

## **South America Oral Care - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

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### **Report description:**

South America Oral Care Market Analysis

The South America Oral Care Market has a market size of USD 8.15 billion in 2025 and is projected to reach USD 11.84 billion by 2030, advancing at a CAGR of 7.74% during the forecast period. This growth trajectory reflects the region's increasing health consciousness and evolving consumer preferences toward premium and specialized oral care solutions. Multinational companies leverage R&D and distribution networks, while local players focus on natural formulations and cultural relevance. Online retail channels are disrupting traditional distribution networks, registering the fastest growth at 9.25% CAGR (2025-2030) and reshaping how oral care products reach consumers. The integration of smart technologies in electric toothbrushes is creating premium segment opportunities, while counterfeit products remain a significant challenge, particularly affecting brand reputation in price-sensitive markets. Government initiatives promoting oral hygiene, such as Brazil's "Smiling Brazil" program, are creating favorable market conditions by expanding access to oral health services and raising awareness about preventive care according to International & American Associations for Dental Research.

South America Oral Care Market Trends and Insights

Oral Health Concerns Propel Market Growth

The increasing prevalence of oral health issues in South America is driving a significant shift in consumer behavior toward preventive care products. Chronic conditions such as severe periodontitis and edentulism continue to strain healthcare systems

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and are projected to remain critical challenges through 2050, thereby boosting the demand for advanced oral care solutions. In response to these rising concerns, dental professionals are recommending improved oral care practices. As of 2024, Brazil had 423,873 registered dental surgeons, according to the Conselho Federal de Odontologia (Brazilian Federal Council of Dentistry). This persistent health burden is accelerating the transition from reactive treatments to preventive care strategies, with consumers increasingly acknowledging the connection between oral health and overall well-being. The World Health Organization's initiative to prioritize oral health as a key component of universal health coverage by 2030 further strengthens this trend, driving market growth beyond basic hygiene products toward therapeutic and preventive offerings.

#### Product Differentiation in Terms of Ingredients

The ingredient composition of oral care products has emerged as a critical differentiation factor, with natural and organic formulations gaining significant traction. This shift is exemplified by companies like Biorigen in Chile, which has developed 100% organic oral hygiene products in response to growing consumer demand for sustainable alternatives. This change is primarily attributed to heightened consumer awareness and scrutiny regarding the composition of oral care products. Companies are proactively adapting their strategies to align with these evolving consumer preferences, recognizing the importance of catering to this growing segment. Furthermore, the industry's strategic priorities are expanding beyond ingredient innovation to address broader sustainability goals. Recyclable packaging has emerged as a critical competitive differentiator in this regard. For instance, Colgate's adoption of recyclable toothpaste tubes highlights a deliberate and forward-looking commitment to environmentally sustainable product development. This approach not only aligns with the region's increasing eco-conscious consumer base but also positions the company as a leader in sustainability-driven innovation within the oral care market.

#### Prevalence of Traditional Way of Tooth Cleaning

Traditional tooth cleaning methods continue to present significant resistance to market penetration in rural and low-income communities across South America. Although the market is experiencing overall growth, cultural practices and economic challenges restrict the adoption of modern oral care products within specific segments. This issue is particularly evident in remote regions of Brazil and the Andean areas, where limited access to dental care and reliance on traditional remedies persist. In Brazil, the dental insurance market remains underdeveloped compared to mature markets like the United States. Odontoprev, the largest dental insurance provider in Brazil, reports only 8.6 million beneficiaries in 2023, highlighting both substantial growth opportunities and barriers to the adoption of modern oral care solutions. This underpenetration indicates significant growth potential but also highlights the barriers to modern oral care adoption. The challenge for manufacturers lies in developing products and educational initiatives that can bridge the gap between traditional practices and contemporary oral health science, particularly as the connection between oral health and overall wellbeing becomes increasingly recognized.

Other drivers and restraints analyzed in the detailed report include:

Integration of Smart Technologies in Electric Toothbrush / Favorable Government Initiatives on Oral Hygiene / Counterfeit Products Affecting Brand Reputation /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Toothpaste commands the largest market share at 52.44% in 2024, benefiting from its status as an essential daily care product across all demographic segments. The segment's leadership is driven by continuous advancements in specialized formulations addressing key oral health needs, including sensitivity, whitening, and gum care. Meanwhile, the mouthwash and rinses segment is poised for rapid growth, with a projected CAGR of 7.95% from 2025 to 2030. This growth is attributed to rising consumer

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awareness of comprehensive oral hygiene practices and the therapeutic benefits of mouthwash beyond basic freshening. Clinical research further supports this trend by demonstrating mouthwash's effectiveness in reducing plaque and improving gum health.

The toothbrush segment is undergoing significant premiumization, particularly in urban markets where demand for electric and smart models is increasing despite their higher price points. Oral-B's iO power toothbrushes have driven high single-digit growth globally, signaling similar growth potential in South America's emerging premium segment. Additionally, products such as dental floss, interdental cleaners, and tongue cleaners, while representing a smaller market share, are gaining traction. This growth is fueled by consumers adopting more comprehensive oral care routines, influenced by recommendations from dental professionals and heightened awareness of oral health.

Conventional/synthetic ingredients maintain market dominance with a 94.24% share in 2024, reflecting established consumer trust and widespread availability across price points. These formulations leverage decades of research, proven performance, and cost efficiency, ensuring broad accessibility. However, the natural and organic segment is gaining traction, projected to grow at a robust 8.24% CAGR from 2025 to 2030. This growth is driven by increasing consumer focus on ingredient transparency and a shift toward sustainable products.

The ingredient landscape is undergoing significant evolution with the adoption of advanced compounds from the skincare industry. Innovations such as peptides and hydroxyapatite for remineralization, along with probiotics aimed at balancing oral ecosystems, are driving the emergence of premium market segments. These developments are redefining the boundaries between oral care and the broader health and wellness categories. Leading brands are responding by developing hybrid formulations that combine natural ingredients with scientifically validated active compounds, targeting both health-conscious consumers and those seeking clinically proven efficacy.

The South America Oral Care Market is Segmented by Product Type (Mouthwashes/Rinses, Toothbrush, Toothpaste, and Other Product Types), Ingredient (Conventional and Natural/Organic), End User (Kids/Children, and Adult), Distribution Channel (Supermarkets/Hypermarkets, Pharmacies/Drug Stores, and More), and Geography (Brazil, Argentina, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Colgate-Palmolive Company / Procter & Gamble Company / Sunstar Suisse S.A. / Unilever plc / Haleon plc / Katjes International GmbH & Co. KG / Kenvue Inc. / Lion Corporation / Dentek Oral Care Inc. / Maquira Dental Group / Laboratorios Pierre Fabre SA / Industrias Suavetex Ltda. / Curaden / Church and Dwight Co. / Philips Oral Healthcare / Ultradent Products Inc / JGB S.A / Alicorp S.A / W. R. Grace & Co. / Salt Oral Care /

Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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