



# بررسی بازار دهانشویه ها

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تابستان ۱۴۰۱

# Introduction

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According to the WHO, 2 billion people suffer from caries of permanent teeth and 520 million children suffer from caries of primary teeth. Consumption of tobacco, alcohol, and food and beverages, which are high in sugar, has contributed to the growth of oral health conditions and other non-communicable diseases.

Gum disease is one of the major problems among people. Nearly half of all adults aged 30 years or above show signs of gum disease and 9% of adults are affected by severe gum disease.

The cost of dental services keeps many people from seeking dental care services.

# Introduction cnt...

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Mouthwash is a medicated solution that is swished around in the mouth to rinse, cleanse, and refresh it. It is held in the mouth after brushing and then gargled, giving the mouth a pleasant odor.

Mouthwash is an important method for the maintenance of oral healthcare. It is mainly used to reach the inaccessible mouth areas that are difficult to clean with a toothbrush. It also helps in preventing caries and plaque formation.



# Introduction cnt...



The prevalence of oral diseases is continuously increasing in low and middle-income countries due to the growing urbanization and eating habits.

Mouthwash is progressively gaining traction all over the world as people are increasingly aware of the importance of the maintenance of good oral hygiene.

Preventing cavities from forming, helps to generate fresh breath, and stop bacterial infection are some of the positive characteristics of the usage of mouthwash.

The increasing oral hygiene campaigns around the world resulting to propel the growth of the market.

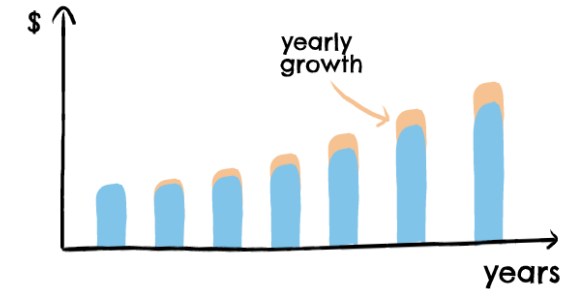
As mouthwash plays prominent role in the protection of the mouth from germs and bacteria, the mouthwash market is expected to witness positive growth curve in years to come.

# Global market

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The mouthwash market was valued at 5,980.35 million USD in 2019 and is projected to reach 9,272.13 million USD by 2027; it is expected to grow at a CAGR of 5.7% during 2020-2027.

Due to the COVID-19 pandemic, the global Mouthwash market size is estimated to be worth USD 3137 million in 2021 and is forecast to a readjusted size of USD 3137 million by 2028 with a CAGR of 5.6% during the review period.



The global oral rinse market size was valued at USD 6.51 million in 2021 and is expected to expand at a compound annual growth rate (CAGR) of 7.1% from 2022 to 2030

# Driving factors

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The growth of the mouthwash market is mainly attributed to the **increasing prevalence of dental conditions** and rising number of oral hygiene campaigns worldwide.

The **rising awareness regarding oral hygiene** is expected to fuel the market growth over the forecast period.

The **consumption of sugar** in emerging countries has tripled over the past five decades and is subsequently leading to substantial growth of dental caries

The considerable **prevalence of aphthous ulcers** is likely to offer substantial growth opportunity for the market during the forecast period.

The **rising spending made on dental care products** across the globe has a significant contribution for the market growth.

# Restraining factors

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**Intensive usage** of mouthwash is leading to a **negative impact on health** and even leads to diabetes acts as a restraining factor for the market growth.

On an examination of **diabetes** and mouthwash it has concluded that mouthwash users who used it twice or more on a daily basis have a higher risk of generating a diabetes.

**Adverse effects associated with the extensive use of mouthwash** restrains the growth of the market.

# The impact of COVID-19

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The mouthwash market is witnessing new product introductions with **capabilities to inactivate coronaviruses**. Such developments are expected to have constructive impact on the market even during and post COVID-19 pandemic.

The COVID-19 pandemic had significantly affected the operations and logistics of the oral care products market.

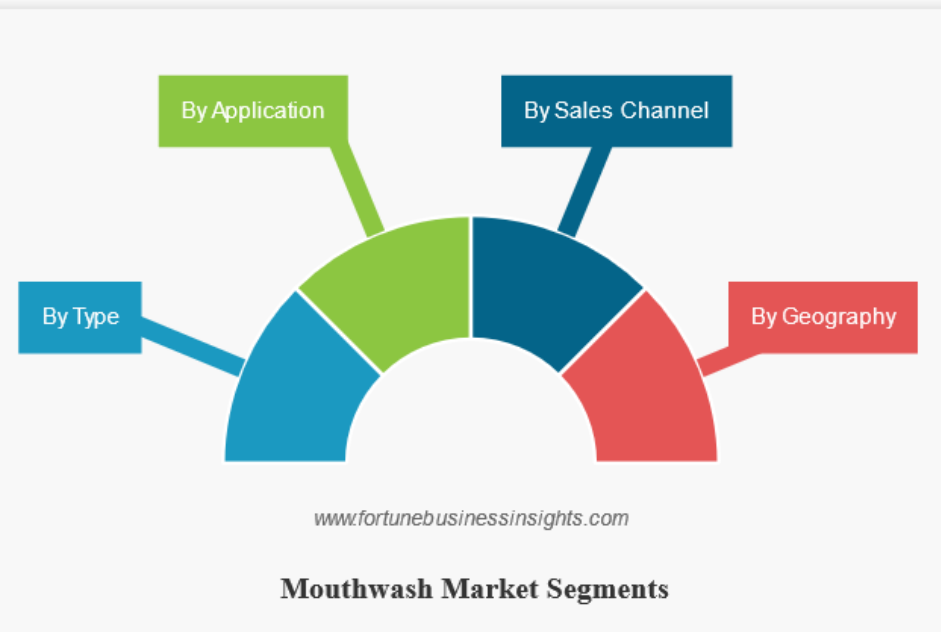
It had disrupted the supply channel of oral care products globally. ✗

The high demand for maintaining oral hygiene during the pandemic has increased the demand for rinse products and other oral care products in the second half of 2020. ✓

A study published in Virus Research found that mouthwash with a **single-agent antiseptic mouthwash** may be associated with a **mild decrease in the rate of COVID-19 transmission**.



# Market segmentation



ATTRIBUTE	DETAILS
By Type	<ul style="list-style-type: none"><li>• Cosmetic</li><li>• Therapeutic</li><li>• Others(Flouride, Antiseptic)</li></ul>
By Material Use	<ul style="list-style-type: none"><li>• Natural</li><li>• Synthetic</li></ul>
By Sales Channel	<ul style="list-style-type: none"><li>• E-commerce Stores</li><li>• Supermarket/hypermarket</li><li>• Retail Stores</li></ul>
By Geography	<ul style="list-style-type: none"><li>• North America (U.S., Canada, and Mexico)</li><li>• Europe (Germany, France, Italy, Spain, U.K., Russia, and Rest of Europe)</li><li>• Asia Pacific (China, India, Japan, Australia, and Rest of Asia Pacific)</li><li>• South America (Brazil, Argentina, and Rest of South America)</li><li>• Middle East &amp; Africa (South Africa, UAE, and Rest of ME&amp;A)</li></ul>

# Type

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Based on product type, the mouthwash market is segmented into fluoride, cosmetics, antiseptics, and oral gels.

The **cosmetic segment** held the largest share of the market in 2019 and is estimated to grow at the highest CAGR during the forecast period.

**Cosmetic mouthwashes** only serve to mask **bad breath** and leave your mouth **with a pleasant taste**.

**Therapeutic mouthwashes** serve clinical purposes, like attacking bacteria and plaque, or strengthening teeth with fluoride.



# Flavor

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The mouthwash market, by flavors, is segmented into active salt, mint, fresh tea, natural lemon, herbs, and fruit and gums.

The **mint segment** held the largest share of the market in 2019 and is estimated to register the **highest CAGR** during the forecast period.



# End user

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VS.



Based on end user, the mouthwash market is segmented into adults and kids.

The **adults segment** held the largest share of the market in 2019. In addition, the same segment is estimated to register the highest CAGR in the market during the forecast period.

# Indication

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On the basis of indication, the mouthwash market is segmented into mouth ulcers, aphthous ulcers, post oral surgery, oral lesions, periodontitis (cavity), gingivitis, receding gums, frequent dry mouth, chronic bad breath, and toothache. The chronic bad breath segment held the largest share of the market in 2019 and is estimated to grow at the highest CAGR during the forecast period



# Application place

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And in terms of Application, the largest application is **Household**, followed by Hospital and Dental Clinic.

# Region

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On the basis of region, **North America** is anticipated to be the leading market shareholder and is anticipated to continue throughout period of 2020-2027.

The large consumption of meat products by people in this region which is resulting in various oral problems such as bad breath, oral cavity and tooth infection is likely to fuel the product consumption rate.

**Asia Pacific** is estimated to show substantial growth in the mouthwash market owing to the increasing consumption of smokeless tobacco such as dip, snuff, ....

# Distribution channel

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On the basis of distribution channel, the mouthwash market is segmented into hypermarkets, supermarkets, online stores, hospital pharmacies, and independent grocery stores.

The **hypermarket segment** held the largest share of the market in 2019 and is estimated to grow at the highest CAGR during the forecast period.





# Key players

The top three Mouthwash players account for approximately 65% of the total global market.

The main Mouthwash players include:

Johnson and Johnson,

P and G,

Colgate,

Reckitt Benckiser

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# Iran Market



ایرشا:

دهانشویه کلرهگزیدین ۰.۲٪ ، مخصوص افراد سیگاری، بدون الکل



ایران ناژو: دهانشویه کلرهگزیدین ۰.۲٪

# Iran Market cnt...

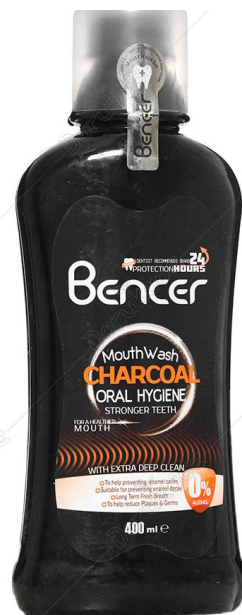


ایروکس:

دهانشویه آنتی پلاک، آنتی سپتیک، کامل

بس: آنتی سپتیک

# Iran Market cnt...



بنسر:

دهانشویه فلوراید، آنتی سپتیک، کامل



پاستا دل کاپیتانو:

محافظ دهان و دندان، زنجبیل، نوجوانان،  
ضد پلاک، دندان های حساس

# Iran Market cnt...



میسویک:

دندان های حساس، ضد پلاک، کامل، کودکان

وی وان:

کلر هگزیدین، کامل، جنرال، گیاهی،  
کودکان

# Mouthwash utilization

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The findings of a study indicate that pattern of mouthwash use is associated with **demographic, socio-economic, behavioral** and **health-related factors**.

Studies showed the **decline of mouthwash use with age**. This might be associated with decrease in number of natural teeth which an individual possesses. However, the use of mouthwash in people above 74 years old maybe related to increasing difficulty in cleaning teeth by other means due to physical disability. The more **common use of mouthwash among females** than males has been reported in the studied.

Frequency of both **tooth brushing and flossing** were showed to be positively related to the frequency of mouthwash use.



# Mouthwash utilization cnt...

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The cost of oral-hygiene products has the biggest influence on consumer to choose a product. Advertisements influenced 55% of consumers in their purchase decisions regarding oral hygiene products.

Studies showed that reasons for product use are disease prevention (58.7%) and freshness of breath (31%).

Logistically, females were significantly 0.66 times less likely to be affected by media advertisements.

# Oral health in Iran

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Oral Hygiene (OH) is in an **alarming situation** in Iran, so urgent efforts should be devoted to promote OH.

**Both education and wealth** significantly affect OH. Thus, strategies for raising public awareness should be designed and implemented.

Poor OH is associated with **behavioral risk factors** due to **low socio-economic levels**.

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**Thanks for your attention**

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