

India Toothpaste Market, By End User (Kids, Adults), By Distribution Channel (Supermarkets and Hypermarkets, Pharmacies, Convenience Stores, Online, Others), By Product Type (Standard Toothpaste, Functional/Medicated Toothpaste), By Region, Competition, Forecast & Opportunities, 2021-2031F

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Abstracts

Market Overview

India toothpaste market was valued at USD 1.45 Billion in 2025 and is expected to reach USD 1.92 Billion by 2031 with a CAGR of 4.8% during the forecast period. The India toothpaste market is witnessing steady expansion driven by rising oral health awareness, increasing disposable incomes, urbanization, and the growing influence of modern retail formats. Consumers are becoming more conscious about preventive healthcare and are increasingly viewing toothpaste not just as a hygiene necessity but also as a wellness product, which is prompting companies to innovate with specialized variants such as herbal, whitening, sensitivity-relief, and gum-care formulations. The herbal and ayurvedic segment, led by brands from Dabur, Patanjali, Himalaya, and Vicco, has gained significant traction owing to the rising preference for natural ingredients, influenced by the wellness movement and government-backed initiatives promoting Ayurveda.

Key Market Drivers

Rising Oral Health Awareness and Preventive Care Adoption

One of the most prominent drivers of the India toothpaste market is the significant rise in oral health awareness and the growing inclination toward preventive dental care across the country. Over the past decade, various factors such as government health programs, dental health campaigns by the Indian Dental Association, and targeted marketing by leading toothpaste brands have contributed to an increased understanding of the importance of maintaining oral hygiene. India is wrestling with a considerable oral health burden: only 12.4% of adults have ever had their teeth examined by a dentist, despite dental caries affecting 32–71.5% of 12-year-olds and 48–86.4% of adults aged 35–45. Among elders aged 65–74, caries prevalence is even higher—51.6% to 95.1%—and an estimated 10 crore children under six years suffer from untreated caries. Earlier, brushing twice a day or using specialized toothpaste was limited to urban, high-income consumers; however, this habit is now penetrating rural and semi-urban populations due to improved education levels and greater exposure to health-related media. Consumers are increasingly aware that oral health is closely linked to overall well-being, influencing their purchase decisions to include products that offer protection against cavities, gum disease, and tooth sensitivity. This has also been fueled by the availability of information through digital platforms and the growing influence of dental professionals recommending specific formulations for various needs. Additionally, the expansion of school dental health programs and CSR activities by FMCG companies has ensured that oral care awareness starts from a young age. The shift from reactive treatment toward proactive prevention means that consumers are now willing to invest in higher-quality and specialized toothpaste products, whether herbal, medicated, or premium whitening variants. Despite persistent gaps—like just 50% of people using a toothbrush, only 4.5% visiting the dentist, and 95% suffering from gum disease. As India continues to urbanize and literacy rates climb, the emphasis on preventive health—supported by rising healthcare costs—will remain a sustained growth engine for the toothpaste sector.

Key Market Challenges

Market Saturation and Intense Price Competition

The Indian toothpaste market is one of the most crowded segments in the FMCG sector, with multinational giants, strong domestic players, and an expanding base of regional and local brands all fighting for the same consumer wallet. Over decades, large brands have already penetrated urban markets to near saturation, leaving little room for dramatic volume growth in those areas. As a result, competition has increasingly shifted toward rural markets, where growth potential exists but comes with its own set of challenges such as lower purchasing power and inconsistent retail infrastructure. In

such an environment, price wars become inevitable. Established players often resort to heavy discounting, bundled offers, and aggressive promotions to maintain market share, eroding margins. Smaller or newer brands, trying to differentiate through niche positioning—such as herbal, ayurvedic, or “natural” claims—face the uphill task of balancing premium pricing with affordability expectations. This race to the bottom on price also risks commoditizing toothpaste, making it harder for brands to maintain loyalty or justify value beyond cost. For companies, the challenge is not only standing out in a sea of similar offerings but doing so without sacrificing profitability.

Key Market Trends

Premiumization and Specialization of Product Portfolios

The Indian toothpaste market is seeing a strong shift toward premium and specialized offerings, even in a price-conscious environment. While mass-market variants remain the backbone of sales volumes, consumers—especially in urban and semi-urban regions—are increasingly willing to pay more for products that claim enhanced or targeted benefits. This has led to a proliferation of specialty toothpastes: whitening formulas, enamel repair variants, sensitivity relief products, and gum protection lines are now common on retail shelves. Some brands are introducing advanced formulations with imported ingredients, nano-calcium particles, or unique flavor profiles to differentiate themselves. Importantly, premiumization is no longer confined to metro cities; aspirational buying in Tier II and Tier III towns is fueling growth for mid- to high-tier variants, aided by greater exposure through advertising, influencer content, and modern trade formats. However, premium products are often launched alongside smaller pack sizes to balance affordability and perceived value, creating a “premium yet accessible” positioning. This trend is gradually shifting the market’s value mix upward, even if volume growth is still dominated by economy and mid-range products.

Key Market Players

Colgate-Palmolive (India) Ltd.

Hindustan Unilever Ltd.

Dabur India Ltd.

Patanjali Ayurved Ltd.

GlaxoSmithKline plc (via Haleon)

Procter & Gamble Co. (P&G) India

Vicco Laboratories

Himalaya Drug Company

J L Morison (India) Ltd.

Amway Corp. (India)

Report Scope:

In this report, the India Toothpaste market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Toothpaste Market, By End User:

Kids

Adults

India Toothpaste Market, By Distribution Channel:

Supermarkets and Hypermarkets

Pharmacies

Convenience Stores

Online

Others

India Toothpaste Market, By Product Type:

Standard Toothpaste

Functional/Medicated Toothpaste

India Toothpaste Market, By Region:

North

East

West

South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Toothpaste market.

Available Customizations:

India Toothpaste market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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