

United States Oral Care Market By Product (Toothpaste, Toothbrush, Mouth Wash, Dental Accessories/Ancillaries), By Sales Channel (Hypermarket/Supermarket, Departmental Stores, Retail Pharmacies, Dental Dispensaries, Online, Others) By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

United States Oral Care Market has valued at USD 9.13 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.21% through 2028. Oral care in the United States is a critical component of overall healthcare and hygiene. It encompasses a wide range of practices and products aimed at maintaining optimal oral health, including dental hygiene routines, professional dental services, and the oral care product industry.

Dental hygiene is a fundamental aspect of oral care, with individuals encouraged to brush their teeth at least twice a day and floss regularly. This routine helps prevent common oral issues like cavities and gum disease. Regular check-ups with dentists are also essential for early detection and treatment of dental problems.

The United States boasts a robust dental care industry, with millions of Americans seeking dental services annually. Dental insurance plays a significant role in facilitating access to these services, although access disparities persist among various demographics and socioeconomic groups.

The oral care product market in the United States is extensive, featuring toothpaste, toothbrushes, mouthwash, dental floss, and various specialty products like teeth

whitening kits and orthodontic aids. Consumers have a plethora of options, ranging from traditional to natural and organic products.

Oral care is increasingly recognized for its connection to overall health, with studies highlighting links between oral health and conditions like cardiovascular disease and diabetes. As such, the importance of maintaining good oral hygiene continues to gain prominence in public health discussions and individual wellness practices across the United States.

Key Market Drivers

Evolving Healthcare Landscape

The United States' oral care landscape is influenced by the dynamic changes in the broader healthcare system. As healthcare reform efforts persist, oral health has increasingly gained recognition as an integral component of overall wellness. The Affordable Care Act (ACA) of 2010 marked a significant shift by extending dental coverage to millions of children, acknowledging the importance of early intervention and prevention. This change catalyzed an increased focus on oral health, as it was recognized that untreated dental issues could lead to more serious systemic health problems. Moreover, the ACA incentivized the integration of dental and medical care, promoting a holistic approach to healthcare that considers the interplay between oral and systemic health. These legislative changes and the broader emphasis on healthcare access have driven the demand for oral care services, both in terms of prevention and treatment.

Additionally, the rise of telehealth and digital technologies has impacted the oral care landscape. Teledentistry, for example, allows patients to consult with dental professionals remotely, expanding access to care, particularly in underserved rural areas. Furthermore, digital tools and mobile applications have emerged to assist individuals in maintaining their oral hygiene routines. The evolving healthcare landscape, with its focus on accessibility and integration, is a significant driver behind the transformations in oral care practices and services in the United States.

Consumer Awareness and Education

A second driver of change in the United States' oral care sector is the increasing awareness and education regarding oral health. With readily available information through the internet and other media, consumers are more informed about the

importance of oral hygiene than ever before. The knowledge that oral health is linked to overall well-being has prompted individuals to take a proactive approach to their dental care.

This awareness is not only evident in personal oral care routines but also in consumer choices regarding oral care products. There is a growing trend towards natural and organic dental products, reflecting consumers' desire for cleaner, more environmentally friendly options. Moreover, individuals are increasingly seeking out specialty oral care products, such as those for teeth whitening, sensitivity relief, and oral hygiene for specific conditions like dry mouth. The United States' market for oral care products has expanded to cater to this demand, with a multitude of options available on the shelves.

Additionally, educational campaigns and initiatives by dental associations, schools, and government agencies have contributed to raising awareness about the importance of oral health. School-based programs, community dental clinics, and outreach efforts are designed to educate children and adults about proper oral care practices and the consequences of neglecting dental health. This emphasis on education is playing a crucial role in driving the oral care industry towards more preventive measures, ultimately reducing the incidence of oral health issues in the country.

Technological Advancements

Technological advancements are another driving force in shaping the United States' oral care landscape. The field of dentistry has seen significant progress in diagnostic tools, treatment options, and preventive measures. Digital radiography and 3D imaging have improved the accuracy of dental diagnoses and treatment planning, reducing the invasiveness of procedures. Laser dentistry has enabled minimally invasive treatments, reducing patient discomfort and recovery time.

Advancements in materials have led to more durable and aesthetically pleasing dental restorations, such as tooth-colored fillings and ceramic crowns. Additionally, innovations like teledentistry and electronic health records have improved the efficiency of dental practices and expanded access to care.

In the consumer realm, toothbrushes equipped with smart technology and mobile apps have gained popularity. These devices provide real-time feedback on brushing techniques and schedules, enhancing user compliance with recommended oral care routines. The advent of at-home teeth whitening kits and orthodontic alignment systems, such as clear aligners, reflects the fusion of technology with consumer-driven oral care

trends. These advancements not only improve the patient experience but also drive the growth of the oral care product market.

Aging Population and Oral Healthcare Needs

The demographic makeup of the United States is undergoing a significant transformation with an aging population. As the baby boomer generation continues to age, there is a growing demand for oral healthcare services and products tailored to the unique needs of older adults. This demographic shift is a substantial driver of change in the oral care industry.

Aging is associated with various oral health challenges, including tooth loss, periodontal disease, and dry mouth. Dentures, dental implants, and advanced periodontal treatments have become more prevalent as solutions to address these issues. Furthermore, an emphasis on retaining natural teeth for as long as possible has led to increased demand for preventative and restorative dental care among older individuals.

The relationship between oral health and overall health becomes particularly salient in an aging population. Older adults are more susceptible to systemic conditions and medications that can impact their oral health. This has led to a greater emphasis on coordinated care between dental and medical professionals, ensuring that the unique needs of older adults are met comprehensively.

In conclusion, the oral care landscape in the United States is continually evolving, driven by a combination of factors. The evolving healthcare system, with its focus on accessibility and integration, has brought about changes in the way oral care is delivered and reimbursed. Consumer awareness and education have prompted individuals to take a proactive approach to their oral health, resulting in a demand for a wider array of oral care products. Technological advancements have improved diagnostic and treatment methods, while an aging population has reshaped the oral healthcare needs of the nation.

Key Market Challenges

Access Disparities

One of the most significant challenges in the United States' oral care landscape is the persistent and often glaring disparities in access to dental services. While strides have been made in extending dental coverage to children through the Affordable Care Act

(ACA), access to dental care remains a pressing issue, particularly among low-income individuals, the uninsured, and underserved communities.

First, the shortage of dental care providers in certain geographic areas exacerbates access disparities. Many rural and urban areas lack an adequate number of dentists, leading to long waiting times for appointments and limited options for those seeking dental care. This shortage is compounded by the fact that many dentists tend to practice in more affluent areas, leaving underserved communities with limited access to care.

Second, dental care is often treated separately from general healthcare, both in terms of insurance coverage and care provision. Dental insurance is often disconnected from medical insurance, leaving individuals with oral health needs to navigate a complex system. This separation not only results in financial challenges but also hinders the integration of dental and medical care, despite the growing recognition of their interconnectedness.

Lastly, cost remains a significant barrier to accessing oral care in the United States. Dental procedures can be expensive, even for those with insurance, as many plans come with coverage limitations and out-of-pocket expenses. For the uninsured, the cost of dental care can be prohibitive, leading many to forgo necessary treatment or rely on emergency care when dental issues become severe. These access disparities perpetuate oral health inequalities, as those with limited access often face more significant oral health problems in the long run.

Oral Health Inequities

Another pressing challenge in the United States' oral care sector is the existence of significant oral health inequities, which disproportionately affect certain demographic groups. These disparities are multifaceted and often intertwined with broader social determinants of health.

First and foremost, socioeconomic factors play a critical role in oral health inequities. Low-income individuals and families are more likely to experience dental issues due to limited access to care and financial constraints. This can result in delayed treatment and more severe oral health problems. Additionally, minority communities, particularly African Americans and Hispanics, often face higher rates of dental disease and untreated dental issues, reflecting deep-rooted racial disparities in healthcare access and quality.

Second, education and oral health literacy are critical factors in oral health outcomes. Communities with lower levels of education tend to have less awareness of proper oral care practices and the importance of regular dental check-ups. This lack of education can lead to preventable oral health problems and a cycle of inequity, as individuals may not possess the knowledge to advocate for their own dental health.

Furthermore, cultural and language barriers can impede access to oral care and lead to misunderstandings between patients and healthcare providers. This can result in miscommunication, misdiagnosis, and inadequate treatment, further exacerbating oral health inequities.

Lastly, vulnerable populations, including the elderly and those with disabilities, often face unique challenges in accessing oral care. Nursing home residents, for example, frequently encounter difficulties in receiving appropriate dental care, which can contribute to the deterioration of their oral health.

Lack of Preventive Education

Preventive education plays a crucial role in maintaining good oral health, but there is still a lack of adequate public awareness and education regarding oral care in the United States. Many people are unaware of the importance of oral hygiene, proper nutrition, and the prevention of dental issues. As a result, they may not take the necessary steps to care for their oral health, leading to avoidable problems. Several factors contribute to this challenge:

Limited Education in Schools: Oral health education is often insufficient in school curricula. Many individuals grow up without a comprehensive understanding of the importance of oral hygiene.

Misinformation: Misinformation about oral care practices, such as fad diets, home remedies, and unverified dental products, can lead to poor oral health outcomes.

Socioeconomic Barriers: People with lower incomes may not have access to educational resources and may not prioritize oral health education due to other pressing concerns.

Promoting preventive education and raising awareness about the importance of oral health is essential. This can be achieved through school-based programs, public health

campaigns, and community initiatives that target underserved populations.

Rising Costs of Dental Services

The increasing cost of dental services is a major challenge in the United States. The high cost of dental care can discourage individuals from seeking treatment, especially for those without insurance coverage. Several factors contribute to the rising costs of dental services:

Overhead Expenses: Dental practices have significant overhead expenses, including equipment, staff salaries, and administrative costs, which can drive up the overall cost of care.

Lack of Price Transparency: In many cases, patients are unaware of the true cost of dental procedures, making it difficult for them to make informed decisions about their care.

Limited Competition: In some areas, there may be limited competition among dental providers, allowing them to charge higher prices.

Addressing the rising costs of dental services may involve increasing price transparency, exploring alternative care delivery models, and advocating for insurance reforms to make dental care more affordable and accessible.

In conclusion, oral care in the United States faces several critical challenges, including limited access to care, oral health disparities, a lack of preventive education, and the rising costs of dental services. Addressing these challenges requires a comprehensive approach, involving policy changes, public health initiatives, and increased awareness about the importance of oral health. Ultimately, ensuring access to quality oral care for all Americans is essential for overall health and well-being.

Key Market Trends

Teledentistry and Telehealth Solutions

One of the most transformative trends in oral care is the adoption of teledentistry and telehealth solutions. Telemedicine has gained widespread acceptance in various healthcare sectors, and dentistry is no exception. Teledentistry allows patients to consult with dental professionals remotely, providing a convenient and accessible way

to address oral health concerns.

This trend gained momentum during the COVID-19 pandemic when in-person dental visits were restricted. Many dental practices turned to virtual consultations for triage, advice, and follow-up care. Teledentistry is particularly useful for initial assessments, routine follow-ups, and oral health education. It enables patients to receive timely guidance and recommendations without leaving their homes.

The convenience of teledentistry can improve access to care, especially for individuals in rural or underserved areas. While it cannot replace all in-person treatments, it has the potential to complement traditional dental care and reduce the burden on overcrowded dental clinics.

Personalized and Preventive Care

In recent years, there has been a growing emphasis on personalized and preventive oral care. Dentistry is shifting away from the traditional 'drill and fill' approach toward a more holistic focus on maintaining oral health and preventing problems. This trend is driven by advances in diagnostic tools, such as digital imaging and saliva testing, which allow for early detection of dental issues.

Personalized care involves tailoring treatment plans to an individual's unique needs and risk factors. Dentists are increasingly using data-driven approaches to identify high-risk patients and provide targeted preventive strategies. This may include recommending specific oral hygiene practices, dietary modifications, and even genetic testing to assess susceptibility to certain oral health conditions.

Preventive care also extends to patient education and awareness. Dental professionals are placing greater importance on teaching patients about the importance of good oral hygiene and its connection to overall health. Regular dental check-ups and cleanings, along with proper home care, can help prevent many dental issues, such as cavities and gum disease.

Technological Advancements

Advancements in dental technology are revolutionizing the field of oral care. The United States is at the forefront of adopting cutting-edge technologies that enhance diagnosis, treatment, and patient experience.

3D Printing: 3D printing is being used to create dental prosthetics, such as crowns, bridges, and dentures, with precision and speed. This technology allows for highly customized and durable solutions for patients, reducing the time and number of visits required for such procedures.

Artificial Intelligence (AI): AI is being integrated into dental practices to aid in diagnosis and treatment planning. AI algorithms can analyze patient data, including radiographs and clinical history, to assist dentists in identifying potential issues. AI-powered robots are also being developed for tasks like teeth cleaning.

Digital Impressions: Traditional dental impressions can be uncomfortable for patients. Digital impression systems, like intraoral scanners, offer a more comfortable and efficient way to capture detailed images of the teeth and gums. This technology simplifies the creation of dental restorations.

Laser Dentistry: Laser technology is being used for various dental procedures, including gum disease treatment, cavity preparation, and soft tissue surgery. Lasers are less invasive and can result in faster healing times.

Sustainability and Eco-Friendly Practices

Sustainability and eco-friendly practices have become a prominent trend in oral care. Dentistry, like many other sectors, is recognizing the importance of environmental responsibility. This trend is visible in several aspects of dental practices and products.

Green Dentistry: Some dental practices are adopting eco-friendly initiatives, such as reducing energy consumption, minimizing waste, and using biodegradable or recyclable materials. Green dentistry aims to reduce the environmental impact of dental care.

Environmentally Friendly Products: Patients are increasingly interested in oral care products that are sustainable and free from harmful chemicals. Biodegradable toothbrushes, eco-friendly toothpaste, and packaging with minimal plastic waste are gaining popularity.

Water Conservation: Dental offices are implementing water-saving technologies to reduce water usage during procedures and equipment sterilization. This not only saves resources but also lowers operating costs.

Mercury-Free Dentistry: Amalgam fillings, which contain mercury, are being phased out

in favor of alternative filling materials that are safer for both patients and the environment.

These trends indicate a shift towards more environmentally conscious and patient-centric oral care practices in the United States. Dentists and patients are increasingly aware of the impact of oral health on overall well-being, and technology is playing a crucial role in improving both diagnosis and treatment. Additionally, the integration of telehealth solutions is making oral care more accessible, particularly in underserved communities. As these trends continue to evolve, the future of oral care in the United States appears promising, with greater emphasis on personalized, preventive, and sustainable practices.

Segmental Insights

Product Insights

In recent years, mouthwash has emerged as the fastest-growing segment in the United States oral care industry. This growth can be attributed to several factors, including increasing consumer awareness of oral hygiene, a desire for fresher breath, and the pursuit of enhanced overall dental health.

Mouthwash offers convenience and an added layer of protection against oral health issues such as cavities, gum disease, and bad breath. Moreover, innovations in mouthwash formulations, including alcohol-free options and those containing fluoride for cavity prevention, have expanded its appeal to a broader audience, including individuals with sensitivities and specific dental needs.

The market for mouthwash continues to thrive as consumers prioritize their oral health, seeking products that not only maintain fresh breath but also provide a holistic approach to dental care. As this trend persists, the mouthwash segment is poised for continued growth and innovation within the United States oral care industry.

Sales Channel Insights

Online retail has emerged as the fastest-growing segment in the United States oral care industry. This growth can be attributed to the increasing consumer preference for convenience, accessibility, and the ease of online shopping. People are turning to e-commerce platforms to purchase a wide range of oral care products, from toothpaste and toothbrushes to floss, mouthwash, and teeth whitening kits.

The COVID-19 pandemic has accelerated this trend, with more individuals opting for online shopping to minimize in-person interactions. The ability to research products, read reviews, and compare prices online has empowered consumers to make informed choices. Additionally, subscription services for oral care products have gained popularity, offering the convenience of automatic product replenishment.

As online shopping continues to evolve, it offers a convenient way for consumers to maintain their oral health with a wide selection of products, often at competitive prices. This trend is expected to persist, driving the growth of the online segment within the United States oral care industry.

Regional Insights

The southern region of the United States stands out as the dominating area in the oral care industry. This dominance can be attributed to several factors, including the region's large population, high oral care awareness, and significant investments in the healthcare sector.

Southern states like Texas, Florida, and California not only have large populations but also a diverse demographic mix, making them prime markets for oral care products and services. The warm climate in many southern states can lead to an increased focus on oral hygiene, especially since issues like dry mouth can be more prevalent in these conditions.

Furthermore, the South has witnessed substantial economic growth, resulting in increased consumer spending on oral health products and dental services. Additionally, there's a strong presence of dental schools, research institutions, and healthcare facilities, contributing to advancements in oral care.

In summary, the southern region's combination of a large population, high awareness of oral health, and robust healthcare infrastructure positions it as the dominating area in the United States oral care industry.

Key Market Players

The Procter & Gamble Company

Unilever Inc.

Colgate-Palmolive Company

Glaxo Smith Kline LLC

Johnson & Johnson Consumer Inc.

Chruch & Dwight Co.

LG Corporation

Lion Corporation

Koninklijke Philips N.V.

Henkel AG & Co. KGaA

Report Scope:

In this report, the United States Oral Care market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Oral Care Market, By Product:

Toothpaste

Toothbrush

Mouth Wash

Dental Accessories/Ancillaries

United States Oral Care Market, By Sales Channel:

Hypermarket/Supermarket

Departmental Stores

Retail Pharmacies

Dental Dispensaries

Online

Others

United States Oral Care Market, By Region:

South

West

Mid-West

North-East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the United States Oral Care market.

Available Customizations:

United States Oral Care Market report with the given market data, Tech Sci 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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