

Oral Care in Western Europe

May 2021

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Key findings

REGIONAL OVERVIEW

Oral care sees fairly stable sales in Western Europe

Western Europe set to see higher growth during the forecast period

Toothpaste leads oral care, but is slowly losing share to toothbrushes

Power toothbrushes and tooth whiteners see the highest value CAGRs

Toothbrushes dominates absolute growth in key markets

Improving oral care routines positively impact absolute value growth

Grocery retailers are the go-to distribution channels in Western Europe

Sales in traditional channels remain stable while e-commerce grows

LEADING COMPANIES AND BRANDS

Top five players dominate the oral care space

Top three players maintain their strong lead in oral care

The top three companies are well-positioned in the largest markets

Solutions with therapeutic claims are gaining traction

Oral care companies follow the sustainability agenda

Antibacterial claims see strong growth in 2020

Natural claims see a 19% increase over 2019-2020

FORECAST PROJECTIONS

Germany leads, but France has the highest absolute growth forecast

Improved oral hygiene will drive growth across most categories

Increasing GDP per capita will boost oral care in Western Europe

Product variety and competitive prices will be key

COUNTRY SNAPSHOTS

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Austria: Competitive and retail landscape

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