chewing gum) have also been discussed.

Indian oral care industry, over the last few years, has been one of the fast growing FMCG sectors. The oral care industry is segmented into five categories which include toothpaste, toothbrush, toothpowder, mouthwashes; others oral care products such as dental flosses and oral care chewing gum. The overall market for Indian oral care products has grown at CAGR of 14.4% during FY'2008-FY'2013. The growth in the industry is driven by rising disposable income, change in consumer lifestyle, entry of international players in the market and introduction of new product categories in toothpaste, toothbrush and mouthwashes. On the account of these factors, the oral care industry witnessed revenue worth INR ~ million in FY'2013, which increased from INR ~ million in FY'2008.

The oral care industry in India has been largely dominated by the toothpaste segment, which contributed around ~% share in the overall revenue of the industry in FY'2013. Toothbrush is the second largest oral care products segment in the industry after toothpaste and majorly including products such as manual and electric toothbrushes. The share of toothbrushes in the total oral care market reported ~% in FY'2013. The toothbrush market in the country has grown at a CAGR of ~% during the period FY'2008-FY'2013. Colgate India has maintained its strong presence in the domestic

toothbrush market for past many decades with a maximum share of ~% in FY'2013.

Toothpowder category, on the other hand has demurred in the industry and in FY'2013. The decline in the toothpowder market revenue was mainly due to change in the consumer tastes and preferences towards easy to use oral care products in the market. Further, the mouthwashes segment has showcased high growth expansion in the Indian market. At present, the penetration percentage of mouthwashes is also in the single digit. The major players in the mouthwashes market are focusing on advance oral problem solution for the consumer in the market. For instance, Sensitive mouthwashes are offered by Colgate Palmolive India to address sensitive teeth.

The long term growth potential of the industry remains optimistic of oral care products. Increasing disposable earnings, growing lower and upper middle class, incline in the population demography, rising oral awareness, convenient oral care products, growing distribution chain and logistics storage, increasing toothpaste penetration, development in oral care solution segments and others are some of the factors expected to drive the industry's growth in the next five years.

The overall oral care industry in India is expected to grow significantly at a CAGR of 13.9% in the forecasted period of FY'2014-FY'2018. The oral care market in India is estimated to witness revenue worth INR ~ million by FY'2018 which will grow from INR ~ million in FY'2013.

KEY TOPICS COVERED IN THE REPORT

Introduction and market size of India oral care industry in terms of value in the last five years, FY'2008-FY'2013

Export and import market for oral care products

Oral Care market segmentation by toothpaste, toothbrush, toothpowder, mouthwashes and others oral care products

India oral care industry value chain

Trends and developments in the oral care market in India

Major oral associations, government policy and regulations in the India oral care

industry

Company profiles of the major players operating in the oral care industry (Colgate Palmolive India, Hindustan Unilever, Dabur, Procter & Gamble Gillette India)

Market share of the major players in Indian oral care industry FY'2013

Market share of the major players in toothpaste, toothbrush, toothpowder, mouthwashes and others oral care products market, FY'2013

Future outlook and projections of the oral care industry of India and by segmentation in terms of value in the next five years, FY'2014-FY'2018

Macro-economic factors of India oral care industry

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