

Global Dental Floss - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Dental Floss Market size is estimated at USD 683.05 million in 2024, and is expected to reach USD 905.91 million by 2029, growing at a CAGR of 5.81% during the forecast period (2024-2029).

Populations disproportionately affected by COVID-19 are at higher risk for oral diseases and experience oral health and oral health care disparities at higher rates. Many studies and organizations have suggested the importance of oral health. For instance, In August 2020, The German Society of Dentistry and Oral Medicine (DGZMK) studies revealed the importance of dental health and the systemic relevance of dentistry, especially during the pandemic. The studies highlighted the importance of improved oral hygiene during a SARS-CoV-2 infection to reduce the bacterial load in the mouth and the risk of bacterial superinfection. Those patients who were reported to have a severe form of COVID-19 (20%) had associated higher levels of inflammatory markers and bacteria. Therefore, as per the studies it is recommended that poor oral hygiene is considered a risk factor for COVID-19 complications, especially in patients with diabetes, hypertension, or cardiovascular disease. Those comorbidities are associated with altered oral biofilms and periodontal disease. Thus, poor oral hygiene is a major risk factor for serious complications during COVID which has generated the need for dental floss, thus, it would make a significant impact on the market.

As per the Health Resources and Services Administration, approximately 49 million United States residents live in areas designated as Dental Health Professional Shortage Areas. This shortage has been compounded by the COVID-19 pandemic that has resulted in limited preventive dental services in the interest of public health safety. Nationally, children in low-income families are at higher risk of caries and are less likely to receive sealants than children in higher-income families, at 39% and 46%, respectively. While as the pandemic is interrupting the supply chain, and many companies will vary to other geographic regions in the future to ensure that products remain available and protect their supply chain. Thus, the supply chain disruption in various areas are creating a significant impact on the market.

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The major factors contributing to the market's growth are the increase in the incidence of oral problems and the increasing demand for oral care products. For instance, in September 2020, as per the Centers for Disease Control and Prevention (CDC), 47.2 percent of adults over 30 years old have some form of periodontal disease. The American Dental Association (ADA) further states that 7.8 percent of adults with gum disease have severe periodontitis.

In addition, there has been increasing awareness about oral health around the world. This is backed by initiatives taken by several governments and non-government organizations, impacting the growth of the market studied. For instance, in February 2020, the American Dental Association conducted National Children's Dental Health Month, which brought together thousands of dedicated professionals, healthcare providers, and educators to promote the benefits of good oral health among children and their caregivers.

Furthermore, the Oral Health Foundation, one of the major independent oral health charities based in the United Kingdom, has been conducting various awareness programs on oral health for many years. The foundation planned to conduct an awareness month on oral health between May 17 and June 17, 2021. Also, the high adoption of tobacco products that cause detrimental effects on oral health is one of the major contributors to adopting convenient and easy-to-use products. This factor is also anticipated to fuel the demand for dental floss over the forecast period.

The rising geriatric population is also expected to boost the market's growth, as this age group is more likely to adopt dental floss. Countries such as Japan, Germany, and the United States have the highest percentage of the elderly population. They are projected to witness the growing penetration of the product due to its effectiveness and compactness. For instance, as per the World Population Prospects 2022, The world's population is projected to reach 8 billion on 15 November 2022. The latest projections by the United Nations suggest that the global population could grow to around 8.5 billion in 2030, 9.7 billion in 2050, and 10.4 billion in 2100. However, the availability of alternatives, like dental picks, is the major restraint for market growth.

Dental Floss Market Trends

Waxed Dental Floss Segment Is Expected to Witness Growth Over the Forecast Period

Waxed dental floss is expected to hold a significant market share over the forecast period. The major reason propelling the growth of this segment is the increasing aging population and oral problems. For instance, in October 2020, according to the World Health Organization, it is estimated that 2.3 billion people suffer from dental caries of permanent teeth, and more than 530 million children suffer from caries of primary teeth globally.

While, as per the world health organization study published in 2020, Oral hygiene involves the daily practice of careful, frequent tooth and gingival oral hygiene involves the daily practice of careful, frequent tooth and gingiva brushing, combined with the use of waxed dental floss between teeth to remove food particles and tartar accumulation. Proper oral hygiene can prevent dental problems, most commonly, dental caries, gingivitis, periodontal diseases, and halitosis (WHO, 2020). The same studies also revealed that proper oral hygiene is necessary to aid in the healing and regeneration of oral tissues stemming from oral pathologic conditions, including, gingivitis, periodontitis, and dental trauma such as subluxation, oral cysts, and following wisdom tooth extraction. Thus, for maintaining proper oral hygiene demand for waxed dental floss is rising continuously which is boosting the growth of the market.

These waxed dental flosses have added advantages as they contain essential oils and enzymes, resulting in effective plaque removal. In addition, waxed dental floss is also available in a polymer coating, which prevents shredding and provides effortless plaque removal. The key players in the market are also investing in natural wax ingredients to produce and commercialize natural dental floss, majorly made up of three natural waxes, namely jojoba, carnauba, and beeswax, further fueling the market's growth.

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North America Dominates the Market, and it is Expected to do Same during the Forecast Period

North America is anticipated to dominate the market share of the dental floss market throughout the forecast period. The rising prevalence of oral diseases and the established healthcare infrastructure are expected to be the major factors propelling the market's growth in this region. For instance, in 2021, the American Academy of Periodontology estimated that more than 55% of American adults above 30 years of age have periodontitis in one or more teeth; the more advanced form of periodontal disease was equivalent to approximately 64.7 million Americans.

Moreover, there is a steady increase in the number of geriatric populations that require regular dental check-ups and assistance. This has also contributed to the growth of the market studied in the United States. For instance, in February 2021, as per the United States Census data and Simmons National Consumer Survey (NHCS), it was reported that 25.62 million United States residents used manual toothbrushes five or more times, and 14.13 million United States residents used store-brand dental floss/flossers/picks eight or more times within a week in 2020.

Additionally, awareness of the importance of oral hygiene to the overall health of the country is also driving the market growth. For instance, in June 2021, The American Dental Association (ADA) is also known to spread awareness among United States citizens about the benefits of oral hygiene. The Protection and Affordable Care Act (PACA) has helped create an organized and competitive market for health insurance by offering private health insurance coverage that lowers the out-of-pocket costs for health and dental services. Thus, owing to the aforementioned factors, the market is expected to grow significantly during the forecast period.

Dental Floss Industry Overview

The dental floss market is moderately competitive and consists of several major players. The market players are focusing on product development to gain a competitive edge in the market share. Some of the companies that are currently dominating the market are P3M, Church & Dwight Co. Inc., Colgate-Palmolive Company, HRB Brand (Dr. Fresh LLC), Johnson & Johnson, Perrigo Company Plc (RANIR LLC), Lion Corporation, Dr Wild & Co. AG, Sunstar Suisse SA, The Humble Co., Procter & Gamble, and Prestige Consumer Healthcare.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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