

Mouthwash - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Mouthwash Market size is estimated at USD 6.07 billion in 2024, and is expected to reach USD 7.60 billion by 2029, growing at a CAGR of 4.56% during the forecast period (2024-2029).

The Covid-19 pandemic has highlighted the importance of oral hygiene to prevent the spread of infectious diseases. Further, there was a significant surge in therapeutic mouthwash as independent research studies by different medical institutes and associations proved the effectiveness of mouthwash to reduce SARS-CoV-2 viral load in the oral cavity. For instance, the research study published in the journal Pathogens by Rutgers School of Dental Medicine shows that Listerine and the prescription mouthwash Chlorhexidine disrupted the coronavirus under laboratory conditions.

The growth of the mouthwash market is majorly attributed to the rising consumer preference for advanced oral care products to address complex oral conditions such as periodontal disease, oral mucositis, halitosis, gingivitis, and xerostomia among others. Further, modern consumers want full ingredient transparency in the overall personal care products including mouthwash, which in turn drives the demand for clean-label and free-from mouthwash products. For instance, USDA-Certified Organic mouthwash is widely preferred among eco-conscious consumers of North America. Some of the brands in the organic mouthwash segment include Miessence, Dental Herb Company, Nature's Brands, and Dr.Brite. among others.

In the long term, demand for therapeutic mouthwash is anticipated to register a significant surge across the Asia Pacific region owing to the rising inclination toward professional dental care services to treat dental problems including cracked teeth, chipped teeth, and hypodontia, among others. For instance, The National Oral Health Epidemiological Investigation in China has been conducting surveys regarding the oral care of the population. It revealed that a major population of the country is suffering from oral problems. This has resulted in a shift in the choices of oral care products among consumers, as they have started moving

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from the economic options to dentists' recommended alternatives.

Mouthwash Market Trends

Evolving Consumer Perception Toward Oral Hygiene Routines

- There is an increasing demand for oral care products around the globe owing to the rising prevalence of different dental disorders among adults and children. According to The Delta Dental Plans Association, around 39% of adults in the United States reported losing sleep due to oral health issues in 2021, while 18% claimed they missed work due to oral health problems.
- This led to the inclination toward professional dental care services in the recent past, which indirectly promotes the use of mouthwash as dentists prescribe different mouthwash based on the oral pathological condition being treated. Thus, increased demand for therapeutic mouthwash, accompanied by the rising consumer preference for professional dental hygiene services, is contributing to the growth in the worldwide mouthwash market.
- Furthermore, the market is witnessing a significant penetration of herbal and organic mouthwash as consumers are opting for nature-based and chemical-free oral hygiene products featuring a blend of bioactive and natural ingredients such as clove, anise, eucalyptus, cinnamon, fennel, rosemary, lavender, and spearmint among others.
- For instance, in January 2021, Dabur launched its ayurvedic mouthwash, namely, Dabur Red Pulling Oil. This product includes all the natural ingredients and herbs available in all the retail outlets and e-commerce platforms in India.

North America is the Largest Market

- The mouthwash market in North America is experiencing rapid expansion due to various factors. It is convenient to use for removing sensitivity, reducing bacterial infection in the mouth, and helping to reduce harmful breath germs. As per data published by Statistics Canada, in 2022, the annual consumer price index for oral-hygiene products across Canada was measured at 142.4. The index is used to measure the changes in average costs of most consumer goods and services.
- Additionally, the young population is highly concerned about physical appearance, which has augmented the demand for esthetic dental restoration procedures. Thus, they prefer using mouthwash for rinsing and gargling prescribed by the dentists, which led to increased growth of mouthwash in the region.
- As per the data published by the Centers for Disease Control and Prevention (CDC) in the United States, 92% of adults aged 20 to 64 have dental caries and have visited a dental clinic in 2021. Thus, there is an increased use of therapeutic mouthwash in the United States, as it contributes to discolouration or stain removal from teeth owing to the presence of active ingredients such as hydrogen peroxide and carbamide peroxide. Moreover, the increased number of mouthwash products as well as other oral care product innovations across the region that are marketed as naturally healthy with sustainable packaging, have been attracting consumers to buy the products.
- For instance, in February 2021, Colgate's Hello products announced the launch of its new mouth, 'Naturally Healthy Mouthwash Refill Pouch', formulated with aloe vera, coconut oil, mint, and xylitol. As per the company, the refill pouch had 80% less plastic than two of its 16 oz mouthwash bottles and caps. Additionally, the product contained no alcohol or artificial sweeteners.

Mouthwash Industry Overview

The global mouthwash market is highly competitive owing to multiple national and international players offering a wide range of mouthwash products and trying to maintain their leadership position in the market studied. The major players operating in the mouthwash market are Colgate-Palmolive Company, SmartMouth Oral Health Laboratories, Johnson & Johnson Inc., Reckitt

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Benckiser Group Plc, and Procter and Gamble Company, among others.

These players are focusing on various strategies to penetrate the global market, including new product innovation, partnering with well-known brands or companies, strengthening their hold over online and offline marketing, and expanding their presence in various countries by mergers and acquisitions with other giant companies in the global market.

In August 2022, Firmline Pvt Ltd. declared the launch of a new product, namely, Dente91 Mom toothpaste and mouthwash, India's first oral care product range for pregnant women. Likewise, the players have been innovating various products that target different consumer segments to strengthen their presence in the market studied.

Additional Benefits:

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

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