

# **Oral Hygiene Market Report by Product (Toothpaste, Toothbrushes and Accessories, Mouthwash/Rinses, Dental Accessories/Ancillaries, Denture Products, Dental Prosthesis Cleaning Solutions, and Others), Distribution Channel (Supermarkets and Hypermarkets, Convenience Stores, Pharmacies, Online Stores, and Others), Application (Adults, Kids, Infants), and Region 2024-2032**

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## **Abstracts**

The global oral hygiene market size reached US\$ 50.8 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 67.8 Billion by 2032, exhibiting a growth rate (CAGR) of 3.2% during 2024-2032. The market is growing rapidly driven by increasing public awareness of oral health, recent technological advancements in oral hygiene products, rising prevalence of oral diseases, the growing geriatric populations, and the escalating influence of cosmetic dentistry.

**Oral Hygiene Market Analysis:**

**Market Growth and Size:** The market is witnessing stable growth, driven by increasing health awareness and advancements in oral care products. Furthermore, the easy availability of a broad range of products including toothpaste, toothbrushes, and mouthwashes, catering to diverse consumer needs, is supporting the market growth.

**Major Market Drivers:** Key drivers influencing the market growth include heightened public awareness about oral health, the growing geriatric population with specific oral care needs, rising prevalence of oral diseases, escalating influence of cosmetic dentistry, and the increasing consumer spending power.

**Technological Advancements:** Recent innovations in products, such as electric

toothbrushes with advanced features and specialized toothpaste formulations, are supporting the market growth. Additionally, the increasing focus on sustainable and eco-friendly product developments, attracting a segment of environmentally conscious consumers, is supporting the market growth.

**Industry Applications:** The market is experiencing high product demand for specific applications, catering to adults, kids, and infants, with adults being the largest segment due to their diverse and complex oral care needs.

**Key Market Trends:** The key market trends involve the ongoing shift toward natural and organic oral care products, reflecting a broader consumer preference for health and wellness. Additionally, the widespread adoption of digital marketing strategies, expanding the reach and accessibility of oral hygiene products is bolstering the market growth.

**Geographical Trends:** Asia Pacific leads the market due to its large population and economic growth, while North America and Europe maintain strong positions due to high consumer awareness and spending power. Other regions are also showing significant growth, fueled by improving economic conditions and increasing health awareness.

**Competitive Landscape:** The market is characterized by the presence of both global giants and emerging local players, creating a competitive environment. They are engaging in strategic initiatives like investments, mergers and acquisitions, and collaborations with dental professionals to enhance their market positions.

**Challenges and Opportunities:** The market faces various challenges, such as diverse regional preferences and regulatory compliances across different countries. However, the rapid expansion into emerging markets, development of innovative and sustainable products, and adoption of digital platforms for wider consumer reach are creating new opportunities for the market growth.

#### Oral Hygiene Market Trends:

The increasing awareness of oral health

The surge in public awareness regarding oral health is a pivotal factor driving the oral hygiene market. The heightened consciousness is not just about basic dental care but extends to understanding the broader implications of oral health on overall well-being. In line with this, the introduction of various educational initiatives led by healthcare professionals, dental associations, and public health campaigns, which emphasize the importance of regular dental check-ups and proper oral hygiene practices, is catalyzing the market growth. Furthermore, the advent of social media and digital platforms, which has further amplified awareness messages, reaching a wider audience across various demographics, is bolstering the market growth. Moreover, the heightened awareness

has led to a behavioral shift among consumers, who are now more proactive in seeking products and solutions for oral health, thus fueling the market growth.

### Recent advancements in oral hygiene products

Technological advancements in oral hygiene products are significantly contributing to the market growth. In line with this, the development of innovative products, such as electric toothbrushes, which offer superior plaque removal, and water flossers, catering to ease of use and efficiency, is positively influencing the market growth. Additionally, the introduction of toothpaste with specialized formulations for sensitivity, whitening, or gum care, which addresses diverse consumer needs, is contributing to the market growth. Furthermore, extensive research and development (R&D) backed by clinical studies, which not only enhance product efficacy but also build consumer trust, is bolstering the market growth. Moreover, these constant innovations not only attract new customers but also encourage existing consumers to upgrade to newer, more advanced products.

### Rising prevalence of oral diseases

The increasing incidence of oral diseases, such as dental caries, periodontal diseases, and oral cancers, is a significant factor driving the oral hygiene market. These diseases are prevalent across the globe, cutting across socio-economic classes, and are often linked to lifestyle choices, dietary habits, and lack of proper oral care. In line with this, the heightened focus on preventive oral care, as consumers are becoming more inclined to invest in quality oral hygiene products as a means to avoid expensive dental treatments, is bolstering the market growth. Moreover, the introduction of several public health initiatives that focus on addressing the burden of oral diseases and providing access to quality treatment options is positively influencing the market growth.

### Growing geriatric population

The growing segment of the geriatric population is a key driver in the oral hygiene market. The geriatric population encounters specific oral health challenges, such as gum recession, dry mouth, and increased susceptibility to oral diseases. They require specialized oral care products that cater to their unique needs. It includes products like softer toothbrushes, non-abrasive toothpaste, and oral moisturizers. Additionally, the geriatric population is generally more conscious of health maintenance, including oral health, and thus are willing to invest in products that ensure their well-being. Besides this, the growing demand for oral hygiene products from this demographic is prompting

manufacturers to innovate and create items tailored for older adults.

### Escalating influence of cosmetic dentistry

The burgeoning field of cosmetic dentistry is playing a significant role in driving the oral hygiene market. In line with this, the growing societal emphasis on aesthetic appearance, including a desirable smile, making cosmetic dental procedures like teeth whitening, veneers, and orthodontics increasingly popular, is driving the market growth. Additionally, consumers are seeking products to maintain and enhance the results of their cosmetic procedures, such as whitening toothpaste, at-home whitening kits, and products designed for sensitive teeth post-cosmetic treatments. Moreover, the rising influence of cosmetic dentistry beyond clinical settings into daily oral care, which aligns consumer habits with the desire for an aesthetically pleasing appearance, is favoring the market growth.

### Oral Hygiene Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product, distribution channel, and application.

### Breakup by Product:

- Toothpaste
- Toothbrushes and Accessories
- Mouthwash/Rinses
- Dental Accessories/Ancillaries
- Denture Products
- Dental Prosthesis Cleaning Solutions
- Others

Toothpaste accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes toothpaste, toothbrushes and accessories, mouthwash/rinses, dental accessories/ancillaries, denture products, dental prosthesis cleaning solutions, and others. According to the report, toothpaste represented the largest segment.

Toothpaste represents the largest segment, driven by its essential role in daily oral care routines. It caters to a variety of oral health needs, such as cavity prevention, gingivitis,

tooth sensitivity, teeth whitening, and enamel protection. Furthermore, recent innovations in formulations, including natural and organic ingredients, that are attracting health-conscious consumers are positively influencing the market growth. Besides this, the easy availability of toothpaste in various flavors and formulations for different age groups, such as children and the elderly, is bolstering the market growth.

The toothbrushes and accessories segment includes manual and electric toothbrushes, interdental brushes, and toothbrush sanitizers. They offer features like timers, pressure sensors, and multiple brushing modes, which aid in effective plaque removal and gum health. Additionally, the growing emphasis on comprehensive oral care among the masses is acting as a growth-inducing factor.

Mouthwash and rinses are essential components of complete oral care, valued for their ability to reduce oral bacteria, freshen breath, and, in some cases, provide fluoride for cavity protection. It includes therapeutic mouthwashes, which offer specific benefits like combating gum disease or tooth sensitivity, and cosmetic mouthwashes, primarily focused on breath freshening.

Dental accessories/ancillaries encompass a range of products, including floss, water flossers, dental picks, and tongue cleaners. They complement toothbrushing by targeting areas that are difficult to reach, thereby enhancing overall oral hygiene. Additionally, the increasing demand for dental accessories/ancillaries due to rising awareness about the importance of interdental cleaning is favoring the market growth.

Denture products cater to the needs of individuals who use dentures, offering solutions for cleaning, maintenance, and comfort. They include denture cleansers, adhesives, and repair kits. Furthermore, manufacturers are focusing on products that ensure effective cleaning to prevent infections, as well as comfort-enhancing adhesives for a better fit.

Dental prosthesis cleaning solutions are designed for dental prostheses, including bridges and implants. They are formulated to ensure the longevity and hygiene of dental prostheses. They are gentle yet effective cleaning agents that prevent damage to the prosthesis while ensuring oral hygiene.

Breakup by Distribution Channel:

Supermarkets and Hypermarkets  
Convenience Stores

Pharmacies  
Online Stores  
Others

Supermarkets and hypermarkets holds the largest share in the industry

A detailed breakup and analysis of the market based on the distribution channel have also been provided in the report. This includes supermarkets and hypermarkets, convenience stores, pharmacies, online stores, and others. According to the report, supermarkets and hypermarkets accounted for the largest market share.

Supermarkets and hypermarkets represent the largest segment due to the wide range of products available under one roof, competitive pricing, and the convenience of combining shopping for oral care with general groceries. Additionally, they offer products from multiple brands, including both premium and budget options, catering to a broad spectrum of consumer preferences. Furthermore, the accessibility of supermarkets and hypermarkets, especially in urban and suburban areas, makes them a primary choice for most consumers seeking oral hygiene products, supporting the market growth.

Convenience stores offer quick and easy access to essential products like toothpaste, toothbrushes, and mouthwash. They are typically located in densely populated areas, making them easily accessible for immediate or emergency purchases. Furthermore, the higher foot traffic in convenience stores also exposes oral care products to a wide range of potential buyers, contributing to sales.

Pharmacies are a key distribution channel for oral hygiene products, particularly for specialized items, such as therapeutic mouthwashes, denture care products, and products catering to specific dental conditions like sensitivity or gum disease. Additionally, consumers often perceive products sold in pharmacies as being more reliable and of higher quality, especially when endorsed or recommended by healthcare professionals.

Online stores are rapidly growing as a significant distribution channel for oral hygiene products. It offers the convenience of shopping from home, often providing a wider variety of choices, including niche and international brands that might not be available in physical stores. Additionally, online platforms also offer competitive pricing, detailed product information, customer reviews, and the ease of comparing different products.



## Breakup by Application:

Adults

Kids

Infants

Adults represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes adults, kids, and infants. According to the report, adults represented the largest segment.

The adult segment dominates the market, driven by a broad range of products tailored to their diverse needs and concerns, such as advanced toothbrushes, interdental cleaning tools, toothpaste for sensitivity, gingivitis, and whitening. Furthermore, the high purchasing power of adults and their increasing awareness of oral health's impact on overall well-being is propelling the market growth. Additionally, the rise in cosmetic dentistry and the focus on maintaining a healthy, aesthetically pleasing smile are contributing to the market growth. Additionally, the growing prevalence of oral diseases among adults, which necessitates a more intensive and specialized oral care routine, is supporting the market growth.

The kids' segment is driven by parents' increasing attention to their children's dental health from an early age. It features products specifically designed for children, including fluoride toothpaste with appealing flavors, soft-bristled toothbrushes in various fun shapes and characters, and alcohol-free mouthwashes.

The infant segment caters to the unique needs of babies and toddlers, primarily focusing on products safe for use in this age group. It includes gentle, fluoride-free toothpaste, soft-bristled toothbrushes suitable for delicate gums, and finger brushes for infants. Additionally, the growing awareness about the importance of starting oral care early to prevent future dental issues is favoring the market growth.

## Breakup by Region:

North America

United States

Canada

Asia Pacific

China  
Japan  
India  
South Korea  
Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

Asia Pacific leads the market, accounting for the largest oral hygiene market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The Asia Pacific region represents the largest segment in the oral hygiene market due to its vast population and rapidly growing economies. Additionally, the increasing awareness of oral health, rising disposable incomes, and the adoption of Western lifestyle habits, are contributing to the market growth. Besides this, the presence of diverse cultures and economic conditions in the region, which offer a wide market spectrum, from basic oral care products to premium and specialized items, is strengthening the market growth. Furthermore, the growing middle class in the Asia Pacific, driving the demand for innovative and advanced oral hygiene products, is supporting the market growth.



North America is known for its advanced healthcare infrastructure and high standards of oral care. Consumers in this region tend to prefer premium and technologically advanced products, such as electric toothbrushes and specialized mouthwashes. Furthermore, the presence of major global players and continuous product innovation is favoring the market growth.

Europe offers a combination of high consumer awareness, robust healthcare systems, and a strong focus on oral health and aesthetics. Furthermore, European consumers are known for their preference for quality and effectiveness, often choosing products with scientific backing and professional endorsements.

The oral hygiene market in Latin America is driven by improving economic conditions, increasing urbanization, and growing consumer awareness about oral health. Furthermore, the penetration of international brands, coupled with the rise of local manufacturers offering affordable products, is contributing to the market growth.

The oral hygiene market in the Middle East and Africa (MEA) is characterized by diverse factors, such as increasing disposable income, urbanization, and a growing youth population. Furthermore, the growing preference for premium oral care products, owing to the increasing consumer awareness about oral health, is driving the market growth.

**Leading Key Players in the Oral Hygiene Industry:**

Key players are actively engaging in several strategic initiatives to maintain and enhance their market positions. They are investing heavily in research and development (R&D) to introduce innovative products that cater to evolving consumer needs and preferences, such as advanced electric toothbrushes, multifunctional toothpaste, and eco-friendly oral care solutions. Additionally, several companies are amplifying their online presence, utilizing e-commerce platforms and digital marketing strategies to reach a broader, more diverse consumer base. In addition to this, they are forming strategic partnerships and acquisitions to expand their global footprint and diversify their product portfolios.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Church & Dwight Co. Inc.

Colgate-Palmolive  
Dabur India Ltd.  
GlaxoSmithKline  
Henkel  
The Himalaya Drug Company  
Johnson & Johnson  
Philips (Koninklijke Philips)  
Lion Corporation  
Procter & Gamble  
Sunstar Suisse SA  
Unilever

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Latest News:

In September 2021, GlaxoSmithKline introduced the first carbon-neutral toothbrush, called Dr. BEST GreenClean.

In March 2021, Colgate-Palmolive entered into a long-term collaboration with Philips to bring oral care benefits of electric toothbrushes to Latin America.

In May 2023, Dabur India Ltd. launched a new activated charcoal-based toothpaste to appeal to younger consumers.

#### Key Questions Answered in This Report

1. What was the size of the global oral hygiene market in 2023?
2. What is the expected growth rate of the global oral hygiene market during 2024-2032?
3. What are the key factors driving the global oral hygiene market?
4. What has been the impact of COVID-19 on the global oral hygiene market?
5. What is the breakup of the global oral hygiene market based on the product?
6. What is the breakup of the global oral hygiene market based on the distribution channel?
7. What is the breakup of the global oral hygiene market based on the application?
8. What are the key regions in the global oral hygiene market?
9. Who are the key players/companies in the global oral hygiene market?

## Contents

### **1 PREFACE**

### **2 SCOPE AND METHODOLOGY**

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
  - 2.3.1 Primary Sources
  - 2.3.2 Secondary Sources
- 2.4 Market Estimation
  - 2.4.1 Bottom-Up Approach
  - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

### **3 EXECUTIVE SUMMARY**

### **4 INTRODUCTION**

- 4.1 Overview
- 4.2 Key Industry Trends

### **5 GLOBAL ORAL HYGIENE MARKET**

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

### **6 MARKET BREAKUP BY PRODUCT**

- 6.1 Toothpaste
  - 6.1.1 Market Trends
  - 6.1.2 Market Forecast
- 6.2 Toothbrushes & Accessories
  - 6.2.1 Market Trends
  - 6.2.2 Market Forecast
- 6.3 Mouthwash/Rinses

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Dental Accessories/Ancillaries
  - 6.4.1 Market Trends
  - 6.4.2 Market Forecast
- 6.5 Denture Products
  - 6.5.1 Market Trends
  - 6.5.2 Market Forecast
- 6.6 Dental Prosthesis Cleaning Solutions
  - 6.6.1 Market Trends
  - 6.6.2 Market Forecast
- 6.7 Others
  - 6.7.1 Market Trends
  - 6.7.2 Market Forecast

## **7 MARKET BREAKUP BY DISTRIBUTION CHANNEL**

- 7.1 Supermarkets and Hypermarkets
  - 7.1.1 Market Trends
  - 7.1.2 Market Forecast
- 7.2 Convenience Stores
  - 7.2.1 Market Trends
  - 7.2.2 Market Forecast
- 7.3 Pharmacies
  - 7.3.1 Market Trends
  - 7.3.2 Market Forecast
- 7.4 Online Stores
  - 7.4.1 Market Trends
  - 7.4.2 Market Forecast
- 7.5 Others
  - 7.5.1 Market Trends
  - 7.5.2 Market Forecast

## **8 MARKET BREAKUP BY APPLICATION**

- 8.1 Adults
  - 8.1.1 Market Trends
  - 8.1.2 Market Forecast
- 8.2 Kids

- 8.2.1 Market Trends
- 8.2.2 Market Forecast
- 8.3 Infants
  - 8.3.1 Market Trends
  - 8.3.2 Market Forecast

## **9 MARKET BREAKUP BY REGION**

- 9.1 North America
  - 9.1.1 United States
    - 9.1.1.1 Market Trends
    - 9.1.1.2 Market Forecast
  - 9.1.2 Canada
    - 9.1.2.1 Market Trends
    - 9.1.2.2 Market Forecast
- 9.2 Asia Pacific
  - 9.2.1 China
    - 9.2.1.1 Market Trends
    - 9.2.1.2 Market Forecast
  - 9.2.2 Japan
    - 9.2.2.1 Market Trends
    - 9.2.2.2 Market Forecast
  - 9.2.3 India
    - 9.2.3.1 Market Trends
    - 9.2.3.2 Market Forecast
  - 9.2.4 South Korea
    - 9.2.4.1 Market Trends
    - 9.2.4.2 Market Forecast
  - 9.2.5 Australia
    - 9.2.5.1 Market Trends
    - 9.2.5.2 Market Forecast
  - 9.2.6 Indonesia
    - 9.2.6.1 Market Trends
    - 9.2.6.2 Market Forecast
  - 9.2.7 Others
    - 9.2.7.1 Market Trends
    - 9.2.7.2 Market Forecast
- 9.3 Europe
  - 9.3.1 Germany

- 9.3.1.1 Market Trends
- 9.3.1.2 Market Forecast
- 9.3.2 France
  - 9.3.2.1 Market Trends
  - 9.3.2.2 Market Forecast
- 9.3.3 United Kingdom
  - 9.3.3.1 Market Trends
  - 9.3.3.2 Market Forecast
- 9.3.4 Italy
  - 9.3.4.1 Market Trends
  - 9.3.4.2 Market Forecast
- 9.3.5 Spain
  - 9.3.5.1 Market Trends
  - 9.3.5.2 Market Forecast
- 9.3.6 Russia
  - 9.3.6.1 Market Trends
  - 9.3.6.2 Market Forecast
- 9.3.7 Others
  - 9.3.7.1 Market Trends
  - 9.3.7.2 Market Forecast
- 9.4 Latin America
  - 9.4.1 Brazil
    - 9.4.1.1 Market Trends
    - 9.4.1.2 Market Forecast
  - 9.4.2 Mexico
    - 9.4.2.1 Market Trends
    - 9.4.2.2 Market Forecast
  - 9.4.3 Others
    - 9.4.3.1 Market Trends
    - 9.4.3.2 Market Forecast
- 9.5 Middle East and Africa
  - 9.5.1 Market Trends
  - 9.5.2 Market Breakup by Country
  - 9.5.3 Market Forecast

## **10 SWOT ANALYSIS**

- 10.1 Overview
- 10.2 Strengths



10.3 Weaknesses

10.4 Opportunities

10.5 Threats

## **11 VALUE CHAIN ANALYSIS**

## **12 PORTERS FIVE FORCES ANALYSIS**

12.1 Overview

12.2 Bargaining Power of Buyers

12.3 Bargaining Power of Suppliers

12.4 Degree of Competition

12.5 Threat of New Entrants

12.6 Threat of Substitutes

## **13 PRICE INDICATORS**

## **14 COMPETITIVE LANDSCAPE**

14.1 Market Structure

14.2 Key Players

14.3 Profiles of Key Players

14.3.1 Church & Dwight Co. Inc.

14.3.1.1 Company Overview

14.3.1.2 Product Portfolio

14.3.1.3 Financials

14.3.1.4 SWOT Analysis

14.3.2 Colgate-Palmolive

14.3.2.1 Company Overview

14.3.2.2 Product Portfolio

14.3.2.3 Financials

14.3.2.4 SWOT Analysis

14.3.3 Dabur India Ltd.

14.3.3.1 Company Overview

14.3.3.2 Product Portfolio

14.3.3.3 Financials

14.3.3.4 SWOT Analysis

14.3.4 GlaxoSmithKline

14.3.4.1 Company Overview

- 14.3.4.2 Product Portfolio
- 14.3.4.3 Financials
- 14.3.4.4 SWOT Analysis
- 14.3.5 Henkel
  - 14.3.5.1 Company Overview
  - 14.3.5.2 Product Portfolio
  - 14.3.5.3 Financials
  - 14.3.5.4 SWOT Analysis
- 14.3.6 The Himalaya Drug Company
  - 14.3.6.1 Company Overview
  - 14.3.6.2 Product Portfolio
- 14.3.7 Johnson & Johnson
  - 14.3.7.1 Company Overview
  - 14.3.7.2 Product Portfolio
  - 14.3.7.3 Financials
  - 14.3.7.4 SWOT Analysis
- 14.3.8 Philips (Koninklijke Philips)
  - 14.3.8.1 Company Overview
  - 14.3.8.2 Product Portfolio
  - 14.3.8.3 Financials
  - 14.3.8.4 SWOT Analysis
- 14.3.9 Lion Corporation
  - 14.3.9.1 Company Overview
  - 14.3.9.2 Product Portfolio
  - 14.3.9.3 Financials
  - 14.3.9.4 SWOT Analysis
- 14.3.10 Procter & Gamble
  - 14.3.10.1 Company Overview
  - 14.3.10.2 Product Portfolio
  - 14.3.10.3 Financials
  - 14.3.10.4 SWOT Analysis
- 14.3.11 Sunstar Suisse SA
  - 14.3.11.1 Company Overview
  - 14.3.11.2 Product Portfolio
  - 14.3.11.3 Financials
  - 14.3.11.4 SWOT Analysis
- 14.3.12 Unilever
  - 14.3.12.1 Company Overview
  - 14.3.12.2 Product Portfolio

14.3.12.3 Financials

14.3.12.4 SWOT Analysis

## List Of Tables

### LIST OF TABLES

Table 1: Global: Oral Hygiene Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Oral Hygiene Market Forecast: Breakup by Product (in Million US\$), 2024-2032

Table 3: Global: Oral Hygiene Market Forecast: Breakup by Distribution Channel (in Million US\$), 2024-2032

Table 4: Global: Oral Hygiene Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 5: Global: Oral Hygiene Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Oral Hygiene Market: Competitive Structure

Table 7: Global: Oral Hygiene Market: Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1: Global: Oral Hygiene Market: Major Drivers and Challenges

Figure 2: Global: Oral Hygiene Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Oral Hygiene Market: Breakup by Product (in %), 2023

Figure 4: Global: Oral Hygiene Market: Breakup by Distribution Channel (in %), 2023

Figure 5: Global: Oral Hygiene Market: Breakup by Application (in %), 2023

Figure 6: Global: Oral Hygiene Market: Breakup by Region (in %), 2023

Figure 7: Global: Oral Hygiene Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 8: Global: Oral Hygiene (Toothpaste) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 9: Global: Oral Hygiene (Toothpaste) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 10: Global: Oral Hygiene (Toothbrushes & Accessories) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Oral Hygiene (Toothbrushes & Accessories) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Oral Hygiene (Mouthwash/Rinses) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Oral Hygiene (Mouthwash/Rinses) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Oral Hygiene (Dental Accessories/Ancillaries) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Oral Hygiene (Dental Accessories/Ancillaries) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Oral Hygiene (Denture Products) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Oral Hygiene (Denture Products) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Oral Hygiene (Dental Prosthesis Cleaning Solutions) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Oral Hygiene (Dental Prosthesis Cleaning Solutions) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Oral Hygiene (Others) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Oral Hygiene (Others) Market Forecast: Sales Value (in Million US\$),

2024-2032

Figure 22: Global: Oral Hygiene Market: Sales through Supermarkets and Hypermarkets (in Million US\$), 2018 & 2023

Figure 23: Global: Oral Hygiene Market Forecast: Sales through Supermarkets and Hypermarkets (in Million US\$), 2024-2032

Figure 24: Global: Oral Hygiene Market: Sales through Convenience Stores (in Million US\$), 2018 & 2023

Figure 25: Global: Oral Hygiene Market Forecast: Sales through Convenience Stores (in Million US\$), 2024-2032

Figure 26: Global: Oral Hygiene Market: Sales through Pharmacies (in Million US\$), 2018 & 2023

Figure 27: Global: Oral Hygiene Market Forecast: Sales through Pharmacies (in Million US\$), 2024-2032

Figure 28: Global: Oral Hygiene Market: Sales through Online Stores (in Million US\$), 2018 & 2023

Figure 29: Global: Oral Hygiene Market Forecast: Sales through Online Stores (in Million US\$), 2024-2032

Figure 30: Global: Oral Hygiene Market: Sales through Other Distribution Channels (in Million US\$), 2018 & 2023

Figure 31: Global: Oral Hygiene Market Forecast: Sales through Other Distribution Channels (in Million US\$), 2024-2032

Figure 32: Global: Oral Hygiene (Adults) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Global: Oral Hygiene (Adults) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Global: Oral Hygiene (Kids) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Global: Oral Hygiene (Kids) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: Global: Oral Hygiene (Infants) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: Global: Oral Hygiene (Infants) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: North America: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: North America: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: United States: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023



Figure 41: United States: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: Canada: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: Canada: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Asia Pacific: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Asia Pacific: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: China: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: China: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Japan: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Japan: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: India: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: India: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: South Korea: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: South Korea: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: Australia: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: Australia: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Indonesia: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Indonesia: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: Others: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: Others: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: Europe: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Europe: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Germany: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Germany: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: France: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: France: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: United Kingdom: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: United Kingdom: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: Italy: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Italy: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Spain: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Spain: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Russia: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Russia: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Others: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Others: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Latin America: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Latin America: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 78: Brazil: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 79: Brazil: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 80: Mexico: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 81: Mexico: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 82: Others: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 83: Others: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 84: Middle East and Africa: Oral Hygiene Market: Sales Value (in Million US\$), 2018 & 2023

Figure 85: Middle East and Africa: Oral Hygiene Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 86: Global: Oral Hygiene Industry: SWOT Analysis

Figure 87: Global: Oral Hygiene Industry: Value Chain Analysis

Figure 88: Global: Oral Hygiene Industry: Porter's Five Forces Analysis

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