Passport

Oral Care in the United Arab Emirates

Euromonitor International

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ORAL CARE IN THE UNITED ARAB EMIRATES

HEADLINES

- Oral care sees little impact on sales from COVID-19 during 2020 as consumers continue with their daily oral and dental hygiene routines despite social distancing, home seclusion and the lockdown situation
- 3% current value growth is recorded in oral care in 2019 as sales reach AED549 million
- Toothpaste remains by far the leading oral care category in 2019 as sales begin to spread to other categories as consumers begin to consider a wider range of oral care products as essential
- Mouthwashes/dental rinses registers the strongest increase in volume sales of any oral care category in 2019, with the declines registered in the average unit price supporting higher demand in the category
- Colgate-Palmolive, Procter & Gamble and GlaxoSmithKline lead sales in oral care in 2019 with respective value shares of 21%, 20% and 18%
- The forecast period is set to see oral care increase in current value at a CAGR of 3% (1% in constant 2019 terms)

PRE-COVID-19 PERFORMANCE

Toothpaste is the biggest category as A wider range of products becomes popular

Toothpaste remained the largest oral care category in 2019, with higher-priced value-added variants among the most popular products in the proximate category. Sales of mouthwashes/dental rinses are also growing as disposable incomes continue to increase, although these products are not yet considered to be must-haves, as toothpaste already is. Rising demand for a wide range of oral care products is being pushed mainly by the growing consumer awareness of the importance of maintaining good oral hygiene. In particular, the government of Abu Dhabi has been a vocal advocate of better oral health, with this being one of the top 10 health priorities for HAAD (Health Authority Abu Dhabi). In 2018, HAAD issued a memo stating that “Oral health enables an individual to speak, eat and socialise without active disease, discomfort or embarrassment”. Such explicit official support for better oral hygiene is very likely to support sales growth in oral care over the forecast period.

Cultural influences and the advice of dentists remain influential

Towards the end of the review period, sales of oral care products in the United Arab Emirates were buoyed by greater awareness of the importance of flossing and using mouthwash on a regular basis for maintaining good oral hygiene and promoting better overall health. This is unsurprising as there is a long and interesting history of oral care in oral hygiene in the country. Brushing one’s teeth and maintaining her hygiene is an integral part of Arabian culture and miswak, the first toothbrush in history, originated in Arabia. Nevertheless, mouthwashes/dental rinses and dental floss are still seen as products of secondary importance rather than as oral care essentials. However, more consumers are listening to the advice of their dentists and these categories are now generating positive growth and respectable sales. In most households across the Gulf region, children's oral health is the domain of their mother, who communicates with her children on how to brush their teeth, and stresses the importance of oral hygiene.

Multinational companies continue to lead sales due to greater focus on innovation

Multinational players continue to dominate sales of oral care in the United Arab Emirates. This can be attributed to their constant focus on research and development and the fact that their respective brands are all well-established. The outright leaders in the category remain Colgate-Palmolive (Gulf States), Procter & Gamble Gulf, GlaxoSmithKline Plc, Unilever Gulf and Johnson & Johnson Middle East. Combined, these companies account for more than three-quarters of value sales. Johnson & Johnson and Colgate-Palmolive are particularly active in the area of new product development, with Colgate-Palmolive launching charcoal toothbrushes and toothpaste towards the end of the review period under the name Colgate 360. These products have so far proven popular, a reflection of the consumer interest in novelty. The difference between charcoal-based products and conventional options is that charcoal helps to better capture debris and bacteria. In terms of premium oral care products, the most recent new launch was APA Beauty's supersonic tool, which is available at Harvey Nichols and Bloomingdales Dubai. Travel size oral care products are also becoming more popular as they can be used on the go and in the gym as well as while travelling, while electric toothbrushes are becoming more popular among tech-savvy consumers.

2020 AND BEYOND

COVID-19 impact

Sales of oral care are now expected to grow by 1% in 2020 in 2019 constant value terms in light of the impact of COVID-19. This is something of a slowdown from the expected 2% rise forecast for 2020 during research conducted at the end of 2019 before the spread of COVID-19.

Sales in the largest oral care categories of toothpaste and toothbrushes were largely unaffected by COVID-19 due to their essential status, which means that demand remained inelastic throughout the first half of 2020. Unlike other beauty and personal care categories, people's oral health care routines have been unaffected by COVID-19 as the imperative to maintain clean and healthy teeth and gums has not been diminished because of social distancing. The slight slowdown seen in sales projections for 2020 can be attributed to the lower volumes of less essential products being purchased due to the pressure that has come on household incomes as a result of economic uncertainty deriving from COVID-19 and the government's reaction to it during the first half of the year.

Affected products within oral care

The oral care categories that form part of consumers' regular daily oral and dental hygiene routines were unaffected by social distancing and home seclusion during 2020. This marks oral care out from other beauty and personal care categories which experienced significant drops in demand as products came to be seen as less essential during the period of lockdown and social distancing. Among categories which have maintained solid demand despite the advent of COVID-19 are electric toothbrush replacement heads, manual toothbrushes, toothpaste and mouthwashes/dental rinses.

Recovery and opportunities

As a category of products that are largely seen as essential daily beauty and personal care items, oral care is likely to continue recording solid positive sales growth over the forecast period. The category can be expected to recover quickly from the slight slowdown registered due to COVID-19 in 2020, with sales set to continue being supported by the increasing focus on more detailed and comprehensive oral and dental hygiene routines that involve a wider range of oral care products, including mouthwashes/dental rinses, power toothbrushes and dental floss. Manual toothbrushes and toothpaste meanwhile is set to continue benefiting from their status as some of the most essential beauty and personal care products for daily use.

CATEGORY DATA

Table 1 Sales of Oral Care by Category: Value 2014-2019

AED million

	2014	2015	2016	2017	2018	2019
Dental Floss	5.2	5.6	5.9	5.9	6.1	6.2
Denture Care	-	-	-	-	-	-
Mouth Fresheners	-	-	-	-	-	-
Mouthwashes/Dental Rinses	49.4	51.5	53.4	54.3	56.7	59.1
Tooth Whiteners	-	-	-	-	-	-
Toothbrushes	138.6	150.5	157.8	160.2	168.2	173.5
- Manual Toothbrushes	133.9	145.5	152.7	155.1	163.0	168.2
- Power Toothbrushes	4.8	5.0	5.1	5.1	5.2	5.3
Toothpaste	249.5	269.5	282.1	288.3	301.6	310.3
Oral Care	442.8	477.0	499.1	508.7	532.6	549.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 2 Sales of Oral Care by Category: % Value Growth 2014-2019

% current value growth

	2018/19	2014-19 CAGR	2014/19 Total
Dental Floss	3.1	3.6	19.3
Denture Care	-	-	-
Mouth Fresheners	-	-	-
Mouthwashes/Dental Rinses	4.2	3.7	19.7
Tooth Whiteners	-	-	-
Toothbrushes	3.2	4.6	25.2
- Manual Toothbrushes	3.2	4.7	25.7
- Power Toothbrushes	1.9	2.3	12.1
Toothpaste	2.9	4.5	24.4
Oral Care	3.1	4.4	24.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 3 Sales of Toothbrushes by Category: Value 2014-2019

AED million

	2014	2015	2016	2017	2018	2019
Toothbrushes	138.6	150.5	157.8	160.2	168.2	173.5
- Manual Toothbrushes	133.9	145.5	152.7	155.1	163.0	168.2
- Power Toothbrushes	4.8	5.0	5.1	5.1	5.2	5.3
-- Battery Toothbrushes	0.3	0.4	0.4	0.4	0.4	0.4
--- Battery Toothbrush Replacement Heads	-	-	-	-	-	-
--- Battery Toothbrush Units	0.3	0.4	0.4	0.4	0.4	0.4
-- Electric Toothbrushes	4.4	4.6	4.7	4.7	4.9	5.0
--- Electric Toothbrush Replacement Heads	1.4	1.4	1.4	1.4	1.5	1.5
--- Electric Toothbrush Units	3.1	3.2	3.3	3.3	3.4	3.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Toothbrushes by Category: % Value Growth 2014-2019

% current value growth

	2018/19	2014-19 CAGR	2014/19 Total
Toothbrushes	3.2	4.6	25.2
- Manual Toothbrushes	3.2	4.7	25.7
- Power Toothbrushes	1.9	2.3	12.1
-- Battery Toothbrushes	1.1	2.0	10.4
--- Battery Toothbrush Replacement Heads	-	-	-
--- Battery Toothbrush Units	1.1	2.0	10.4
-- Electric Toothbrushes	2.0	2.3	12.3
--- Electric Toothbrush Replacement Heads	2.8	2.1	10.8
--- Electric Toothbrush Units	1.6	2.5	12.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Toothpaste by Type: % Value Breakdown 2015-2019

% retail value rsp

	2015	2016	2017	2018	2019
Acid Wear/Enamel Strengthening	4.3	4.0	4.3	4.3	4.4
Children's	1.4	1.5	1.5	1.6	1.6
Fresh Breath	3.4	3.4	3.5	3.5	3.5
Gum Health	2.7	2.8	2.9	2.9	3.2
Sensitive	13.6	12.7	13.0	13.2	13.4
Total Care/Complete Care	29.0	29.5	29.5	29.8	30.0
Traditional/Standard/ Basic	20.1	20.5	20.6	20.6	20.6
Whitening	21.5	21.5	21.5	21.6	21.6
Others	3.9	4.0	3.3	2.5	1.6
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 NBO Company Shares of Oral Care: % Value 2015-2019

% retail value rsp

Company	2015	2016	2017	2018	2019
Colgate-Palmolive (Gulf States) Ltd	21.6	21.5	21.6	21.0	20.6
Procter & Gamble Gulf FZE	21.3	21.0	20.9	20.1	19.6
GlaxoSmithKline Plc	18.7	18.8	19.1	18.5	18.3
Unilever Gulf FZE	11.7	11.7	11.9	11.5	11.2
Johnson & Johnson Middle East FZ-LLC	5.7	5.8	5.9	5.7	5.6
Trisa AG	4.5	4.5	4.5	4.3	4.2
Jordan AS	2.9	3.0	3.0	2.8	2.8
Church & Dwight Co Inc	2.0	2.0	2.0	2.0	1.9
Dabur International Ltd	1.0	1.0	1.0	0.9	0.9
Pierre Fabre SA, Laboratoires	0.7	0.7	0.8	0.7	0.7
Himalaya Drug Co FZCO, The	0.6	0.7	0.6	0.7	0.7
Corlison Pte Ltd	0.2	0.2	0.2	0.2	0.2
Others	9.0	9.3	8.6	11.6	13.3
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Oral Care: % Value 2016-2019

% retail value rsp

Brand (GBO)	Company (NBO)	2016	2017	2018	2019
Colgate (Colgate-Palmolive Co)	Colgate-Palmolive (Gulf States) Ltd	21.5	21.6	21.0	20.6
Sensodyne	GlaxoSmithKline Plc	14.2	14.5	14.1	14.0
Oral-B (Procter & Gamble Co, The)	Procter & Gamble Gulf FZE	11.5	11.4	11.0	10.7
Crest (Procter & Gamble Co, The)	Procter & Gamble Gulf FZE	9.5	9.4	9.1	8.9
Signal (Unilever Group)	Unilever Gulf FZE	6.7	6.8	6.6	6.4
Listerine (Johnson & Johnson Inc)	Johnson & Johnson Middle East FZ-LLC	5.8	5.9	5.7	5.6
Closeup (Unilever Group)	Unilever Gulf FZE	5.0	5.0	4.9	4.7
Trisa	Trisa AG	4.5	4.5	4.3	4.2
Jordan (Orkla Group)	Jordan AS	3.0	3.0	2.8	2.8
Aquafresh	GlaxoSmithKline Plc	2.7	2.6	2.5	2.5
Arm & Hammer	Church & Dwight Co Inc	2.0	2.0	2.0	1.9
Parodontax	GlaxoSmithKline Plc	1.9	1.9	1.9	1.8
Elgydium	Pierre Fabre SA, Laboratoires	0.7	0.8	0.7	0.7
Himalaya (Himalaya Drug Co, The)	Himalaya Drug Co FZCO, The	0.7	0.6	0.7	0.7
Miswak (Dabur India Ltd)	Dabur International Ltd	0.7	0.7	0.7	0.7
Babool (Dabur India Ltd)	Dabur International Ltd	0.2	0.2	0.2	0.2

Pearlie White	Corlison Pte Ltd	0.2	0.2	0.2	0.2
Jordan	Jordan AS	-	-	-	-
Others	Others	9.3	8.6	11.6	13.3
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2016-2019

% retail value rsp

Brand (GBO)	Company (NBO)	2016	2017	2018	2019
Listerine (Johnson & Johnson Inc)	Johnson & Johnson Middle East FZ-LLC	54.0	55.3	53.4	52.0
Colgate (Colgate-Palmolive Co)	Colgate-Palmolive (Gulf States) Ltd	18.6	19.0	18.4	17.9
Sensodyne	GlaxoSmithKline Plc	6.7	6.8	6.6	6.4
Signal (Unilever Group)	Unilever Gulf FZE	6.0	6.1	5.9	5.7
Oral-B (Procter & Gamble Co, The)	Procter & Gamble Gulf FZE	2.9	2.9	2.8	2.7
Pearlie White	Corlison Pte Ltd	1.6	1.6	1.6	1.5
Others	Others	10.3	8.3	11.4	13.9
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 LBN Brand Shares of Toothpaste: % Value 2016-2019

% retail value rsp

Brand (GBO)	Company (NBO)	2016	2017	2018	2019
Colgate (Colgate-Palmolive Co)	Colgate-Palmolive (Gulf States) Ltd	23.5	23.7	23.2	22.9
Sensodyne	GlaxoSmithKline Plc	19.1	19.7	19.3	19.2
Crest (Procter & Gamble Co, The)	Procter & Gamble Gulf FZE	16.8	16.7	16.1	15.8
Signal (Unilever Group)	Unilever Gulf FZE	10.8	10.9	10.6	10.3
Closeup (Unilever Group)	Unilever Gulf FZE	8.8	8.9	8.6	8.4
Arm & Hammer	Church & Dwight Co Inc	3.6	3.6	3.5	3.4
Parodontax	GlaxoSmithKline Plc	3.4	3.4	3.3	3.2
Aquafresh	GlaxoSmithKline Plc	1.6	1.6	1.6	1.5
Elgydium	Pierre Fabre SA, Laboratoires	1.3	1.3	1.3	1.3
Himalaya (Himalaya Drug Co, The)	Himalaya Drug Co FZCO, The	1.2	1.1	1.2	1.2
Miswak (Dabur India Ltd)	Dabur International Ltd	1.3	1.3	1.2	1.2
Babool (Dabur India Ltd)	Dabur International Ltd	0.4	0.4	0.4	0.4
Others	Others	8.3	7.4	9.8	11.0
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Forecast Sales of Oral Care by Category: Value 2019-2024

AED million

	2019	2020	2021	2022	2023	2024
Dental Floss	6.2	6.3	6.3	6.3	6.3	6.4
Denture Care	-	-	-	-	-	-
Mouth Fresheners	-	-	-	-	-	-
Mouthwashes/Dental Rinses	59.1	60.1	61.3	62.5	63.7	64.9
Tooth Whiteners	-	-	-	-	-	-
Toothbrushes	173.5	176.4	177.4	178.3	179.2	180.1
- Manual Toothbrushes	168.2	171.1	172.0	172.9	173.8	174.7
- Power Toothbrushes	5.3	5.3	5.4	5.4	5.4	5.5
Toothpaste	310.3	312.7	314.4	316.2	318.2	320.2
Oral Care	549.2	555.5	559.4	563.3	567.4	571.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 11 Forecast Sales of Oral Care by Category: % Value Growth 2019-2024

% constant value growth

	2019/2020	2019-24 CAGR	2019/24 Total
Dental Floss	1.0	0.4	1.9
Denture Care	-	-	-
Mouth Fresheners	-	-	-
Mouthwashes/Dental Rinses	1.6	1.9	9.8
Tooth Whiteners	-	-	-
Toothbrushes	1.6	0.7	3.8
- Manual Toothbrushes	1.7	0.8	3.8
- Power Toothbrushes	0.0	0.5	2.7
Toothpaste	0.8	0.6	3.2
Oral Care	1.2	0.8	4.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
Note: Oral Care total excludes the category total for manual and power toothbrushes

Table 12 Forecast Sales of Toothbrushes by Category: Value 2019-2024

AED million

	2019	2020	2021	2022	2023	2024
Toothbrushes	173.5	176.4	177.4	178.3	179.2	180.1
- Manual Toothbrushes	168.2	171.1	172.0	172.9	173.8	174.7
- Power Toothbrushes	5.3	5.3	5.4	5.4	5.4	5.5
-- Battery Toothbrushes	0.4	0.4	0.4	0.4	0.4	0.4
--- Battery Toothbrush Replacement Heads	-	-	-	-	-	-
--- Battery Toothbrush Units	0.4	0.4	0.4	0.4	0.4	0.4
-- Electric Toothbrushes	5.0	5.0	5.0	5.0	5.0	5.1
--- Electric Toothbrush Replacement Heads	1.5	1.5	1.5	1.6	1.6	1.6
--- Electric Toothbrush	3.4	3.4	3.4	3.5	3.5	3.5

Units

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales of Toothbrushes by Category: % Value Growth 2019-2024

% constant value growth

	2019/2020	2019-24 CAGR	2019/24 Total
Toothbrushes	1.6	0.7	3.8
- Manual Toothbrushes	1.7	0.8	3.8
- Power Toothbrushes	0.0	0.5	2.7
-- Battery Toothbrushes	-0.3	0.2	1.1
--- Battery Toothbrush Replacement Heads	-	-	-
--- Battery Toothbrush Units	-0.3	0.2	1.1
-- Electric Toothbrushes	0.1	0.6	2.9
--- Electric Toothbrush Replacement Heads	0.4	0.9	4.5
--- Electric Toothbrush Units	-0.1	0.4	2.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources